



Telehealth Service Foundations and Workflow Course

4 – 8 January 2027
San Diego



Telehealth Service Foundations and Workflow Course

Ref: 1493_210260 **Date:** 4 – 8 January 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Telehealth Service Foundations and Workflow Course is a one-week foundation course for healthcare administrators, clinicians, coordinators, digital health, operations, quality, and patient-support personnel, who leave with a Telehealth Service Workflow Pack. The course connects service models, suitability, access, patient journeys, virtual communication, consent, privacy, scheduling, documentation, escalation, technology readiness, accessibility, quality, and implementation governance. Agile Leaders Training Center presents telehealth service foundations for coordinated virtual and hybrid care.

Who Should Attend

- Teams beginning telehealth service delivery or implementation
- Personnel responsible for virtual appointment coordination and support
- Functions responsible for digital health operations and technology readiness
- Teams responsible for telehealth quality, privacy, and patient experience
- Personnel supporting access, inclusion, and hybrid care pathways

The course assumes experience in healthcare service delivery or support and leaves out diagnosis, prescribing, technical platform administration, and jurisdiction-specific legal advice.

Departments and Industries

The course supports organizations that deliver, coordinate, or enable care across distance.

- Hospital and ambulatory care services
- Primary, community, and behavioral health teams
- Digital health and health technology organizations
- Remote monitoring and home-care services
- Insurance, occupational health, and patient-support functions

Learning Objectives

By the end of this course, participants will be able to:

- Compare synchronous, asynchronous, and monitoring service models
- Apply suitability, access, and accommodation criteria
- Build telehealth patient journeys and team workflows
- Use identity, consent, privacy, and documentation controls
- Evaluate escalation, continuity, technology, and quality risks



- Prioritize implementation actions through service governance

Course Agenda

Day 1: Telehealth Models and Access

- Synchronous, Asynchronous, and Monitoring Model Map
- Service Need and Use-Case Definition Canvas
- Telehealth Suitability and In-Person Escalation Criteria
- Digital Access and Accommodation Checklist
- Virtual and Hybrid Care Pathway Map

Day 2: Patient Journey and Workflow

- Referral, Scheduling, and Reminder Workflow
- Digital Intake and Pre-Visit Readiness Check
- Identity, Location, and Participant Verification Protocol
- Virtual Visit Role and Handoff Matrix
- Post-Visit Follow-Up and Continuity Route

Day 3: Communication, Consent, and Documentation

- Virtual Communication and Presence Guide
- Consent and Privacy Preference Record
- Interpreter, Caregiver, and Support-Person Plan
- Telehealth Encounter Documentation Checklist
- Communication Failure and Backup Channel Procedure

Day 4: Technology, Risk, and Quality

- Technology Readiness and Usability Assessment
- Privacy and Security Risk Control Map
- Technical Failure and Service Continuity Plan
- Clinical Boundary and Escalation Decision Tree
- Access, Experience, Safety, and Quality Measure Set

Day 5: Telehealth Service Practice

- Suggested Exercise: Model and Suitability Decisions
- Suggested Exercise: Patient Journey and Workflow Build
- Suggested Exercise: Consent and Communication Review
- Suggested Exercise: Risk and Quality Control Assessment
- Capstone Exercise: Telehealth Service Workflow Pack



Practical Exercises

The course uses suggested activities with fictional primary care, hospital, behavioral health, home-care, and remote-monitoring scenarios.

- Suggested activity: select a service model and document suitability, access, and escalation criteria.
- Suggested activity: map scheduling, intake, visit, handoff, documentation, and follow-up steps.
- Suggested activity: review identity, consent, privacy, communication, and accommodation controls.
- Suggested activity: assess technology risks and select measures for service review.

FAQs

Who suits telehealth service foundations training, and what does it assume?

Healthcare administration, clinical coordination, digital health, operations, quality, and patient-support personnel suit the course; it assumes experience in healthcare services or support.

How does telehealth service foundations training differ from clinical telemedicine training?

Telehealth service foundations training focuses on service models, workflows, access, communication, privacy, documentation, escalation, technology readiness, and quality rather than clinical diagnosis, treatment, or prescribing.

How is a patient assessed for telehealth suitability?

Telehealth suitability considers the service need, clinical boundary, urgency, communication needs, technology access, privacy, accessibility, support persons, location, contingency options, and conditions requiring in-person care.

What should a telehealth workflow include?

A telehealth workflow should define referral, scheduling, reminders, digital support, intake, identity and location checks, consent, visit roles, documentation, escalation, technical backup, follow-up, and experience measurement.

Conclusion

Participants leave with a Telehealth Service Workflow Pack containing model maps, suitability criteria, access checks, patient journeys, role matrices, consent records, documentation checks, backup procedures, risk controls, and quality measures. The pack turns virtual-care requirements into connected service steps. It helps teams coordinate delivery, protect boundaries, support access, and review performance.