TELEHEALTH IMPLEMENTATION

A CHECKLIST FOR INITIATING TELEHEALTH SERVICES

gpTRAC
Great Plains Telehealth
Resource & Assistance Center

Things to be CONSIDERED

This list is intended to serve as an overview of the issues to be considered as a clinic- or hospital-based telehealth program is being developed. These items will often require significant planning, even within the individual steps identified.

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FOUNDATIONAL WORK:

- Determine location eligibility for reimbursement.
- Confirm administration and medical staff engagement.
- Develop the business plan with ALL involved sites and providers. Include:
  - Problem Statement
  - Baseline
  - Goals
  - Financial Impact (reimbursement & budget)
  - Dates
- Develop & sign telehealth services agreement:
  - Defines responsibilities
  - Reduces overall risk
  - Identifies payment/billing process
- Identify lead person(s) and personnel requirements.
- Identify broadband capacity/requirements.
- Establish full implementation team.
- Conduct initial site visit:
  - Perform gaps analysis
  - Identify roles at remote site
  - Identify roles at provider site
- Determine success measurements:
  - Identify key measures
  - Develop comparison report/dashboard

IMPLEMENTATION CONSIDERATIONS:

Once the initial planning is done, launching a telehealth program or service is more than simply buying and installing the equipment. Many additional steps must be completed in order to be successful.

ADMINISTRATION

Things to be considered and addressed prior to the actual delivery of services.

- Providers are licensed in states of service delivery.
- Ensure providers are credentialed and privileged as is needed.
- Understand fully the patient scheduling and registration process (how will telehealth visits mirror the in-person experience):
    - Provider's location
    - Patient's location
    - Confirm necessary EMR access
    - Telehealth visit types are added to the department in the EMR
- Documentation is reviewed and established for telehealth visits, for both the remote (patient) and provider locations.
- Plan for the patient communication and referral process.
- Determine coding and billing process for charge flow (as needed).
- Verify reimbursement has occurred:
    - Track concerns
    - Create a dashboard to track and share monthly statistics

THE PATIENT VISIT

Understand the in-person patient visit in order to mirror via telehealth, as appropriate.

- Is there a review of patients at the start of the day? Are telehealth patients included in the review?
- Who schedules patients?
- Who registers patients?
- How is _____ completed? For example:
    - Patient intake (are any vitals needed, is consent signed)
    - Med. reconciliation
    - Ambulatory profile
    - Smoking history, etc.
- How does provider know when patient is ready?
- What physical assessment is needed (if any)?
- What type of ancillary testing is needed/completed? (diagnostics/labs)
    - Where are these completed? (on-site/elsewhere)
    - How is the information incorporated into the EMR?
- What types of consults and/or follow-up visits are needed?
    - Who schedules at the remote location?
    - Who schedules at the provider location?
- Which CPT codes get billed for these visits?

- How is the end of the visit communicated?
  - By provider to the patient
  - At the remote location
- Who prints/distributes the visit summary?
  - Is there any paperwork that needs to go to/with the patient?
  - How is this handled?
- What metrics are addressed and how will you know if they are achieved?

EQUIPMENT

- Determine network viability and flexibility to support telehealth.
- Identify available equipment and that which is needed.
- Determine equipment location/s.
- Create purchase order and place order.
- Install equipment.
- Determine reporting process for equipment issues and failures.
- Conduct daily or regular equipment checks.
- Develop an equipment user guide or "cheat sheet".
- Identify Help Desk process for both providers and patients.

TRAINING

- Demonstrate use of the equipment.
- Develop lesson plan for staff and providers.
- Create In-service training opportunities for staff and providers.
- Allow for regular practice.
- Confirm staff and providers proficiency or competency, initial and on-going.

PROCESS EXCELLENCE:

On-going success needs regular review and evaluation of the processes.
- Develop an implementation priority and timeline.
- Determine the introductory meeting agenda.
- Develop a training agenda (providers, support staff, etc.).
- Develop a site-specific resource manual to at least include:
  - Policies/procedures
  - Important contacts
  - Cheat Sheet/s for equipment, etc.
- Determine program's quality improvement process.