

The Provider Telehealth Checklist

This checklist helps healthcare providers facilitate an effective telehealth clinical call with patients. It advises on how to be clearly heard and easily understood through optimizing the call environment, selecting appropriate telecommunications equipment, and implementing a continuous improvement process.

Action	Application
Issue written instructions for making the call.	<input type="checkbox"/> Describe how to connect to the call. <input type="checkbox"/> Describe how to fix common problems.
Hold a test call.	<input type="checkbox"/> Assist the patient in setting up equipment, adjusting room conditions, and understanding conversation about medical matters.
Choose a quiet place.	<input type="checkbox"/> Use a room where others are not talking and noise is minimal. <input type="checkbox"/> Choose a room with sound absorbing materials such as an acoustical tile ceiling or acoustical wall panels. <input type="checkbox"/> Use a sheltered place out of the wind if outside.
Reduce background noise.	<input type="checkbox"/> Turn off noisy items such as televisions and fans. <input type="checkbox"/> Mute your microphone when not speaking. <input type="checkbox"/> Turn off or mute your cell phone if talking on a computer. <input type="checkbox"/> Use the settings on your computer or phone to reduce background noise, if possible.
Ensure a good appearance on screen.	<input type="checkbox"/> Light your face with a lamp or window in front of you. <input type="checkbox"/> Close curtains/blinds and turn off lamps behind you. <input type="checkbox"/> Check that the camera is on. <input type="checkbox"/> Position the camera at eye level. Look straight at it when speaking. <input type="checkbox"/> Ask the patient if they can see you well.
Ensure good call audio.	<input type="checkbox"/> Speak within 3 feet of the microphone. People in a group should take turns being close to the microphone or use multiple microphones for groups if your system allows. <input type="checkbox"/> Use a headset/earbuds/handset if you are the only person on the call. <input type="checkbox"/> Ask the patient if they can hear you.
Ensure speech privacy.	<input type="checkbox"/> Close the door. <input type="checkbox"/> Make sure people not associated with the call cannot understand the conversation. Comply with HIPAA speech privacy.
Ensure ability to hear and understand.	<input type="checkbox"/> Use see-through masks or clear face shields, if needed, or if not hazardous to others, remove mask so that patient can see your mouth. <input type="checkbox"/> Periodically check that the patient can hear and understand you. <input type="checkbox"/> Inquire whether someone can assist the patient, if beneficial to the patient.
Suggest audible assistance.	<input type="checkbox"/> Consider the following tools for audible assistance should the patient require it: <ul style="list-style-type: none"> • hearing aid integration with computer or phone • phone assist integration with computer or phone • Bluetooth • Telecommunications Relay Service (TRS)
Provide transcripts, summary notes, or an audio recording.	<input type="checkbox"/> Consider using software (apps) for transcribing or recording the call: <ul style="list-style-type: none"> • voice-to-text app • captioning • translator • make an audio recording of the call <input type="checkbox"/> Offer the patient a call transcript or summary notes.
Administer a post-call evaluation.	<input type="checkbox"/> Ask the patient how well the call went for them. <input type="checkbox"/> Ask the patient what you can do to improve the call.

