BEST PRACTICE

Ensure your workflow addresses the entire telehealth life cycle.

Partner with your clinical champions to determine how best to update your workflow. Remember to incorporate legal feedback and security standards to make sure risk and liability are properly assessed. Then, when adapting your organization-specific workflow, consult the Workflow Design Checklist in Appendix G.1 for specific considerations.

1 BEFORE THE VISIT

Patient Engagement and Education:

- Identifying patients likely to succeed
- Educating patients on the offering
- Setting expectations for use
- Educating on proper appointment standards

Scheduling Protocols:

- Identifying appropriate clinical use cases
- Determining when/how telehealth visits will fit into the schedule
- Updating the EHR scheduler
- Identifying triage questions for scheduling appointments
- Ensuring clinicians are only providing care in states where they are licensed
- Ensuring telehealth is covered in clinicians' liability insurance

2 DURING THE VISIT

- Handling patient intake, "rooming" patients
- Supporting patient and clinician troubleshooting
- Setting up the exam room
- Communicating with patients

3 AFTER THE VISIT

- Knowing codes available for telehealth
- Integrating CPT® codes and appropriate modifiers into the EHR
- Sharing visit summary and follow up care