

Printable telehealth consultation checklist

An adaptable team prompt for Australian clinicians and practice teams. It is not a clinical protocol or a form that establishes legal compliance. Use it alongside professional guidance and local procedures, with roles allocated for your setting.

Before the consult

- ☐ Consider whether phone or video suits the patient, purpose and information needed.
- ☐ Give the patient joining instructions, the expected call window and a contact for help.
- ☐ Arrange relevant language, cultural, accessibility and support-person needs.
- ☐ Prepare a private clinician space, secure technology, clear audio/video and access to the relevant patient record.
- ☐ Have a callback number and reconnection plan ready. Explain who will call back.

At the start and during

- ☐ Introduce participants and confirm patient identity using relevant professional and local procedures.
- ☐ Explain the process. Confirm privacy, participation, understanding and relevant consent.
- ☐ Apply relevant professional guidance to the specific recording or AI-scribe workflow. Obtain and record any required consent before capture.
- ☐ Confirm the patient's current location when relevant to care or an urgent safety response.
- ☐ Allow time for questions and accessible communication. Clarify anything lost through poor sound or video.
- ☐ Reassess suitability throughout. Arrange appropriate alternative care if remote care is insufficient.

Before ending the call

- ☐ Summarise the plan, invite questions and confirm the patient's understanding.
- ☐ Explain how prescriptions, requests, referrals or written information will reach the patient.
- ☐ Agree who does what next, the timing and follow-up, including patient-specific advice on seeking further help.

After the consult

- ☐ Complete and send agreed actions through approved channels.
- ☐ Follow your practice's documentation review and filing process. The clinician reviews AI-generated draft notes and makes needed edits before saving.
- ☐ Assign outstanding follow-up or handover to a named person with a due time.
- ☐ Track outstanding actions in the practice follow-up system. Address gaps under local procedures.