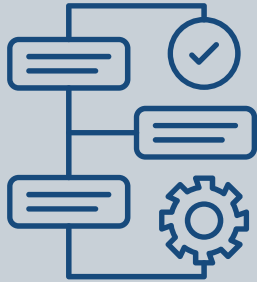


Sample Telehealth Workflow for a Clinic

A Practical Guide for Healthcare Organizations and Providers



This resource is a clean, practical sample telehealth workflow for a clinic. It is structured so you can easily adapt it to your organization and use it for training, standard operating procedures (SOPs), or implementation planning in an outpatient care setting.

Note: This content is for informational purposes only and does not constitute legal advice or interpretation. NETRC encourages you to consult the appropriate state agency, internal colleagues, or an attorney for guidance.



1 | Scheduling Appointment

Role	Task
Patient	Schedules a telehealth visit via phone, website, or patient portal 
Administrative Staff	Verifies: • Patient identity • Insurance eligibility for telehealth • Preferred technology (smartphone, tablet, computer) 
Outputs	• Appointment confirmed • Appointment type set to "Telehealth-Video" • Patient receives automated or manual visit instructions

2 | Pre-Visit Preparation (1-3 days before visit)

Role	Task
Administrative Staff	Sends patient: • Video visit link or portal instructions • Technology check instructions (camera, microphone, broadband) • Pre-visit questionnaire • Consent form, if required   
Clinical Support	Reviews patient chart for: • Outstanding labs or imaging • Upcoming preventive care due • Medication refills needed
Outputs	• Patient prepped and informed • Staff ready for intake documentation

3 | Check-in (0-15 minutes before visit)

Role	Task
Medical Assistant/Nurse	• Connects with patient via video or phone • Confirms: ◦ Two forms of patient identity ◦ Patient's physical location at time of visit ◦ Consent (if not previously collected) • Collects or updates: ◦ Medication list ◦ Allergies ◦ Updates to health history ◦ Home vitals (Blood pressure, pulse, SpO₂, temperature, weight) • Enters data into electronic medical record (EMR)  
Technical Support	Assists the patient if they have trouble entering the virtual waiting room
Outputs	Patient prepped for virtual visit

4 | Virtual Visit with Provider (15-30 minutes)

Role	Task
Health care provider	1. Enters the virtual room 2. Confirms patient identity 3. Performs clinical evaluation ○ Take history ○ Conduct visual exam through camera ○ Review home vitals 4. Diagnoses and plans 5. Provides: ○ Education ○ Medication management ○ Treatment plan ○ Safety plan, if needed
Documentation Requirements	• Physical location of provider • Physical location of patient • Video vs. audio-only modality • Clinical decision-making notes • Duration (if required for billing)



5 | Post-visit Administrative Workflow

Role	Task
Administrative Staff	• Schedules follow-up visits (telehealth or in person) • Collects co-pays, if applicable • Sends after-visit summary and patient education • Sends prescriptions to pharmacy • Uploads any patient-submitted home device data
Outputs	• Patient receives visit summary • Next steps are organized



6 | Billing and Coding

Role	Task
Billing Staff	• Applies the correct telehealth visit CPT codes • Adds appropriate modifiers (e.g. 95, GT, POS 10, depending on payer) • Ensures documentation meets payer requirements • Submits claim 

7 | Quality and Compliance Review (Periodically)

Role	Task
Quality / Compliance Team	• Reviews telehealth encounter logs • Performs documentation audits • Tracks: ○ No-show rates ○ Technical issues ○ Patient satisfaction ○ Clinical outcomes • Updates workflow based on staff and patient feedback 

8 | Optional Workflow Enhancements

Tasks could include:
• Pre-visit automated reminders • Remote patient monitoring (RPM) integration • Real-time IT support • Provider training modules • Templates for telehealth documentation  

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