NEQCA
New England Quality Care Alliance
Affiliated with Tufts Medical Center

TELEHEALTH BEST PRACTICE WORKFLOWS

PRACTICE SET-UP

1. Inform your patients about your practice's telehealth policies during the COVID-19 crisis
   a) Send a blast portal message (electronic communication) to all patients about telehealth appointments being offered by the practice (samples available).
   b) Update voice message
   c) Update social media (if applicable)
   d) Update website (if applicable)
   e) Inform patient answering service
2. Understand the billing and coding guidelines for telehealth visit
3. Create EMR template to capture necessary telehealth components
4. Training
   a) Familiarize yourself with the telehealth workflow by performing several "test" patients with trainer and staff

PATIENT IDENTIFICATION

1. Proactive triage of your existing schedule
   a) Review your existing schedule to review patients that need to be seen in person, or whether they can be managed via telehealth
2. Assess incoming calls
   a) Determine whether incoming patient requests (e.g., refill requests, pages on call, urgent calls to office) are better managed through a telehealth visit
3. Proactive "targeted" patient outreach.
   a) Outreach to patients at risk because of comorbidities, or members without office visits to monitor if they remain medically stable
4. Enroll your patient in your patient portal
   a) Having your patient on your portal will make it easier to send post-visit communications and instructions

PATIENT SCHEDULING

1. Maintain your practice management system as the "source of truth"
   a) Your telehealth system and practice management system/EMR should match
      i. Update your appointment system/EMR with a notation of how the visit will be conducted, i.e. telehealth
   b) Maintaining your practice management system/EMR will simplify follow up, track billing, and avoid double booking over the course of a fluid day
2. Ensure contact information is consistent
   a) Ensure the email or phone number used in telehealth system is the same as what is in your EMR and practice management system. This will make it easier to trouble shoot if needed
3. Account set-up/Technology/Expectations
   a) If you are using AmWell for telehealth, have them set up the APP prior to scheduling the appointment (if possible)
   b) Technology discussion
      i. Does the patient have a smart phone, or a laptop/computer/tablet with a camera? How is their internet connection?
   c) Telehealth Appointment Expectations
      i. What to expect the day of the appointment from the staff and provider? Will there be a wait? Who can they call if they run into any issues?

TELEHEALTH VISIT

PRE-VISIT PATIENT PREPARATION

1. Call the patient before the visit
   a) Your Nurse or Medical Assistant could/should call the patient 30 – 60 minutes or 1 day before the visit to ensure the following:
      i. Telehealth set up: Confirm that the patient has downloaded the application, set up their account, and has tested the telehealth application
      ii. Set up EMR template: Your Nurse/Medical Assistant can set up your EMR note as usual and ask any template like questions:
         - Patient medication and medical history review (visit specific)
         - Home weight and BP (if available and/or applicable)
      iii. Patient preparation: Instruct patient to gather anything needed for the visit (e.g., list of meds, blood pressure cuff, glucometer log, body weight, etc.)

DURING THE VISIT

1. Hardware
   a) Consider having separate devices for telehealth and EMR, unless telehealth is integrated into EMR
2. Visit duration
   a) Remember to log the visit duration – this is commonly overlooked
3. Patient feedback
   a) Consider soliciting feedback from the patient so you can improve your processes

POST VISIT and BETWEEN VISITS

1. Documentation checklist
   a) The documentation requirements can be extensive, especially when the reimbursement landscape for telehealth is shifting. Before signing the note, it may be helpful to run a checklist on all your notes at the end of the day to make sure the requirements are being met
2. Post-visit workflow
   b) A regular in-person visit; the workflow does not end when the provider leaves the room. Remember to continue your normal post-visit workflow (e.g., scheduling follow-up appointments, scheduling referrals, etc.)
3. Prepare for the unexpected
   c) Things may not go as planned, so have some contingencies. For instance, consider having your front desk call patients if you are running late

MISCELLANEOUS

1. Keep an eye out for other materials being made available on the NEQCA website under COVID19 section
2. Don't make assumptions
   a) Patients may be more willing to try telehealth in order to limit potential exposure to the coronavirus, and friends or family may be willing to help those who need assistance in setting up a telehealth visit.
3. Appoint a point person at your practice for telehealth, i.e. telehealth super user
4. Telehealth *seems* to work best via a smartphone app
   a) Incoming phone calls will interrupt the visit, to avoid, enable "do not disturb" while seeing patients
   b) Set your screen lock to NEVER
   c) Sometimes the Wi-Fi connection can be weak, if so, ask your patient to switch off Wi-Fi and transition to the LTE network (cellular data)
5. Consider adjusting your extended hours' policy to offer early morning or late evening "telehealth" visits

***** If you require support developing any specific practice workflows or materials for the practice or patients, please contact your NEQCA representative***