

Telehealth Clinical Roles and Responsibilities



Use this as a resource to understand how different members of the care team may contribute to your telehealth program and for suggestions on how to optimize their roles by ensuring physicians and staff are maximizing utilization of their licenses.

Keep in mind—the entire care team can generate excitement with the patient and encourage engagement!

PHYSICIAN/PROVIDER

- Let patients know telehealth is an option in your practice
- Be familiar with the conditions and situations that are appropriate for a telehealth visit
- Be able to access and navigate the telehealth technology platform and conduct a visit
- Appropriately perform, document, and bill for telehealth visits
- Conduct medical decision-making for necessary follow-up care
- Ongoing care management of patients including supporting care coordination, patient outreach, and any necessary follow-up to ensure engagement as needed
- Let doctor know when a patient has “checked in” for a telehealth appointment (if platform does not include this feature)
- Schedule telehealth appointments as appropriate/based on protocols
- Know how to appropriately schedule telehealth visits in the doctor’s schedule
- Understand patient benefits at the time of scheduling and registration to set financial expectations with patients

The roles below may differ based on your practice resources and staffing model:

NURSE/CARE MANAGER

- Be familiar with the conditions and situations that are appropriate for a telehealth visit
- Provide patient education
- Set expectations for telehealth appointments, including appropriate use of telehealth and what they’ll need as patients to participate in a successful telehealth visit

MEDICAL ASSISTANT (MA) OR PATIENT CARE TECH (PCT)

- Be familiar with the conditions and situations that are appropriate for a telehealth visit
- Educate patients on telehealth expectations
- Support patient troubleshooting related to platform pre-visit and during visit
- Let doctor know when a patient has “checked in” for a telehealth appointment (if platform does not include this feature)

FRONT DESK STAFF/SCHEDULER

- Be familiar with the conditions and situations that are appropriate for a telehealth visit

PRACTICE MANAGER

- Support MA or PCT with troubleshooting issues with the platform/technology
- Create and run reports on metrics for success
- Monitor patient and provider feedback
- Interface between care team and administrative needs to achieve success (i.e., IT, supply chain, etc.)
- Understand all revenue aspects of the process including scheduling, registration, and billing
- Know how to submit and reconcile EOB