



Telehealth Procedure

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Purpose To outline procedures for Department of Behavioral Health (DBH) staff and contract providers furnishing behavioral health services via telehealth. For all telehealth related requirements, refer to Telehealth Policy (MDS2027).

Telehealth Preparation The following outlines the required elements which providers, regardless of discipline, must ensure in preparation for any telehealth session with a client:

Element	Action
DBH Room and/or Distant Site Set-up	<ul style="list-style-type: none"> If the client is electing to use a DBH clinic for their telehealth visit, it must be ensured the room is of sufficient size and located in a clean, comfortable, distraction-free and client-friendly environment; Telehealth equipment should be prepared and ready prior to a scheduled appointment, and For telehealth services rendered by provider while teleworking, provider must ensure designated workspace and client location are in a private setting (distant and originating site) to ensure confidentiality.
Informed Consent	<ul style="list-style-type: none"> Obtain verbal or written consent to conduct the session via telehealth and document consent in the client's medical record (See Telehealth Actions block of this Procedure), and If written consent is already confirmed as recorded in the record, there is no need to obtain a consent an additional time. Consent is only required to be obtained <i>once</i> during the entire duration of treatment with DBH. <p>Note: see Telehealth Policy (MDS2027) for complete telehealth consent requirements.</p>
Signal Recovery	<ul style="list-style-type: none"> Information Technology (IT) and/or designated staff shall be available to recover connection in the event of a loss of the internet-based video telecommunications signal, and Session should continue on a phone line while contact with IT/designated staff is made; and/or staff at clinic site will assist remote technician.

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Telehealth Procedure, Continued

Telehealth Actions

The following outlines the general actions to be taken by designated staff at prior to a telehealth appointment visit.

Designated Staff	Actions
<ul style="list-style-type: none"> • Office Assistant; • Clinic Assistant, or • Other Designated Staff 	<ul style="list-style-type: none"> • Schedule client’s telehealth appointment; • Notify client, health care provider and other authorized staff of the appointment details through the clinic’s established methods of notification; • Verify pertinent client information when client arrives (if applicable), for their appointment and update any information including forms, as necessary, and • Assist with telehealth appointment if/as requested.
<ul style="list-style-type: none"> • Health Care Provider 	<ul style="list-style-type: none"> • Access EHR and applicable software via multifactor authentication (MFA); • Ensure the telehealth session is conducted in private and quiet location, which is conducive to provide services via telehealth and maintain client confidentiality; • Review client chart and pertinent documents; • Ensure telehealth consent is on file [see Telehealth Consent form (MDS042) for written consent], and if not, proceed with obtaining a written or verbal consent. If a verbal consent is obtained, the following should be communicated to the client and document in the record: <i>“Under Medi-Cal you have the option to receive services in person in a face-to-face visit or via telehealth. If you have trouble accessing in person services due to transportation, Medi-Cal provides coverage for transportation services when other resources have been reasonably exhausted. There may be limitations or risks related to receiving services through telehealth rather than in person. For example, technical glitches, disconnection, compromised privacy/security, etc. If you choose to receive services by telehealth, you may change your mind at any time by letting us know. If you change your mind about using telehealth, you will still have access to Medi-Cal covered services. Knowing all of this, do you want to have the option of receiving services from us now or in the future via telehealth? (Yes/No);”</i>

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Telehealth Procedure, Continued

Telehealth Procedure, continued

Designated Staff	Actions
<ul style="list-style-type: none"> • Health Care Provider, continued 	<ul style="list-style-type: none"> • Ensure privacy and security safeguards are followed, including: <ul style="list-style-type: none"> ○ Stating your name and credentials at the beginning of the encounter; ○ Confirming client's identity at the beginning of each encounter; ○ Ensuring encounter is continuously conducted in a private area (distant and originating site) to ensure confidential information is not overheard by others, and ○ Use of appropriate-issued devices.
<ul style="list-style-type: none"> • IT/Assigned Staff 	<ul style="list-style-type: none"> • Be available, remotely or in person, as needed, to assist staff with any technical issues during the telehealth appointment.

Related Policy or Procedure

[DBH Standard Practice Manual and Departmental Forms:](#)

- Confidentiality of Protected Health Information (COM0905)
- Electronic Transfer of Client Protected Health Information Internet and Intranet Policy (COM0909)
- Security of Protected Electronic Health Information Policy (COM0923)
- Electronic Mail Use Policy (IT5005)
- Telehealth Policy (MDS2027)
- Transportation of Protected Health Information Policy (COM0948)

Reference(s)

- [Board of Behavioral Services, Discussion of Telehealth Laws for Associates and Trainees](#)
- [California Business and Professions Code, §2242\(a\) §2242.1\(a\), §2290.5, §23.8](#)
- [California Code of Regulations, §1810.205.1](#)
- [California Civil Code, §56.05](#)
- [California Health and Safety Code, §1374.13](#)
- [California Welfare and Institutions Code, §5328, §14132.72 and 14132.723](#)
- [Centers for Medicaid and Medicare: Telehealth Services Fact Sheet](#)
- [Code of Federal Regulations, Title 42 Part 2 Final Rule and §410.78](#)
- [Code of Federal Regulations, Title 45, §164](#)
- [Department of Health Care Services – BHIN No. 23-018](#)
- [Department of Health Care Services – Medi-Cal Provider Manual: Telehealth](#)
- [Department of Health Care Services – Telehealth FAQs](#)