This activity can minimize the likelihood that the patient will encounter issues with their technology during a visit, ultimately leading to a better patient experience of care. This activity may take place at a scheduled time in advance of or immediately prior to the patient’s visit with the clinician. Users should customize this workflow based on their health center’s staffing and telehealth platform.
Advise patient to go into their device’s Camera and Microphone Settings and select their permissions to allow apps to access their camera and microphone.

Review forms and documents needed for the visit.

Includes: Direct patient to electronic forms so they can complete and upload (if possible) in advance.

What device will the patient use for the telehealth visit?

SMARTPHONE OR TABLET

How will the telehealth visit be initiated?

Patient clicking a link

Provider calling (video call)

Patient clicking a link

Provider calling (audio call)

Advise patient to go into their device’s Camera and Microphone Settings and select their permissions to allow apps to access their camera and microphone.

Instruct the patient to set up in a private space with minimal background noise; explain that, if space is not private, they may wish to use headphones and an external microphone.

Recommend the patient try to set-up in a well-lit room with little or no backlighting; provide explanation (if needed).

Recommend the patient place the device on a solid surface to keep the camera steady.

Provider calling (video call)

Patient clicking a link

Provider calling (audio call)

Continue on next page

See Workflow 3 – Connecting to Interpretation Services for steps.

If forms are reviewed and completed as part of this contact, see Workflow 2 – Patient Work-up for steps.

Health centers may provide patients with a code word to confirm identity and/or for patients to indicate they are comfortable proceeding with the visit when contacted.

Continued on next page

December 2020

Sponsored by Bayer
Advise patient to go into their device’s Camera and Microphone Settings and select their permissions to allow apps to access their camera and microphone.

Patient is able to make appointment

Continued

December 2020

Sponsored by Bayer

SAMPLE WORKFLOW 1

Technology Set-Up

Obtain or confirm patient’s contact information, including a number to call if disconnected

Includes: Confirm patient’s preferred method of communication and confidentiality needs; document in medical record

Review forms and documents needed for the visit

Includes: Direct patient to electronic forms so they can complete and upload (if possible) in advance

What device will the patient use for the telehealth visit?

SMARTPHONE OR TABLET

How will the telehealth visit be initiated?

Provider calling (video call)

Detail what will display on the patient’s caller ID when the provider calls

Review provider’s name

Give code word and explain that the provider will ask for this word at the beginning of the visit; document code word in medical record

Patient clicking a link

Explain when and how patient will receive the appointment link

Advise patient to go into their device’s Camera and Microphone Settings and select their permissions to allow apps to access their camera and microphone

Instruct the patient to set up in a private space with minimal background noise; explain that, if space is not private, they may wish to use headphones and an external microphone

Recommend the patient try to set up in a well-lit room with little or no backlighting; provide explanation (if needed)

Recommend the patient place the device on a solid surface to keep the camera steady

Provider calling (audio call)

Advise patient that, although their device has video capabilities, the visit will or may be audio only; provide reason (optional)

Detail what will display on the patient’s caller ID when the provider calls

Review provider’s name

Instruct the patient to plan to be in a private space with minimal background noise

Give code word and explain that the provider will ask for this word at the beginning of the visit; document code word in medical record

Continued on next page

See Workflow 3 – Connecting to Interpretation Services for steps

If forms are reviewed and completed as part of this contact, see Workflow 2 – Patient Work-up for steps.

Health centers may provide patients with a code word to confirm identity and/or for patients to indicate they are comfortable proceeding with the visit when contacted
SAMPLE WORKFLOW 1
Technology Set-Up

**NON-SMARTPHONE**

- Detail what will display on the patient’s caller ID when the provider calls
- Review provider’s name
- Instruct the patient to plan to be in a private space with minimal background noise
- Give code word and explain that the provider will ask for this word at the beginning of the visit; document code word in medical record

**COMPUTER**

- How will the telehealth visit be initiated?

  **Patient clicking a link**
  - Explain when and how patient will receive the appointment link
  - Advise patient to go to their computer’s Sound Settings to test the microphone and ensure speakers are turned on
  - Recommend the patient try to set up in a well-lit room with little or no backlighting; provide explanation (if needed)

  **Provider calling (video call)**
  - Confirm the patient’s VoIP (Voice over Internet Protocol) phone number
  - Detail what will display on the patient’s caller ID when the provider calls
  - Give code word and explain that the provider will ask for this word at the beginning of the visit; document code word in medical record

- Instruct the patient to set up in a private space with minimal background noise; explain that, if space is not private, they may wish to use headphones and an external microphone

- Advise patient to go to their computer’s Camera Settings to allow apps to access their camera

**Smartphone or tablet**

- Instruct patient to have device fully charged or plugged in (if applicable)
- Communicate the plan for reconnecting if there are technology issues; confirm patient understanding
- Confirm all the patient’s questions have been answered

- Remind patient to let the health center know if they cannot make the scheduled appointment
- Disconnect from patient; document in call record

See Workflow 3 – Connecting to Interpretation Services for steps
If forms are reviewed and completed as part of this contact, see Workflow 2 – Patient Work-up for steps
Health centers may provide patients with a code word to confirm identity and/or for patients to indicate they are comfortable proceeding with the visit when contacted