

# POLICY AND OPERATIONAL STANDARDS

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## **KTHN003 – CLINICAL TELEHEALTH ENCOUNTER POLICY**

Telehealth providers shall comply with the policies and procedures established by the Telehealth Board when conducting clinical telehealth encounters over the KTHN (10 KAR 3:050 – Establishing protocols and standards for telehealth network training centers and rural sites)  
**BOARD REVIEW AND APPROVAL – MARCH 25, 2014**

Individuals in the role of “presenter” and “consulting clinician” shall adhere to the policies and procedures for conducting clinical encounters via telemedicine. “Presenter” refers to a person who is present with the patient during the time of the encounter, who aids in the examination by following documented or established written protocols. “Consulting clinician” means a clinician who, using telehealth technology, examines a patient, from a site distant from the patient, while the patient is located at a presenting site.

The following policies have been established for the delivery of clinical telehealth encounters:

- Telehealth staff shall be trained and able to properly operate all video conferencing equipment and medical peripheral devices to ensure safe and competent operation of the equipment for clinical encounters.
- Telehealth staff may schedule clinical encounters on the KTHN schedule <http://www.kytelehealthnet>, ensuring that the presenting and consulting site facilities are scheduled, and the consulting clinician is scheduled and credentialed to perform the clinical encounter. Clinics outside the KTHN backbone can consider reporting monthly to the schedule.
- Patient should be registered at both ends of the telehealth encounter to bill the professional fee and the facility fee.
- Telehealth staff shall secure a private room for the clinical encounter. During a clinical encounter, doors to the telemedicine exam room and the consulting clinician’s exam room must be closed.
- Telehealth staff shall ensure patient privacy. Clinical encounters must be direct point-to-point calls, or bridged calls must be restricted to only the sites that are participating in the clinical encounter.
- Telehealth staff shall ensure that everyone involved in the clinical encounter are made aware of everyone who is in each room, including those who may be off camera. Patients must be informed that they may request that anyone but the consulting provider not be present during the clinical encounter.
- Telehealth staff shall obtain a written telemedicine consent form (example attached) from the patient prior to the clinical encounter.
- Telehealth staff shall ensure that confidential information is kept in accordance with the presenting and consulting site’s policies and procedures.

# POLICY AND OPERATIONAL STANDARDS

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- Telehealth staff shall ensure that patient medical records are kept in accordance with the presenting and consulting site's policies and procedures.

## **Presenting Site Procedures**

- All patients must obtain a referral stating why the clinical encounter is needed from the referring clinician.
- Patient encounter should be noted on the KTHN Schedule.
- Video conferencing technology should be connected at least 10 minutes prior to the encounter time to allow for testing and troubleshooting.
- The consultant should have all appropriate patient data (history, radiology reports, lab work...) prior to the clinical encounter.
- Presenter explains to the patient what will occur during a clinical encounter to prepare them for their experience.
- Presenter requests the completion of site specific forms from the patient which may include:
  - Registration Form and demographic information
  - Consent to Treat and Release of Information Form
  - Telemedicine Informed Consent Form
  - Financial Responsibility Form
- Presenter takes the patient into a secure, private room for the clinical encounter and obtains any vital signs or pertinent information prior to the clinical encounter; e.g., EKG, etc.
- Presenter may need to use medical peripheral devices, such as an electronic stethoscope or specialty cameras should the consulting clinician need them during the examination.
- Presenter manages the patient for consultant to provide appropriate information, which may include for some types of healthcare, palpating the patient under the order of the consultant.
- Presenter manipulates the video conferencing equipment, cameras and medical peripheral devices.
- Upon completion of the clinical encounter, the presenter shall transmit all required documentation to the consulting site.
- Presenting sites are encouraged to utilize the KHIE for current clinical information and document accordingly.

## **Consulting Site Procedures**

- Patient data is collected and paperwork is prepared for the clinical encounter.
- Prior to the clinical encounter, the patient is contacted to remind them of their appointment. This process should mirror the existing process for contacting patients in a traditional encounter, but it is critical that patients are reminded they will be seen on video conferencing technology and to not travel to the consulting clinician's office.

## **POLICY AND OPERATIONAL STANDARDS**

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- The day of the clinical encounter, the consulting clinician is provided with a patient packet including referral information, evaluation form, billing form and progress notes.
- Consulting clinician is asked their preference of having telehealth staff assist them with the video conferencing equipment, or if they wish to manage by themselves.
- Consulting clinicians should have some advanced preparation by the telehealth staff to prepare how the clinical encounter should take place. The telehealth team should tailor the process around the preference of the consulting clinician, rather than ask the consulting clinician to adapt their practice to the technology. Ideally, the telehealth encounter should closely mirror the clinician's standard in a traditional in-person face-to-face encounter.
- Consulting clinician explains to the patient how the encounter will be conducted, that the technology utilized has proven effective, and upon completion of the clinical encounter, findings and recommendations will be forwarded to the referring clinician.
- Consulting clinician guides the presenter through the clinical encounter.
- Consulting clinician completes consult notes and billing form just as if the patient were present in their normal clinic.
- All documentation is processed just as if the patient was present in the consulting clinician's clinic. Appropriate information is sent to the referring provider and to the consulting clinician's medical records department. Documentation of the encounter should be captured in the medical records of both the consulting clinician and the referring provider.
- Consulting clinician should follow the rules stipulated by Medicaid, Medicare and commercial health insurance to bill telehealth encounters. Generally, all providers must use the GT modifier to designate an encounter used telehealth technology and the facility fee is triggered by using the appropriate HCPCS code and the appropriate designation for the type of service for telehealth originating site facility.

### **Requirements for Consulting Clinicians**

- A. Consulting Clinicians shall be licensed providers, in accordance with 907 KAR 3:170 and KTHN007 – Telehealth Provider Licensure Policy, by the State of Kentucky.
- B. Consulting Clinicians shall be credentialed and privileged at the healthcare facility for which the clinical telehealth consultation is being conducted.

# POLICY AND OPERATIONAL STANDARDS

## Kentucky Telehealth Network Clinical Telehealth Encounter Checklist

	Presenting Site	Consulting Site
<b>Before Clinical Encounter</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Gather from referring clinician referral summary stating patient’s history, why consult is needed, and any other appropriate documentation</li> <li><input type="checkbox"/> Schedule patient for consult</li> <li><input type="checkbox"/> Gather patient data (i.e., labs, X-rays, EKGs), history, and referral form then forward to consulting site immediately upon scheduling the consult</li> <li><input type="checkbox"/> Patient reminders are determined by the sites, depending upon each clinic’s preference</li> <li><input type="checkbox"/> Explain to patient about telemedicine to prepare them for their experience and request completion of evaluation form</li> <li><input type="checkbox"/> Patient completes registration form, consent to treat and release of information, KTHN Telemedicine Informed Consent Form, financial responsibility form for each visit, and any other documentation required by either site</li> <li><input type="checkbox"/> Presenter collects clinical data for the consultant such as vital signs</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Collect patient data and prepare paperwork for clinic</li> <li><input type="checkbox"/> Patient reminders are determined by the sites, depending upon each clinic’s preference</li> <li><input type="checkbox"/> Provide consultant with package including referral information, evaluation form, billing form and progress notes</li> <li><input type="checkbox"/> Ask consulting clinician for preference of having telehealth personnel assist with the equipment or if they wish to manage by themselves</li> <li><input type="checkbox"/> Provide appropriate instructions and support for using the equipment</li> </ul>
<b>During Clinical Encounter</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Presenter manages the patient for consultant to provide appropriate information, which may include for some types of healthcare palpating the patient under the order of the consultant</li> <li><input type="checkbox"/> Presenter manipulates the telemedicine equipment, cameras and peripheral devices</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Consulting clinician explains to patient how the consult will be conducted and that the technology has been proven effective and that after the consult, findings and recommendations will be forwarded to referring clinician</li> <li><input type="checkbox"/> If consulting clinician has performed clinics, briefly explain their experience and comfort level to the patient</li> <li><input type="checkbox"/> Consulting clinician guides the presenter through the consult</li> </ul>
<b>After Clinical Encounter</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Immediately after the consult, documentation is processed at both the presenting site and the consulting site. This documentation and the process for transmission are determined by each site when developing the procedures and protocols for each clinic.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Consulting clinician completes consult notes and other documentation</li> <li><input type="checkbox"/> Documentation is processed just as if the patient was present in the consulting clinician’s clinic. Appropriate information is sent to the referring provider and to the consulting clinician’s medical records department. Documentation of the encounter should be captured in the medical records of both the consulting clinician and the referral provider.</li> <li><input type="checkbox"/> Consulting clinicians should follow the rules stipulated by Medicaid, Medicare and commercial health insurance to bill telehealth encounters. Generally, all providers must use the GT modifier to designate an encounter used telehealth technology and the facility fee is triggered by using the appropriate HCPCS code and appropriate designation for the type of service for telehealth originating site facility.</li> </ul>

### Kentucky Telehealth Network

# POLICY AND OPERATIONAL STANDARDS

## TELEMEDICINE INFORMED CONSENT FORM

PATIENT INFORMATION	
Patient Name:	DOB:
Site Where Patient is Seen via Telehealth:	
Consulting Provider Name Seeing Patient via Telehealth:	Provider Location:
INTRODUCTION	
<p>You are going to have a clinical visit using videoconferencing technology. You will be able to see and hear the provider and they will be able to see and hear you, just as if you were in the same room. Since 1994, the technology has connected tens of thousands of patients and providers in Kentucky. The information may be used for diagnosis, therapy, follow-up and/or education.</p>	
<p><b>Expected Benefits:</b></p> <ul style="list-style-type: none"> <li>Improved access to care by enabling a patient to remain within the facility and obtain services from providers at distant sites.</li> <li>Patient remains closer to home where local healthcare providers can maintain continuity of care.</li> <li>Reduced need to travel for the patient or other provider.</li> </ul>	
<p><b>The Process:</b></p> <p>You will be introduced to the provider and anyone else who is in the room with the provider. You may ask questions of the provider or any telemedicine staff in the room with you, if you are unsure of what is happening. If you are not comfortable with seeing a provider on videoconference technology, you may reject the use of the technology and schedule a traditional face-to-face encounter at any time. Safety measures are being implemented to insure that this videoconference is secure, and no part of the encounter will be recorded without your written consent.</p>	
<p><b>Possible Risks:</b></p> <p>There are potential risks associated with the use of telemedicine which include, but may not be limited to:</p> <ul style="list-style-type: none"> <li>A provider may determine that the telemedicine encounter is not yielding sufficient information to make an appropriate clinical decision.</li> <li>Technology problems may delay medical evaluation and treatment for today's encounter.</li> <li>In very rare instances, security protocols could fail, causing a breach of privacy of personal medical information.</li> </ul>	
<p><b>By Signing this Form, I understand the following:</b></p> <ol style="list-style-type: none"> <li>1. I understand that the laws that protect privacy and confidentiality of medical information also apply to telemedicine, and that no information obtained in the use of telemedicine which identifies me will be disclosed to researchers or other entities without my consent.</li> <li>2. I understand that I have the right to withdraw my consent to the use of telemedicine in the course of my care at any time, without affecting my right to future care or treatment.</li> <li>3. I also understand that if the provider believes I would be better served by a traditional face-to-face encounter, they may, at any stop the telehealth visit and schedule a face-to-face visit.</li> <li>4. I understand that I may expect the anticipated benefits from the use of telemedicine in my care, but that no results can be guaranteed or assured.</li> </ol>	
<p><b>Patient Consent to the Use of Telemedicine:</b></p> <p>I have read and understand the information provided above regarding telemedicine, and all of my questions have been answered to my satisfaction. I hereby give my informed consent for the use of telemedicine in my care.</p>	
<p>I hereby authorize _____ to use telemedicine in the course of my diagnosis and treatment.  <small style="margin-left: 100px;">(Agency or Physician Name)</small></p> <p>Signature of Patient (or authorized person) _____ Date _____</p> <p>If authorized signer, relationship to patient _____</p> <p>Witness _____ Date _____</p>	