

Patient Telephone Confirmation Checklist: Preparing for a Successful Telehealth Visit



This checklist is completed when the telephone call is placed to confirm the patient's telehealth appointment. The goal is to ensure the patient is prepared, and confident they'll have a successful telehealth visit with their provider. The confirmation call is recommended 24-48 hours prior to the patient's appointment.

1. Confirm the patient received an email with the date and time they were scheduled, and are planning to complete the visit.
 - a. Confirm they also received the instructions for downloading your VCP and a link or meeting ID to log into the VCP the day of their appointment.
 - b. If the patient has not yet downloaded the VCP software, assist the patient to complete this step

2. Complete a test meeting successfully with the patient, and reinforce this is exactly what they'll need to do the day of their appointment.
 - a. Confirm that their appointment is scheduled to begin 30 minutes prior to the encounter with their provider to ensure all connection and/or technology issues are resolved prior to when their provider logs in.

3. Confirm the phone number the patient would like the provider to use to re-establish contact if technology or connectivity challenges prohibit the visit from being completed on your VCP.
 - a. Ask the patient to keep their phone with that number nearby the day of their visit.
 - b. Remind the patient that the **provider will reach out to the patient** if the video connection is lost during the visit.

4. Communicate the expectations to the patient for during the visit.
 - a. A private and quiet area in the home with limited distractions and clear of power cords is ideal.

5. Confirm the patient's vitals will be collected prior to the appointment if possible on the day of their appointment – another step completed prior to the encounter with their provider.
 - a. Let patient know that this is not a requirement if they do not have the tools needed.
 - b. Vital signs that might be reportable by patients from home include:
 - Temperature (note type of thermometer used)
 - Blood pressure (note type of BP cuff used and proper protocol followed)
 - O2 level oximetry (pulse oximeter)
 - Pulse (manual wrist counting for 30seconds, smart watch, phone app, pulse oximeter)
 - Height and weight
 - Other Smartwatch and activity data