Patient-Provider Telehealth Workflow

Workflow will vary between states and institutions, with staff being responsible for varying sets of tasks from location to location. This is to give a general overview of the telehealth process. All organizations must maintain HIPAA compliance with the telehealth regulations and follow local and federal laws.

1. **Begin**
   - Schedule appointment

2. **Office Staff, Nurse, Telehealth Coordinator**
   - Screen patient for telemedicine criteria

3. **Confirm appointment with patient, set them up with login information

4. **Obtain consent documentation and verify insurance**

5. **Provider**
   - Receive instructions and appointment confirmation

6. **Log-on ahead of appointment and complete pre-visit check-in**

7. **Greet patient, confirm patient check-in, connection to platform and identity**

8. **Vitals taken, by patient as possible, digital remote devices, or by MA at telehealth center**

9. **Prepares for appointment. Reviews history and other patient information received**

10. **Joins virtual room and allows patient in when ready**

11. **Evaluator and goes through virtual exam**

12. **Recommends care management, fills prescription**

13. **Completes documentation of encounter, writes prescriptions and referrals as needed**

14. **Ask questions and addresses any other needs from the provider**

15. **Acknowledged and farewell from provider, patient passed to appropriate staff**

16. **Complettes education and billing process. Follow-up needed?**
   - Yes: Schedule follow-up telemedicine appointment
   - No: Completes education and billing process. Follow-up needed?

17 a. **Patient checks-out and disconnects from the virtual appointment**

17 b. **An in person follow up is scheduled or referral requested**

17 c. **End**

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