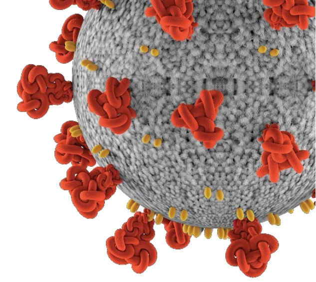
Telehealth Protocol Checklist



July 14, 2020

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).

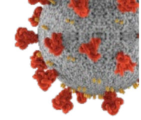
Immediately prior to the consultation

- [ ] 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.