Conducting Telehealth Consultations via Video:
A Checklist for Clinicians

This checklist provides a quick reference to assist with providing quality telehealth-based care for your clients. It is intended to be used after the following has been implemented within your practice:

- Telehealth technology in line with relevant professional practice requirements
- Practice policies and processes have been updated to reflect inclusion of telehealth practice
- Profession specific evidence related to intended service provision is known
- Staff have undergone relevant training

Please refer to the AHPA Telehealth Guide for further details.

Allied Health Professions Australia

Step 1: Before a booking is made

- **Assess client for suitability:** Will telehealth provide a quality & safe consultation?
- **Provide the client with your practice's plain language telehealth information, including privacy aspects**
- **Gain client consent and record this consent in your client record system**

Step 2: Make a booking

- **Coordinate telehealth consultation booking**
- **Provide the client with your practice's telehealth access and trouble-shooting information**
- **Provide the client with a list of unique requirements they need to prepare:**
  - Are you likely to need the client to **move** around? How much **space** will they need, and will they need someone there to **assist** them?
  - Is there any **equipment** they may need to have available during the consultation to support the consultation? For example, a tape-measure, assistive technology they use, an eyechart or forms they need to complete?
- **Ensure you have access to any client information you might need:**
  - Are there any **tests** you need them to have done before the consultation? Do they know where to get these done? Will the **results** come direct to you and how long before the appointment do they need to complete them?
  - Is there any **data you need them to collect** prior to the consultation? For example, a falls, food or exercise diary.
  - Is there any **data you need them to upload** to a specific system so you can have access to it? For example, their insulin pump, other personal monitoring devices and/or exercise equipment. Do you have a log-in to access this information?
  - Is there **anything you need to post them** so they can use it before the consultation?
- **Where possible, test technology with client prior to consultation day and time**

Step 3: Before the consultation

- **Ensure your personal presentation is professional**
- **Review all relevant notes and data; enable access for consultation**
- **Test equipment and connectivity:**
  - **Check internet connection** and limit other uses if connection unstable
  - **Check camera positioning:** Is it at eye-level and stable? Do you need a tri-pod or alternative to be seen if you need to move and/or demonstrate something?
  - **Check audio input and output**: Consider if you will continue to be heard if you move away to demonstrate or conduct an activity
  - **Check charge levels of equipment** and/or **ability to charge** if required
- **Prepare trouble shooting options for technical challenges.** Organise any necessary equipment that may need to be implemented, such as a phone to call the client.

Step 3: Before the consultation (continued)

- [ ] **Is your environment ready?**

- Are required **therapy tools** and **resources** in reach? For example, anatomy charts, demonstration items and exercise equipment/supports
- Are **online tools** working?
- Is the **privacy** of all clients being maintained? (Ensure previous client's information is not in view)
- Will your **background be quiet enough?** Consider methods to **prevent interruptions** and maximise acoustics such as using a carpeted room
- Do you have **good lighting?** Try to ensure no bright light sources are behind or above you
- Is a **professional background** in view?
- Do you have space to **demonstrate assessments** or exercises for the client?

Step 4: During the consultation

- [ ] **Test vision, sound and other relevant settings with client before initiating consultation formally**
- [ ] **Smile and look at the camera, not the screen, speak naturally or slightly slower than usual**
- [ ] **Introduce yourself and others by confirming each person's identity, credentials and role**
- [ ] **Check the client's details are correct:** Invite them to self-identify or use other means to confirm the client's identity
- [ ] **Ask the client to confirm** if anyone else is present and their role in the consultation
- [ ] **Confirm and record client's consent to participate**
- [ ] **Ask client to adjust set up and/or environment if required**
- [ ] **Discuss privacy and security, including whether you or the client is intending to record the consultation**
- [ ] **Explain how the client can safely share personal health data or other information with you if they need to**
- [ ] **Provide an overview for how the consultation will run:**

- **Ask questions** at any time
- **Explain how turns to talk will be taken** and to **place self on mute** when not talking if required
- **Confirm the role** of each individual again if required

- [ ] **Remind client of plan B if technology challenges arise**
- [ ] **Undertake clinical consultation:**

- **Adhere to evidence-based practice and professional standards at all times**
- **Let the client know** when you are reading something/ taking notes/ why you need to look away

- [ ] **Make clinical notes as you would in a standard consultation**
- [ ] **Summarise key points and what will happen next, who will do what and when?**

Ask the client to **repeat instructions** back to you

- [ ] **Ask the client if they have questions or need anything clarified**
- [ ] **Ask the client if they are willing to participate in telehealth in future and record response**

Step 5: After the consultation

- [ ] **Ensure systems are shut down securely at the end of the consultation**
- [ ] **Review your notes to ensure they are appropriate and record any technical malfunctions, length of service and whether the service was in person or via telehealth**
- [ ] **Store notes securely and delete any client information you may have received outside your clinical information system, for example that you may have downloaded or received as a message or email**
- [ ] **Arrange any client management activities such as follow-up actions and arranging further appointments**
- [ ] **Seek payment via agreed method**
- [ ] **Send the client an evaluation form to seek feedback and inform quality improvement**