



## **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**