

## 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.

The development of this toolkit is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) under grant number G22RH30357. This information or content and conclusions are those of the author and should not be construed as the official position or policy of, nor should any endorsements be inferred by HRSA, HHS or the U.S. Government.

- 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](https://www.gptrac.org/file_download/inline/a1531fee-c873-434b-975a-f544d21ac72a)

## Primary Care

### Knowledge and Skills for Telehealth Services



- 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.*

---

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.

The development of this toolkit is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) under grant number G22RH30357. This information or content and conclusions are those of the author and should not be construed as the official position or policy of, nor should any endorsements be inferred by HRSA, HHS or the U.S. Government.