

Telehealth Readiness Checklist

Everything your practice needs to check before seeing patients online

Telehealth (video or phone visits) is a great way to care for patients without them coming to the office. But before you start, you need to make sure your billing, technology, and legal paperwork are all ready. Use this checklist to make sure nothing is missed.

SECTION 1 — Technology & Equipment

Reliable Internet Connection

- ☐ 1 Make sure your office internet is fast enough for video calls. A minimum speed of 10 Mbps upload/download is recommended. Test it before patient visits.

HIPAA-Compliant Video Platform

- ☐ 2 Only use video tools approved for healthcare — such as Zoom for Healthcare, Doxy.me, or Microsoft Teams (Business). Regular Zoom or FaceTime is NOT allowed.

Camera and Microphone Check

- ☐ 3 Test your camera and microphone at least 30 minutes before each visit. Make sure the patient can clearly see and hear you.

Quiet and Private Location

- ☐ 4 Conduct all telehealth visits from a private room where other people cannot overhear the conversation. Hang a 'Do Not Disturb' sign if needed.

Backup Plan Ready

- ☐ 5 If your video tool stops working, have a phone number ready to switch to a phone call. Tell patients about this backup option before the visit.

■ **Quick Tip:** Test your full telehealth setup with a staff member before seeing your first patient.

SECTION 2 — Patient Consent & Communication

Written Telehealth Consent Form

- ☐ 6 Every patient must sign a consent form before their first telehealth visit. This form explains how telehealth works, its limitations, and their privacy rights.

Patient Has the Right Technology

- ☐ 7 Confirm the patient has a smartphone, tablet, or computer with a working camera and internet. If not, plan for a phone-only visit.

Send Instructions Ahead of Time

- 8 ☐ Email or text the patient a step-by-step guide on how to join the video call at least 24 hours before the appointment.

Verify Patient Identity

- 9 ☐ At the start of every telehealth visit, ask the patient to state their full name and date of birth to confirm who you are speaking with.

Document Patient Location

- 10 ☐ Always ask and record the patient's physical location (city and state) at the time of the visit. This is required for billing and legal reasons.

SECTION 3 — Billing & Insurance

Verify Insurance Covers Telehealth

- 11 ☐ Not all insurance plans pay for telehealth visits. Call the patient's insurance before the visit to confirm coverage and get an authorization number if needed.

Use the Correct Billing Codes

- 12 ☐ Use the right CPT codes for telehealth. For example: 99212–99215 for established patients, 99202–99205 for new patients. Add modifier '95' for live video visits.

Check Place of Service Code

- 13 ☐ Use Place of Service (POS) code 02 for telehealth visits where the patient is NOT at home, and POS 10 for visits where the patient IS at home.

Review State Telehealth Laws

- 14 ☐ Each state has different rules for telehealth billing. Make sure your billing team knows the rules for every state where your patients are located.

Know the Parity Laws

- 15 ☐ Many states have 'parity laws' that require insurance companies to pay the same amount for telehealth visits as in-person visits. Check if your state has this law.

■ **Quick Tip:** Keep a log of every telehealth session: date, time, patient location, technology used, and how the visit was conducted.

SECTION 4 — Documentation & Compliance

Document the Visit Type Clearly

- 16 ☐ In the patient's chart, clearly note that this was a telehealth visit (audio-video or audio-only), and the platform used.

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Medical Necessity Must Be Documented

The note must explain WHY the patient needed this visit and what was done. Vague notes like 'follow-up' are not enough for insurance claims.

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E-Prescriptions Only

For telehealth visits, prescriptions must be sent electronically. Verbal prescriptions are generally not allowed. Make sure your e-prescribe system is working.

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Provider Must Be Licensed in Patient's State

The treating provider must hold a valid medical license in the state where the patient is physically located during the visit. Verify this before scheduling.

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Retain Records for Required Period

Store all telehealth visit records — video logs, consent forms, notes — for at least 7 years (or longer depending on your state's rules).