

# Telehealth Checklist for Skilled Nursing and Assisted Living Facilities

## Before the Visit:

- Confirm with resident's provider that a telehealth visit is OK for the resident's health issue/concern and ensure any needed adaptive equipment is available
- Communicate to provider if a translator, or other support, will be needed during the telehealth visit
- Check resident's chart for instructions about the appointment, including the link for joining the telehealth visit
- Discuss with the resident the reason for the appointment, how long the appointment will take, and any family or care-partners they would like included on the call
- Prepare a list of the resident's questions/concerns
- Discuss with the resident what they will wear for the telehealth visit, including clothing that is comfortable
- Obtain signatures from the resident and family/care partner on HIPAA agreements/consent forms
- Confirm the appointment day and time with the family/care partner
- Have a back-up plan, for example a telephone number to call, in the event of technical issues or the appointment gets dropped
- Identify a private and well-lit quiet room for the telehealth appointment (reserve the room, if needed)
- Gather information about how the resident has been sleeping and eating and collect other information as needed such as height, weight and/or vitals
- Gather information about the resident's prescriptions/medications, including PRN meds and how frequently used since the last visit
- Set up the telehealth equipment, including making sure it is fully charged and the audio and video are working. Also, make sure the device is stable and not wobbly
- Close any applications that will not be used on the computer or device



### During the Visit:

- Assist the resident with any devices so that they can see and/or hear better during the telehealth appointment
- Confirm that all parties can see and hear each other
- Encourage the resident (and family/care partner) to engage in the conversation, including asking questions related to the resident's care. Prompt: Ask the resident what matters to them
- Ask the clinician offering the telehealth visit (e.g. provider, care manager, charge nurse) to review and clarify next steps
- Document in resident's chart a number to call if the resident has any problems after hours



### After the Visit:

- Recap and clarify next steps with resident and family/care partner
- Record treatment plan, including any follow-up appointments, tests or medications prescribed
- Conduct follow-up care (if needed). For example, care management such as outreach

