Telehealth Protocol Checklist

During Scheduling
- Confirm receipt of referral and imaging if available.
- Confirm the patient is comfortable with the technical requirements of an internet video conference and can meet the requirements of a working webcam and microphone, quiet space, good lighting (or flashlight) and something to retract the cheek.
  - Offer practice/test meeting to confirm ability to use web conferencing app.
  - If technical difficulties are likely, schedule an in-person consultation instead.
- Inform the patient he or she will be consenting to telehealth services, which are iterated in the email when he or she clicks the join-the-meeting link.
  - Specifically state if the meeting will be recorded by the practice or allowed to be recorded by the patient.
- Inform the patient the email also will have attachments that will be referenced during the consultation.
- Inform the patient of the office’s billing policies related to telehealth services. Specify the following:
  - Insurance coverage
  - Out-of-pocket expense
  - Method and timing of payment
- Create the web conferencing meeting.
- Email the patient the web conferencing link in the appropriate email template (e.g., third molar consult, implant consult, basic oral surgery procedure consult).

Immediately prior to the consultation
- Confirm receipt of referral, imaging (if available) and completed online registration form.
- Open the patient’s EHR chart and create a history and exam template.
- Create and customize expected consent form(s).
- Open a web browser to the practice website.
- Have patient-education models available, if applicable.
- Open the web conference meeting with video and audio on.

Once the patient joins the meeting

Clinical staff
- Confirm the patient’s location and privacy – or who the patient is with – and enter in the EHR notes.
- Review registration, medical and surgical history, social history, medications and allergies and update the EHR notes.
- Determine anesthesia preferences. (Review anesthesia options if needed.)
- Review IV sedation instructions, if applicable.
- Discuss postoperative strategies.
- Explain COVID-19 and telehealth consents, as necessary.
- Explain COVID-19 appointment protocol:
  - Inform the patient and companions to wear face coverings to enter the practice.
  - Explain the patient should arrive alone, or one parent/guardian or assistant may accompany if needed.
  - Inform the patient to call the office upon arrival for entry; COVID-19 screening and temperature screening will be performed.
  - Obtain imaging as appropriate.
  - Finalize the treatment plan and perform the planned procedure(s).
- Notify the doctor the patient is ready.
**Doctor**

*Note: Meeting can be joined from any computer.*
- Confirm the patient’s referral.
- Review the patient’s medical history.
- Perform the exam.
- Review the treatment options and provide the patient education, as necessary.
- Create the treatment plan.
- Obtain procedural consent from the patient or guardian.
- Notify administrative staff that the patient is ready.

**Administrative staff**

*Note: Meeting can be joined from any computer.*
- Review treatment cost estimate, including:
  - Insurance benefits, if applicable.
  - Network discount, if applicable.
  - Noncovered services, if applicable.
  - PPE pandemic fee, if applicable.
  - Telehealth exam and day-of-procedure exam fees, if applicable.
  - Total out-of-pocket expenses to be paid prior to or on the day of the procedure.
- Discuss payment preferences:
  - Bill and pay online invoicing
  - In-office contactless credit or debit card payment
  - Check
  - Cash
  - Manually swiped credit card
- Stipulate that refunds will be issued after possible account receivables are complete.