Idaho Telehealth Readiness Assessment for Primary Care Clinics

Health Management Associates
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Idaho Telehealth Webinar Series

**Purpose:** In alignment with SHIP, provide a telehealth curriculum to primary care practices to enhance capacity in specialty care and behavioral health service delivery.

- Wednesday Sept. 28\textsuperscript{th} - Demand Analysis
- Tuesday October 11\textsuperscript{th} - Readiness Self-Assessment
- Wednesday November 2\textsuperscript{nd} - Reimbursement, Billing and Coding
- Tuesday November 8\textsuperscript{th} - Equipment Selection
- Wednesday December 14\textsuperscript{th} - Program Development
- Tuesday, January 10\textsuperscript{th} - Evaluation and Monitoring

All webinars will be held at 11:30am PT/12:30pm MT
Learning Objectives

• Review the components of the Roadmap to Telehealth Adoption in Primary Care
• Present the Readiness Assessment process and tool
  – Step-by-step instructions
  – Tool for assessment
• Q &A
HMA: Our Firm

• We are a leading independent, national health care research and consulting firm providing technical and analytical services.

• We specialize in publicly-financed health programs, system reform and public policy.

• We work with purchasers, providers, policy-makers, program evaluators, investors and others.

• We are currently participating in the implementation of the SHIP through the PCMH Transformation component.
What is Telehealth?

A comprehensive overview is available under “helpful links” within this link:
Roadmap to Telehealth Adoption in Primary Care

- Determine need in practice or community
- Evaluate external barriers
- Establish SMART goals
- Assess financial impact/ROI
- Assess internal readiness
- Determine specialty partners and structured relationship

- Develop clinical and administrative workflows
- Evaluate technology and equipment requirements
- Staff and PCP training
- Patient engagement and community marketing
- Evaluation
- Pulling it all together: Business Plan or Project Charter
Readiness Assessment

• **Purpose:** To determine organizational readiness to implement a telehealth program and define the path to readiness.

• **Process:**
  – Step 1: Identify team to complete assessment
  – Step 2: Review readiness assessment content
  – Step 3: Complete readiness assessment
  – Step 4: Outline next steps and get buy-in to complete
  – Step 5: Take advantage of HMA consulting hours to help fill in the gaps
Step 1: Assemble a team

- The readiness assessment should be performed by individual primary care practices.
- The individual completing this response should have responsibility for executing the telehealth program within their clinic.
- The individual should gather inputs from team members who may be more familiar with specific aspects of the organization.
- After completion, seek approval by leadership/senior management.
Step 1: Assemble a team

<table>
<thead>
<tr>
<th>RA Team Members</th>
<th>Background and Skill Set</th>
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</thead>
<tbody>
<tr>
<td>Telehealth program manager</td>
<td>Individual who completes the RA – has ultimate responsibility for implementation</td>
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<tr>
<td>Executive champion</td>
<td>Executive who sets vision/strategy for the organization</td>
</tr>
<tr>
<td>Clinician champion</td>
<td>Physician or clinical provider familiar with telehealth and/or telehealth-like solutions to address access issues.</td>
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<tr>
<td>Technical support</td>
<td>Familiar with organization’s information technology capability.</td>
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<tr>
<td>Referral coordinator</td>
<td>Knowledge of practice referral trends and access issues.</td>
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<tr>
<td>Billing and coding representative</td>
<td>Understanding of the practice payer mix and state reimbursement regulations.</td>
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</table>
Step 2: Review assessment

The assessment covers the following domains of readiness for telehealth implementation:

<table>
<thead>
<tr>
<th>Organizational readiness</th>
<th>Clinical considerations</th>
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<tbody>
<tr>
<td>Experience with telehealth</td>
<td>Relationship with specialty providers</td>
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<tr>
<td>Organizational technology capacity</td>
<td>Workforce development</td>
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<tr>
<td>Equipment selection</td>
<td>Patient engagement and marketing</td>
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<tr>
<td>Regulatory or policy understanding</td>
<td>Evaluation and outcome measurement</td>
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<tr>
<td>Financing and reimbursement</td>
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</tbody>
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Statewide Healthcare Innovation Plan

HMA
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Step 2: Review assessment

Section I: Organizational Readiness

A. PLANNING
Planning begins with a strategic plan, scope, a level of understanding of what the program will entail, a definition of the problem, and a description of how the technology will help to address the problem.

<table>
<thead>
<tr>
<th>Question</th>
<th>NO</th>
<th>PARTIAL</th>
<th>YES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has your organization defined “telehealth” and created a general understanding of what services will be included in this program and what clinical problem the program is attempting to solve?</td>
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<tr>
<td>Is a telehealth program included in your organization’s strategic plan?</td>
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<td>Have you created and shared the goals for a telehealth program with all team members and stakeholders?</td>
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<td>Do you have general agreement from key stakeholders on moving into the readiness assessment phase?</td>
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<tr>
<td>Are there competing initiatives that would prevent you from implementing a telehealth program in the next year such as major renovations, re-organization, re-alignment of business partners, or the launch of other resource intensive initiatives?</td>
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<tr>
<td>Do you have dedicated resources currently in place (staff, funding) to start a telehealth program?</td>
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<td>Does your funding extend beyond the initial planning and pilot stages so that the model is sustainable?</td>
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<tr>
<td>Has your team created a telehealth business plan that outlines the use case and business model?</td>
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</table>
Step 2: Organizational Readiness

• Three elements:
  – **Planning**: begins with a strategic plan, scope, a level of understanding of what the program will entail, a definition of the problem, and a description of how the technology will help to address the problem.
  – **Engagement**: involves including key stakeholders- beginning with project planning.
  – **Change management**: addresses the impact that this new program will have on your existing operations.

• Examples:
  – Is telehealth included in your organization’s strategic plan?
  – Do you have dedicated resources (staff, funding) for the effort?
  – Have you established and engaged a telehealth workgroup?
  – Do you have an implementation plan that identifies anticipated changes and have you shared the plan with staff?
Step 2: Experience with Telehealth

• Understanding prior institutional and organizational experience in telehealth is key to identifying and leveraging the solutions that have been successful as well as the barriers that may remain.

• Examples:
  – Do you have any experience with virtual visits, eConsults, etc?
  – If so, identify any challenges and barriers that should be addressed before proceeding to add telehealth capacity
Attendee Survey

• Is your practice already providing telehealth services? (Y/N)
Step 2: Organizational Technology Capacity

• The telehealth program team should include members with the skills and time to evaluate and support the technology requirements for your selected services.

• Examples:
  – Do you have access to an information technology (IT) expert who can help with IT readiness?
  – Have you determined equipment needs for both originating and distance sites?
  – Do you have access to staff who can work with IT vendors?
Step 2: Equipment Selection

• Two elements:
  – **Choosing equipment**: requires specific expertise and dedicated time. Commitments to acquire specific equipment should be reserved for later stages of the program development.
  – **Working with vendors**: Having a vendor relationship strategy will maximize your time and resource allocation when evaluating multiple tools and technology solutions.

• Examples:
  – Do you have a process for equipment selection and experienced staff?
  – Have you designated an appropriate space with adequate video/light capacity?
  – Do you have a lead identified for vendor relations and do you have a vendor assessment tool?

• **Note**: This will be covered in more depth on the Nov 8 webinar
Step 2: Regulatory or Policy

• Telehealth regulations, policies and requirements are specific to certain providers, locations and scope of services; each element will need a thorough evaluation for compliance early in the stages of program development.

• Examples:
  – Do you have a process for ongoing updates on regulatory and policy changes?
  – Is your privacy officer engaged in the development of the program?
  – Have you agreed on a process for credentialing providers in the telehealth program?
  – Have you considered program implications for malpractice and liability?
Step 2: Financing and Reimbursement

- The telehealth program should be built on a solid financial plan that is sustainable and scalable. The return on investment should reflect an acceptable financial model as well as an understanding of the non-financial benefits.

- Examples:
  - Have you performed a payer mix analysis?
  - Is your team aware of payer reimbursement policies and requirements?
  - Have you gathered information to perform a Return-on-Investment analysis for your program?

- Note: This will be covered in more depth on the Nov 2 webinar
Step 2: Clinical Considerations

• The clinical services delivered within the telehealth program, and specifically within virtual visits, are expected to meet the same quality standards as an in-person visit.

• Examples:
  – Do you have the clinical staff you need or will you need to contract out?
  – Will your program require new processes (e.g. after hours on call services) that are not currently in place?
  – Do you have a process for clinical oversight?
  – Is the space set up so that the provider can perform a clinical assessment and make an adequate recommendation similar to an in-person exam?
Attendee Survey

• Do you feel you need to build more capacity in behavioral health? (Y/N)
Step 2: Relationship with Specialty Providers

- Defining the relationship between the referring providers and the specialty consultants is an important step to address early in the program development.

- Examples:
  - Have you identified which specialties will be included in the program?
  - What will be the source of specialty consultations (internal/community/vendor-supported)?
  - Have you developed the template for contracting between the originating and distant sites?

- Note: This will be covered in more depth on the Dec 14 webinar
Step 2: Workforce Development

• The telehealth program should include staff who are engaged in the process and who have the time and expertise to facilitate a telehealth visit.

• Examples:
  – Do you have time set aside for training and education?
  – Do you have a clinical champion on the team?
  – Do you have a medical assistant or other staff who can support telehealth interactions?
  – Have you made arrangements to make any staff hires prior to implementation?

• Note: This will be covered in more depth on the Dec 14 webinar
Attendee Survey

• Do you have a clinical champion or can you think of a potential telehealth champion within your organization? (Y/N)
Step 2: Patient Engagement and Marketing

• Effective marketing to all stakeholders: providers, specialists, patients and their care givers will lead to increased rates of engagement.

• Examples:
  – Have you created policies/process for selecting patients for telehealth?
  – Have you identified materials that need to be developed for patient education?
  – Do you have a communication strategy or staff who will lead this effort?

• Note: This will be covered in more depth on the Dec 14 webinar
Step 2: Evaluation and Outcomes Measurement

- Defining and measuring outcomes will help to establish and share the success of the program and indicate opportunities for improvement.

- Examples:
  - What clinical outcomes do you expect?
  - What utilization/cost impacts would you like to achieve?
  - Do you have a method for measuring patient satisfaction with telehealth?

- Note: This will be covered in more depth on the Jan 10 webinar
Step 3: Complete RA

- For each of the questions in the domains, identify whether your organization fully has the capability (YES), partially has the capability (PARTIAL) or does not have the capability at all.
- Where your organization has no capability or only partial capability, make note of this gap.
Step 4: Outline next steps

- Based on your identified gaps, outline next steps to complete to improve readiness. For example,
  - Revise strategic plan to include telehealth
  - Complete financial assessment of telehealth program
  - Complete specific policies and procedures
  - Rework staff roles to support telehealth
- Once you have completed these next steps, pursue executive and clinical buy-in to carry out the steps
Step 5: Seek assistance

• Some of the follow-up steps will be very straightforward to implement
• Other webinars in this series will go into more depth on issues that may help you determine how to proceed
• Others issues may be more complex for your clinic – for those steps where you need additional assistance, there are resources available to help you
• Send all questions to ruralhealth@dhw.idaho.gov
Readiness Analysis: Summary

• Once you have established a demand for telehealth, you need to ensure your clinic is primed to take advantage.

• After performing the readiness assessment, you should have a good idea of your capabilities and the gaps remaining for your clinic to implement a telehealth program.

• Next, you will evaluate the gaps and determine how to address them, seeking assistance as needed.
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Questions?

Comments?
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