Getting Started with Telehealth:
Your Organization's Checklist

Ensuring the Best Experience for Your Clients When Using Telehealth

Choose a HIPAA-compliant telehealth software that is right for your practice/office

Train all staff on chosen telehealth software

Train administrative staff on what to do if clients have connection difficulties

Create workflows so all staff members know how to process new and existing clients via telehealth
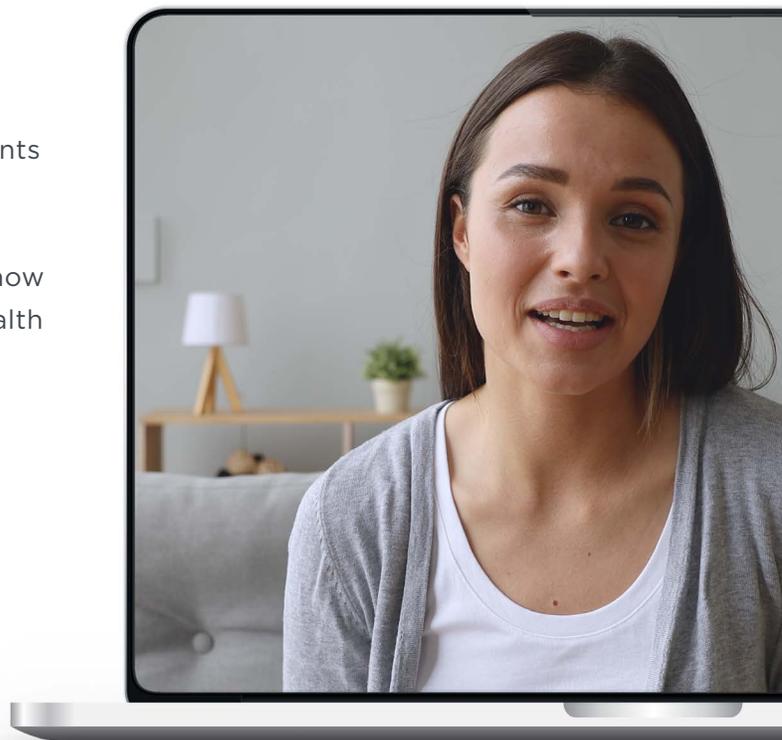
Ensure staff have the right tools to conduct telehealth appointments:

- Silent keyboard
- Noise-cancelling headphones
- Laptop/computer that can connect to EHR, telehealth software, etc.
- Strong internet or WiFi connection

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An Everyday Telehealth Checklist
for Providers

Before Each Session

Login and test your telehealth software (Skype, FaceTime, or other platforms) before your first session of the day, including your speakers and microphone

Test your WIFI connection

Close unnecessary computer programs that are running in the background

Check your video background—"What's behind you is what you wear to work"

Check your lighting—use overhead lighting, if possible

Check your camera placement so that you aren't 'looking down' at your clients; maintain good eye contact

Have noise-cancelling headphones ready to use, if needed

Make sure your **laptop charger is close-by**, if needed

Dress as you would for an in-person appointment

Tidy your desk or workspace

Make sure client is comfortable with conducting their session via telehealth

During Session

Confirm that the client is in a "comfortable and private space"

Verify client's identify and document it, if needed

Confirm session back-up plan if your or their internet connection fails

Maintain good eye contact

If you have two monitors, mention that you might look down or away to take notes, but you're still listening

Leave time for client to ask questions about telehealth or their session

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