



Telehealth Therapy Preparation Checklist

Pre-session

1. Get familiar with the video platform process.
2. Prepare patient to become familiar with telehealth site in advance. Patient may like to have a support person to help with technology or to switch to a telephone visit if needed.
3. Verify insurance coverage of the telehealth session, proper therapy specific coding including modifiers.
4. Verify written consent from patient, if indicated by state law.
5. Set up office space for telehealth video consulting.
 - a. Private HIPAA compliant space
 - i. No other people viewing the screen
 - ii. No other people listening to the session (headphones with microphone)
 - iii. Secure connection for video
 - iv. Video feed within EHR or via secure feed
 - b. Ensure enough bandwidth for the session
 - i. [Speedtest by Ookla - The Global Broadband Speed Test](#)
 - ii. [Speed Test by Measurement Lab](#)
 - iii. Minimize other open tabs or wifi usage (no downloading or streaming during the telehealth session on the same wifi)
 - c. Set up a neutral background with attention to décor.
 - i. Gray or light blue solid background advised.
 - ii. Clinic logo or banner positioned within video feed.
 - iii. Lighting in front of your body
 - iv. Use laptop camera on selfie mode to check image and background.
6. Equipment check.
 - a. Choose device for telehealth session: desktop, laptop, tablet, or smartphone.
 - b. Minimize background distractions or noise; consider headset with microphone.
 - c. Update software programs.
 - d. Turn off email notifications, cell phone audible notices.
 - e. Practice a trial run of equipment during the week prior to the first session to get familiar with the program and controls.

Day of the session.

1. Prepare similar to a clinical site session.
 - a. Visit restroom prior to session.
 - b. Have supplies nearby
 - i. Adaptive equipment
 - ii. Strengthening tools
 - iii. Hand coordination devices
 - iv. Puzzles/games, etc, to demo with children (or adults)
 - c. Review medical record and current referral
 - d. Set up computer webpage sites to share
 - e. Verify appointment time and client ability to use video
 - f. Have staff set up client in video “waiting room” where they may complete outcome report (QuickDASH, UEFI, LEFI, SPADI, etc)
 - g. Position webcam to eye level, not above (view of your hair) or below (view up your nose)
 - h. Have phone number for IT support and patient for ease of access if needed.
 - i. Log into the session on time
7. Connect via video
 - a. Speak clearly to introduce yourself and the therapy facility.
 - b. Request patient name and date of birth.
 - c. Do verify if patient is private or if other people are present. Also, confirm therapist setting is private.

References

Miller, N. (2020, October 27). *Telehealth Visit Etiquette Checklist*. Telehealth Visit Etiquette Checklist (osisonline.net)

Telehealth Resource Center. (2020, November 30). *Telehealth Etiquette Checklist*. HTRC Telehealth Etiquette Checklist | National Consortium of Telehealth Resource Centers