

Telehealth Visit Staffing and Steps Sample Outline

PURPOSE

This sample outline presents guidance on which staff may need to be involved in each phase of a telehealth visit, what steps to take (and when), and other related information to support staff implementing Title X services via telehealth. As telehealth visits may be a new (or expanded) service at a Title X agency, all involved staff need sufficient training and support to continue providing high-quality reproductive health services to clients.

HOW TO USE

This outline of key elements in a telehealth visit should be referred to in conjunction with the *Telehealth Visual Flow* job aid that depicts the steps associated with these elements. Title X grantees can expand upon this sample outline, customizing it with tips and steps specific to their settings.

[INSERT AGENCY NAME and LOGO]

HOURS OF PROVIDING VISITS VIA TELEHEALTH

- Monday–Wednesday: 9 am–12 pm, 1–3 pm
- Thursday: 2–7 pm
- Friday: 9 am–12 pm, 1–3pm

CLIENT

- Accesses the agency's telehealth platform, electronically signs a Telehealth Consent form, and any other agency-specific forms, and enters the virtual waiting room.

TELEHEALTH MEDICAL ASSISTANT (MA)

- Sees a client in the virtual waiting room and connects with the client to assess family size and income, review costs, and service(s) to determine if they can be provided via telehealth.
- If a client is not eligible, there will be no charge, and MA can schedule the client for an in-person visit if desired.
- If a client is eligible, register them in the electronic health record software and message the provider at the clinic.
- Under first name used (in the Identification section) enter location of the client (e.g., home).

- As needed, collect any co-pays or fees.
- Place the client on hold in a virtual waiting room.

FRONT DESK STAFF

- As applicable, complete a billing form or note in the agency's billing processes where the client is located (e.g., at home). Provide information as needed to the provider.

PROVIDER

- When a client is in the telehealth schedule, log into telehealth software, follow instructions on pulling the client from the virtual the waiting room, and connect to the client.
- Complete as needed, a Telehealth Consent form with client.
- Complete Review of Systems (will populate with visit type).
- Complete elements of physical exam for telehealth.
- Complete visit orders, as needed.
- Print out any signed forms, including a Telehealth Consent form from telehealth software.
- Complete superbill.
- Close encounter.

Front Desk Staff:

- Scan signed consents into client's chart.
- Enter charges from code on superbill.

Adapted with permission from Maine Family Planning.
