



Created by the AHI Telehealth Technical Assistance Center

## Checklist for Providers to Conduct a Successful Telehealth Visit

- 1) Use a high-quality webcam and ensure it is set-up at eye level.
- 2) Use quality sound equipment.
- 3) Have a dedicated space for conducting telehealth visits that is quiet and free of distractions.
- 4) Be mindful of the time and your schedule for the day. Develop a mechanism or workflow within your software platform or EMR that notifies you when your next patient is ready. If that is not possible, is there a phone tree that can be used with nursing staff to alert you?



- 5) Test, test, and test again! Ensure your webcam is working, and your microphone and audio are clear. If you are using a smartphone, make sure it is in a holder or phone dock.
- 6) Make sure all your devices are plugged in and use a wired internet connection wherever possible vs. Wi-Fi.
- 7) Close out any unnecessary programs that can impact the quality of your audio and video feed.
- 8) If you are using an online web app, ensure you are using the correct browser.

- 9) Dress appropriately and professionally.
- 10) Adjust your lighting to ensure the image is clear, there is no backlighting from a window, and only overhead light is used.
- 11) Address or read the patient's chief complaint before the visit begins, just as you would in an in-person visit.
- 12) Have a support staff number or contact easily available in case technical issues arise.



- 13) Have the patient history on hand and EMR pulled up.
- 14) Follow the same clinical guidelines you would with an in-person visit.
- 15) Stay engaged! Make eye contact with the patient, and use body language that shows acknowledgment of their concerns.
- 16) Explain next steps – thank them for using telehealth. Let them know what they need to do next. Let the patient end the visit.

For more information on telehealth, please review the resources available in the AHI Telehealth Technical Assistance Center Resource library:

<https://ahihealth.org/telehealth-technical-assistance-center/#about>