

Sample Policy **Any Facility, USA**

Policy Title: Assisting with a Telemedicine Patient General Exam

Purpose:

- To promote a quality telemedicine experience for the patient and practitioner
- To maintain the continuum of care

Key components of a successful consult

- Attitude: Demonstrate a positive attitude towards telemedicine
- Assessment: Appropriate assessment skills are necessary to meet the requirements of the consult
- Anticipate: Anticipate the practitioners needs, making the consult more efficient
- Assist: Assist with the examination at the direction of the specialty practitioner
- Advocate: Advocate for the patient and practitioner, seeking/ providing clarification when needed

Transfer of Information:

1. Transfer of information should follow your normal process. If your organization and the practitioner are on the same electronic medical record, (EMR) information can be accessed using the EMR.
2. If not on the EMR, information should be faxed as soon as the appointment is made to allow for chart development and review by the practitioner.
3. If the practitioner has specific forms that the patient would complete if they came to their office, these forms should be made available to the patient to complete at the rural site as well and faxed prior to the consult.
4. If the patient is originating from another organization verify that they will be providing the specialty practitioner's clinic the required medical information.

Preparation:

1. As needed, move the video equipment to the consult location. Position in the room to meet the requirements for the consult.
2. Turn the video unit on prior to the consult to be ready to receive a video call and allow for testing and troubleshooting if needed.

3. Prepare examination camera, stethoscope, and other telemedicine peripherals as indicated by the patient condition. Example: exam camera to visualize a wound

4. Check that all equipment required for the specialty is available. Example: reflex hammer, chart to figure BMI, monofilament, etc.

5. If the patient's chart is not available electronically, obtain the patient's medical record as available.

Patient preparation:

1. Patient should arrive 30 minutes before their appointment time for registration and preparation.

2. Register patient according to your facility's policy.

3. Assist patient to the telemedicine examination room.

4. An appropriate tele-presenter will need to be present to assist with the examination.

5. Explain the telemedicine process. It should be explained that this is an actual consult and that the tele-presenter will be assisting the practitioner with the examination. The patient should be encouraged to ask questions just like a traditional in-person consult.

6. Follow your facility's policy on informed consent for telemedicine.

7. Provide the patient with any specific forms that need to be completed prior to the telemedicine consult.

8. Obtain the patient's BP, TPR, height and weight, list of current medications and other assessments or information as required by the specialist. Record in EMR as soon as completed or be prepared to provide information to the specialty practitioner verbally or by fax.

9. Prepare patient for examination.

a. If necessary for proper viewing of condition, have the patient put on a patient gown

b. Properly place the patient for best visualization of patient condition.

c. Prepare stethoscope and exam camera for use as instructed by the practitioner.

d. Set video presets to assist with camera transitions.

Procedure:

1. The consult begins with the main camera focused on the patient and telepresenter. When the specialist and/or their staff appear on the video screen, introduce the patient and anyone else present in the room.
2. Assist with the patient examination at the direction of the consulting practitioner. This may involve performing basic and specific assessments under their direction; using the examination camera to view wounds, rashes, etc.; placing of the stethoscope to listen to heart, lung and bowel sounds; viewing of the lower extremities to assess edema; and more. The telepresenter should be positioned so as to not obstruct the view of the specialist while performing the exam. The specialist should be able to see the telepresenter's technique and the patient's responses to the assessment.
3. Advocate for the patient and practitioner seeking clarification and relaying information as needed. During the consult, the telepresenter should observe for clues that something may need to be repeated or clarified and also that the specialist is hearing the full intent of what the patient is saying. The telepresenter should also let the specialist know of any specific findings that were found during their assessment
4. After examination is completed, complete any procedures as needed (example, re-dressing a wound)
5. After the consult is completed, the specialist will review the plan of care with the patient and the telepresenter.
6. Provide discharge instructions to the patient as given by the consulting practitioner providing any clarifications as needed.

Continuum of Care:

1. Orders should be entered electronically into the EMR or faxed as needed.
2. Assist with scheduling any follow-up testing as needed.

Documentation:

1. Document according to your facility's policy. Add the names of those present during the consult.