



Attachment E
Remote Services Protocol Checklist

- ✓ When calling the client to confirm the client's telehealth or phone appointment...
 - Ask if the client will be located within the State of California for the scheduled appointment. If the client will not be in California, the appointment should be rescheduled for when they return to California.

- ✓ For remote services to take place, the following conditions must be met:
 - The provider is located in the California.** If the provider is located in a State other than California, the provider should contact their supervisor and BHRS QM to confirm if they are eligible to practice out of State.
 - The client is located in California.**
 - The provider should have reviewed with the client and had the client sign or provide verbal consent for the **Electronic Communication Consent Form**. This only needs to be done once per admit. (If a client had been discharged and is readmitted, a new form should be completed.)

- ✓ When beginning the Telehealth or Phone Appointment with the client, the provider should do the following:
 - Ensure the client is in a safe environment for the phone or video call.
 - Confirm client location, and the best way to reach the client, or caregiver, in case of an emergency. Document the client's location in a progress note and update client emergency contact information in the Electronic Health Record (e.g., Avatar).
 - The provider shall reconfirm the mode of service delivery for the current appointment and obtain verbal consent from the client for the use of phone or telehealth as an acceptable mode of delivering the services for the current appointment. The consent shall be documented in a progress note.
 - The provider should not have a remote session with a client who is driving, even if they are using a hands-free device. The appointment should be rescheduled for a time when the client is in a safe location.

- ✓ If the Access Call Center or a clinic/program gets a call from a client who is out of the country or outside of California, the client should be encouraged to seek care where they are located at the time of the call.
 - If possible, appointments should be made for when the client returns to California.