



Creating Protocols

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How do I ensure that the consultations are conducted in a consistent, medically appropriate manner?

A good way to make sure that the consultations are conducted in a consistent, medically appropriate manner is to use a clinical protocol that specifies how the consultation should be conducted. A protocol is a detailed, specific, step-by-step documented process that describes the actions that each party involved in the consultation should take prior to, during the course of, and following the consultation. It may provide alternative courses of action depending on circumstances that can arise as well as decision criteria for taking those alternative courses. Protocols may take a variety of forms from general descriptive documents to checklists of actions. A protocol should be an authoritative document that is developed by experts, accepted by all those providers involved in the consultation and used as a basis for training. Due to the differing nature of the various types of specialty consultations, distinct protocols for each type are necessary. When the protocols are relatively general, the recommendations are often called practice guidelines. When there is

sufficient agreement on a protocol for a given specialty, this may become labeled as a standard of practice denoting a high level of approval and acceptance by the specialty group.

Telemedicine Technical Assistance Guide

What needs to be included in a protocol for a live, interactive session?

A live, interactive telemedicine consultation protocol should contain the following general categories of information:

- How the consultation is to be scheduled
- What information is to be obtained prior to the consultation and how it is to be delivered to the specialist
- How and when the connection between the remote site and the specialist is to be made
- How the consultation room is to be organized and arranged including the videoconferencing equipment
- How the consultation is to be conducted including actions of the provider, telemedicine presenter and the patient
- What is to be documented and how it is to be done during the consultation
- Following the consultation, what information is to be collected and what actions taken
- Who generates the follow up report and how is this delivered to the referring physician.

Telemedicine Guideline Example

What needs to be included in a protocol for a store-and-forward telemedicine consultation?

A store-and-forward telemedicine consultation protocol should contain the following general categories of information:

- What clinical information is to be obtained by interviewing the patient and from their medical record.
- Detailed steps on how the images or sounds are to be captured.
- How the patient information and the other captured information is to be transmitted to the specialist.
- Expected turn-around time for the specialist to evaluate the patient's information and prepare a report.
- What the telemedicine presenter or other providers are to do once they receive the specialist's report.

- What needs to be documented about the consultation and how this should be done.

Store-and-Forward Telemedicine Protocol Example

Where can I find protocols for various specialties?

Most specialty clinics already have protocols for in-person patient visits. This is usually an excellent starting point that assures that patients will be treated the same whether they see the specialist in person or via telemedicine to the extent possible. In addition, a variety of resources for telemedicine protocols and guidelines exist from medical/clinical specialty professional organizations, the American Telemedicine Association and federal government agencies. While protocols do exist, they are often in a general form that needs to be adapted to your specific situation. Below are some useful links to help get started.

- [ATA Telemedicine Protocols](#)
- [Great Plains TRAC Telemedicine Protocols by](#)
- [Northeast TRC Telemedicine Protocols by](#)
- [Northwest Regional TRC Telemedicine Protocols by](#)

How is a protocol for a new service created?

The most straightforward approach is to adapt an existing protocol from a similar service or from the in-patient service for the same specialty. For example, an existing cardiology consultation protocol might be used as the starting point for a pulmonology consultation protocol. The source document should be compared in detail to one of the protocol frameworks to note any missing components that should be included. The next step is to create a draft document that fills in any missing components and revises the existing components as necessary for the new service. The draft needs to go through a review and testing process. The protocol can be tested and revised to optimize its utility. Protocols should become part of the official telemedicine consultation documents.

Who should be involved in creating a protocol?

At a minimum, the practitioners who are directly involved in conducting the telemedicine consultation should be involved in creating the protocol because they are the clinical and operational experts. This would typically include the medical specialist, nurses, telemedicine presenters and technical staff. If the organization has a process improvement group, they would also be good candidates for inclusion.

Who should approve a new protocol?

The protocols that are to be used for telemedicine consultation should be officially approved by the medical/clinical director and the relevant specialty providers at the provider site in addition to the medical/clinical director at the remote site. These are the parties that represent the organization and take legal responsibility for the care of the patient in a telemedicine consultation.