

Telemedicine Implementation Checklist

Part 1: Lay the Foundation

Step	Suggested Stakeholders
1. Define your problem statement	Providers, Staff, Patients, Finance, Legal, IT
<ul style="list-style-type: none"> <input type="checkbox"/> What is the value proposition of telemedicine for your organization, providers, staff, and patients? <input type="checkbox"/> How can telemedicine address the pain points for providers and staff, and the gaps in care patients face? <input type="checkbox"/> How does telemedicine align with your strategic goals? <input type="checkbox"/> Any constraints (ex. IT, legal, financial, regulatory etc.) to be aware of? <p>Goal of Step: <i>Identify the true need for telemedicine which would have the greatest impact for your organization</i></p>	
2. Form your implementation team	IT, Clinical Leadership, Administrative Leadership, Finance, Legal, Billing/Compliance, Marketing
<ul style="list-style-type: none"> <input type="checkbox"/> What are the roles and responsibilities of each area? <input type="checkbox"/> Is every area of your organization necessary for successful implementation represented here? <input type="checkbox"/> What is the structure of this team? For example: Any subgroups needed? How often should you meet? Timeline for key decisions? <p>Goal of Step: <i>Make sure you have the right people involved from the beginning</i></p>	
3. Define success	Implementation team
<ul style="list-style-type: none"> <input type="checkbox"/> What are your desired outcomes and deliverables? <input type="checkbox"/> What metrics and measures are appropriate for evaluating progress towards these outcomes and deliverables? <input type="checkbox"/> How will you collect data for these metrics and measures? <p>Goal of Step: <i>Defining success helps ensure your goals are SMART: Specific, Measurable, Achievable, Realistic, and Timely</i></p>	

Part 2: Evaluate your Technology Options and choose a Vendor

Step	Suggested Stakeholders
4. Assess your current platform and its capabilities	IT, Clinical Leadership, Administrative Leadership
<ul style="list-style-type: none"> <input type="checkbox"/> Does it support integrating video technology, or will that have to be separate? Is it compatible with certain vendors? <input type="checkbox"/> Does it suggest any characteristics to look for when evaluating available vendors and products? <input type="checkbox"/> Are there any constraints, such as bandwidth, to be aware of? <p>Goal of Step: <i>Understand your current platform in order to ensure new technology will work well for you</i></p>	
5. Identify potential vendors and products	IT, Clinical Leadership, Administrative Leadership
<ul style="list-style-type: none"> <input type="checkbox"/> Survey similar organizations to see what they use and learn about their experience 	

- Survey collaboratives and associations for reviews
- Consider building a Request for Proposal (RFP) to send to potential vendors
- Schedule demos with vendors
- Ensure vendors can comply with HIPAA rules and are willing to sign a Business Associate Agreement (BAA)
- Recommend a few vendors to leadership and provide established criteria to help them decide

Goal of Step: *Pick a vendor that is right for your organization and who you would be excited to enter a long-term partnership*

6. Contract with your vendor

Implementation Team

- Set clear expectations for how the partnership will work and negotiate terms. For example: Will they provide training or other support? What is their definition of success, and how does it align with yours? What is their upgrade schedule like?
- Make sure all terms are clearly captured in legal documents
- Establish the timeline for the current contract and when it will need to be renegotiated

Goal of Step: *Make sure expectations are clear and aligned, and are codified in a legal document*

Part 3: Establish necessary policies and infrastructure for implementation

Step	Suggested Stakeholders
7. Create a privileging process for providers to perform telemedicine	Clinical Leadership, Legal, Finance, IT
<ul style="list-style-type: none"> <input type="checkbox"/> Review regulations around what training and other items are required in order to provide telemedicine <input type="checkbox"/> Create training and a system to ensure that all necessary providers complete it <input type="checkbox"/> Determine whether telemedicine will be a standalone privilege, or whether it will be added to providers' core privileges <p>Goal of Step: <i>Make sure all providers meet regulatory requirements in terms of training and practice</i></p>	
8. Determine equipment needs	Clinical Leadership, Administrative Leadership, IT
<ul style="list-style-type: none"> <input type="checkbox"/> What equipment will you need to perform telemedicine? For example: Headsets, webcams, speaker phones? <input type="checkbox"/> Will equipment be ordered and managed centrally? Or will each area be responsible for obtaining their own equipment? <input type="checkbox"/> How much equipment should be available to each area? For example: One set per provider? One set per average number of providers in clinic? Etc. <p>Goal of Step: <i>Have a clear process for obtaining equipment</i></p>	
9. Establish guidelines for telemedicine workspaces	Clinical Leadership, Administrative Leadership, IT
<ul style="list-style-type: none"> <input type="checkbox"/> Will providers be able to perform telemedicine off-site, or should they do it at clinic only? <input type="checkbox"/> If providers can perform off-site, what are the guidelines in terms of having adequate bandwidth, privacy, appropriate lighting, and minimal background noise? <input type="checkbox"/> What guidelines should each clinic area use in identifying telemedicine workspaces? 	

Goal of Step: *Ensure telemedicine visits are conducted with privacy and that there are no distractions or disruptions*

10. Determine what setup is needed with vendor

Clinical Leadership, Administrative Leadership, IT

- Do providers have to configure individual accounts to use the product?
- Does product have to be installed by IT?

Goal of Step: *Make sure product is installed and configured appropriately for all users*

Part 4: Workflow and Training

Step	Suggested Stakeholders
11. Design, document, and disseminate a telemedicine workflow	Clinical Leadership, Administrative Leadership
<ul style="list-style-type: none"> <input type="checkbox"/> Decide whether your organization should have one standard workflow, or whether each clinic area can create a workflow that meets their needs. If there can be more than one workflow, are there elements that should be standard across the organization? <input type="checkbox"/> Design workflow(s) and clearly identify roles and responsibilities for: scheduling telemedicine appointments, communicating with patients, checking in appointments, conducting the actual visit, and documenting and billing telemedicine visits <input type="checkbox"/> Develop resources to support workflows such as job aids, procedures, templates etc. <input type="checkbox"/> Test the workflow(s) by doing internal practice telemedicine visits <input type="checkbox"/> Socialize the workflow(s) and determine where to house it so it can be accessible to everyone that needs it <p>Goal of Step: <i>Document your workflow for telemedicine and ensure everyone understands their role</i></p>	
12. Train and prepare providers and staff	Clinical Leadership, Administrative Leadership, IT
<ul style="list-style-type: none"> <input type="checkbox"/> Provide technical and operational training on new technology and telemedicine workflow. See if vendor can provide technical training. <input type="checkbox"/> Consider a “train the trainer” approach; identify champions in each role that can train others and answer questions <input type="checkbox"/> Ensure clinic areas provide training on all clinic area-specific workflows to ensure all roles involved are clear on the process <input type="checkbox"/> Encourage all providers to conduct practice sessions to become comfortable with all steps involved <input type="checkbox"/> Include training in onboarding process for new staff and providers <input type="checkbox"/> Determine how and when training will be reviewed and revised as needed <p>Goal of Step: <i>Ensure everyone involved in telemedicine is trained and ready for go-live</i></p>	
13. Ensure everything is in place for go-live	Implementation Team
<ul style="list-style-type: none"> <input type="checkbox"/> Are providers privileged for telemedicine? <input type="checkbox"/> Do clinic areas have the necessary equipment? Has the setup with the vendor been completed? <input type="checkbox"/> Have all providers and staff reviewed the workflow(s) and gone through training? <p>Goal of Step: <i>Make sure all previous steps have been completed before go-live; adjust go-live date if necessary</i></p>	

Part 5: Go-live

Step	Suggested Stakeholders
14. Have additional support on hand for telemedicine launch	Implementation Team
<ul style="list-style-type: none"> <input type="checkbox"/> Be prepared to support providers and staff with any issues during initial visits <input type="checkbox"/> Be prepared to support patients with any issues during initial visits <input type="checkbox"/> Allow for extra time in telemedicine visits in the beginning <p>Goal of Step: <i>You will need additional time and support during beginning until telemedicine reaches a steady state</i></p>	
15. Test your workflows and adjust if necessary	Clinical Leadership, Administrative Leadership
<ul style="list-style-type: none"> <input type="checkbox"/> Is your workflow working as intended? Do any roles or responsibilities need to be adjusted? <input type="checkbox"/> Solicit feedback from providers and staff on what's working well and what needs to improve <input type="checkbox"/> Collect any feedback from patients on their experience to see if any adjustments are warranted <input type="checkbox"/> Track metrics and measures of success outlined in step 3 <p>Goal of Step: <i>Learn from implementation and adjust if necessary</i></p>	
16. Evaluate success	Implementation Team
<ul style="list-style-type: none"> <input type="checkbox"/> Review data used to track metrics and measures of success <input type="checkbox"/> Evaluate feedback from providers, staff, patients, and implementation team <input type="checkbox"/> If short of your goals, rework and iterate your process as necessary <input type="checkbox"/> If reaching your goals, disseminate success and consider next iteration of telemedicine <p>Goal of Step: <i>Understand how telemedicine is going before determining next steps</i></p>	

Part 6: Stabilize and Scale

Step	Suggested Stakeholders
17. Integrate telemedicine into everyday operations	Implementation Team
<ul style="list-style-type: none"> <input type="checkbox"/> Ensure any improvement opportunities identified during go-live are resolved <input type="checkbox"/> Develop process for ongoing support and training <input type="checkbox"/> Develop process for auditing visits to ensure workflow is being followed <input type="checkbox"/> Create a "handoff" process from implementation teams to clinic areas for oversight of telemedicine <p>Goal of Step: <i>Telemedicine should be and incorporated into everyday operations once stable</i></p>	
18. Look for ways to expand telemedicine	Implementation Team
<ul style="list-style-type: none"> <input type="checkbox"/> Determine next use case for telemedicine. For example: New patient populations? New specialties? Different types of visits? <input type="checkbox"/> Adjust workflow(s) for next use case if necessary <input type="checkbox"/> Adjust training for next use case if necessary <input type="checkbox"/> Determine how you will track metrics and measures of success for next use case <p>Goal of Step: <i>Build upon your success with telemedicine and look for other ways telemedicine can address your needs</i></p>	