



TELEHEALTH ONBOARDING CHECKLIST

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There are many steps to consider when implementing telehealth into your clinic. This checklist can be used to help navigate the Telehealth onboarding and implementation process.

CHECKLIST

- Select your telehealth platform
 - Stand-alone OR Integrated with current EHR
 - HIPAA Compliant (Protection of PHI)
- Design Telehealth policy for the practice including workflow
 - Availability for scheduling
 - Provider Schedules- allotted time
 - Visit Types
- Establish the minimum requirements for hosting a Telehealth visit
 - Computer
 - Camera
 - Microphone
 - Quiet Space
- Create necessary documentation templates, consents and questionnaires
 - Examples can be found on the Catalyst Health Network Resource page [here](#)
- Share with your patients that they will need the following when scheduling Telehealth visit with Audio and Video
 - Camera
 - Microphone
 - Web enabled

- Quiet/private space (when possible)
- Set up your PM/EHR system to support Telehealth billing
 - Facility set up with POS = 11
 - Modifiers added to the system for Telehealth
 - *Telehealth visit with Video & Audio: 95*
 - *Telehealth visit with Audio only: GQ*
 - Set up visit type for Telehealth visits

Note: Please reference the payer grid found on the Catalyst Health Network Resource Website [here](#) for the most up-to-date information regarding Telehealth modifiers and POS

- Educate all users on policies for billing Telehealth and being reimbursed for your state
 - Resource: [Center for Connected Health Policy](#)
- Educate providers on proper documentation
 - **Consider** setting up a test patient for workflow review with staff and providers
- Update your marketing material and social media outreach to inform the patient population of this service
 - Social media channels
 - Patient portal
 - Website
 - Campaigns
 - Email Blasts
 - Other patient communications
- Develop a plan to support your patients that will access this technology
 - Consider patient internet access
 - Remove potential barriers for patients
 - Use or create patient friendly instructions for your chosen telehealth platform

Note: Reach out to info@catalysthealthnetwork.com if you have any questions or need additional support optimizing your telehealth solution.