10-Step Telehealth Implementation Checklist

A high-level checklist to aid your organization's efforts to implement telehealth in an ambulatory setting, promoting a thoughtful approach that recognizes important fundamentals of your implementation plan.

☐ 1. Define what your organization needs to accomplish with telehealth **now.**
- Use community and business assessments.
- Policy at federal and state levels, specifically based on type of organization (i.e. RHC, FQHC, et al):
    - What can your organization do? What can it not do?
    - What regulations, statutes, and guidelines apply?
    - What are the rules around reimbursement?

☐ 2. Establish specific organizational goals and metrics.
- *What's your why?* What specific strategic objectives/outcomes must you accomplish by doing the thing(s) above?
- What metrics indicate your organization has successfully accomplished the objective/outcome?

☐ 3. Identify a provider champion and implementation lead.
- Which provider is passionate, has influence with your organization's med staff, and sees the "now" opportunity?
- Which leader broadly understands the operations/"how things work" of your organization and gets things done?

☐ 4. Define the implementation **essentials.**
- What do answers to the above presume or require of your organization?
    - For each, rate on a 1-5 scale from "Can come back to later" to "Success depends on it".
- For others that will emerge, ask what adding it mean to your current scope's:
    - Team/human resource, i.e.do it have the bandwidth?
    - Speed of implementation and target launch date?
    - Cost
    - Design
  And, what is the Impact to current your organization's business functioning?

☐ 5. Choose your technology wisely.
- What platforms are similar organizations, that are trying to accomplish what you are, using and how is it working for them?
- What criteria does the solution needs to meet, i.e. is it HIPAA compliant?
    - Refine it as demos/proposals are reviewed/compared.
- Follow-up on references – you'll be surprised what you can learn.

☐   6. Develop your telehealth workflow.
- Define a Workflow Task Force and an Implementation Team.
- What activities, in what order, completed by what role/function?
- Start with the Telehealth Workflow template provided.

☐   7. Determine the clinical reasons for patient visits that are "telehealth appropriate".
- Gain med staff, coding and legal approval to defined list
- Document list to create a reference tool
- Identify recipients and distribute (ensure updates go to all recipients)

☐   8. Use personal means and every opportunity to gain acceptance/use.
- Patient communication plan: What medium, what sequence, by and to whom?
- Script: Simply stated, what is telehealth?
- Protocol: Simply stated step-by-step for a telehealth visit using technology

☐   9. Prioritize training.
- Staff training plan **by function** (including VCP provider)
- Patient training plan for all patient-facing roles
- Patient training for using telehealth
- Tracking tool for VCP users to help identify/prioritize fixes

☐   10. Integrate your telehealth solution to your organization's strategic plan (when you get it out the gate).
- What opportunities does the telehealth services delivery model you implemented set you up for, that are aligned with your current goals?
- What new goals answer other or new community and business needs?

Additional resources:

- Telehealth Essentials Checklist Training recorded webinar presented on March 18 by Kathy HSU Wibberly, PhD, Director, Mid-Atlantic Telehealth Resource Center, is a very good, 50-minute high-level overview for those just getting started.
- GPTRAC Detailed Telehealth Checklist for a more detailed checklist. This checklist frames the telehealth opportunity from the perspective of a rural site implementing telehealth as an originating site (where the patient is located). This was the option for RHCs and FQHCs prior to the COVID-19 PHE, although the activities identified are generally the same for launching telehealth as the distant site (where the provider is located).
- MATRC Vendor Selection Toolkit from the Mid-Atlantic Telehealth Resource Center offers a helpful, detailed guide to working through the selection of a videoconferening vendor.