

Telehealth Service Compliance Documentation Checklist

Administrative Requirements

- Provider licensure verification completed and documented
- Telehealth policies and procedures written and accessible
- Patient consent for telehealth services obtained and stored
- Telehealth platform compliance with HIPAA or relevant data privacy standards

Clinical Documentation

- Date and time of telehealth encounter documented
- Provider and patient locations recorded
- Type of telehealth service (video, audio, etc.) specified
- Reason for visit, assessment, and plan documented
- Follow-up and referrals included if indicated

Billing & Coding Compliance

- Correct CPT and modifier codes for telehealth documented
- Time spent on telehealth visit recorded if required
- Supporting documentation for reimbursement prepared

Technical & Security Audit

- Annual telehealth system security risk assessment completed
- Documentation of encryption and secure transmission in place
- User access controls and authentication policies in effect

Notes