



Healthcare Telehealth Procedure Checklist: Security & Compliance

Pre-Visit Technical Setup

Ensuring the telehealth platform and equipment are functioning correctly.

Scheduled Visit Start Time

Platform Status

- ☐ Online and Ready
- ☐ Technical Issue - Offline
- ☐ Limited Functionality

Bandwidth Speed (Mbps)

Enter a number...

Camera Functionality

- ☐ Working
- ☐ Not Working
- ☐ Static Image

Microphone Functionality

- ☐ Working
- ☐ Not Working
- ☐ Static Noise

Screenshot of System Status (if applicable)

 Upload File

Patient Consent and Verification

Confirming patient understanding and agreement to telehealth services.

Confirm Patient Understanding of Telehealth Limitations

- ☐ Yes, patient acknowledges limitations
- ☐ No, patient needs further clarification

Patient Willingness to Participate in Telehealth

- ☐ Yes, patient agrees
- ☐ No, patient declines

Patient Acknowledgment of Privacy Policy

Write something...

Patient Signature

Emergency Contact Information Verified

- ☐ Yes, contact information confirmed
- ☐ No, contact information needs updating

Date of Consent

Enter date...

Data Security & Privacy

Verifying adherence to HIPAA and other relevant data protection regulations during the telehealth session.

Encryption Protocol Used

- ☐ TLS 1.2
- ☐ TLS 1.3
- ☐ AES-256
- ☐ Other (Specify)

Two-Factor Authentication Enabled?

- ☐ Yes
- ☐ No

Data Security Measures Implemented

- ☐ Firewall
- ☐ Intrusion Detection System
- ☐ Regular Security Audits
- ☐ Data Masking
- ☐ Access Controls

Data Encryption Key Rotation Frequency (Days)

Enter a number...

HIPAA Business Associate Agreements in Place?

☐ Yes

☐ No

Summary of Privacy Training Provided to Staff

Write something...

Platform & Device Security

Checking for software updates, security protocols, and encryption.

Last Platform Software Update Date

Enter date...

Platform Encryption Level (e.g., AES-256)

Enter a number...

Firewall Status

☐ Active

☐ Inactive

☐ Pending Review

Security Protocols Enabled

- ☐ TLS 1.3
- ☐ HTTPS
- ☐ Two-Factor Authentication
- ☐ Endpoint Encryption

Antivirus/Malware Protection

- ☐ Active
- ☐ Inactive
- ☐ Needs Update

Last Device Security Scan Date

Enter date...

Session Recording & Storage (if applicable)

Following proper procedures for recording and storing telehealth sessions, ensuring patient consent and secure storage.

Is Session Recording Enabled?

- ☐ Yes
- ☐ No

Was Patient Consent for Recording Obtained?

- ☐ Yes
- ☐ No

Brief Description of Patient Consent Process

Write something...

Date of Consent Obtained

Enter date...

Time of Consent Obtained

Upload Consent Form (if applicable)

 Upload File

Notes on Recording Process

Write something...

Documentation & Record Keeping

Accurately documenting the telehealth visit, including patient interactions, assessments, and treatment plans.

Patient Subjective Report

Write something...

Objective Findings (Physical Exam)

Write something...

Assessment & Diagnosis

Write something...

Treatment Plan

Write something...

Date of Telehealth Visit

Enter date...

Time of Telehealth Visit

Provider Signature

ICD-10 Code(s)

☐ Select ICD-10 Code

☐ ICD-10 Code 1

Emergency Procedures

Having clear protocols in place for handling medical emergencies during the telehealth visit.

Emergency Contact Identified?

- ☐ Yes
- ☐ No

Emergency Contact Phone Number

Enter a number...

Brief Summary of Emergency Situation

Write something...

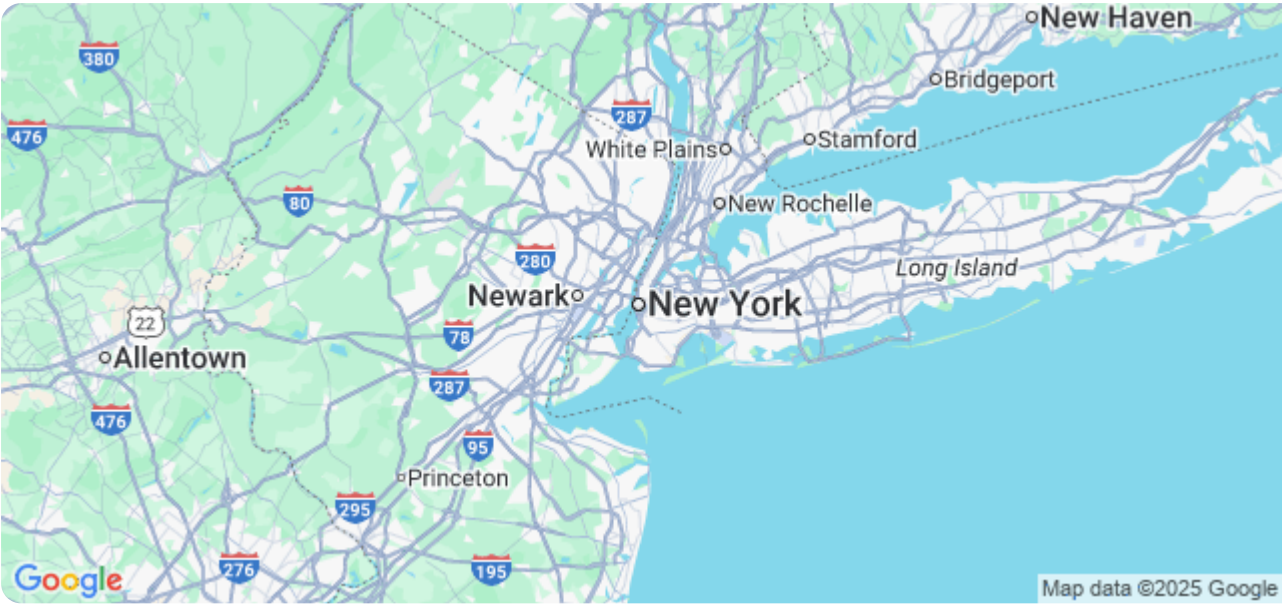
Emergency Services Contacted?

- ☐ Yes
- ☐ No

Time Emergency Services Contacted

Patient's Current Location (if applicable)

 Set My Current Location



Signature Confirmation of Emergency Protocol Followed

Post-Visit Compliance

Verifying data security and privacy protocols are followed after the telehealth visit concludes.

Date of Compliance Review

Enter date...

Reviewer Signature Verified?

- ☐ Yes
- ☐ No

Data Encryption Status Confirmed?

- ☐ Yes
- ☐ No

Number of Encrypted Files Confirmed

Enter a number...

Backup Protocol Adherence?

- ☐ Yes
- ☐ No

Notes/Comments on Compliance Review

Write something...