



## Checklist for Initiating Telehealth Services

### Pre-Work:

- Location Eligibility (CMS, for long-term reimbursement purposes)
- Confirm interest 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 (participating sites)
  - Defines responsibilities
  - Reduces risk
  - Identifies payment/billing process
- Identify contact person(s) and 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
- 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 day?
  - Who schedules patients?
  - Who registers patients?
  - Is \_\_\_\_\_ done?
    - Intake (any vitals needed, consent signed)
    - Med Reconciliation
    - Ambulatory Profile
    - Smoking History
  - How does provider know when patient is ready?
  - What 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 any paperwork that needs to go with the patient?
  - How is this handled?
- Which CPT codes get billed for these visits?
- What metrics are addressed and how will you know if achieved?

### 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 (provider/patient)

### 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



# Telehealth Service/ Site Implementation Checklist