



Getting Started with Telehealth: 10 Best Telehealth Practices to Ensure Your Organization's Success

Thinking about offering telehealth visits to your patients? Wondering how to do it quickly and successfully throughout your practice? If so, you're not alone. Telehealth has expanded rapidly, especially as healthcare organizations respond to COVID-19 and look for ways to deliver timely care while limiting direct patient contact. Finding and implementing the right solution for your organization requires careful planning and consideration of several key factors, however. Review the following best practices to launch a successful telehealth program that will meet your patients' needs today—and tomorrow.

1. Prioritize a quick and easy setup.

When choosing a telehealth platform, what are the most important things to consider? In addition to making sure the solution provides the unique features and functionalities specific to your organization's needs, consider these three factors first:

- **Deployment:** How quickly can the platform be set up?
- **Support:** What is the easiest way to access vendor support?
- **Scaling:** Can the platform support my organization's current and future volumes of patients, providers and staff?

Your patients' health and safety are your most important considerations, so look for a vendor that prioritizes a fast and efficient implementation process to ensure they continue to receive the care they need. Later, when your staff and patients are more accustomed to using telehealth, you can focus more on criteria such as scaling and security.

2. Automate patient intake.

Now that your patients are no longer in a physical space, how do you manage all of the pre-visit processes that would normally happen in the waiting room? What does the registration process look like? How do you collect patients' demographic and clinical information?

Phreesia's [Intake for Telehealth](#) workflow allows you capture necessary patient intake information for every telehealth visit, at scale. Patients can complete all of the steps in a regular check-in process—verifying their demographics, paying their copay or balance, signing consents, and reviewing any confidential information—all from the comfort and privacy of their own device.

3. Prompt patients to book virtually.

Create awareness about your telehealth offering by sending messages to patients that introduce the service and prompt them to schedule a virtual visit. Create some external communications about your telehealth services, including website, newsletter and social media announcements that highlight its value to patients. Phreesia's Practice Announcement email template can help you present telehealth to your patients, as well as instruct them on how to schedule an appointment and outline what they can expect during the visit. You can also use Phreesia's Health Campaigns to send targeted messages to specific patient populations or individual patients.

Examples:

- Invite specific patient groups who require **continuity of care** to schedule a telehealth follow-up visit.
- Reach out to patients who recently **cancelled** an appointment and ask them to schedule a telehealth visit instead.
- Notify patients who recently **missed** an appointment that they have the option to book a telehealth consultation instead.

4. Streamline the technology to help patients embrace change.

Good communication is the key to successfully introducing a new technology system, so make sure your patients are not only aware of your telehealth services, but also educated about how and when to use them. And just as with in-person visits, it's important to remind patients about their upcoming telehealth appointments, and prepare them for what to expect.

Using Phreesia's [Intake for Telehealth](#) solution, patients receive an email or text that allows them to pre-register and sign consents. Once their pre-registration is completed, patients receive information about what to expect in their telehealth visit. Minutes before the visit, patients receive another email or text to finalize their check-in and are given a link to enter the virtual waiting room or shown how to start their telehealth session (depending on the telehealth vendor).

5. Mind your screenside manners.

Good bedside manners are an integral part of the patient visit and overall experience. As your organization shifts to virtual appointments, remember that telehealth encounters require the same courtesy and compassion as in-person visits.

Use [this Telehealth Visit Etiquette Checklist](#) to ensure that your clinical team follows the same professional standards during virtual visits that they maintain during in-person consults.

6. Anticipate, address and act on challenges.

Make sure your staff has a solid understanding of the telehealth solution and is comfortable helping patients navigate the platform as they begin to use it. While you may encounter some initial technical challenges or barriers, you can improve the likelihood of successful telehealth adoption by considering how you will address the following challenges before you launch your program:

- **Access:** Patients and providers in rural areas may have limited access to high-speed internet.
- **Tech-Savviness:** Not all patients are familiar with or comfortable using technology to manage their healthcare and may take longer to adjust. Note that this is often not related to a patient's age.
- **Language:** Does your practice see patients who speak a language other than English? Consider how your interpreter services will support them during telehealth visits.

7. Consider a phased approach to implementation.

Decide whether you want to make telemedicine available to all patients at all times, or if a phased approach is more appropriate. Depending on your organization's needs and capabilities, you may decide to designate certain times and providers for telemedicine encounters as follows:

- **Dedicated visit types:** Target a subset of appointment types that are well-suited to virtual visits (e.g., Medicare Annual Wellness visits).
- **Dedicated hours:** Establish pre-set business (or after-business) hours for telemedicine encounters.
- **Dedicated providers:** Ask those providers who are most receptive to telemedicine (or who have prior experience with it) to be the first to offer virtual visits.

8. Protect your data.

Consult with your privacy and security experts to evaluate potential telehealth vendors. Your telehealth vendor should have privacy and security controls in place to safeguard your patients' protected health information (PHI). For instance, the vendor should encrypt PHI in motion and at rest to prevent unauthorized individuals from accessing or disclosing PHI. Make sure you have a business associate agreement (BAA) with your vendor to ensure compliance with HIPAA privacy and security requirements. Look for industry-recognized security certifications such as SOC 2 Type 2. Also, ask your telehealth vendor if their company offers additional security features, such as multi-factor verification or single-sign-on authentication for patients.

9. Monitor reimbursement changes.

As federal guidelines and policies for telehealth evolve, it's important to stay up to date on reimbursement rates and changes. Designate a staff member in your billing department to visit payer websites daily. Ask him/her to create a spreadsheet that summarizes updates and post it to a local shared drive. Ask your billing team to hold regular meetings with key stakeholders and send regular internal emails to everyone in your organization. This [CPT reporting one-pager](#) from the American Medical Association offers at-a-glance CPT information for telehealth visits and COVID-19 testing. Additionally, the American College of Physicians' [COVID-19 Practice Management Resources](#) provide a robust toolkit of information about billing and payer policies, as well as guidance on practice financial and management issues during this national emergency.

10. Scale early and effectively.

As you incorporate feedback from patients and staff, consider how telehealth could improve other aspects of your practice, including reaching additional patient populations, treating more conditions and expanding visit types, practice specialties and services, and care locations. It's likely that telehealth is here to stay—and with the right implementation plan, your organization can successfully scale these services to a wide range of patients across your organization.



Contact your account manager or visit phreesia.com to learn more about how Phreesia can support your intake needs for telehealth, as well as your broader COVID-19 response efforts.