Office and Technology Checklist for Telemedicine Services

Screen your patient(s) to determine whether videoconferencing services are appropriate for them.

☐ Consider patient’s clinical & cognitive status – can the patient effectively participate?
☐ Does the patient have technology resources for a videoconference – e.g. webcam or smartphone?
☐ Consider patient’s comfort in using technology – can they log in and effectively use the technology?
☐ Does the patient have physical space for a telemedicine session?
☐ Is parent/guardian permission required? If so, obtain it.
☐ Consider patient safety – are there any risks here when deciding to do telesessions?

Technology

☐ Is your technology platform consistent with HIPAA-compliant practices? *It is advisable to follow HIPAA regulations where possible, although HIPAA regulations will not be enforced during this public health*
☐ Do you have a Business Associate Agreement (BAA) for that technology vendor?
☐ Do you and the patient have adequate internet connectivity for videoconferencing?
☐ Did you discuss with the patient how to log in and use the technology?
☐ Are you using a password-protected, secure internet connection, not public or unsecured WiFi? What about your patient? (If not, it increases the risk of being hacked.)
☐ Did you check that your antivirus/malware protection is up-to-date to prevent being hacked? What about your patient?

Set-up

☐ Is the location private? Is it reasonably lit?
☐ Make sure the room is well lit. Example: A window in front of you might cast a shadow or create low visibility.
☐ To improve eye contact, position your camera so that it’s easy to look at the camera and the patient on screen.
☐ Consider removing personal items or distractions in the background.
☐ Check the picture and audio quality. Can you see and hear each other? Make sure nobody is muted.
☐ As much as possible, both people should maintain good eye contact and speak clearly.

Pre-session

☐ Discuss the potential risks/benefits of telehealth sessions with the patient(s).
Get a signed informed consent from your patient(s) or patient’s legal representative. If the psychologist or patient is quarantined, informed consent must be signed electronically; consider DocHub or DocuSign.

Do you have a back-up plan in case of technical difficulties? In case of a crisis situation? What contact information do you have? Do you know the local resources (e.g. emergency room) where the patient is?

Did you discuss how this session will be billed? Will the patient be billed if late/no-show?

In the case of minors, determine where the adult will be at that location.

**Beginning of virtual session**

- Verify the patient’s identity, if needed.
- Confirm patient’s location and a phone number where the patient can be reached.
- Review importance of privacy at your location and patient’s location.
- All individuals present for the virtual visit must be within view of the camera, so you are aware of who is participating.
- Confirm that nobody will record the session without permission.
- Turn off all apps and notifications on your computer or smartphone. Ask patient to do the same.
- Conduct the session mostly like you would an in-person session. Be yourself.

*(For information purposes only. Not for use in clinical records.)*