

# Telehealth Roles & Responsibilities Toolkit



## A Comprehensive Operational & Clinical Reference Guide

This toolkit provides an expanded operational and clinical framework covering **a wide spectrum** of telehealth positions—spanning administrative, clinical, safety monitoring, allied health, technical support, and patient navigation domains.

### Key Roles Overview

| Category                       | Role                                     | Key Focus                     | Primary Responsibilities                                                                                                                                        | Typical Qualifications                                                                              |
|--------------------------------|------------------------------------------|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| <b>ADMIN &amp; OPS</b>         | Virtual Care Coordinator                 | Operations & Workflow         | Patient intake, tech checks, EHR documentation, and schedule alignment.                                                                                         | Associate's/Bachelor's in Healthcare Admin or equivalent.                                           |
| <b>ADMIN &amp; OPS</b>         | Telehealth Manager / Director            | Leadership & Compliance       | Program oversight, regulatory compliance, quality metrics, and process optimization.                                                                            | Bachelor's/Master's in Healthcare Management (MHA, MBA).                                            |
| <b>CLINICAL CARE</b>           | Telehealth Nurse / Care Manager          | Triage & Care Management      | Virtual triage, remote patient monitoring (RPM), patient education, and provider liaison.                                                                       | Active RN license; BSN/CCM preferred.                                                               |
| <b>CLINICAL CARE</b>           | Telemedicine Physician/Provider          | Direct Diagnosis & Treatment  | Synchronous/asynchronous video consults, remote diagnosis, prescribing, and care planning.                                                                      | Active MD/DO/NP/PA licensure; board certification.                                                  |
| <b>SAFETY &amp; MONITORING</b> | Virtual Observation Specialist           | Safety & Surveillance         | Continuous video/telemetry safety monitoring, fall prevention, and rapid escalation.                                                                            | CNA/MA certification or specialized clinical observation training.                                  |
| <b>SAFETY &amp; MONITORING</b> | RPM Specialist                           | Data & Vitals Tracking        | Tracking patient biometric data trends, flag triage, and equipment troubleshooting.                                                                             | MA, LPN/RN, or Health Data Specialist background.                                                   |
| <b>ALLIED HEALTH</b>           | Telebehavioral Provider                  | Behavioral Health & Therapy   | Remote psychiatric evaluation, individual therapy, counseling, and psych medication management.                                                                 | Licensed Clinical Social Worker (LCSW), Psychologist, or Psych NP/MD.                               |
| <b>ALLIED HEALTH</b>           | Tele-Rehab Specialist (PT/OT)            | Physical & Functional Therapy | Remote movement assessments, customized home exercise plans, and functional tracking.                                                                           | Licensed Physical Therapist (PT/DPT) or Occupational Therapist (OTR/L).                             |
| <b>TECH &amp; SUPPORT</b>      | Technical Support Specialist             | Technical Infrastructure      | Platform troubleshooting, network connectivity, and end-user hardware support.                                                                                  | IT certifications (CompTIA, network admin) or Healthcare IT background.                             |
| <b>TELEHEALTH NAVIGATION</b>   | Telehealth Navigator / Patient Navigator | Access & Engagement           | Helps patients access, schedule, and prepare for telehealth visits; builds digital skills; connects patients to devices, connectivity, and community resources. | High school diploma/GED or Associate's; CHW certification or patient navigation training preferred. |

## Detailed Role Breakdown

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### 1. Administrative & Operations Roles

#### Virtual Care Coordinator / Telehealth Coordinator

- **Primary Objective:** Manages administrative backbone and tech readiness for virtual patient encounters.
- **Patient Onboarding:** Conducts pre-visit tech checks, assists patients with portal registration.
- **Workflow & Scheduling:** Coordinates multi-provider virtual visits and manages clinic schedules.
- **EHR Management:** Inputs intake data, verifies insurance eligibility, and records visit logistics.

#### Telehealth Manager / Director

- **Primary Objective:** Oversees strategic implementation, operations, and regulatory compliance for telehealth service lines.
- **Quality & Performance:** Audits visit completion rates, technical failure rates, and satisfaction scores.
- **Regulatory Compliance:** Ensures virtual care delivery adheres to HIPAA, state licensing rules, and reimbursement policies.
- **Cross-Department Alignment:** Collaborates with clinical, IT, and billing teams to refine care pathways.

### 2. Clinical Care Roles

#### Telehealth Nurse / Remote Nurse Care Manager

- **Primary Objective:** Delivers remote clinical care, triage, and ongoing care management through digital platforms.
- **Remote Triage:** Evaluates patient-reported symptoms virtually to determine appropriate care levels.
- **Care Management:** Coordinates chronic disease care, manages medication refills, and tracks health trends.
- **Patient Education:** Provides virtual instruction on treatment adherence and post-visit instructions.

#### Telemedicine Physician / Advanced Practice Provider (NP/PA)

- **Primary Objective:** Diagnoses, treats, and manages acute and chronic medical conditions via telehealth.
- **Virtual Consultation:** Conducts video/phone appointments, performs remote exams, diagnoses conditions.
- **Clinical Decision-Making:** Formulates treatment plans, orders diagnostic tests, and prescribes medications.
- **Multi-State Practice:** Maintains active licensure across practicing jurisdictions and coordinates care.

### 3. Patient Safety & Monitoring Roles

#### Virtual Observation Specialist / Remote Monitor

- **Primary Objective:** Maintains continuous visual or sensor surveillance to ensure real-time safety for high-risk patients.
- **Safety Surveillance:** Monitors high-risk patients continuously via video feeds or telemetry.
- **Early Warning Detection:** Identifies early signs of distress, unscheduled bed/chair egress, or clinical changes.
- **Rapid Escalation:** Communicates instantly with floor nurses and response teams for immediate intervention.

#### Remote Patient Monitoring (RPM) Specialist

- **Primary Objective:** Tracks and triages continuous biometric data received from patient wearable devices.
- **Biometric Tracking:** Reviews incoming patient vitals (blood pressure, blood glucose, heart rate, pulse ox).
- **Alert Triage:** Filters false alerts and escalates abnormal clinical trends to attending clinicians.
- **Equipment Logistics:** Assists patients with setup, connectivity, and hardware troubleshooting.

### 4. Allied Health & Behavioral Health Roles

#### Telebehavioral / Telemental Health Provider

- **Primary Objective:** Delivers mental health therapy, psychiatric evaluations, and counseling via telehealth.
- **Virtual Assessment:** Conducts comprehensive mental health intakes, evaluations, and risk assessments.
- **Therapeutic Intervention:** Delivers individual or group psychotherapy and behavioral interventions.
- **Medication Management:** (*Psychiatrists/PMHNPs*) Manages and adjusts psychotropic medications adhering to rules.

#### Tele-Rehab Specialist (Remote PT/OT)

- **Primary Objective:** Delivers physical and occupational therapy assessments and guidance through video visits.
- **Movement Assessment:** Evaluates patient mobility, range of motion, and physical safety in home environments.
- **Custom Exercise Guidance:** Directs therapeutic exercises, functional adaptations, and ergonomic adjustments.
- **Progress Tracking:** Evaluates functional recovery progress and updates rehab treatment plans.

### 5. Technical & Systems Support Roles

#### Telehealth Technical Support Specialist

- **Primary Objective:** Ensures technical reliability, platform uptime, and security across virtual care channels.
- **Platform Support:** Troubleshoots audio/video integration issues, software bugs, and platform outages.
- **Hardware Management:** Manages and maintains peripheral telehealth devices (digital otoscopes, carts).
- **Security Oversight:** Ensures end-to-end encryption standards and HIPAA-compliant data transmissions.

### 6. Telehealth Navigation Roles

#### Telehealth Navigator / Patient Navigator

- **Primary Objective:** Helps patients and caregivers access, understand, and successfully use telehealth services.
- **Access & Enrollment:** Explains telehealth options, assists with scheduling and portal registration, and prepares patients for visits.
- **Digital Skills Coaching:** Teaches patients to use devices, apps, and video platforms, including practice visits.
- **Barrier Resolution:** Connects patients to broadband, loaner devices, interpreter services, and other community resources.
- **Care Continuity:** Follows up on missed visits and referrals and links patients to in-person or community services.

## Core Responsibilities Summary

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- **Operations & Care Coordination:** Guide patients through portal registration and pre-visit tech checks; align virtual appointment schedules; maintain up-to-date health records, verify eligibility, and enforce strict HIPAA guidelines.
- **Clinical Care Delivery & Assessment:** Assess patient-reported symptoms, adjust care plans, and monitor chronic conditions remotely; educate patients on disease management; serve as the central communication bridge across care teams.
- **Patient Safety & Continuous Monitoring:** Maintain continuous video/sensor observation for high-risk patients to prevent falls; monitor vital signs and clinical indicators to escalate sudden health changes promptly.

## Implementation & Quality Best Practices

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### OPERATIONAL TIP:

Regularly audit telehealth visit completion rates, technical failure occurrences, and patient satisfaction metrics to identify workflow bottlenecks and enhance care quality.

- **Standardized Onboarding:** Ensure all virtual care staff undergo thorough training on specific telehealth platforms, video troubleshooting, and secure EHR workflows.
- **Patient Privacy:** Utilize encrypted, HIPAA-compliant platforms and establish clear privacy protocols for both patients and remote clinicians.
- **Escalation Pathways:** Maintain clear protocols for transitioning virtual patients to in-person care or emergency services when clinical criteria dictate.

## Resources

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- **Sample Job Descriptions:** [California Telehealth Resource Center \(CTRC\): Sample Job Descriptions](#)
- **AAMC Telehealth Competencies:** [Center for Connected Health Policy \(CCHP\): Telehealth Competencies Across the Learning Continuum](#)

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