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
  o Costs & benefits analysis
  o Positive ROI?
  o 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):
  o Workflow orientation
  o Training on technology and/or EMR
  o Telehealth etiquette & “webside manner”

WHAT?
• Clinical Service?
• Telehealth modality?
  o Real-time interactive video teleconference
  o Store & Forward
  o Remote patient monitoring
  o Case conference
  o Telephone…or…
  o 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

Telehealth Start-Up Checklist & Resources, C Towle & D LaMarche, NRTRC, April 15, 2020
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