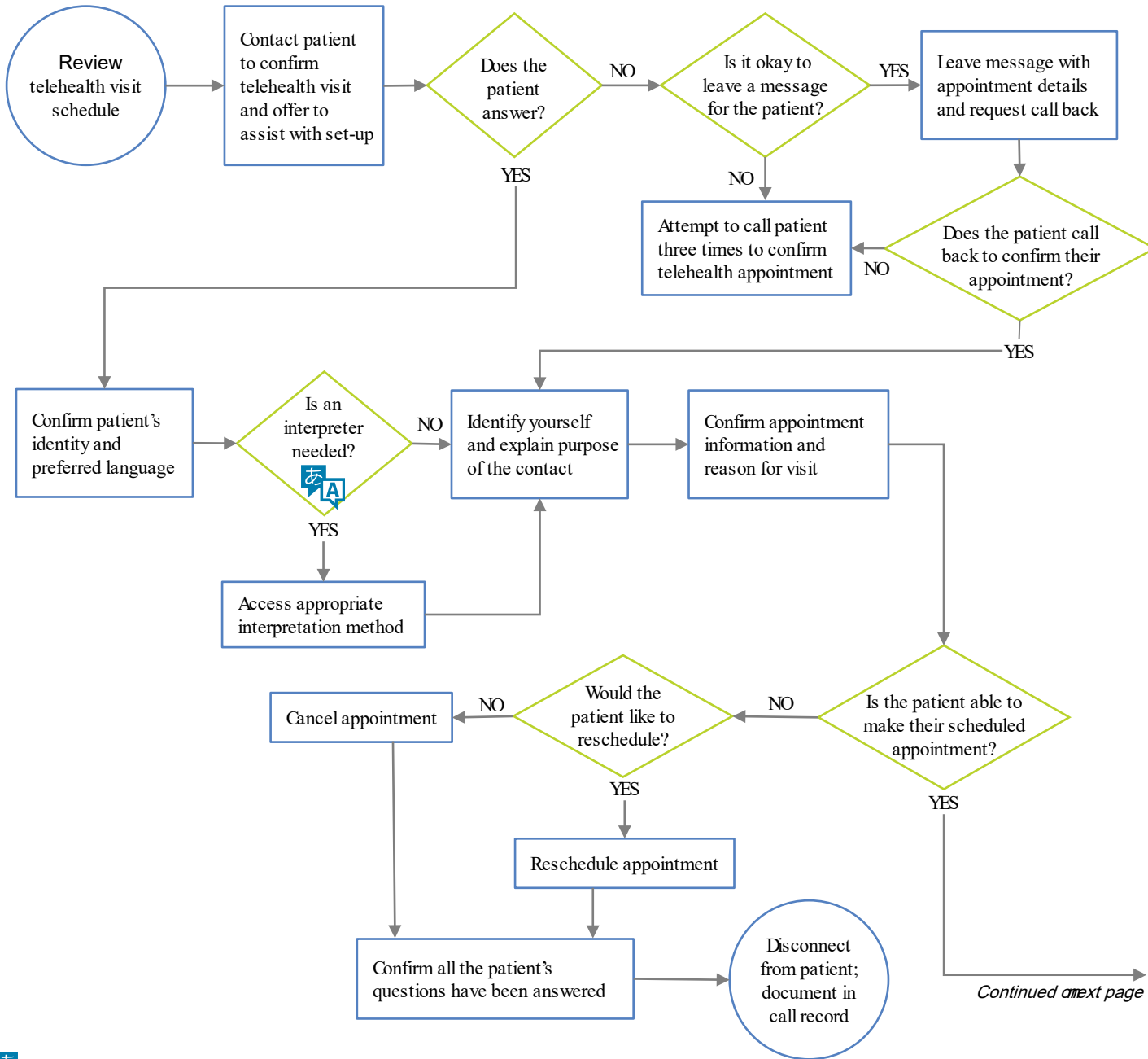


This activity can minimize the likelihood that the patient will encounter issues with their technology during a visit, ultimately leading to a better patient experience of care. This activity may take place at a scheduled time in advance of or immediately prior to the patient’s visit with the clinician. Users should customize this workflow based on their health center’s staffing and telehealth platform.



Continued on next page

See Workflow 2 Connecting to Interpretation Services for steps
 If forms are reviewed and completed as part of this contact, see [Patient Workflow](#) for steps
 Health centers may provide patients with a code word to confirm identity and/or for patients to indicate they are going on to the visit when contacted

Patients able to make appointment

Continued

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

NONSMARTPHONE

COMPUTER

Continued on next page

How will the telehealth visit be initiated?

Patient clicking a link

Provider calling (video call)

Explain when and how patient will receive the appointment link

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

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

Continued on next page

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

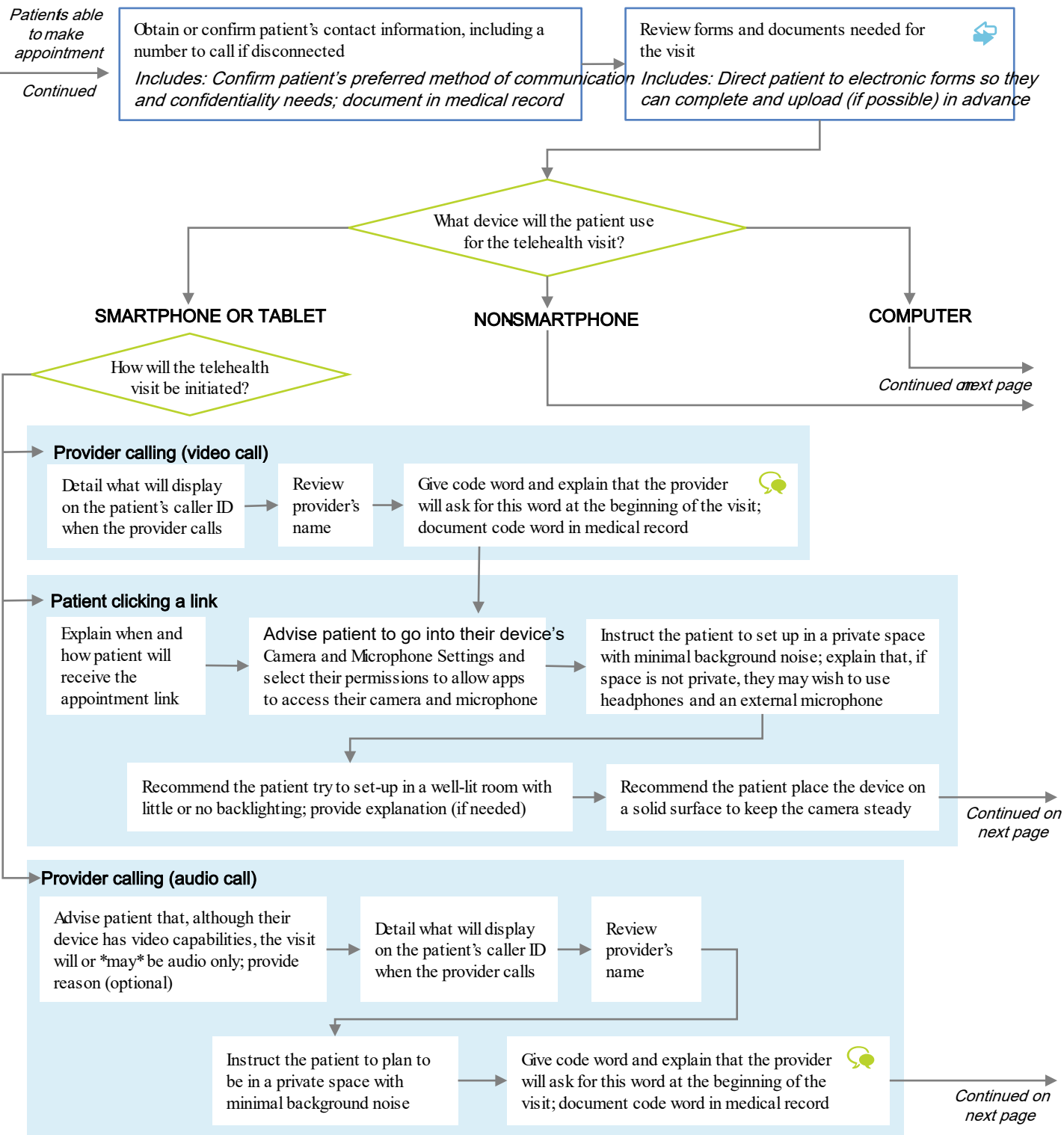
Give code word and explain that the provider will ask for this word at the beginning of the visit; document code word in medical record

Continued on next page

See Workflow [Connecting to Interpretation Services](#) for steps

If forms are reviewed and completed as part of this contact, see [Patient Workflow](#) for steps

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

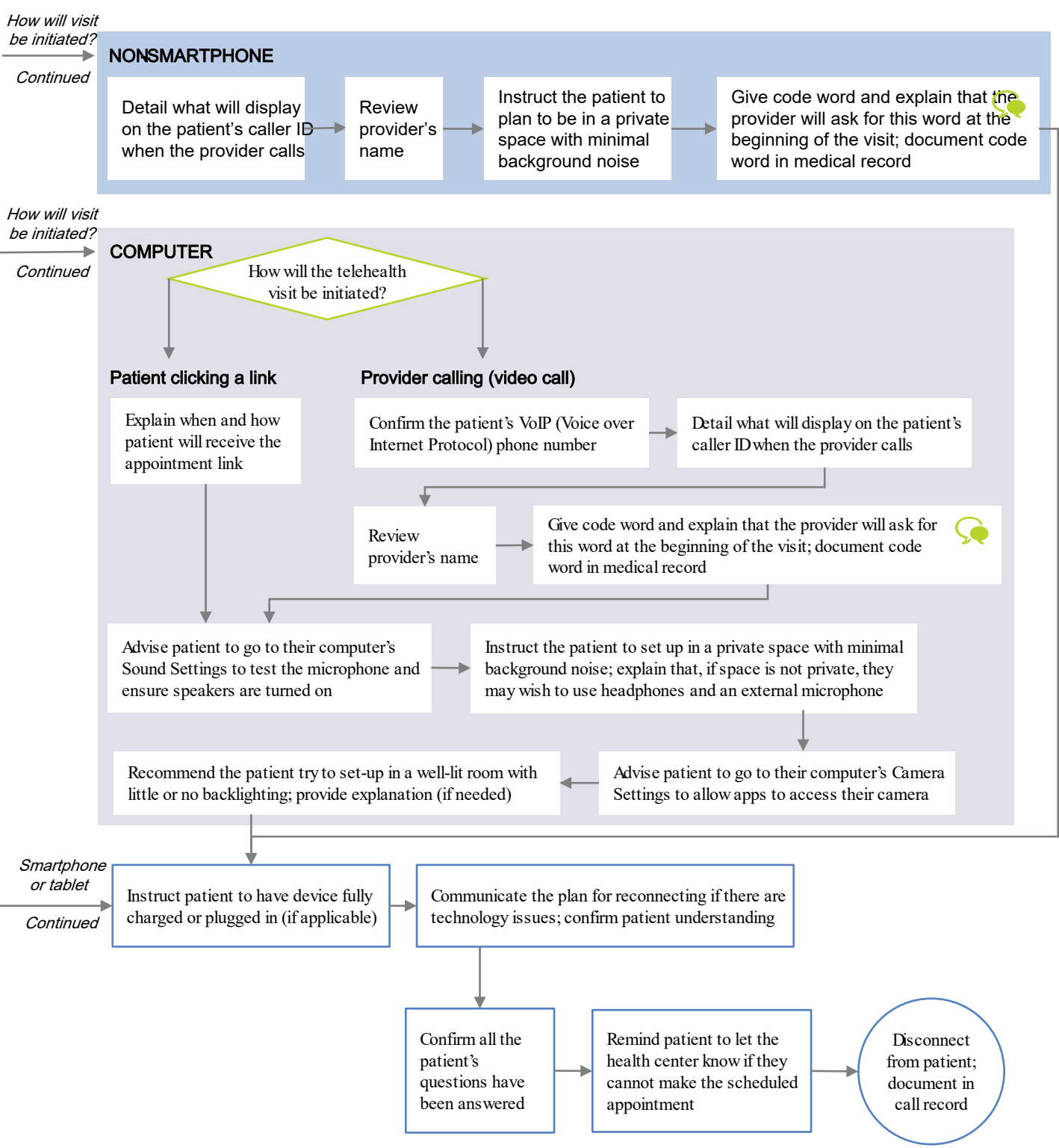


See Workflow [Connecting to Interpretation Services](#) for steps

If forms are reviewed and completed as part of this contact, see [Patient Workflow](#) for steps.

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

SAMPLE WORKFLOW Technology Set-Up



See Workflow [Connecting to Interpretation Services](#) for steps

If forms are reviewed and completed as part of this contact, see [Patient Workflow](#) for steps

Health centers may provide patients with a code word to confirm identity and/or for patients to indicate [they are in on the line](#) when contacted