Telehealth Start-Up Checklist
NRTRC Telehealth 101 Workshop
April 15, 2020

WHY?
- Goals & objectives
- Alignment with organizational mission
- Measures of success
- Business Case & Business Plan
  - Costs & benefits analysis
  - Positive ROI?
  - Project management: who-what-when-how

WHO?
- Providers
- Partners, clients, and/or audience
- Physician or Provider Champion
- Leadership, Provider, & User buy-in
- Relationship management
- Training (providers and staff):
  - Workflow orientation
  - Training on technology and/or EMR
  - Telehealth etiquette & “webside manner”

WHAT?
- Clinical Service?
- Telehealth modality?
  - Real-time interactive video teleconference
  - Store & Forward
  - Remote patient monitoring
  - Case conference
  - Telephone…or…
  - A combination of modalities?
- Provider-to-patient or provider-to-provider?
- To a health care facility, to patient “home,” or other?
HOW?

- **Legal/Regulatory Issues**
  - Legislation
    - Federal and state
    - Patient location, provider location
  - Licensing
  - Credentialing & Privileging
  - HIPAA/privacy & security
  - Liability
  - Contracts & BAAs

- **Financial sustainability**
  - Funding, Billing & Reimbursement
    - Eligible for reimbursement?
      - Medicare restrictions?
      - Other restrictions?
    - Documentation requirements
    - Payor mix
    - Professional fee or facility fee – who bills for what?
  - Financial model (contractual, membership, billing FFS, direct access, grant-supported, etc.)
  - Other financial benefits, e.g.:
    - Reduced provider travel time/cost
    - Greater efficiencies
    - Meet contractual obligations or other mandates, etc.

- **Technology & Space**
  - Both at provider and at patient sites
  - Equipment, software
    - Build or buy?
    - Interoperability with existing telehealth platforms internally and between sites (fewer platforms = better)
    - EMR compatibility
    - HIPAA/security
  - Connectivity, bandwidth
  - Room design/set-up
  - Costs of purchase, maintenance, & support
  - User friendly technology vs need for tech support

- **Workflow & Protocols**
  - Referrals, scheduling, appointment initiation
  - Privacy and confidentiality
  - Consents?
  - Clinical and billing documentation – where does documentation live? How does user obtain access?
  - “What if” scenarios – emergencies, technical failures, etc.
  - Protocols & Policies
  - Provider/User training
o Patient-facing materials
o Templates, smart phrases, cheat sheets
o Integration within normal workflows, or free standing program?

MARKETING
• Know your market
• Know your competitors
• Create a marketing or engagement plan
  o External audience
  o Internal audience

EVALUATION
• Metrics:
  o Clinical outcomes
  o Patient, provider, partner satisfaction
  o Business outcomes
    ▪ Saved costs
    ▪ Improved efficiencies
    ▪ Improved access
    ▪ Broader reach
    ▪ Meeting mandates
    ▪ New patient acquisition/market share
  o Patient impacts: travel time and cost savings, convenience, access to specialty care, etc.
• Reporting
  o To clients
  o To internal leadership
  o To funders
• Continuous Quality Improvement