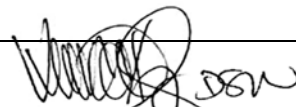


San Bernardino County Department of Behavioral Health

Telehealth Procedure

Effective Date 07/18/2018

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Veronica Kelley, DSW, LCSW, Director

Purpose To provide guidelines for delivery of behavioral health services via telehealth, including specialty mental health (SMH) and substance use disorder (SUD).

Process Description The following process outlines the five (5) stages of the telehealth process. Roles and responsibilities for each stage are described herein.

Stage	Description	Time Period
Notification and Consent for Telehealth	This is a one-time-only task where the Licensed Health Care Provider (LHCP) educates the client about services delivered and informs the client that future appointments, based on his/her consent may be delivered using telehealth technology. The LHCP may document the consent in either a Progress Note or Psychiatric Evaluation in the chart. Consent may be written or verbal, as long as documented in the medical record.	When telehealth services are initially provided.
Scheduling	This stage includes all steps necessary to schedule a client for a Telehealth appointment.	
Appointment Preparation	This stage outlines all preparation that must be conducted once a client has agreed to telehealth as the alternative service delivery method. (Includes preparation the days leading up to the appointment). Preparation activities on the day of the appointment are outlined in the During Appointment stage.	After appointment scheduled or day before appointment at latest

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Telehealth Procedure, Continued

Process Description, continued

Stage	Description	Time Period
During Appointment	This stage includes all preparation activities that must happen on the day of the appointment and/or during the actual appointment with the Licensed Health Care Provider.	Morning of appointment; Day of Appointment
After Appointment	This stage includes all activities that must happen once the LHCP has concluded the Telehealth appointment and the client has exited the telehealth office.	End of day of appointment or next morning at latest

Scheduling

The following are the roles and responsibilities of each Telehealth team member when scheduling an upcoming Telehealth appointment:

Team Member Roles	Originating Site Responsibilities
Office Assistant/ Clinic Assistant	<ul style="list-style-type: none"> • Notify client that service will be provided via telehealth technology • Provide any clarifications needed from client • Notify client to check in 15 minutes before appointment.

Appointment Preparation

The following are the roles and responsibilities of each Telehealth team member when preparing for an upcoming Telehealth appointment:

Team Member Roles	Originating Site Responsibilities	Distant Site Responsibilities
LHCP		<ul style="list-style-type: none"> • Review Mock Chart

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Telehealth Procedure, Continued

Appointment Preparation, continued

Team Member Roles	Originating Site Responsibilities	Distant Site Responsibilities
Office Assistant/ Clinic Assistant	<ul style="list-style-type: none"> • Gather Mock Chart contents and send to the Distant Site LHCP/designee. • Confirm lab results, if applicable and other identified clinical documents were received from outside sources and sent to the distant site. • Be available for coordination between staff. <p>Initial Telehealth Appointment</p> <ul style="list-style-type: none"> • Ensure all consent forms for Telehealth are signed and completed • Fax or scan & email documents to Distant Site to create Mock Chart prior to the scheduled appointment. <p>• Continuing Telehealth Appointment Ensure any new/updated forms are faxed/scanned to the Distant Site at least two (2) days prior to the scheduled appointment date.</p>	<ul style="list-style-type: none"> • Confirm lab results, if applicable and other identified clinical documents have been received from Originating Site. • Prepare Mock Chart at least one day prior to the scheduled appointment date. • Deliver Mock Charts for clients on scheduled appointment day. • Be available for coordination between staff.

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Telehealth Procedure, Continued

During Appointment

The following are the roles and responsibilities of each Telehealth team member on the day of the Telehealth appointment:

Team Member Roles	Originating Site Responsibilities	Distant Site Responsibilities
Mental Health Nurse/ Psychiatric Technician/ Licensed Vocational Nurse/ Clinical Therapist/Licensed Health Care Provider or AOD Counselor	<ul style="list-style-type: none"> • For Mental Health services, assess client's impulse control prior to each Telehealth session. A LHCP or other necessary staff shall be present immediately in case the client is no longer able to remain safely in the room. 	
LHCP		<ul style="list-style-type: none"> • Deliver service
Psych Tech/ Mental Health Nurse/ Clinic Assistant/LHCP/AOD Counselor	<ul style="list-style-type: none"> • Check chart for updated information. • For Mental Health Services; Measure height, weight, pulse rate, and blood pressure. Children required; adults, if indicated. • For Mental Health Services; Calculate Body Mass Index for children and if indicated for adults (www.cdc.gov). • Fill out forms. • Escort client to Telehealth office for appointment and act as an additional set of eyes, ears, and nose for the LHCP. Remain available to assist LHCP throughout appointment. 	

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Telehealth Procedure, Continued

During Appointment,
continued

Team Member Roles	Originating Site Responsibilities	Distant Site Responsibilities
Office Assistant/ Clinic Assistant	<ul style="list-style-type: none"> Remain available to fax/scan documents to the distant site as needed 	<ul style="list-style-type: none"> Remain available to present LHCP with new documentation as needed

After Appointment

The following are the roles and responsibilities of each Telehealth team member after the Telehealth appointment has ended:

Team Member Roles	Originating Site Responsibilities	Distant Site Responsibilities
LHCP		<ul style="list-style-type: none"> Complete CDI, finalize any chart documentation including completion of JV-220 if required, and give to Office Assistant/ Clinic Assistant.
Case Manager/ Clinic Assistant	<ul style="list-style-type: none"> Address any biopsychosocial-related concerns Provide resources for identified needs 	
Psych Tech/ Nurse/ Clinic Assistant/AOD Counselor/ Office Assistant	<ul style="list-style-type: none"> Have client sign any necessary paperwork Follow up on referrals, prescriptions, and/or lab needs and exams given during sessions, if applicable. Go over any questions, comments, concerns Provide client education and handwritten prescriptions if applicable. 	

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Telehealth Procedure, Continued

After Appointment,
continued

Team Member Roles	Originating Site Responsibilities	Distant Site Responsibilities
Office Assistant/Clinic Assistant	<ul style="list-style-type: none"> • Enter CDI after matching notes to CDI. • When original documents are received from Distant Site, <ul style="list-style-type: none"> ○ Remove previously scanned/faxed document copies from the original chart and shred. • Marry documents with the LHCP's wet signatures to documents with the client's wet signatures. 	<ul style="list-style-type: none"> • If client has JV-220, type completed JV-220(A) or JV-220(B) from Licensed Health Care Provider and send to appropriate court for foster children. • Copy all chart documentation and place in the Mock Chart, including JV-220. • Scan/fax CDI, chart documentation, including JV-220 forms, to Originating Site, and then mail the originals to the Originating Site.

Treatment Team Meetings

Relevant staff will present necessary client information during Treatment Team Meetings for therapeutic services.

A LHCP delivering Telehealth services must be reasonably available to members of the Treatment Team for consultation and planning regarding any specific evaluative or treatment services delivered during the Telehealth encounter but are not required to be immediately available on an ongoing basis to the treatment team.

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Telehealth Procedure, Continued

Closing Case/ Episode: Mock Chart Contents

At the close of the case, the Office Assistant/Clinic Assistant shall review the Mock Chart, sending any original documents to the Originating Site for inclusion in the medical record and shred any photocopies.

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Related Policy or Procedure

DBH Standard Practice Manual:

- Confidentiality of Protected Health Information ([COM0905](#))
 - Telehealth Policy ([MDS2027](#))
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Reference(s)

- Business and Professions Code, Division 2, Section 2290.5
http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=BPC§ionNum=2290.5
 - CA Welfare and Institutions Code, Section 14132.72
http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=WIC§ionNum=14132.72
 - Code of Federal Regulations, Title 42, Section 410.78
https://www.ecfr.gov/cgi-bin/text-idx?SID=be765fde5bd7ce25510c046306539c76&mc=true&node=se42.2.410_178&rgn=div8
 - Telehealth Advancement Act of 2011
http://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201120120AB415
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