Telehealth session readiness check

A practical California working record - editable in Word

USE IT THIS WAY	DO NOT MISTAKE IT FOR THIS
Use before starting telehealth and when the client location, platform, or emergency plan changes.	This does not authorize practice across jurisdictions or replace clinical judgment and emergency procedures.

Working record

Prepared by	
Reference (no names)	
Date opened	
Next review date	

Six review points

1	**[ ] Confirm where each person is located** Record the relevant locations for the session and escalate jurisdiction questions before providing care. **Your record:** _____ Source: BBS: HIPAA, telehealth, advertising, and notices
2	**[ ] Verify identity and contact route** Document the verification method and a reliable way to reconnect after interruption. **Your record:** _____ Source: BBS: HIPAA, telehealth, advertising, and notices
3	**[ ] Confirm consent and modality** Record the telehealth consent process and the technology being used. **Your record:** _____ Source: BBS: HIPAA, telehealth, advertising, and notices
4	**[ ] Check privacy at both ends** Discuss foreseeable privacy limits and agree on what to do if privacy is lost. **Your record:** _____ Source: HHS: Security Rule guidance
5	**[ ] Set the local emergency route** Record the client location, local emergency resources, and the session-specific escalation plan. **Your record:** _____ Source: BBS: HIPAA, telehealth, advertising, and notices

6	**[ ] Document disruptions** Record material failures, modality changes, and follow-up without copying clinical detail into this worksheet. **Your record:** _____ Source: BBS: HIPAA, telehealth, advertising, and notices

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- BBS: HIPAA, telehealth, advertising, and notices
- HHS: Security Rule guidance

Educational information only. Not legal, clinical, tax, billing, or regulatory advice. Recheck every source before relying on an older saved copy. Do not put client-identifying information in a copy you cannot secure.