A telehealth implementation is only successful when patients are aware of the option, are empowered to use it, and appropriately interact with the platform.

Below is a five-step outline of how to educate patients about telehealth and keep them engaged.

1. **Announce Telehealth Launch and Availability**
   - **Timing:** Go-live date; Quarterly, Before/after visits; New patient; Plan to message the same patient about three times about telehealth before engagement
   - **Messaging:** Showcase benefits including increased convenience; increased access to specialized care not locally available; decreased time and money spent getting to care; use cases; evidence; appropriate uses; where to sign up
   - **Channels:** In-person; Office collateral; Email newsletter; Patient portal; Website; Social media

2. **Educate Patient About Using Telehealth**
   - **Timing:** Once visit is scheduled
   - **Messaging:** How to download the app or platform; learn more about the telehealth process; what to expect; payment/billing practices; FAQs
   - **Channels:** Email; Phone

3. **Telehealth Visit Reminder**
   - **Timing:** Day of visit; 15 minutes before visit
   - **Messaging:** Walk through check-in process; provide link to meeting
   - **Channels:** Email; Text

4. **Follow-up Care**
   - **Timing:** After visit
   - **Messaging:** Collect patient satisfaction feedback; schedule any necessary follow-up care
   - **Channels:** In telehealth platform; Email; Text

5. **Scaling Announcements**
   - **Timing:** Quarterly
   - **Messaging:** New use cases and/or capabilities of telehealth solution
   - **Channels:** Website; Social media; Patient portal; Email; Text

Disclaimer: This document is for informational purposes only. It is not intended as medical, legal, financial, or consulting advice, or as a substitute for the advice of an attorney or other financial or consulting professional. Each health care organization is unique and will need to consider its particular circumstances and requirements, which cannot be contemplated or addressed in this Playbook.