

Accreditation Now

Telehealth Service Delivery Training

Note: This training is an overview of Telehealth Service Delivery in a professional health setting. It is intended to provide a basic understanding of Telehealth Services for staff who use this medium with consumers and meet the CARF Accreditation Standards for competency-based training.

Telehealth policies, procedures and practices must be in accordance with state, federal, and nationally recognized guidelines on Telehealth Service Delivery and ensure a solid foundation for legal and ethical work environment.

Please read this brief overview of Telehealth Services. Upon completion, answer the questionnaire that follows. It will provide several scenarios about Telehealth services and is intended to support your organization when implementing this type of medium. It is not a replacement for ALL the training that may be legally and ethically required, but it does offer a basic overview of Telehealth Service Delivery.

Definitions

1. **Telehealth:** Live interactive audio and visual transmissions of provider and client from one site to another using telecommunications technology. For these purposes, we will be focusing on live video with real time communication to support long-distance clinical services.
2. **Synchronous Communication:** Refers to real-time interaction facilitating two-way audio and video (visual) communication between two people or two sites.
3. **Asynchronous Communication:** Refers to information that is stored and forwarded at a later time. This communication is not real-time but can be interactive Telehealth.
4. **Originating Site:** The originating site refers to the location of the person(s) other than where the provider is located.
 - a. Examples of Originating Sites:
 - i. Clinics and sometimes other Federally approved locations
 - ii. Hospital or Critical Access Hospital
 - iii. Rural Health Clinic or Community Mental Health Center
5. **Distant/Remote Site:** The physical location of the professional providing the health care service.
6. **Privacy:** Defined as the right of the individual to keep information about themselves from being disclosed. Our organization follows national standards for storing and protecting PHI. All staff complete HIPAA security training so all records are confidential. Only authorized persons have access to PHI.

7. **Confidential Information:** Protected health information (PHI) and proprietary information.

Informed Consent for Telehealth Services:

A signed Telehealth Informed Consent must be obtained prior to the first Telehealth appointment. The Informed Consent for Telehealth Services is an **addendum** to the agency Consent for Services.

The Telehealth Consent will provide the client with the credentials of the provider, information regarding the structure and timing of services, record keeping, scheduling, contact between sessions, privacy and security, potential risks and benefits, confidentiality, billing, and client rights and responsibilities. Any person aged 18 years and older (or one's legal guardian), must give voluntary consent to participate in Telehealth, demonstrated by the person's (or legal guardian's) signature on the Telehealth Consent Form prior to the delivery of the service. Consumers have the right to engage in or decline (stop) services at any time. Consumers may not be suitable for Telehealth for the following reasons:

- a. Cognitive impairment that affects the ability to engage in Telehealth services
- b. Severe mental illness or those who pose a danger to self or others
- c. Medical or psychiatric diagnosis that affects ability to engage in Telehealth services
- d. Intoxication of any kind that affects ability to engage in Telehealth services
- e. Telecommunications usage issues
- f. Excessive cancellations or "no shows"
- g. Environmental or physical safety issues such as domestic violence
- h. Client in need of specialty care not available through our services

Termination, Closure, Referral or Client Transition will follow the typical policies and procedures outlined in the General Informed Consent signed when engaging in services. Beginning the termination process for transition, discharge, or referral depends on the length and intensity of the treatment. A provider may end treatment for a variety of reasons including payment default, poor fit between client and professional, ineffective treatment, client request, or if services are not used properly. If services are terminated for any reason or another provider is requested, a list of qualified professionals or agencies will be offered. Consumers can also choose someone on their own accord or from another referral source. Should a client fail to schedule an appointment for two consecutive weeks, unless other arrangements have been made in advance, for legal and ethical reasons, we must consider the professional relationship discontinued.

Risks and Benefits

Risks and benefits must be reviewed by anyone engaging in Telehealth services because Virtual care may not be the best choice for everyone. It is important to consider when and if virtual care is the right fit for consumers. Consumers are supplied information about the risks and benefits upon engaging in Telehealth services via the Telehealth Client Handbook (Guide to Services), the website, and/or other handouts.

Advantages of Telehealth services include:

1. Access-Increased access to information and services that may not be readily available due to geographic, economic, familial, and/or workforce barriers
2. Convenient-Direct interaction with your provider in real time
3. Person Centered Care is provided, and specialty care can be readily accessed
4. Saves money-in most cases, Telehealth is a billable service for consumers health insurance
5. Simple-connect using a computer, laptop, smart phone, or tablet
6. Secure and private-we use a HIPAA, PIPEDA, or GDPR compliant platform
7. Reduce no-shows/cancellations

Disadvantages of Telehealth services include:

1. Availability and cost of Telehealth equipment (it can be expensive to set up and maintain)
2. Potential loss of personal connection (rapport) vs. in person services
3. Certain types of diagnosis or issues cannot be seen through Telehealth
4. Limited coverage for some managed care companies
5. Malfunctioning equipment or poor internet connection
6. Availability of technical training for effectively and efficiently using the Telehealth tool can be difficult and costly
7. Privacy limitations beyond our control, but may be within your control such as other individuals in close proximity during our session who may overhear what's being said
8. Potential limitations on our staff's ability to utilize non-verbal cues or other environmental information during assessment and treatment

Licensure Guidelines

Staff providing telehealth services must maintain applicable licensing, training, credentialing, and privileging to ensure proper practice of telecommunication services. Healthcare organizations and professionals must review federal, state, and local laws and policies when implementing Telehealth services. Each state has its own laws associated with healthcare practices within that state's boundaries and laws are typically enforced by state regulatory boards. However, some government agencies allow some categories of providers licensed in one state, to

practice within their federal duties in any state and some across international borders.

Providers are responsible for being aware of, and abiding by, the current rules and laws governing the state they are licensed in. Counselors must review the state regulatory boards' policies and other laws prior to conducting Telehealth.

Training

Staff who engage in the use of Telehealth must develop knowledge, skills, and competency regarding technical, ethical, and legal considerations to deliver services via Telecommunication systems. Personnel who deliver Telehealth services using the software system, will receive training in the following areas:

1. Features
2. Set-up
3. Use
4. Maintenance
5. Safety Considerations
6. Infection control
7. Troubleshooting

Equipment Operation, Maintenance, and Troubleshooting

A designated staff member shall be appointed to ensure office telecommunication equipment is running and kept according to manufacturer guidelines. This will ensure fully functional, secure, and compliant with applicable laws and guidelines. Additionally, maintenance will ensure that a base line of privacy, equipment, and IT goals are being obtained. It is also important that minimum requirements to be able to support image resolution, bandwidth speed, and audio equipment so the client can understand and effectively communicate with the consumer.

The staff member assigned to manage telecommunication equipment shall execute inventory asset lists as well as ensure equipment, materials, and usability of services meets our strategic goals, risk management indicators, as well as our accessibility and privacy expectations. Our business's equipment shall at a minimum, meet the following requirements:

1. A camera that can provide multiple views of the client with the capability of altering the resolution, focus, and zoom elements
2. Have a display monitor with enough size to support diagnostic needs
3. Bandwidth speed and image resolution operating at 384 Kbps or higher
4. Audio equipment that ensures clear communication and echo cancellation
5. Ability for audio transmission with less than 300 millisecond delay

Room Set-up

A secure space is needed for performing Telehealth services. This is to secure privacy and confidentiality as well as prevent tampering or unauthorized use of the equipment. Additionally, enough physical space is necessary to accommodate the provider and relevant equipment based on the type of services being provided (i.e. adult vs. children's services). The room environment, background image, lighting, and sound shall be conducive for therapeutic services, privacy, confidentiality, and comfort. Camera position and angle are also important considerations. Testing ahead of time shall be a part of the training and education for staff, persons served, and other stakeholders. Lastly, professional attire must be worn when conducting services.

Troubleshooting

For troubleshooting related to hardware, consult the appointed IT person. For troubleshooting issues related to the use of a specific service provider (doxy.me, Zoom for Healthcare, etc.), visit the provider's website. The Q & A or Help section may address many issues, such as the ones listed below:

1. Audio Issues or Camera Issues
2. Check-In or Out Issues
3. Connection or Account Setting Issues
4. Browser Issues or other Technical Issues

Emergency Procedures

Persons served, staff, and other stakeholders will receive safe healthcare through the provision of telehealth services. Each site and/or staff member should have emergency information readily available in the case of a technical issue, safety concern, or crisis so that services are provided in a psychologically and physically safe environment free from the threat of violence or harm to clients, staff, visitors, and other stakeholders.

Emergency Planning Procedure

Emergency plans for the organization shall be available and implemented. All staff must be familiar with originating and remote site procedures to ensure correct responses are made in emergency situations. Current contact information for consumers and support roles shall be easily accessible for anyone engaging in services (i.e. consumer's emergency support person, local law enforcement information, facility security information, medical response team(s), crisis

response intervention information, as well as Duty to Warn (mandated reporting-practices for abuse or neglect).

Physical Safety Considerations

Equipment that touches any part of the body or is used to assess a client or staff member's functioning will be properly sanitized. Persons served, staff, and other stakeholders are reminded to use proper handwashing, shielding coughs and sneezes, and the use, if necessary, of gloves or masks to minimize risks associated with sharing equipment. When public equipment is used (i.e. the library, school, or rotating office space) the client and staff member is instructed to practice proper sanitization for cleaning the mouse, keyboard, headset, etc.

Psychological Safety

Verify that the client's space is safe, confidential, and secure. This can be done by asking the client to scan the room they are in with the camera to ensure there are no hidden people. If the environment is not secure, a "safe word" can be set up before starting the session and the consumer can say that word when/if the room is not psychologically safe. Suggestions include something that could be used in regular conversation so as not to arouse suspicion (i.e. "the weather is cold/hot/rainy/etc."). This will signal to the staff member to stop talking about any confidential or privileged information.

Environmental Considerations

If a threat of harm is perceived during the appointment, the staff member shall at once report it to the proper authority as well as consulting with their supervisor for further guidance. If there is immediate danger, 911 shall be called, and a 3rd party report is to be made. Verification of safety shall be determined upon beginning a telehealth appointment. Safety information is available on our website, in the handbook, and visibly posted at our business location. If a staff member determines hospitalization is necessary, the staff member will:

1. Inform the client so this process can be performed together, if appropriate
2. Contact the nearest crisis facility, to verify space and admittance criteria (eligibility)
3. Inform and consult with your direct supervisor for consultation or debriefing
4. Complete paperwork to ensure documentation is in order

Beginning and Ending a Telehealth Session

Check-in and check-out for telehealth appointments must be professional, therapeutic in nature, and mimic as closely as possible, an in-person appointment. A test call is recommended to ensure functioning connectivity on

both ends. Each site should have contact information readily available in the case of technical issues or emergencies.

A stable internet connection as well as a device with a camera and microphone is necessary to begin services. Equipment verification should be performed before beginning any service. Additionally, testing software will ensure a smooth Telehealth experience.

To begin a session, the client will be provided the personalized link which should be selected or typed into the browser.

1. After accessing the personalized link, the consumer will type in their name and begin waiting in the virtual room (verification of equipment can be executed while waiting).
2. The provider is notified that the client is waiting in the queue and the session will ensue after the provider selects the client.

When ending a session, the client and provider will close their session.

1. The client will close the session on their device.
2. The provider will end the meeting on their side ensuring all equipment and software has been closed.