



## 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