Telehealth Nursing Practice

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Introduction

Learning Outcome Statement

The purpose of this chapter is to enable the reader to integrate professional standards of nursing as they relate to patient care and technology. Within the domain of nursing, this chapter will provide guidance on the process of the delivery, management, and coordination of care and services provided via telecommunication technology.

Assisting patients with health problems on the telephone has been a long-standing practice in ambulatory care. However, as early as the 1970s, it was recognized that this nursing function could cover a broad range of patient needs, including symptom review, medication requests, and physician support. Over time, this practice developed into an ambulatory care subspecialty, and the American Academy of Ambulatory Care Nursing (AAACN) set forth guidelines and standards of care for telehealth practice. As time progressed, the role of telehealth nurses has continued to expand. Much more than just a "phone nurse," the practice of telehealth is now considered to be "the delivery, management and coordination of health services that integrate electronic information and telecommunication technology to increase access, improve outcomes, and contain or reduce costs of health care" (AAACN, 2009, p. 9).

Learning Objectives

After reading the chapter, the registered nurse (RN) working in the Telehealth Role will be able to:
- Utilize technology to more efficiently apply the nursing process, focusing on the assessment and disposition of symptom-based callers, rather than message taking.
- Demonstrate critical-thinking skills in assessing needs of the patient/caller.
- Provide care consistent with the functional re-quirements of the patient's developmental age.
- Interview, collect data, assess, and prioritize ac-cording to ambulatory care nursing guidelines.
- Document care specific to the actual or potential health care needs of the patient/caller.
- Engage in a therapeutic interaction with the patient/caller to establish an instant trusting relationship by using charisma and appropriate communication skills.
- Accept personal responsibility for maintaining and improving the knowledge and skills necessary to assess triage and manage patients.
- Utilize current standards of evidence-based practice to write and contribute to the development of protocols and guidelines in telehealth nursing.

Competency Definition

Telehealth nursing is the delivery, management, and coordination of health services that integrates electronic information and telecommunications technologies to increase access, improve outcomes, and contain or reduce costs of health care. Telehealth is an umbrella term used to describe a wide range of services delivered across distances by all health-related disciplines (AAACN, 2011).

Telehealth nursing is practiced in the home, health care clinic, doctor's office, prisons, hospitals, telehealth call centers, and mobile units. Telephone triage, remote monitoring, and home care are the fastest growing applications. Home telehealth nurses use systems that allow monitoring of patient data and physiological parameters, such as blood pressure, heart sounds, blood glucose, oxygen levels, and respiratory peak flow and weight measurements via a phone or Internet connection.

Application of Professional Standard
A. Key action tips.
   1. Nursing process.
      a. Use technology to more efficiently apply the nursing process. Nursing staff are involved in the development and/or adaptations of tech-nologies to improve patient care, or to deliver care more efficiently. Through interactive video systems, patients can contact on-call nurses and arrange a live video consultation to address problems (e.g., doing a dressing change, drawing insulin).
   2. Software programs.
      a. Understand, select, and use relevant soft-ware programs appropriately. Disease man-agement programs, health information sys-tems, physician referral modules, and physician-to-physician consult modules.
   3. Care management and analysis.
      a. Use selected program decision-support tools to address caller/patient needs to identify actual and potential health risks. Write or contribute to the development of protocols and guidelines using current stan-dards of evidence-based practice.
   4. Health Insurance Portability and Accountability Act (HIPAA) requirements.

a. Demonstrate how to protect patient privacy before, during, and after all telehealth encounters.

Telehealth Nursing Practice/Professional Knowledge

"Through use of a strong knowledge base, critical thinking skills, and articulation of formal nursing guidelines, the nurse is able to advise the patient of the appropriate plan of care, instruct the patient in self-care as appropriate, and offer other measures necessary to ensure the best outcome" (AAACN, 2009, p. 24).

Definition
The nurse uses electronic devices to communicate with the patient and to receive information from the patient to monitor his or her condition. Technology is a tool used by the professional nurse rather than a substitute for sound nursing judgment.

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Telehealth involves patient triage, patient education, patient counseling as well as teleconsultations, conducting and communicating medical tests/results, collaboration with healthcare providers in implementing medical treatment protocols, and providing follow-up care.

Outline
A. Key action tips.
   1. Assess: Interview, collect data, assess, prioritize.
   2. Plan: Determine and use the most appropriate decision-support tool(s), reference other resources as appropriate, and collaborate.
   3. Implement: Problem-solve, apply intervention and/or activate disposition, educate the patient and/or family, provide support, coordinate resources, and facilitate appropriate follow-up care.
   4. Evaluate: Document, communicate, and perform follow-up analysis.
   5. Example.
      a. The nurse controls the call. The patient may call with a self-determined diagnosis, and it is important for the nurse to ask the type of questions that will help in determining what is wrong. Often, the nurse will need to redirect patient for the reason he/she called.
B. Call processing: Managing clinical calls using the nursing process.
   1. Assessment.
      a. Demonstrate critical-thinking skills in assessing covert as well as overt parameters relevant to the needs of the caller.
      b. Systematically assess and address the patient's needs with decision-support tools.
         i. Elicit reason for the call (e.g., chief complaint) and quickly identify emergent signs and symptoms.
         ii. Obtain history of symptoms, associated symptoms, allergies, and medical history.
         iii. Determine priorities, use active listening skills, and collect and interpret data.
         iv. Validate patient/caller information.
         v. Keep the encounter client-focused and time limited.
   2. Planning.
      a. Utilize problem-solving skills.
      b. Develop a collaborative plan of care with patient/caller.
      c. Employ coaching as needed.
   3. Implementation.
      a. Implement plan of care.
      b. Give support and guidance.
      c. Provide care advice to the caller/patient specific to his or her needs: Consultation, triage, referrals, and coordination of care.
   4. Evaluation.
      a. Elicit caller feedback and evaluate the understanding of recommended advice. Follow-up and evaluation.
      b. Surveillance.

Telehealth Nursing Practice/ Interpersonal Skills

Definition
"The professional nurse must efficiently establish a caring, trusting relationship with the caller and elicit information related to the reason for the call and current symptoms. After assessing and making a triage decision, the nurse must be able to facilitate closure on the call by summarizing symptoms discussed and repeating health advice given" (AAACN, 2009, p. 9).

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"Within the telehealth nursing practice, clear and understandable communication becomes especially challenging because the nurse and the caller cannot observe non-verbal behaviors as a means to confirm the understanding or misunderstanding of the message" (AAACN, 2009, p. 39).

A. Key action tips.
   1. Be aware of cultural, ethnic, gender, and racial differences and their potential to impact patient outcomes.
   2. The professional nurse works to safeguard patient trust by maintaining confidentiality.
   3. Level of the caller/patient's knowledge.
   4. Examples:
      a. Follow-up calls after triage or admission to the emergency room.
      b. Use of interpreter services for patients as necessary.
      c. Provision of culturally competent care

Table 1.
Standards: Documentation

Scope and Standards of Practice for Professional Ambulatory Care Nursing (AAACN, 2017)	Standard 5	Implementation
Scope and Standards of Practice for Professional Telehealth Nursing (AAACN, 2011)	Standard 11	Communication
Scope and Standards of Practice for Registered Nurses in Care Coordination and Transition Management (AAACN, 2016)	Standard 11	Communication

through developing awareness of own knowledge biase and skills: the nurse seeks opportunities to broaden awareness of different cultures.

B. Customer service.
1. Manage clinical calls using the nursing process.
2. Establish a therapeutic relationship: Interact with the caller/patient in a warm and friendly manner (courteously greet caller, use a pleasant tone of voice, display a calm professional demeanor).
3. Establish the level of the caller/patient's knowledge.
4. Provide means of overcoming identified barriers to learning.
5. Clarify interpret the caller/patient's description of symptoms.
6. Demonstrate ability to adapt to different personalities and emotions.
7. Maintain confidentiality of interactions.

C. Trust-relationship.
1. Establish a trust-relationship to elicit accurate patient/caller information.
2. Foster trust.
    a. Identify yourself by name and title to the caller. Call the patient by name and/or identify the patient's relationship of the patient to the provider (patient/non-patient). Determine relationship of patient to provider (patient/non-patient).
    b. Call the patient by name and/or identify the patient's relationship to the caller.
    c. Determine the relationship of the patient to the provider (patient/non-patient).
    d. Immediately take the necessary actions to meet the caller's requests or needs.
    e. Use simple, direct language for better caller/patient understanding.
    f. Listen to understand what the caller/patient has to say.
    g. Offer caller the opportunity to express any concerns/problems prior to ending the call.

D. Communication skills.
1. Use effective interpersonal communication skills to engage in, develop, and disengage in a therapeutic interaction.
2. Conduct assessment and focus on listening, probing, questioning, and analyzing to identify what the caller/patient wants to achieve with the interaction.
    a. Ask open-ended questions.
    b. Speak directly to person with symptoms whenever possible.
    c. Listen attentively and interject appropriately.
    d. Quantify and qualify symptoms (e.g., pain scales, pea-size, quarter-size).
    e. Interpret the caller/patient's description of symptoms (location, appearance).
    f. Repeat and clarify the caller/patient's statements for better understanding of descriptions.
    g. Identify any hidden agendas for the call.
    h. Sort and prioritize symptoms.
    i. Be aware of self-diagnosis.
    j. Identify primary and secondary symptoms.
    k. Focus conversation for goal-directed, time-limited communication.
    l. Display good speaking and writing skills.

Telehealth Nursing Practice – Documentation

Definition
Documenting in a telehealth environment is the process between the nurse and the patient (or patient representative) that occurs using technology to assist with the encounter (see Table 1). Included in the interaction should be careful interview techniques and the development of organized, integrated actions to ensure that individuals and groups have timely, appropriate access to and utilization of health care services that are tailored to the specific symptoms or situation of the patient.

The professional ambulatory care nurse documents patient encounters using standardized language to convey pertinent information to other providers, as well as to ensure the continuity of care throughout the health care system. Documentation serves to illustrate details of the patient's current health status, relevant contributing factions, and rationale for disposition decisions. Documentation supports clinical decision-making and justifies billing, and may be used to defend litigation situations (AAACN, 2010). Lastly, telehealth documentation must meet the requirements of the Board of Nursing within the state the nurse is practicing.

Standards
Telehealth encounters: The nurse will document telecommunications that reflect care specific to the actual or potential health needs of the caller or patient.

Table 2.
Standards: Personal and Professional Development

Scope and Standards for Professional Ambulatory Care Nursing (AAACN, 2017)	Standard 7	Performance Improvement
Scope and Standards for Professional Telehealth Nursing (AAACN, 2011)	Standard 10	Performance Improvement
Scope and Standards of Practice for Registered Nurses in Care Coordination and Transition Management (AAACN, 2016)	Standard 10	Performance Improvement

Documentation will include both incoming and out-going calls as they occur and the nurse will communicate effectively with other team members to provide continuity of care and patient advocacy. There should also be a reflection of patient care by identifying assessment of the patient as a whole person and the patient's perceived understanding of the current health issue. Specific points of a telehealth triage encounter will include:

A. Reason for the call or contact.
   1. Patient and record identifiers.
   2. Significant medical history.
      a. Medications.
      b. Surgeries, current or past medical illnesses.
      c. Allergies.
   3. Complete assessment of the symptom.
   4. Clinical guideline or protocol used for assessment and triage category.
   5. Care advice.
      a. Instructions to seek care in appropriate facilities.
      b. Home care.
      c. Comfort care.
      d. When appropriate, include other health care providers in the process, such as physicians, advanced practice nurses, and physician assistants.
   6. Disposition of care for the patient, referrals provided, or follow-up offered.
   7. Disclaimer(s) given to the patient or caller.
   8. Documentation of the patient's understanding of the care plan of action, any refusals of care, and the nurse's response to refusal.
   9. References used for care coordination.
   10. Follow-up calls or interventions completed.
B. Problematic encounters may need more detailed documentation.
   1. Example A: Patient refuses to come in for a clinic visit or present to an immediate care facility (emergency or urgent care); documentation should reflect the nurse's attempt to identify barriers to care, such as inability to procure transportation, other caregiving responsibilities, knowledge deficit, need for involvement by other care team members.
   2. Example B: Patient who is seen in a clinical facility, including ambulatory care or hospital setting after a telehealth encounter, may be scheduled for a follow-up call to determine any unmet need(s). This conveys interest from the nurse to the patient, outcomes, and demonstrates a positive feeling of concern on the part of health care providers for their patients to provide continuity of care across the continuum.

Telehealth Dimension: Personal and Professional Development

Definition

Nurses practicing in telehealth must understand the need to assure ongoing competency by accepting personal responsibility for maintaining and improving the knowledge and skills necessary to assess, triage, and manage patients (AAACN 2013) (see Table 2). This reflects the journey of all nurses from novice to expert in functional skills and disease management. Nurses who are transitioning from inpatient, ambulatory, or community care will bring with them valuable experience, but they will also need to develop new skills to manage care using telehealth nursing principles.

The professional nurse secures the safety of patients in developing awareness of personal, professional, and regulatory standards related to the delivery of patient care by assuming responsibility for continued competence and professional development.

A. Demonstrate the commitment to enhance clinical, telehealth, technical, medical, and legal knowledge for safe and effective nursing practice
   1. Attend continuing nursing education training within the work organization or seek out independent classes or seminars.
   2. Complete individual and online learning opportunities on a variety of topics, with special attention to telehealth topics.
B. Initiate and participate in a wide variety of education programs relevant to practice area, including health care trends, updates on current illnesses, and clinical developments.
   1. Share knowledge with nursing peers.
   2. Design and present unit education programs based on assessed needs of staff.
C. Represent and articulate the value of telehealth nursing as related to improved patient outcomes.

Table 3.
Standards: Resource Management

Scope and Standards of Practice for Professional Ambulatory Care Nursing (AAACN, 2010b)	Standard 15	Resource Management
Scope and Standards of Practice for Professional Telehealth Nursing (AAACN, 2011)	Standard 15	Resource Management
Scope and Standards of Practice for Registered Nurses in Care Coordination and Transition Management (AAACN, 2016)	Standard 15	Resource Management

1. Attend meetings of local, state, and possibly national nursing organizations.
2. Network with other nurses, including within the work area and the organization as a whole, and with colleagues in varied fields of nursing.
3. Maintain membership in professional organizations, such as AAACN.
D. Meet obligation for ongoing training through the state Board of Nursing.

Telehealth Nursing and Resource Management

Within the nursing profession, there are numerous opportunities to improve care while implementing cost-saving measures (see Table 3). Telehealth nursing can be a more cost-effective means to provide assessment of needs and triage of patient complaints. Managing within departmental resources is not limited to nurses in supervisory roles; it is the responsibility of each nurse working within a department to be cognizant of budgetary constraints and use resources judiciously. Within a telehealth practice, resources include hardware, software, and other technological applications, as well as staff members (including various functions of each level), office equipment, and general supplies (AAACN, 2013).
A. Budgetary resources: Use assigned resources to assure departmental practices fit within the organizational structure, as well as within telehealth best practices and standards and the state Board of Nursing.
   1. Understand staffing budget, working to place the right person in the right position to provide high levels of safe care to patients.
   2. Evaluate capital expenditures and billing practices to foster efficient fiscal management.

B. Clinical resources: Use clinical resources, including triage protocol references, to provide quality care to patients and families.
   1. Subject triage protocols to regular review by physicians and nursing leaders to assure safe and up-to-date care guidelines.
   2. Follow organization-defined procedures for managing a symptom-based call when no triage guidelines are included in the database.
   3. Utilize the clinical assessment of caller variables to maintain appropriateness of disposition (e.g., define urgency or assignment of a level of care needed) with the availability of clinical services. Options include home care, provider office, urgent care, and emergency care.
      a. Use technology to streamline telehealth work to avoid repeating actions and patient contact.
      b. Schedule call backs for callers as defined by the clinical need and/or department policy.
   4. Use additional references when needed to provide caller or patient with information.
      a. Communication and information given outside of protocols may include reliable, professionally vetted websites (such as https://www.cdc.gov/).
      b. Community resources may also be provided, including local agencies that care for the aged, children, or those who require mental health sources for care.
         i. Children: http://www.acf.hhs.gov/occ/parents/
         ii. Older adults: http://www.aoa.gov/
         iii. Mental health: https://www.mentalhealth.gov/

Table 4.
Standards: Ethics

Scope and Standards of Practice for Professional Ambulatory Care Nursing (AAACN, 2010b)	Standard 12	Ethics
Scope and Standards of Practice for Professional Telehealth Nursing (AAACN, 2011)	Standard 7	Ethics
Scope and Standards of Practice for Registered Nurses in Care Coordination and Transition Management (AAACN, 2016)	Standard 7	Ethics

Table 5.
Telehealth Practice: Telehealth Nursing Is Care Delivered through Knowledge, Skills, and Attitudes for Competency

Telehealth nursing is the delivery, management, and coordination of care and services that integrate electronic information and telecommunication technologies to increase access, improve outcomes, and contain or reduce costs of health care (Rutenberg & Greenberg, 2012).

	Section	Knowledge	Skills	Attitudes	Sources
1	Technical Skills	Develop skills to use telehealth technology tools, including basic computer skills, electronic medical record programs, online protocols, and resource tools.	Understand the tools needed and practice continual learning to build excellence in practice as technology expands and changes.	Create an atmosphere to benefit patient care where learning new tools and technology is embraced, while supporting staff orientation and evaluating skills to focus on continual quality in all staff members.	AAACN (2011)
2	Professional Knowledge	Recognize the need for understanding the telehealth process and the details of call handling that are industry-wide as well as specialized to a particular institution.	Participate in departmental orientation and pursue ongoing education opportunities. Understand the nursing process as it applies to telehealth, the delivery of care, and challenges of patient care across technology.	Accept effective learning as a lifelong journey to maintain relevancy across the years to accommodate advancing technology, improvements in care, and the expansion of medical and disease information.	AAACN (2009)
3	Interpersonal Skills	Define the role of effective communication in a health care encounter to improve the efficiency, quality, and safety of patient care.	Practice effective listening and observation skills, with attention paid to symptoms, age, culture, and knowledge of the patient or caller.	Value positive interpersonal communication skills to engage in, develop, and disengage a therapeutic interaction that stays in accordance with the nursing process.	White & Sullivan (2012)
4	Continuity of Care	Understand the role of telehealth nursing in the total framework of patient care as care is delivered across the continuum of facilities, time of day, diagnoses, and treatment plans.	Communicate all patient activities with well-written notes containing details of care so all members of the health care team can be informed and knowledgeable, allowing for better care planning and outcomes.	Accept nursing excellence in the documentation details of telehealth nursing care, which support clinical decision-making, provide information on ongoing patient needs and plans, justify billing, and may be used to defend actions in litigation situations.	Rutenberg & Greenberg (2012)
5	Personal and Professional Development	Identify resources for improvement of personal practices in telehealth nursing and the improvement of professional skills in patient care.	Complete continuing education activities, network with nursing colleagues, and work to expand skills and knowledge base to improve competency in telehealth care.	Accept personal responsibility for maintaining and improving the knowledge and skills necessary to assess, triage, and manage patients.	AAACN (2011)
6	Resource Management	Recognize opportunities to improve care while implementing cost-saving measures that maintain clinical excellence, protect nursing staff, adhere to budgetary demands, and maximize capital resources.	Identify avenues to improve practices and care delivery by appropriate use of personnel and clinical assets.	Apply appropriate resources to meet the needs of the caller, family, or patient.	Coonan (2007)
7	Ethics and Patient Rights	Recognize the ability of the telehealth nurse to identify the total needs of the patient and family that includes care excellence, privacy protection, and spiritual and cultural differences.	Remove personal, professional, and organizational barriers that would interfere with the patient receiving clinically, ethically, and socially appropriate care.	Acknowledge nursing telehealth practice in accordance with ethical, legal, and organizational framework that ensures the individual patient's needs, interest, and well-being are met.	AAACN (2009)

Notes: AAACN = American Academy of Ambulatory Care Nursing.

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Chapter 5

Telehealth Nursing Practice Issues

Professional telehealth and ambulatory nurses recognize and practice ethical values "with compassion and respect for the inherent dignity, worth and uniqueness of every person" (American Nurses Association, 2015, p.1). This is with respect for the cultural, spiritual, age, gender, intellectual abilities, and psychosocial needs of the person(s), families, groups, or communities that nurses serve (AAACN, 2010b) (see Table 4).

Nursing Practices
A. Undertake and record an accurate and thorough nursing assessment per the use of guidelines within the telehealth encounter.
B. Refrain from providing a diagnosis or giving personal opinions or advice.
C. Practice in a fair non-discriminating way, acknowledging the difference in beliefs and cultural practices of callers and patients.
D. Manage emergency medical system or crisis intervention referrals.
E. Contribute to caller/patient safety by ensuring a safe consultation through the use of established risk management protocols/procedures complemented by a licensed independent provider consultation as indicated.
F. Evaluate nursing practice with regular reviews of work practices, including individual performances and departmental guidelines.

Organizational Practices
A. Create appropriate policies and procedures to support ambulatory and telehealth nursing practices that are subject to regular review and updating.
B. Adhere to and provide support in nursing practice for mandated reporting of suspected or known abuse and neglect.
C. Evaluate, comprehend, and support national and local legislation of health and social policy as it relates to nursing practice.
D. See Table 5.

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