CHANGE CONCEPTS FOR OPTIMIZING TELEHEALTH

Driver	Change concept
1.1 Dynamic plan based on assessment of need	1.1.1 Regularly address overall population needs for telehealth based on patient and visit data.
	1.1.2 Look for innovative ways to use virtual care to address needs and preferences of patients and the care team.
	1.1.3 Conduct formal operations, technology, clinical, and patient readiness assessments.
	1.1.4 Assess operational impact of all types of telehealth (phone, synchronous video, other).
	1.1.5 Establish aims, determine how to measure them, and include these in the organization's strategic and quality plans.
1.2 Policies and procedures to cover HR, operations, legal	1.2.1 Identify candidates who will benefit from telehealth using defined criteria.
	1.2.2 Identify patients who may have difficulty engaging in telehealth and develop mitigation strategies for those for whom telehealth is desired.
	1.2.3 Designate oversight responsibility for telehealth.
	1.2.4 Follow federal, local, medical practice and malpractice insurance guidance for virtual care provision.
	1.2.5 Engage patients and frontline staff to develop and implement generalized workflows and those needed for specific population segments.
	1.2.6 Adapt job descriptions and onboarding material to include telehealth expectations.
1.3 Optimized space, equipment, and technology	1.3.1 Assign responsibility for technical support.
	1.3.2 Confirm or supply needed home monitoring devices and interfaces.
	1.3.3 Protect privacy and security in all locations and with all device options.
	1.3.4 Stay current with evolving technology.
	1.3.5 Anticipate things that can go wrong and develop written contingency plans.
2.1 Standardized, role-based workflows, scripts, and documentation	2.1.1 Define responsibilities for all aspects of the telehealth visit, including the provision of self-management support.
	2.1.2 Use scripts for reliable messaging before, during, and after the visit.
	2.1.3 Incorporate virtual care and remote monitoring documentation into an overall record and care plan.

	2.1.4 Regularly review and standardize telehealth workflows.
	2.1.5 Develop procedures to ensure patient safety in the virtual care environment.
2.2 Communication and marketing to reach internal and external stakeholders	2.2.1 Engage a clinical champion.
	2.2.2 Engage patient champions.
	2.2.3 Build awareness in staff and community about telehealth options offered by the practice.
	2.2.4 Assist patients and families in understanding the types of care and visits appropriate for telehealth.
	2.2.5 Prepare staff, patients and families for positive and effective engagement through telehealth.
2.3 Formal initial and ongoing training approaches	2.3.1 Train all members of the care team for their roles and responsibilities for telehealth.
	2.3.2 Cross train staff in their roles and responsibilities for telehealth.
	2.3.3 Provide staff with tools and information to engage patients in a culturally appropriate manner.
3.1 Continuous data-driven quality improvement system	3.1.1 Monitor care delivery performance for all patients, those that receive telehealth and those that do not.
	3.1.2 Incorporate feedback from staff, patients, and families to improve experience with telehealth for all.
	3.1.3 Regularly monitor and act on metrics that align with goals.
3.2 Ongoing review of the business case for telehealth services.	3.2.1 Regularly assess the value telehealth brings, including documentation of value in non-financial terms as well as financial value as a return on investment.
	3.2.2 Assess and optimize the efficiency of telehealth services.
	3.2.3 Maximize traditional and alternative funding opportunities.
	3.2.4 Understand positive and negative financial impact of telehealth on patients.