



Telehealth is Here to Stay

VERSION 1

Last Updated: June 24, 2020. Updox's Practice Transformation Series provides evidence and expert opinion on the future of healthcare and shares best practices on how to transform your practice to deliver the best in-person and virtual care. The COVID-19 pandemic drastically accelerated telehealth adoption with the removal of many long-standing telehealth barriers. This guide is intended to set your practice up for long-term success with telehealth. To learn more, visit [updox.com](https://www.updox.com).

Get Started

Set your practice up for long-term telehealth success by implementing these essential steps to get started.

1

Identify Telehealth Champions

Identify at least one telehealth champion at your practice to:

- Determine and evaluate telehealth goals
- Evaluate and pilot technology
- Develop telehealth workflow
- Lead telehealth trainings

2

Review Federal and State Laws and Regulations

It is important to review federal and state law and regulations for telehealth. Telehealth requirements to consider include, but are not limited to:

- Consent
- Liability
- Licensure
- Prescribing
- Privacy and Security
- Reimbursement

Additional resources are found at the end of this document.

3

Familiarize Yourself with Updox Resources

Updox has resources available to ensure your practice's success with telehealth.

- [Updox Telehealth information](#)
- [Updox Community:](#) Our online customer Community allows users to ask questions and view best practices on using Updox products. We also have an extensive Learning Center to get started
- [Updox Support:](#) Our support team is available live via chat or by email to assist

Design Your Telehealth Workspace

Use this checklist to design a telehealth workspace that provides a safe and comfortable experience for patients and providers.

TELEHEALTH WORKSPACE CHECKLIST

- Private and quiet room or space**
- Diffuse room lighting without shadows**
- Desk or counter**
- Comfortable chair**
- Desktop or laptop computer**
- Additional monitor or tablet** (one screen will be used to document and the other screen will be used to view the patient)
- Wired internet connection** (for less interruptions)
- Headset with microphone**
- Webcam at eye level**
- Clean background free of clutter**
- Practice support team information**
- Printed copy or link to [Updox technical guide](#)**

Develop Your Telehealth Workflow

Make these key decisions ahead of time to increase adoption and minimize friction when developing your telehealth workflow.

Key decisions to make when developing your telehealth workflow.

1. Providers

Identify which providers are willing to offer telehealth visits. This may include non-physician providers such as nurse practitioners, physician assistants, pharmacists and more.

2. Visit Times

Determine when telehealth visits will occur. Your practice may choose to offer them as part of your regular schedule or during a specific block of time.

3. Visit Types

In a May 2020 survey, Updox users reported three main visit types offered via telehealth are: 1.) medication management, 2.) chronic disease management, and 3.) sick visits. Telehealth is not appropriate for all visits including first-time appointments, appointments requiring physical assessment, and when a patient is experiencing a symptom outside the bounds of your clinical protocols for telehealth visits (e.g., fever, difficulty breathing, vomiting, confusion, agitation, or other abnormal mental states, etc.).¹ For detailed, common use cases for telehealth, see [Figure 1](#) on the following page.

4. Workflow Visual

A visual mapping out the steps of the telehealth process will allow providers and staff members to understand the workflow. Here are a few examples:

- [American Academy of Pediatrics](#)
- [Aledade](#)
- [Updox](#)

Develop Your Telehealth Workflow (continued)

Figure 1: Common Uses for Telehealth¹

- Appointments for existing patients
- Prenatal visits
- ADHD, anxiety, depression, toddler behavioral, and sleep (follow-up and medication management)
- Asthma follow-up and medication management (not when having acute symptoms or wheezing); children on high dose inhaled steroids may need to be seen in the office to monitor growth
- Allergy evaluation/medication management
- Eczema, acne evaluation, and medication management and follow-up
- Any other medication management not requiring a physical exam
- Simple conjunctivitis (pink eye) without fever
- Minor trauma screening (lacerations, abrasions, animal bites)
- Follow-up on dietary guidance
- Review of lab, X-ray, and consultation reports
- *Surgery follow-up*
- Foreign travel (may require a vaccination visit)
- Foreign adoption (review of records prior to adoption)
- Lactation

Train Your Practice

Training your practice on telehealth involves training providers, staff, and patients.

For all, the following information will need to be shared:

- How to schedule a telehealth visit
- Who is eligible for a telehealth visit
- How to use Video Chat
- Differences between a telehealth visit and in-person visit
- How to test your device
- How to troubleshoot technical issues
- Telepresence reminders including camera at eye level and minimizing audio and visual distractions

For providers and staff, these additional topics should be covered:

- Telehealth workflow
- Individual roles and responsibilities
- Marketing for telehealth services including social media posts, updates to website, and text or email
- Patient education

Telehealth Resources

1. American Medical Association Telehealth Implementation Playbook:
<https://www.ama-assn.org/system/files/2020-04/ama-telehealth-playbook.pdf>
2. American Telemedicine Association:
<https://www.americantelemed.org/>
3. Center for Connected Health Policy:
<https://www.cchpca.org/>
4. Centers for Medicare & Medicaid Services:
<https://www.cms.gov/Medicare/Medicare-General-Information/Telehealth>
5. National Consortium of Telehealth Resource Centers:
<https://www.telehealthresourcecenter.org/>
6. Office of National Coordinator for Health Information Technology Health IT Playbook:
<https://www.healthit.gov/playbook/patient-engagement/>
7. State Medical Association
8. State Medical Board