

Primary Care

Knowledge and Skills for Telehealth Services



- Policy:** It is the policy of [Organization name here] to ensure that all staff possess the knowledge and skills needed to provide safe and quality health care services to qualified beneficiaries in a HIPAA-compliant environment.
- Purpose:** To explain the knowledge and skills needed for the provision of telehealth services, from a Medicare Rules and Regulations perspective.
- Scope:** This document is applicable for primary care practices, in accordance with the rules and regulations of the Centers for Medicare & Medicaid Services (CMS). Each organization should check their state regulations for further requirements and opportunities.

*Temporary PHE Guidance**

“Medicare beneficiaries will be able to receive a specific set of services through telehealth including evaluation and management visits (common office visits), mental health counseling and preventive health screenings. This will help ensure Medicare beneficiaries, who are at a higher risk for COVID-19, are able to visit with their doctor from their home, without having to go to a doctor’s office or hospital which puts themselves and others at risk.”

For further reading: <https://www.cms.gov/newsroom/fact-sheets/medicare-telemedicine-health-care-provider-fact-sheet>

*Temporary guidance related to Public Health Emergency (PHE)

Procedures:

I. Knowledge and Skills of Telehealth Services and Practice.

- A. Physicians and Practitioners must have the knowledge and skills to provide telehealth services.
 - 1. Physician and Practitioner knowledge of providing telehealth services must include:
 - a) Knowledge of federal and state telehealth rules and regulations of HIPAA and telehealth, as well as telehealth-specific documentation. **(Refer to Primary Care Distant Site, Technology and Documentation policies)**

This document is provided by gpTRAC as a sample/template only. This should be edited in order to meet your organization's specific needs and requirements.

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- b) Knowledge of patient telehealth education, to include explaining to the patient the purpose of usage of technology during the visit. **(Refer to Primary Care Consent, Originating Site, and Technology policies)**
 - c) Knowledge of data collection and evaluation of telehealth performance improvement initiatives.
 - d) Knowledge of how to access IT support.
 - 2. Physician and Practitioner skills for providing telehealth services must include:
 - a) The ability to access and operate technology, to include video equipment and examination camera, computer/tablet/Smartphone, microphone, and other peripherals as indicated/needed (i.e., electronic stethoscope, otoscope, etc.).
 - b) The ability to direct the use and accept data/images from originating site equipment.
- B. Nursing Personnel must have the knowledge and skills to provide telehealth services.
- 1. Nursing Personnel knowledge of providing telehealth services must include:
 - a) Knowledge of federal and state telehealth rules and regulations, HIPAA and telehealth, as well as telehealth-specific documentation. **(Refer to Primary Care Distant Site, Technology and Documentation policies)**
 - b) Knowledge of setting-up the space for a telehealth visit, and how to check-in/check-out the patient. **(Refer to Primary Care Distant and Originating Site policies)**
 - c) Knowledge of patient telehealth education, to include explaining to patient the purposed and usage of technology during the visit. **(Refer to Primary Care Consent, Originating Site, and Technology policies)**
 - d) Knowledge of data collection and evaluation of telehealth performance improvement initiatives.
 - e) Knowledge of how to access IT support.
 - 2. Nursing Personnel skills for providing telehealth services must include:
 - a) The ability to access and operate technology, to include setting up video equipment and examination camera, microphone, and other peripherals as indicated/needed (i.e., electronic stethoscope, etc.).
- https://www.gptrac.org/file_download/inline/a1531fee-c873-434b-975a-f544d21ac72a

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- C. Administrative Personnel must have the knowledge and skills to support telehealth services.
1. Administrative personnel knowledge of telehealth services must include:
 - a) Knowledge of HIPAA and telehealth services. (**Refer to Primary Care Technology policy**)
 - b) Knowledge of phone etiquette and scheduling appointments.
 - c) Knowledge of data collection for performance improvement.
 - d) Knowledge of how to access IT support.
 2. Administrative personnel skills for the support of telehealth services must include:
 - a) The ability to use a computer, software, and the phone.

Tips:

- *Ensure the organization's clinical educator is familiar with telehealth-specific knowledge and skills.*
- *Telehealth-specific knowledge and skills should be integrated into the staff member's orientation and competency checklist and reviewed annually.*

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