

Utah Telehealth Network Clinical Protocols

Clinic Title: NCPDD*
Policy Number: 4.10
Date Approved: _____
Date Revised: _____
Date Reviewed: _____

Approved by:
Specialist: Jana Hartle, RN, NP
Telehealth Director: Marta Petersen, MD
Clinical Coordinator: Sherri Evershed, RN, MSPH
Other: _____
Other: _____

Purpose: To identify the needs of a new clinical service and specialty to assure optimal quality patient examinations/consultations.

Appropriate Patient and Type of Consult: *To be completed by consultant*

Describe, in your opinion, what type of patient can receive exams via the telehealth system. This includes initial referrals and follow up exams. This can include types of patients that don't qualify for an exam via telehealth. (In other words, this can be a list of exclusions).

Telehealth is used for new intake referral and routine follow-up visits with patients who are fairly stable psychiatrically. If a patient is actively psychotic or is unable to verbalize and accurate understanding of telehealth, it is inappropriate to see them over telehealth and they need to be seen in person.

Referral and Scheduling Procedure: *To be completed by consultant.*

Define the person in your department responsible for patient scheduling. Describe how a patient will be referred to your specialty service for a telehealth exam or consultation visit.

Patients are referred from the Division of Services for People with Disabilities in Vernal, Utah. The presenting practitioner (nurse) will schedule the patients and fax a copy of the clinic schedule to the consulting practitioner one day prior to the telehealth clinic.

Telehealth Consult Procedures:

Pre-examination:

Education and Training

1. The UTN telehealth staff is responsible for the education and training of consulting and patient site personnel on the use of the telehealth equipment. This will be done prior to the patient exam.
2. The consultant is responsible for educating/training the patient site personnel regarding specific expectations for a telehealth patient exam. This can take place in several ways. a) The presenting practitioner spends a whole or half day with the consultant in their clinical practice; b) Both

- providers do a mock patient exam; c) Ongoing joint evaluation of each patient exam.
3. The telehealth staff will assist with any additional education and training of hub and patient site personnel to meet the needs of the patients and providers.

The presenting practitioner is trained on the use of the electronic otoscope and the hand-held zoom camera.

Written documents *To be completed by consultant*

1. List specific patient information you need to know before seeing the patient. Information such as patient name, address, phone number, DOB, SS#, current insurance, medical records, referring physician, patient history, prior diagnosis, reason for referral, current medications and dosages, and any other pertinent information.

Prior to seeing the patient over telehealth, a patient screening is done by the referring site to determine if the patient is eligible to be seen over telehealth. Prior to the telehealth exam the DSPD nurse faxes behavioral data graphs, medications and dosages and recent patient history and active problems to the consulting practitioner.

2. Preliminary screening. *To be completed by consultant.* List any tests/procedures you need prior to or at the time of the patient examination, such as lab tests, vital signs, height, weight, x-rays, EKG's, etc.

Vital signs and the patient's weight is taken by the DSPD nurse prior to the exam. If other tests are indicated, then an order is faxed to the facility by the consulting practitioner. The results need to be available at the time of the telehealth exam.

3. Define who will send this information to you, how they will send it (fax, mail, email, phone), and how far in advance you will need this information (an hour, a day, etc.) *To be completed by consultant.*

The DSPD nurse will fax this information one day prior to the telehealth exam.

4. Patient Informed Consent. Follow the UTN guidelines for Obtaining Informed Consent, sec.2.4. The patient site will obtain a signed consent form from the patient immediately prior to the first patient telehealth examination/consultation. The referral site will fax a copy of the signed consent form to the UTN telehealth hub staff. Additional consent forms are not required for subsequent visits for two years. Examinations and consultations may not proceed without a signed consent form on file. An original copy of the consent form will be kept in the patient's file at the patient site.

Exam Room preparation *To be completed by consultant*

1. Patient site. List what medical supplies and/or equipment you need for the exam. Include such items as stethoscope, otoscope, patient camera, items needed for psychiatric consults, appropriate development assessment tools for pediatric exams, nutritional assessment tools, and other.

The room needs to be quiet and secure (i.e. where conversation between the practitioner and patient will not be overheard). A stethoscope and a blood pressure cuff need to be available for the nurse to take vital signs. The electronic otoscope and the hand-held zoom camera need to be connected and ready to use. A scale needs to be available to obtain weigh patients.

2. Consulting site. In addition to what supplies and equipment is needed at the referring site, inform the telehealth staff if you will need to use the Elmo documentation camera to transmit written orders, documentation, or instructions to the patient. If you are doing an educational presentation, describe what type of audiovisual aids you will be using, such as power point, audiotape or slide presentation.

The ELMO documentation camera needs to be available to share staff notes.

Patient examination:

Follow the UTN Telehealth Standard Procedure for Consulting Provider, sec. 3.4.

1. Confidentiality
 - a. The patient site coordinator will explain to patients participating in a telehealth exam for the first time, how the system works, emphasizing that the system is confidential; that no video taping of the exam is done, and that no one except the consulting provider and patient presenter will be in the exam room at either the patient or consultant site, without the patient's knowledge and approval.
 - b. The consulting provider will introduce himself or herself to the patient before the exam begins. The consulting provider will ask the patient's permission to have any other person in the room to observe the exam. If the patient declines, the observer must leave the telehealth room.
2. The telehealth patient exam will replicate as closely as possible the way the specialist currently examines patients in person. Briefly describe a basic telehealth consultation for your clinic or specialty, including how the presenter will be expected to assist the consulting provider, if needed, during the exam. *To be completed by consultant.*

A typical telehealth consultation proceeds as follows. The nurse and the patient enter the room and are both in view of the camera. The patient is greeted briefly, following which the nurse will give a verbal report including vital signs, current weight and current concerns. The nurse will stay with the patient during the exam. The consulting practitioner will ask questions of the patient, discuss current concerns, and conduct an AIMS exam. Following the interview with the patient and after the patient has left the room, the consulting and presenting practitioners will discuss the patient visit.

3. Infection Control - Follow patient site standard policies and procedures for infection control.

Post-examination:

Follow the Telehealth Standard Procedure for Consulting Practitioners, sec. 3.4

1. Discuss with the presenter and patient any medications, follow up tests, or procedures that need to be done before the next visit.
 - a. The presenter is responsible for ordering any necessary test, obtaining the test results and forwarding them in a timely manner to the consultant.
2. Schedule a follow-up exam as needed. Tell the patient and presenter if and when the patient needs to be seen again. Indicate if the next patient visit will be in person or via telehealth.
3. Document patient exam in medical records. Indicate where the patient's telehealth medical records will be filed.

The patient notes and clinic chart will be part of the permanent record kept at Neurophysiatric Clinic for People with Developmental Disabilities (NCPDD) in SLC. The nurses notes will stay with the patients permanent record at DSPD in Vernal.

4. The consultant instructs the patient and presenter on who to contact (local physician, nurse practitioner, P.A., pharmacist, etc.) if the patient has any adverse reaction to any of the prescribed treatments. *To be completed by consultant.*

The patients will contact the DSPD nurse in Vernal, their primary care physician or pharmacist, and page the after hours emergency NCPDD staff.