

Instruction Guide for Completing Telemedicine Clinical Protocols

(as per OTN Practice Guideline: Telemedicine Clinical Protocols and Outline)

These items are to be completed by the Specialist plus Telemedicine staff (when available).

Document Header

- Include the Member site organizational logo if possible
- Include the name of the organization.
- Indicate the clinical service to which the protocol pertains.
- Include the name(s) of the Specialist(s).
- Indicate the name of the individual who prepared the protocol.
- Indicate the date which the protocol takes effect.
- If you are reviewing an existing protocol, indicate the review/revision date.

1.0 Overview

Briefly describe the clinical service offered. Possibly include what type of patient can be seen via the telemedicine system. Specify acceptable referring sources, specific communities, etc.

Inclusion Criteria

- Include what type of patients could be seen via the telemedicine system.
- Specify the patient characteristics that would be conducive to telemedicine.
- Specify acceptable referring sources or specific communities if necessary.

Exclusion Criteria

Identify patient characteristics that rule out participation in a telemedicine session.

2.0 Referral and Scheduling Procedure

- Describe the organizational processes for how referrals are accepted and processed through to the scheduling of the session.
- Describe how the telemedicine equipment / space is to be booked.
- Describe additional patient information required beyond that which is included on the OTN Patient Referral Form if necessary (refer to OTN Referral Form). Indicate how far in advance you will need this information. List any patient information you need to know before seeing the patient in addition to patient demographics such as lab tests, x-rays, ECG's, etc.
- Indicate if there is a difference in these requirements for new referrals vs. follow-up patients.
- Identify specific days and length of time held for block clinics if necessary.
- Define length of time required for initial consultations vs. follow-up visits.

Identify if there is a requirement to have an allied health care professional from a specific discipline present with the patient to facilitate the examination during the consultation (for example, a Physiotherapist should be present, etc.).

3.0 Preparation Requirements

Develop a step-by-step description of what is done prior to a telemedicine session. This is especially important for Telemedicine Coordinators at Referral sites, but also useful for Specialist sites.

Patient Preparation

Identify special instructions for the patient, for example bring current medications and dosages, assistive devices, etc.

Telemedicine Studio Preparation

Referring Site:

List what medical peripheral devices and/or supplies you will need for the exam, for example patient exam camera, electronic stethoscope, otoscope, measuring tape, reflex hammer, etc. Specify any special camera positioning requirements or furniture arrangements.

Specify any special equipment positioning requirements (both telemedicine equipment and clinical equipment) or furniture arrangements.

Specialist Site:

List what peripheral devices or supplies you might need, for example a document camera or prescription pads, etc.

4.0 Telemedicine Session

This section outlines the 'best practice' for clinical telemedicine sessions in addition to an indication of the specific examination and assessment requirements of the Specialist.

Starting Telemedicine Sessions

The Referring site Telemedicine Coordinator verifies the identity of the patient.

The Referring site Telemedicine Coordinator obtains informed consent for the session (refer to OTN Guideline).

The Referring site Telemedicine Coordinator explains how the system works to the patient and reviews how their personal health information will be protected and kept private.

The Specialist introduces himself or herself to the patient before the exam begins.

The patient encounter continues with examination and assessment components as required.

Examination and Assessment Requirements

This information is crucial to help the referring site Telemedicine Coordinator or other specific allied health care personnel understand what will be expected for the patient assessment and examination including the need to have appropriately qualified and skilled staff present to assist if required.

Indicate the requirements or steps of the assessment or examination that the Telemedicine Coordinator will be asked to facilitate.

Indicate what the components of that examination are and if any parts require the assistance of an allied health care professional from a specific discipline.

If necessary, develop and include a patient assessment record or data form as part of the Telemedicine clinical protocol.

Ending Telemedicine Sessions

The Specialist makes recommendations for follow-up, replicating as closely as possible how this is managed in an in-person visit.

The telemedicine session is documented and stored (refer to OTN Guideline)

The Referring Physician organizes any tests and shares copies of results with the Specialist as required.

The patient is informed if a follow-up visit is required, and whether the next visit will be by telemedicine or in-person.

Follow-up

Indicate how follow-up telemedicine sessions are scheduled.