



<p>Team Name: Regional Telehealth Committee</p> <p>Team Lead: Executive Director - Mid</p> <p>Approved by: Executive Director - Mid</p>	<p>Reference Number: ORG.2010.PL.003</p> <p>Program Area: Telehealth</p> <p>Policy Section: General</p>
<p>Issue Date: September 3, 2014</p> <p>Review Date: June 11, 2018</p> <p>Revision Date:</p>	<p>Subject: Documentation – Clinical Telehealth Session</p>

**POLICY SUBJECT:**

Documentation – Clinical Telehealth Session

**PURPOSE:**

The purpose of this policy is to outline the process and minimal requirements when documenting clinical telehealth sessions.

**BOARD POLICY REFERENCE:**

Executive Limitation (EL-01) Global Executive Restraint & Risk Management

**POLICY:**

- Client clinical telehealth sessions require documentation within the client’s relative health record at both the client telehealth site and the provider telehealth site.  
**Exception:** Services offered by the Blue Cross Employee Assistance Program do not require any documentation at the client telehealth site as means to facilitate the anonymity of the client.
- Documentation adheres to respective organization policies and procedures and professional standards from both the client and provider telehealth sites

**PROCEDURE:**

1. Document all relevant information from client clinical telehealth sessions within the client’s relative health record. Client clinical telehealth sessions are those that pertain to the provision of services to an individual client or family. These include but are not limited to consultation with a specialist, discharge planning or individualized patient teaching.
2. Document relevant clinical information according to respective organization policies, procedures and professional standards of practice.
3. Documentation is integrated into the client’s relative health record according to the outlined process:

### 3.1 Provider site:

- The provider is responsible to document relevant clinical information within the client health record.
- Documentation is to include a notation that the session occurred over telehealth and the physical client site.
- Any pertinent information relative to the session having been held by telehealth, such as limitations or difficulties that incurred is documented.

### 3.2 Client telehealth site:

- Documentation in the client's health record includes at minimum the following:
  - Telehealth appointment
  - Date and time of session
  - Name of provider
  - Information provided to the client about telehealth as applicable
  - Any care directly provided by local health providers in the client telehealth site is documented including but not limited to: assessments, wound care, teaching, or any support provided to the client
  - Signature and designation of individual completing documentation.

### ➤ Documentation is completed in the relative client's health record as follows:

- Community based client accompanied by Relative Health Professional: i.e. Client with a professional mental health worker in attendance - client's community health record.
- Chemotherapy patient: client's chemotherapy health record.
- Dialysis patient: client's dialysis health record.
- Outpatient in Hospital or Transitional Care: Outpatient form
- In patient: In-patient health record
- Client Telehealth session hosted in a primary care setting: client's primary care health record or Electronic Health Record