Key Considerations When Designing a Telehealth Workflow

Although each practice or organization's workflow may look different, there are key questions and criteria to keep in mind when building a telehealth-inclusive workflow.

Below are the key questions and criteria to keep in mind:

GENERAL CONSIDERATIONS

- ❑ How will the telehealth technology integrate with the EHR if it isn't through your existing EHR setup?
- ❑ How will clinicians document telehealth visits?
- ❑ How will telehealth visits fit into the clinic/clinician schedule?
- ❑ Where will telehealth visits take place in the clinic (e.g., administrative office, specific exam room)?
- ❑ How do patients first hear about telehealth? (e.g., from health care practitioner (HCP) during appointment, read in waiting room, read on website, email announcement)
- ❑ How do patients learn more about telehealth? (e.g., designated staff, website, email)
- ❑ How do patients register for telehealth?
- ❑ What reimbursement model makes most sense for your practice (e.g., bill insurance, flat fee for patient)?
- ❑ Who will keep track of developing reimbursement policies?
- ❑ Are the appropriate codes available in the EHR system?
- ❑ Do the care team members know what documentation is required for telehealth billing?

Key Considerations When Designing a Telehealth Workflow (Cont.)

PRE-VISIT

Identification

- ❑ How will eligible patients be identified for telehealth appointments?
- ❑ How do patients know if they and/or their case is eligible for a telehealth appointment? (e.g., digital triaging of patients to in-person or telehealth)
- ❑ When there is coordination between providers, how will information exchange occur?
- ❑ How do we ensure the clinician is licensed in the patient's state?

Education

- ❑ What type of preparation education is needed? (e.g., how to download and use platform, visit expectations)
- ❑ Who educates the patient on telehealth?

Communication

- ❑ How will patients be reminded of appointments?
- ❑ Who sends appointment reminders?
- ❑ Who will field patient questions?
- ❑ How are appointments scheduled? (e.g., time blocks vs. throughout the day; digitally vs. manually)
- ❑ How will you ensure eligible and interested patients are covered?

Managing Coding and Billing

- ❑ Who will verify insurance eligibility and manage authorization?

DAY OF/DURING VISIT

Administrative

- ❑ How will patients "check in" for their appointment?
- ❑ Who will get patients set up on the platform (e.g., "room" them)?
- ❑ How will patient consent be obtained and stored?
- ❑ Who ensures the HCP's room is set up? (e.g., clean, quiet, Wi-Fi working)
- ❑ Who troubleshoots with the patient and/or HCP?
- ❑ How many people need to be ready to answer patient and/or HCP questions?
- ❑ How does the handoff to the provider take place?

Clinical

- ❑ Which care team member(s) is providing virtual care?
- ❑ What is the record-keeping workflow? (e.g., codes and modifiers to include in note)
- ❑ What are the protocols for telehealth patients?

POST-VISIT

Clinical

- ❑ How are prescriptions or follow-up tests ordered?
- ❑ How is the care plan entered?

Administrative

- ❑ When and how will patient follow-up be conducted?
- ❑ How often are patients expected to have an in-person visit and how is that communicated to patients?
- ❑ How is feedback collected?

Managing Coding and Billing

- ❑ How is payment collected?
- ❑ Who will manage reimbursement paperwork?
- ❑ Who will track reimbursement status?
- ❑ Who will work with insurance companies to ensure billing is correct?
- ❑ Who will follow up on rejected reimbursements?