

Telemedicine Clinical Service Clinical Guidelines Development

This document is intended to assist health care professionals with the development of written guidelines for providing a clinical service via telehealth. Telehealth staff is available to work with health care providers throughout the process if desired.

Program Name: _____

Purpose:

The clinical guideline will:

- Identify the clinical requirements to assure optimal quality patient examinations/consultations. Outline the workflow from beginning to end, including referral, pre-evaluation tests, scheduling, consultation and billing.

Facilitate coordination and mutual understanding of roles and responsibilities for both ends of the telehealth encounter.

Consultant Site:

Identify facility name and location and the following key contacts:

Include the clinical, administration, schedulers and IT support contacts and contact information (email, phone, pager, FAX#).

Patient & Primary Care Provider (PCP) Site:

Identify facility names(s) and location(s) and the following key contacts:

Include the clinical, administration, schedulers, super-users and IT support contacts and contact information (email, phone, pager, FAX#).

Appropriate Patient and Type of Consult: *To be completed by consultant*

Describe, in your opinion, what type of patient can receive exams via the telehealth system. This includes initial referrals and follow up exams. This can include types of patients that don't qualify for an exam via telehealth. (In other words, this can be a list of exclusions).

- Referral pattern
- Appropriate diagnosis
- Pre lab, radiological images and tests required

Referral and Scheduling Procedure: *To be completed by consultant.*

Define the person in your department responsible for patient scheduling. Describe how a patient will be referred & scheduled to your specialty service for a telehealth exam or consultation visit.

- Referral process
- Scheduling person
- Scheduling process
- Registration process

Telehealth Consult Procedures:

Pre-examination:

Education and Training

1. The appropriate telehealth staff is responsible for the education and training of consulting and patient site personnel on the use of the telehealth equipment. This will be done prior to the patient exam. Mock telemedicine consultations are recommended prior to the patient exam.
2. The consultant/specialist is responsible for educating/training the patient site personnel regarding specific expectations for a telehealth patient exam. This can take place in several ways. a) The presenting practitioner spends a whole or half day with the consultant in their clinical practice; b) Both providers do a mock patient exam; c) Ongoing joint evaluation of each patient exam.
3. The appropriate telehealth staff will assist with any additional education and training of hub and patient site personnel to meet the needs of the patients and providers.

Written documents To be completed by consultant

1. List specific patient information you need to know before seeing the patient. Information such as patient name, address, phone number, DOB, SS#, current insurance, medical records, referring physician, patient history, prior diagnosis, reason for referral, current medications and dosages, and any other pertinent information.
2. Preliminary screening
List any tests/procedures you need prior to or at the time of the patient examination, such as lab tests, vital signs, height, weight, x-rays, EKG's, etc.
3. Define who will send this information to whom, how they will send it (fax, mail, email, phone), and how far in advance you will need this information (an hour, a day, etc.)
4. Patient Informed Consent
The patient site will obtain a signed Telehealth consent form from the patient immediately prior to the first patient telehealth examination/consultation. The referral site will fax a copy of the signed consent form to the appropriate telehealth hub staff. Additional consent forms are not required for subsequent visits for two years. Examinations and consultations may not proceed without a signed consent form on file. An original copy of the consent form will be kept in the patient's file at the patient site.

Exam Room preparation To be completed by consultant

1. Patient site.
Clinical requirements needed for the patient consult, including: medications, medical supplies, medical equipment, teleradiology, clinical laboratory. Include such items / peripherals as digital stethoscope, digital otoscope, bed scales, patient camera, items needed for psychiatric consults, appropriate development assessment tools for pediatric exams, nutritional assessment tools, and other.
List all of the Technical requirements, including: videoconferencing equipment (far-end camera control), internet access, wireless access, remote EMR access and radiological imaging for teleradiology.
2. Consulting site. In addition to what supplies and equipment is needed at the referring site, inform the telehealth staff if you are doing an educational presentation, describe what type of audiovisual aids you will be using, such as power point, audiotape or slide presentation.

Patient examination:

1. Connection procedure
Generally the patient site coordinator will connect with the distant consultant site 30 minutes prior to the patient encounter to ensure adequate time to troubleshoot any technical issues.
2. Confidentiality
 - a. The patient site coordinator will explain to patients participating in a telehealth exam for the first time, how the system works, emphasizing that the system is confidential; that no video taping of the exam is done, and that no one except the consulting provider and patient presenter will be in the exam room at either the patient or consultant site, without the patient's knowledge and approval.
 - b. The consulting provider will introduce himself or herself to the patient before the exam begins. The consulting provider will ask the patient's permission to have any other person in the room to observe the exam. If the patient declines, the observer must leave the telehealth room.
3. Patient Consult *To be completed by consultant*
The telehealth patient exam will replicate as closely as possible the way the specialist currently examines patients in person. Briefly describe a basic telehealth consultation for your clinic or specialty, including how the presenter will be expected to assist the consulting provider, if needed, during the exam. Attach specific Clinical Protocols.
4. Equipment Failure and Back-up Procedure *To be completed by consultant*
5. Infection Control - Follow patient site standard policies and procedures for infection control.

Post-examination: To be completed by consultant.

1. Medication Management and other Orders
Discuss with the presenter/referring PCP and patient any medications follow up tests, or procedures that need to be done before the next visit. The presenter is responsible for ordering any necessary test, obtaining the test results and forwarding them in a timely manner to the consultant.
2. Follow-up Care
Schedule a follow-up exam as needed. Tell the patient and presenter if and when the patient needs to be seen again. Indicate if the next patient visit will be in person or via telehealth.
3. Documentation
Indicate where the patient's telehealth medical records will be filed and document the patient exam in the patient's medical records. Outline the transfer of documents and referral letter process.
4. Adverse Reaction / Urgent Care
The consultant instructs the patient and presenter on who to contact (local physician, nurse practitioner, P.A., pharmacist, etc.) if the patient has any adverse reaction to any of the prescribed treatments. Outline emergent transportation options and transfer options (ground, helicopter, fixed wing).

5. Billing Process

For assistance with any phase of telemedicine clinical service development or implementation, contact the Utah Telehealth Network at 585-2426.

EXAMPLE