Avant
By doctors for doctors

Setting up telehealth in your practice
Checklist

1. Consider how you might conduct consultations

As you will be aware, moving to consulting by telehealth is not just a matter of installing a piece of technology. Ideally, start by looking at your existing processes and systems and consider how you could adapt these to telehealth consultations. Your practice may need to consider:

Existing systems and processes

Working from your practice

- ☐ Does your current technology set-up support telehealth?
- ☐ Do you have access to technology support (e.g. from an IT provider or, if you are a GP, your Primary Health Network)?
- ☐ Can your booking system (online, phone, paper-based) support telehealth?

> "We certainly have become more nimble and adaptable. We're quite quick to try new things. If they're not working, we drop them and try something new."
>
> **Dr Bridget Clancy**, ENT and head and neck surgeon.

Working from home

- ☐ Can you access the booking system?
- ☐ Can you access your practice management system (including patient records) remotely?
- ☐ Can you access the practice telephone system offsite?
- ☐ Do you have dedicated mobile phones?

> "When we switched to telehealth, it really showed the rest of our digital infrastructure was behind. We didn't have widespread adoption of secure messaging to be able to send referrals to other specialists. We didn't have ways to communicate securely with patients to send them a pathology form or a medical certificate. We didn't have electronic ordering of pathology, radiology or widespread use and electronic prescribing."
>
> **Dr Amandeep Hansra**, General practitioner.

Consider your patients and practice

- ☐ What is your contingency plan if your patient needs a face-to-face consultation?
- ☐ What sources might you be able to get patient health information from (e.g. MyHealthRecord)?

Privacy

- ☐ Can you maintain your privacy (e.g. using practice phones, block calling numbers, use web-based platforms)?
- ☐ If you are working remotely, can you keep patient records secure?
- ☐ How will you ensure consultations are private? Will practitioners and staff be able to ensure they can't be overheard or viewed when conducting a consultation?

2. Assess any new technology needs

- ☐ Do you require a new technology platform or additional licences?
- ☐ Do you require new hardware?
- ☐ Do you require lighting, microphones, headsets, webcams etc.?
- ☐ Does your technology meet necessary privacy and security standards?

> "It is really about building a process more than just picking the right piece of technology."
>
> **Rocky Ruperto**, Legal and Policy Officer, Avant.

3. Amend or develop protocols and processes

Pre-consultation triaging

Practitioners will only be able to bill MBS for a telehealth consultation if they are able to provide the full service safely through this means. The booking process needs to ensure that, as far as possible, only those consultations that can be safely conducted via telehealth are booked as tele-consultations.

Have you determined the role of practitioner versus practice staff in developing the following processes?

- ☐ Verifying patient identity, discuss billing and obtain financial consent to any fees.
- ☐ Accepting new patients.
- ☐ Assessing whether it is safe and clinically appropriate to conduct the consultation by telehealth.
- ☐ Determining whether the consultation will happen via phone, video or face-to-face.
- ☐ Arranging safe face-to-face consultations if required.
- ☐ Assessing the patient's access to technology and confirming contact details.
- ☐ Assessing and managing patients with COVID-19 symptoms or risk.

☐ Informing the patient about the telehealth process and obtaining their consent to telehealth.

☐ Obtaining informed financial consent.

☐ Obtaining consent to communicate via email or SMS.

Ensure email and /or SMS communication with your patient is only provided in accordance with your indemnity insurance policy, as there may be requirements such as having had previous in person consultation.

> "If they haven't already agreed to our practice policies for receiving emails or text messages from us before the consultation then I seek that consent during the consultation. It's important because it smooths the way for communicating with patients after a telehealth consultation."
>
> **Dr Bridget Clancy**, ENT and head and neck surgeon.

Adapt current policies to telehealth environment

Privacy policy

☐ Does your privacy policy include issues that arise due to use of telehealth (such as informing patients that telehealth consultation will not be recorded)?

☐ Is your privacy policy accessible to patients from their home (for example, include it on your website)?

WHS policy

☐ Do you have a checklist for staff working from home?

Electronic communication policy

☐ Have you updated the policy to include email communication with patients (e.g. referrals, scripts)?

Records, follow-up and recalls

Have you reviewed your processes or protocols for the following?

☐ Accessing and updating patient records.

☐ Following up tests and referrals, prescriptions, further investigations and managing patient recalls (including chronic patients due for regular checks or screening tests at this time).

☐ Managing missed appointments.

☐ Managing and booking a face-to-face consultation if necessary (and ensuring these are billed appropriately).

Billing

☐ Have you ensured that all practice staff understand how consultations will be billed (e.g. Medicare versus private billing or both)?

☐ Have you clarified with staff how you will confirm patient assignment of the MBS benefit?

☐ Have you outlined to staff patient financial consent process?

☐ If privately billing, have you clarified with staff any out-of-pocket expenses for the patient?

4. Supporting staff

Many healthcare workers – particularly in primary care – are reporting they are finding consulting via telehealth during COVID-19 draining and stressful. The lack of direct contact, challenge of interpreting patient history and symptoms without the usual non-verbal cues, supporting patients who are distracted or experiencing mental health issues are all difficult. Additionally, many people are also experiencing their own personal and financial challenges. On the other hand, some strategies to keep staff well and avoid burnout include:

☐ Do you have adequate processes in place to supervise trainees?

☐ Do you have adequate education and training on your processes?

☐ Do you have technical support?

☐ Have you arranged opportunities to debrief?

☐ Have you scheduled regular breaks?

☐ Are you regularly checking in with staff (particularly if staff are working remotely or physically distanced)?

☐ Do you know where to direct staff to find help and support if they need it?

For more information or immediate medico-legal advice, call us on 1800 128 268, 24/7 in emergencies.
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