CODAC Telehealth Visit Checklist

This checklist is intended for clinicians and care team members who will be hosting the telehealth visit to ensure that the professional standards of in-person care is maintained in a virtual environment.

The list below is not exhaustive but rather some key considerations to make when preparing to conduct telehealth visits.

TELEHEALTH VISIT ETIQUETTE CHECKLIST

❑ **Environment**
- ❑ Ensure Privacy (HIPAA)
- ❑ Clinically appropriate room location, size and layout
- ❑ Avoid background noise
- ❑ Adequate lighting for clinical assessment
- ❑ Consider using a "Do Not Disturb" sign while in session to avoid disruptions

❑ **Equipment**
- ❑ Computer (PC or Laptop)
- ❑ Cellphone/ iPads/ Tablets
- ❑ High-speed internet
- ❑ Web camera (If needed)
- ❑ Microphone (If needed)
- ❑ Headphones if needed

❑ **Dress**
- ❑ The same level of professional attire as in-person care

❑ **Do's**
- ❑ Turn off other web applications and all notifications (eliminate distractions)
- ❑ Review patient records before the beginning call
- ❑ Adjust webcam to eye level to ensure contact
- ❑ Identify patient's identity after admitting into zoom meeting
- ❑ Verbalize and clarify next steps such as follow-up appointment, care plan, prescription orders
- ❑ Pause to allow transmission delays
- ❑ Speak clearly and deliberately
- ❑ Use non-verbal language to signal that you are listening

❑ **Don'ts**
- ❑ Don't eat while in session
- ❑ Don't drive and engage in a telehealth session
- ❑ Don't continue session if there is an interruption

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