Plan Your Telehealth Workflow
A tip sheet for making telehealth part of your practice

STEP 1: Plan Your Telehealth Program
Consider all of your options before launching your telehealth services:
- Consider your community’s ability to access reliable internet service
- Pick a telehealth platform that meets the needs of your patients and your practice
- Plan to accommodate telehealth appointments in scheduling, staffing, and billing

STEP 2: Create an Accessibility Plan
Make sure you can offer telehealth services to all of your patients:
- Patients with hearing loss
- Patients with vision loss
- Patients in behavioral health crisis
- Patients not fluent in English
- Patients with mobility issues
- Caregivers supporting patients

STEP 3: Prepare for Telehealth Visits
A seamless transition to telehealth will benefit your patients, your staff, and your practice:
- Make sure your staff is trained and feels comfortable using telehealth
- Post clear instructions for scheduling telehealth appointments
- Give your patients clear instructions on how to join their telehealth appointment
- Consider having a medical assistant greet your patient and ask a few initial questions before you join
- Create a plan for a bad or lost internet connection and share that plan with your patients
- Hold a practice telehealth appointment with a staff member or co-worker before seeing patients to make sure everything works seamlessly

STEP 4: Conduct Telehealth Visits
Feeling comfortable with telehealth leads to more convenient health care:
- Identify yourself to new patients and confirm their identity
- Verify at the start of each call that the patient’s internet connection is working
- Make sure the patient has the privacy they need to speak freely
- Create an emergency plan in case your patient is in crisis
- Use friendly body language and eye contact to make the appointment feel like an in-person visit

STEP 5: Follow Up After a Telehealth Visit
Grow the success of your telehealth program with patient feedback and follow through:
- Document the patient visit and note that it was a telehealth appointment
- Follow through with any needed lab orders, prescriptions, or follow-up appointments
- Consider asking your patients how your team could improve their telehealth experience

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