

Telehealth quick start guide

Checklist for new clinic sites

(Complete these steps before submitting a telehealth referral for the first time)

- ☐ Review [remote site guidelines](#)
- ☐ Complete a connection test (contact Clinical Telehealth Coordinator at 916-734-4735 or telehealth@health.ucdavis.edu to schedule a test)
- ☐ Participate in a meet and greet with relevant specialty representatives
- ☐ Register for [PhysicianConnect](#) (secure online portal for accessing patient medical records)

Steps for submitting a telehealth referral

1. Review relevant [pediatric specialty referral guidelines](#) and [adult specialty referral guidelines](#) (for services or specialties not listed, please contact telehealth@health.ucdavis.edu)
2. Complete and submit the [Telehealth Referral Request Form](#) and supporting documentation by fax to 866-622-5944 (ensure you have the required level of presenter available for the requested consultation date and time)
3. UC Davis Health telehealth coordinator calls or emails to schedule and confirm the consultation with the referring site's telehealth coordinator
4. Instructions are provided on how to connect for the telehealth consultation
5. At least 10 business days prior to the consultation, submit the completed [Telehealth Referral Request Form](#) with the following documentation via fax or email:
 - Copy of patient's insurance card(s) and insurance authorization (if applicable)
 - Completed [Medicare Secondary Payer Questionnaire \(MSPQ\)](#) form (if applicable)
 - Provide patient with [UC Davis Health's Notice of Privacy Practices](#) and obtain signed and dated [Acknowledgment of Receipt of UC Davis Health's Notice of Privacy Practices](#)
 - All pertinent medical records, labs and tests as indicated in the referral guidelines
6. Notify the patient at least two business days prior to the consultation and **document the patient's verbal consent to participating in a telehealth consultation** in the patient's chart or electronic medical record (tip: this reminds patients of their appointment and decreases no-shows)

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