

Planning Your Telehealth Workflow

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PRE-VISIT

Screening/Patient
selection

Scheduling

Pre-visit period

VISIT

Pre-provider

Provider

Post-provider

POST-VISIT

Plan Your Telehealth Workflow

A tip sheet for making telehealth
part of your practice

STEP 1: Plan Your Telehealth Program



Consider all of your options before launching your telehealth services:

- ▶ Consider your community's ability to access reliable internet service
- ▶ Pick a telehealth platform that meets the needs of your patients and your practice
- ▶ Plan to accommodate telehealth appointments in scheduling, staffing, billing, privacy, and data security.

STEP 2: Create an Accessibility Plan



Make sure you can offer telehealth services to all of your patients:

- ▶ Patients with hearing loss
- ▶ Patients with vision loss
- ▶ Patients in behavioral health crisis
- ▶ Patients with limited English proficiency
- ▶ Patients with mobility issues
- ▶ Caregivers supporting patients

STEP 3: Prepare for Telehealth Visits



A seamless transition to telehealth will benefit your patients, your staff, and your practice:

- ▶ Make sure your staff is trained and feels comfortable using telehealth
- ▶ Post clear instructions for scheduling telehealth appointments
- ▶ Give your patients clear instructions on how to join their telehealth appointment
- ▶ Consider having a medical assistant or digital navigator meet with your patient prior to the appointment to address any access issues.
- ▶ Create a plan for a bad or lost internet connection and share that plan with your patients
- ▶ Hold a practice telehealth appointment with a staff member or co-worker before seeing patients to make sure everything works seamlessly

STEP 4: Conduct Telehealth Visits



Feeling comfortable with telehealth leads to more convenient health care:

- ▶ Identify yourself to new patients and confirm their identity
- ▶ Verify at the start of each call that the patient's internet connection is working
- ▶ Make sure the patient has the privacy they need to speak freely
- ▶ Create an emergency plan in case your patient is in crisis
- ▶ Use friendly body language and eye contact to make the appointment feel like an in-person visit

STEP 5: Follow Up After a Telehealth Visit



Grow the success of your telehealth program with patient feedback and follow through:

- ▶ Document the patient visit and note that it was a telehealth appointment
- ▶ Follow through with any needed lab orders, prescriptions, or follow-up appointments
- ▶ Consider asking your patients how your team could improve their telehealth experience



Telehealth Implementation Playbook

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4 Key Areas

Technology



Staffing



Scheduling



Patients



Technology

- **Easy to use?**
- **Location?**
- **Integrate with EHR?**
- **Training options?**
- **Challenges to consider?**
- **Patient access?**
- **Costs, contracts, warranties, tech support, useful life?**





Toolkits

Toolkits are a critical part of the work that the Telehealth Technology Assessment Center does. These interactive elements allow users to learn the fundamentals of how various technologies work, as well as how to assess them for use in telehealth programs.

We will be releasing new toolkits or assessments in our new [Innovation Watch](#) section of our website every few months, as well as working to keep existing content relevant and accurate. Some toolkits will guide users through performing their own assessments. Other toolkits will help users identify their needs, bringing technology into alignment with clinical requirements.



TOOLKITS



RESOURCES

- [Clinician's Guide to Video Platforms](#)
- [What Technology will most impact Healthcare in the next 3-5 years](#)
- [Direct to Consumer](#)
- [Electronic Stethoscopes](#)
- [Home Telehealth](#)
- [mHealth](#)
- [mHealth App Selection](#)
- [Mobile Blood Pressure](#)
- [Patient Exam Cameras](#)
- [Technology Assessment 101](#)
- [Tympanometers](#)
- [Video Otoscopes](#)
- [Pandemic Response Technology Response Plan](#)
- [Virtual Telehealth Technology Showcase Video Series](#)

The National Telehealth Techno
variety of services in the area of telehealth
appropriate technologies for your

FEATURED ITEMS

Staffing

- **Additional staff or new roles & how will they change?**
- **Comfortable using technology?**
- **Committed to telehealth?**
- **Preparation & training?**

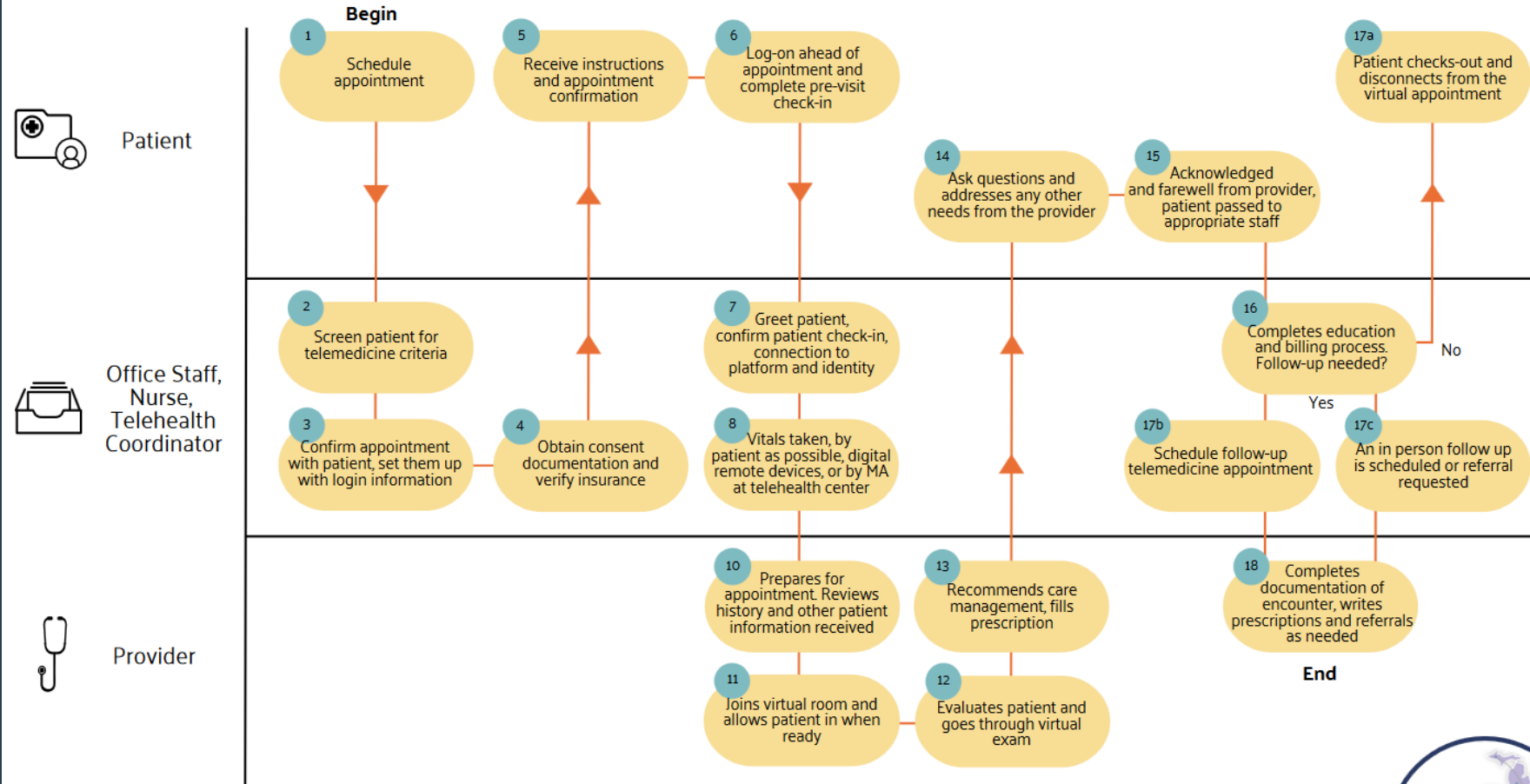


Scheduling

How?
Who?
When?

— Patient-Provider Telehealth Workflow —

Workflow will vary between states and institutions, with staff being responsible for varying sets of tasks from location to location. This is to give a general overview of the telehealth process. All organizations must maintain HIPAA compliance with the telehealth regulations and follow local and federal laws.



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[Click here for other Sample Workflows](#)

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[This table summarizes many, but not all, of the common conditions providers are likely to encounter in a direct-to-patient primary or urgent care virtual visit. The suitability of conducting a virtual visit by video or phone is noted, based on an objective review of the literature and expert consensus. The designations are not meant to indicate whether or not a given condition can or cannot be managed by telemedicine, but rather whether there is adequate evidence to support a provider's professional decision on whether or not to engage in a virtual visit. It is clearly recognized that with future research and the evolution of technology, the suitability of telemedicine for each condition may change. The provider **shall** exercise their best clinical judgment in determining the appropriateness of a virtual visit on a case-by-case basis. Where evidence is lacking, providers **shall** use their best professional judgment, experience and expertise to determine whether or not a virtual visit is suitable.

Condition	Telephone Only*	Video
Routine Conditions That Are Suitable For Telemedicine Management		
Acid Reflux	Yes	Yes
Acute Conjunctivitis (e.g., uncomplicated viral or allergic)	No	Yes
Allergic rhinitis	Yes	Yes
Anxiety and Depression	Yes	Yes
Assessment of minor wounds	No	Yes
Burns (e.g., minor, sunburn)	No	Yes
Common rashes (e.g., contact dermatitis, shingles)	No	Yes
Constipation	Yes	Yes
Diabetes management (routine and follow-up)	Yes	Yes
Influenza (uncomplicated)	Yes	Yes
Sinusitis (uncomplicated)	Yes	Yes
Skin Infections	No	Yes
Smoking Cessation	Yes	Yes
Upper Respiratory Infections (uncomplicated)	Yes	Yes
Urinary tract infections (uncomplicated in non-pregnant women and in the absence of vaginitis)	Yes	Yes
Weight management	Yes	Yes
Conditions That May Be Suitable for Telemedicine Management		
Asthma	No	Yes

Bronchitis (mild symptoms, pneumonia not suspected)	Yes	Yes
Essential Hypertension	Yes	Yes
Migraine headache (diagnosis established, uncomplicated)	Yes	Yes
Musculoskeletal issues muscle strains and joint sprains	No	Yes
Pain control (mild to moderate for known conditions)**	Yes	Yes
Rash (generalized without fever or systemic symptoms)	No	Yes
Viral gastroenteritis (uncomplicated)	Yes	Yes

Conditions That Are NOT Suitable For Telemedicine Management***

Acute abdominal pain	No	No
Acute neurologic symptoms	No	No
Altered mental status and inability to communicate history or symptoms	No	No
Anaphylaxis or severe allergic reaction	No	No
Chest pain	No	No
Diarrhea and vomiting (severe and with at least moderate dehydration)	No	No
Immune-compromised patient in which condition poses significant added risk	No	No
Procedure required for treatment	No	No
Rash (disseminated with fever and systemic symptoms)	No	No
Acute, or chronic shortness of breath	No	No
Trauma (moderate to severe of one or multiple sites)	No	No
UTI or kidney stone (complicated)	No	No
Vision disturbance due to eye trauma, peri-orbital infection	No	No

* The use of phone may be appropriate for some of the conditions indicated as "no" depending on factors such as the ability of the patient/caregiver to describe the condition, the use of still photos or mobile device applications with video capability, and the confidence/expertise of the provider in establishing a diagnosis and care plan by telephone.

** An established provider-patient relationship may be warranted for certain conditions and medication requirements.

***Patients with these conditions should not be managed virtually. Urgent or emergent face-to-face evaluation is indicated for these or similar conditions.

Patient Needs

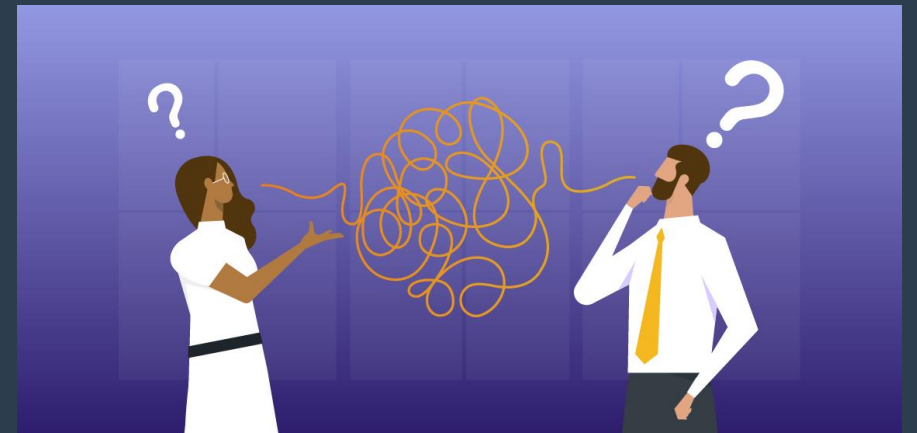
- **Language & limited English proficiency**
- **Limited digital literacy**
- **Older patients, younger patients, families**
- **Patients with disabilities**
- **Am Hosp Assn Disparities Toolkit**

<https://www.aha.org/hretdisparities/toolkit>



Patient Needs

- Identify languages
- Create multilingual patient resources
- Use accessible materials in multiple languages
- Federal regulations - must translate all “vital” documents = any info necessary to get services or benefits, or any information required by law:
 - telehealth platform
 - patient portal
 - intake forms
 - prescription information
 - instructions for discharge or follow-up appointments
 - phone and text reminders
 - emails
 - brochures
- Qualified medical interpreters familiar with remote interpretation (before, during, after visits)
- Match patient with provider when possible



I Speak Cards

2004
Census
Test

United States
Census
2010

LANGUAGE IDENTIFICATION FLASHCARD

- ضع علامة في هذا المربع إذا كنت تقرأ أو تتحدث العربية. 1. Arabic
- Խաղաղամ էՆք՝ Նչում կատարեք այս քառակուսում, եթե խոսում կամ կարդում եք Հայերեն: 2. Armenian
- যদি আপনি বাংলা পড়েন বা বলেন তা হলে এই বাক্সে দাগ দিন। 3. Bengali
- ឈ្លូមបញ្ជាក់ក្នុងប្រអប់នេះ បើអ្នកអាន ឬនិយាយភាសា ខ្មែរ ។ 4. Cambodian
- Motka i kahon ya yangin ûntûngnu' manaitai pat ûntûngnu' kumentos Chamorro. 5. Chamorro
- 如果你能读中文或讲中文，请选择此框。 6. Simplified Chinese
- 如果你能讀中文或講中文，請選擇此框。 7. Traditional Chinese
- Označite ovaj kvadratić ako čitate ili govorite hrvatski jezik. 8. Croatian
- Zaškrtněte tuto kolonku, pokud čtete a hovoříte česky. 9. Czech
- Kruis dit vakje aan als u Nederlands kunt lezen of spreken. 10. Dutch
- Mark this box if you read or speak English. 11. English
- اگر خواندن و نوشتن فارسی بلد هستید، این مربع را علامت بزنید. 12. Farsi

- Cocher ici si vous lisez ou parlez le français. 13. French
- Kreuzen Sie dieses Kästchen an, wenn Sie Deutsch lesen oder sprechen. 14. German
- Σημειώστε αυτό το πλαίσιο αν διαβάζετε ή μιλάτε Ελληνικά. 15. Greek
- Make kazyè sa a si ou li oswa ou pale kreyòl ayisyen. 16. Haitian Creole
- अगर आप हिन्दी बोलते या पढ़ सकते हैं तो इस बक्स पर चिह्न लगाएँ। 17. Hindi
- Kos lub voj no yog koj paub thiab hais lus Hmoob. 18. Hmong
- Jelölje meg ezt a kockát, ha megérti vagy beszéli a magyar nyelvet. 19. Hungarian
- Markaam daytoy nga kahon no makabasa wenna makasaoka iti Ilocano. 20. Ilocano
- Marchi questa casella se legge o parla italiano. 21. Italian
- 日本語を読んだり、話せる場合はここに印を付けてください。 22. Japanese
- 한국어를 읽거나 말할 수 있으면 이 칸에 표시하십시오. 23. Korean
- ໄທພາຍໃສ່ຊ່ອງນີ້ ຖ້າທ່ານອ່ານຫຼືປາກເວນພາສາລາວ. 24. Laotian
- Prosimy o zaznaczenie tego kwadratu, jeżeli posługuje się Pan/Pani językiem polskim. 25. Polish

- Assinale este quadrado se você lê ou fala português. 26. Portuguese
- Însemnați această căsuță dacă citiți sau vorbiți românește. 27. Romanian
- Помните этот квадратик, если вы читаете или говорите по-русски. 28. Russian
- Обележите овај квадратичу колико читате или говорите српски језик. 29. Serbian
- Označte tento štvorček, ak viete čítať alebo hovoriť po slovensky. 30. Slovak
- Marque esta casilla si lee o habla español. 31. Spanish
- Markahan itong kuwadrado kung kayo ay marunong magbasa o magsalita ng Tagalog. 32. Tagalog
- ໄທກາຄືກັບ ມາກກາລ ໃນໜ້າ ມັກກາທ່ານອ່ານຫຼືປາກເວນພາສາໄທ. 33. Thai
- Maaka 'i he puha ni kapau 'oku ke lau pe lea fakatonga. 34. Tongan
- Відмітьте цю клітинку, якщо ви читаете або говорите українською мовою. 35. Ukrainian
- اگر آپ اردو پڑھتے یا بولتے ہیں تو اس خانے میں نشان لگائیں۔ 36. Urdu
- Xin đánh dấu vào ô này nếu quý vị biết đọc và nói được Việt Ngữ. 37. Vietnamese
- באצינינט דעם קעסטל אויב איר לייענט אדער רעדט אידיש. 38. Yiddish

Talking to Families: Telehealth for Children with Special Needs

A tip sheet on involving the whole family in telehealth care for children with complex needs

STEP 1: Prepare for your telehealth visit



Be familiar with each family's communication needs before the appointment starts:

- ▶ Confirm the family has internet access and a computer, smartphone, or tablet to attend the virtual visit
- ▶ Ask the family if they will need assistive technology to communicate during a telehealth appointment
- ▶ Book a slightly longer telehealth appointment to account for delays or pauses in communication with a child

Extra Resource

Learn how to help families access telehealth services with the [Family Advocate Telehealth Training course](#) (<https://www.familytelehealthtraining.org/>)

STEP 2: Speak directly to the child during the telehealth appointment



Ensure the child has an important role in their own health care:

- ▶ Greet the child by name and have everyone present introduce themselves
- ▶ Speak directly to the child during the virtual visit, even if the child is non-verbal
- ▶ Save time for the child to ask questions or share something that is important to them
- ▶ Involve the child in the decision making process whenever possible
- ▶ Recognize that some children may be distracted or unable to sit for an entire appointment

STEP 3: Use child-friendly communication techniques



Keep the child engaged and comfortable so they can be more involved in their care:

- ▶ Take time to celebrate the child's successes and milestones
- ▶ Use props during the telehealth visit, such as toy animals, dolls, or colorful flashcards
- ▶ Encourage children to draw a picture while you chat with the parents or guardians and then share at the end of the telehealth appointment

STEP 4: Make sure the family has a clear plan for follow-up care



Ongoing partnerships between doctors and families give children the best chance to thrive:

- ▶ Follow up with any prescriptions, lab or imaging orders, or referrals
- ▶ Book a follow-up appointment, if necessary
- ▶ Schedule an in-person visit if the child was unable to participate in a telehealth appointment
- ▶ Ask the family if they have suggestions for improvement during the next telehealth visit

Telehealth for Individuals with Communication Disabilities

Telehealth is an option to help you access health care services, including if you have a communication disability such as difficulty hearing, seeing, or speaking.

What are communication disabilities?

Problems with hearing, vision, or speech are examples of communication disabilities.



Deafness and hard of hearing are common hearing impairments. [Fifty-five](#) percent of people aged 75 and over have substantial hearing loss.



Poor sight and blindness are examples of vision impairments. Many people have problems with their sight, including [93 million](#) American adults at high risk for serious vision loss.



Aphasia is an example of a language impairment. About [2 million](#) people in the United States have aphasia.

What accommodations are available to me to use telehealth?

Let your provider know if you need auxiliary aids and services to help you communicate during your telehealth appointment. Examples include:



Asking for more time. This could include additional time logging in and getting ready for the appointment. You could also ask for more time during your telehealth visit if needed.



Requesting real-time captioning. This allows you to read what your health care provider is saying.



Using a qualified sign language interpreter to participate in your appointment. The interpreter should be able to join your appointment from another location.



Using Telecommunications Relay Services. This can help you communicate by phone.



Using a screen reader with the telehealth platform. This is helpful if your provider is sending you messages or videos.



Using a headset or sound strengthening device. This can help to ensure you hear your provider during the appointment.



Having a caregiver or family member join a telehealth visit to support you.

Tip

These aids and services should be provided free of charge and in a timely manner. If a provider denies your preferred method of accommodation, they must still provide an alternative aid or service that is equally effective to the maximum extent possible.

Community Health Workers Help Patients Use Telehealth

Community health workers support the health care needs of their community and can help patients learn about telehealth.



Who are community health workers (CHWs)?

CHWs have many roles, such as digital health navigators. Below are some of the ways CHWs are uniquely able to build trust with the people they support to access telehealth:

- ▶ Coordinate access to telehealth services in a patient's preferred language
- ▶ Ensure the patient feels included and empowered to make health care decisions using telehealth
- ▶ Arrange needed health care and social services, including exploring online resources
- ▶ Promote the use of preventive care with telehealth and online tools
- ▶ Manage chronic conditions, such as diabetes, with telehealth

Why are community health workers important for telehealth?

CHWs help community members feel more comfortable with using telehealth. They support communication and teach technical skills to help community members connect with providers. CHWs can perform the below tasks:



Call before a scheduled telehealth visit to ensure the patient is comfortable using telehealth. CHWs can check on whether the patient would like a medical interpreter, assistive device, or other support to help with communication. CHWs can also call the patient after a telehealth visit to find out how well the technology worked and what could help improve a future telehealth visit.



Perform a walk-through pre-visit virtually or in the patient's home. CHWs can ensure technology equipment is working, such as the camera, speakers, microphone, and internet access. They can also check the space in the home for appropriate lighting and whether it is private.



Bridge the gap between patients and providers as part of the telehealth workforce team. For example, CHWs can share information about the patient with their provider to help address specific challenges that the patient may have difficulty communicating.



Explain that telehealth visits are private, and what patients can do to [protect personal health data](#).

Resources for integrating community health workers in your telehealth practice

It is important for CHWs to be familiar with telehealth technologies and workflows so they can help the communities and patients they serve. Below are recommended tools and trainings for CHWs:

- [On the Front Lines of Health Equity](#) (PDF) – U.S. Department of Health and Human Services
- [CHW Digital Navigator Toolkit](#) (PDF) – Telehealth Resource Centers

Visit [Telehealth.HHS.gov](https://www.hhs.gov/telehealth)



Telehealth 101: What libraries need to know

[Home](#) / [Training](#) / [Class Catalog](#) / Telehealth 101: What Libraries Need To Know

Libraries in locations across the United States are beginning to offer their patrons access to telehealth services as a strategy for addressing inequities in digital access to healthcare. This class introduces telehealth, why it's important, and how it enables people to have greater access to quality healthcare. Explore how different libraries provided patrons in their communities with access to telehealth services. This class will address privacy and ethical concerns, and review the technology and infrastructure needed to launch a successful telehealth program in your library. The class will consist of three one-hour modules. Each module will focus on one of the course objectives, which are:

- Recognize the different approaches/models to providing telehealth access within libraries.
- Describe resources available to the library for Telehealth technology and the role of the library in support of digital skills training for telehealth.
- Address potential ethical and legal concerns in offering telehealth access within libraries.

This is an online class taught in the Moodle learning management system over 4 weeks.

This class addresses increasing health equity through information, increasing health information access and use, and the NNLM initiative of Bridging the Digital Divide by identifying infrastructure-related resources available to the library for providing telehealth services. In addition, the class covers the role of the library in support of digital skills training for telehealth and describes different models of telehealth access within libraries that have been used by NNLM-funded projects.

Before Visit

Reminders



Information



Paperwork



Technology



Troubleshooting



Legal considerations



Accommodations



The Visit & FU

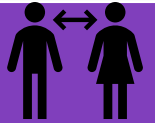
Confirmation



Intake



Getting patient engaged



Documentation



Evaluation



All things talked about last time!

<https://southwesttrc.org/>

<https://telehealthresourcecenter.org/>

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