

Checklist for Initiating Telehealth Services

This resource is designed to provide you with prompts for some of the questions you need to consider as you look to implement a telehealth site or new service. The answers are NOT provided as they will be unique to each entity or organization.

Pre-Work:

- Location Eligibility (CMS, for reimbursement purposes)
- Confirm interest and expectations with Administration and Medical Staff
- Develop the business plan/service charter with both service providers and remote site
 - Problem Statement
 - Baseline
 - Goals
 - Financial Impact
 - Including reimbursement status
 - Budget
 - Dates
 - Etc.
- Develop/Sign Telehealth Service Agreement/Contract
 - Defines responsibilities
 - Reduces risk
 - Identifies payment/billing process
- Identify contact person(s) and establish personnel requirements
- Identify broadband capacity/requirements
- Establish/Identify full implementation team
- Conduct Initial Site Visit
 - Gaps Analysis
 - Identify roles at remote site
 - Identify roles at provider site
- Determine success measurements
 - Identify key measures
 - Develop comparison report/dashboard

Implementation Plan Activities:

Administration

- Providers licensed in the state of service delivery
- Credentialing/Privileging - Provider Enrollment
- Scheduling/Registration Process Reviewed
 - Provider location
 - Patient location
 - Confirm appropriate EMR access
 - Telehealth visit types (or POS-02) added to department in EMR (as needed)
- Documentation reviewed/determined
 - Remote location
 - Provider location
- Patient Communication and referral process
- Coding & Billing process for charge flow (as needed)
- Verify reimbursement
 - Track concerns
 - Monthly statistics
- Report out monthly

Provider/Patient Interaction

- Review and Confirm Visit Process (mirror in-person/"regular" process)
 - Is there a review of patients at the start of the day?
 - Who schedules patients?
 - Who registers patients?
 - Is ____ done?
 - Intake (any vitals needed)
 - Med Reconciliation
 - Ambulatory Profile
 - Smoking History
 - How does the provider know when the patient is ready?
 - What type of physical assessment is needed (if any)?
 - What type of ancillary testing is done/needed? (diagnostics/labs)
 - Where are these done? (on-site/elsewhere)
 - How is that information incorporated into the EMR?
 - What types of consults and/or follow-up visits will be done?
 - Who schedules at remote location?
 - Who schedules at provider location?

- How is the end of the visit communicated?
 - By provider to patient
 - At remote location
- Who prints the AVS?
 - Is there other information/paperwork that needs to go with the patient?
 - How is this handled?
- Which CPT codes get billed for these visits?
- What metrics are we trying to achieve and how will we know if progress is being made? (i.e. reducing A1c; ...)

Equipment

- Identify Equipment (currently available/needed)
- Equipment location identifies
- Purchase order
- Equipment Installation
- Reporting process for equipment failure
- Daily/Regular equipment checks procedure
- Equipment use "cheat sheet" developed
- Help Desk Process

Training

- Demo of equipment
- Practice
- Develop lesson plan for staff
- Inservice training for staff
- Proficiency/Competency Checklist
 - Initial
 - On-going

Process Excellence - Resource Development

- Implementation Timeline
- Introductory Meeting Agenda
- Training Agenda (example)
- Site-Specific Resource Manual
 - Policies
 - Procedures
 - Cheat Sheet(s)
 - Equipment
 - Helpful Contacts

A Telehealth Implementation Checklist