



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 & “websites 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

- Patient-facing materials
- Templates, smart phrases, cheat sheets
- Integration within normal workflows, or free standing program?

MARKETING

- **Know your market**
- **Know your competitors**
- **Create a marketing or engagement plan**
 - **External audience**
 - **Internal audience**

EVALUATION

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