

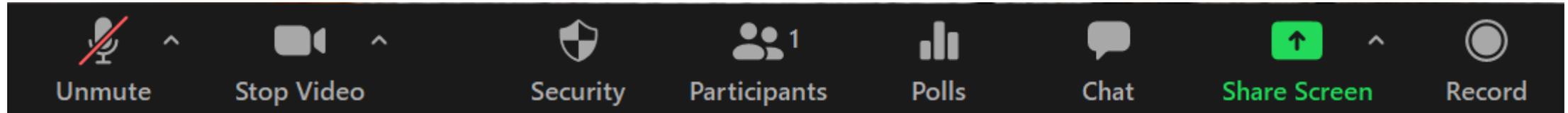


Implementation Workshop Session 1

Assessing Program Needs

April 19, 2022

Zoom Tips



Muted on Entry

You are muted on entry. If you wish to comment or ask a question, you can unmute yourself.

Use Your Video

Please turn on the video for a more collaborative and engaging experience.

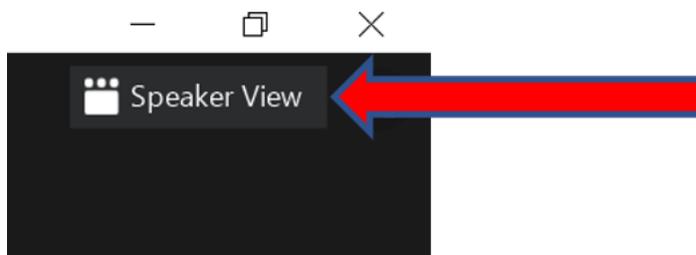
Open the Chat

Please open the chat and use it liberally; we want to hear from you!

Send questions and feedback to **"Everyone"**

Video Recording

The presenter will indicate if the meeting is being recorded and where to find the recording after the presentation is complete.



Speaker View vs Gallery View

At the top right of your screen, you can change the video panel to just show the main speaker, or to gallery view to see the speaker and other participants, depending on your preference.

About Us



California Telehealth Resource Center is a HRSA funded program established in 2006



CTRC offers educational resources that help California providers and patients get the most from telehealth



CTRC supports providers and patients in rural and urban areas by offering

- On demand resources on telehealth
- Training and technical assistance
- Unbiased insights on telehealth

The California Telehealth Resource Center (CTRC) and all resources and activities produced or supported by the CTCRC are made possible by grant number U1UTH42520-01-01 from the Office for the Advancement of Telehealth, Health Resources and Services Administration, DHHS. This information or content and conclusions are those of the CTCRC and should not be construed as the official position or policy of, nor should any endorsements be inferred by HRSA, HHS or the U.S. Government.

We're Here For You!



Lindsey Haase, MBA
Executive Director



Shubha Devadoss
Manager, CTRC Program



Jeanne Russell
Training and TA Manager



Aislynn Taylor
CTRC Program Specialist

Introductions

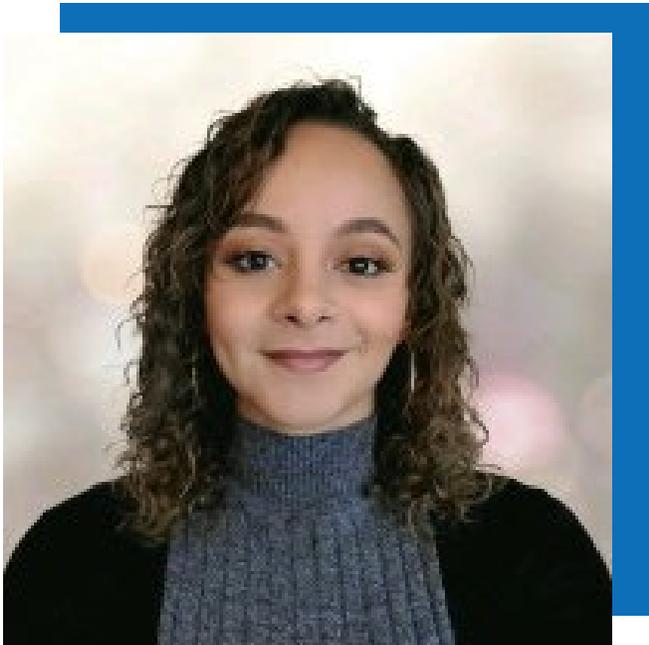


Jeanne Russell

Training and Technical Assistance Manager
CTRC

Jeanne Russell is dedicated to improving health care access to all Californians, she is considered a telehealth subject matter expert and works directly with health care centers to improve telehealth clinical operations, workflow assessments, training and technical assistance. Jeanne has 19 years of clinical experience and 11 years in program development. Prior to joining the CTRC team she serviced as the Telehealth Advisor for a 13 clinic FQHC where she developed one of the largest telehealth programs in California earning multiple telehealth performance awards. For her MAVEN project leadership and her continuous efforts to improve quality health care access Jeanne was also a nominee and runner-up for the prestigious Schwartz Caregiver of the Year award. Her firsthand knowledge of clinic operations, workflows, staff/provider training practices, patient presentation techniques, and provider contract negotiations make her an outstanding team asset at CTRC.

Introductions



Aislynn Taylor
Program Specialist
CTRC

Aislynn Taylor is a detail-oriented professional with a record of success managing programs within the health care industry. She joined CTRC in 2017, bringing with her several years of dedicated customer service, brand management, and marketing experience. Aislynn is certified in digital marketing, training facilitation, project management, and online course creation. She is also knowledgeable in telehealth program operations and best practices. Aislynn has a talent for developing strategic initiatives, redesigning processes, and launching tools that enhance operations while improving customer support. She is a champion for CTRC marketing and outreach, telehealth technical assistance, and CTRC events.

Meeting Agenda

01 Telehealth Implementation
Workshop Series Overview

02 What's the point of an assessment?

03 What areas need assessing?

04 How will this help you?

05 What is CTRC doing with this
assessment info?

06 Things to know for the next series
sessions!

07 Questions & Answers

What is Telehealth?

- **Live Video/ Synchronous:** Live, two-way interaction between a person and provider using audiovisual telecommunications technology.
- **eConsult /Asynchronous:** Transmission of pre-recorded health history through an electronic communications system to a practitioner who uses the information to evaluate the case or render a service outside of real-time or live interaction.
- **Remote Patient Monitoring (RPM):** Personal health and medical data collection from an individual in one location via electronic communication technologies, which is transmitted to a provider in a different location for use in care and related support.
- **Direct to Patient (Direct to Consumer):** A provider uses live video to meet with a patient who is in their home or other location to discuss and provide treatment, educate patients and providers through apps and video conferencing.

Facts:



Telehealth is a collection of methods for delivering care



Telehealth means utilizing telecommunications technologies to deliver care



Telehealth enhances health care, public health, and health education delivery

CTRC Implementation Roadmap



Assess

1

Clinical & Administrative Services Needs

- Specialty services
- Administrative meetings
- Continuing education

Technology Infrastructure and Equipment Inventory

- Tele-Communications
- Equipment and peripherals

Leadership Support

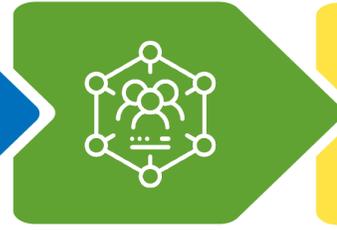
- Program financing
- Staffing allocation
- Ongoing program support

Clinical Provider Buy-In

- Patient referral
- Telehealth participation

Potential Relationships with Specialty Providers

- In-house
- In the community
- Statewide



Establish

2

Telehealth Team

- Medical leadership
- Administrative leadership
- Coordinator
- Technical Support

Partnerships

- Clinical service providers
- Education providers

Technology Infrastructure

- Secure medical grade broadband to clinic and conference rooms
- Equipment and peripherals

Revenue Cycle Management Program

- Financial modeling
- Licensure
- Credentialing / Privileging
- Payer credentialing / contracting
- Program contracting & compensation



Define

3

Policies and Procedures

- Clinical guidelines for specialty referral
- Referral forms
- Exchanging medical information
- Process for patient consent
- Clinic scheduling
- Patient insurance billing
- Specialty services billing and payment
- Credentialing
- Patient flow

Staff Roles

- Coordinator
- Clinician champion
- Technical support



Implement

4

Technology

- Hardware, software, peripheral equipment and telecommunications configuration and testing

Staff Training

- Referral protocols
- Equipment usage and troubleshooting
- Patient presentation techniques
- Coding and billing
- Medical records
- Patient consent
- Process flow

Provider Orientation

- Equipment demonstrations
- Video meet and greet with referring and specialty clinicians
- Medical staff meeting discussions

Patient Education

- Equipment Demo
- Appointment fliers
- Web site, Local news media

Go Live with Patient Visits!



Improve

5

Revenue Cycle Analysis and Improvement

- Review and update financial model
- Review claims and payments for potential areas of process improvement
- Analyze utilization data

Provider Satisfaction

- Are your clinical providers getting the information they need to provide patient care?
- Is the technology adequate, reliable and easy to use?

Identify and Address Culture Barriers to Integration

- Provider buy-in
- Patient buy-in

Ice Breaker

Introduce yourself and tell us... If you had a superpower, what would it be?



Poll question

**What types of organizations are attending
this session?**



Planning, implementation, and integration require a multidisciplinary team to be involved throughout each phase of the project.

The purpose of the needs assessment



The purpose of a needs assessment is to learn more about what your program or group may or may not need.



To become aware of possible needs that you never saw as particularly important or that you never even knew existed.



To document your needs, this may be helpful in advocating for your cause.



To make sure any actions you eventually take will be in line with what you have identified as the NEED.



Conducting a needs assessment can also bring support in your intended action when it comes time to implement some of the changes intended.

Where to start

You will want to conduct several assessments over time with your program.

Where to start?

Step #1:

Organizational Readiness Assessment



Areas of Assessment

Clinical and
Administrative
Service Needs

Technology
Infrastructure and
Equipment
Inventory

Leadership
Support

Clinical Provider
Buy-in

Relationships with
Specialty Providers

Who Should Fill Out A Readiness Assessment?

- CMO, CEO, CFO
- Medical Director
- Chief of Operations
- Department Management
- Telehealth Director
- Telehealth Coordinator
- C-suite and leadership staff
- Administrative personnel in a leadership position



Poll question

How many of you have already conducted some sort of needs assessment related to your telehealth program?

Basic information collected in the organizational readiness assessment:

- Facility address
- Facility type (CAH, FQHC, RHC, Private Practice...)
- Payer mix
- Managed Care Plans
- Current no-show rate

How is this important?

- Payer mix will always be something to consider when implementing services or adding a service to your current program. Not all services or services providers are covered for telehealth as they are in a brick-and-mortar setting.

What is your current level of experience with telehealth?

- Do you currently have a telehealth program in place?
- Did you have a telehealth program in place that is no longer active?

Why is this information important?

- May be able to leverage existing program staff/equipment for expansion activities
- May be able to address barriers or adjust the approach to get the program back on track

Needs Assessment: Clinical and Administrative



Questions to identify the level of training needed at your organization

- What telehealth tools, platforms, and or software have you used in the past?
- Do you use store and forward technologies?
- What platform do you use for these services?
- What specialties do you provide through store and forward?



Do you have dedicated staff responsible for your telehealth program (telehealth coordinator)?



Is staff trained to use telehealth as a part of your onboarding process?

Why this is important?

Having dedicated staff makes someone accountable and provides the needed support for all telehealth-related issues.

Including telehealth as a part of your onboarding process is a best practice

Does your site have a plan for implementing new telehealth services?

Why do you need to know this?

Having a target date for go-live is important for planning purposes. Milestones to incorporate into the project plan:

- Policy and Procedure & workflow development, staffing allocation
- Provider contracting
- Data and connectivity infrastructure enhancement
- Equipment procurement, installation, testing
- Staff training

Do you have leadership and management support?

- Grant funding
- Institutional funding commitment
- Staffing Allocations
- Program design; management of day-to-day operations
- Ongoing program support
- IT staffing for technology needs

Clinical Provider Buy-in

Understanding the value of telehealth

Are staff prepared and willing to incorporate telehealth into their daily practice?



Do you perceive any of the following as barriers to implementing and sustaining your telemedicine program?



- Quality of care concerns
- Lack of technical staff
- No available service providers/ specialist
- Time commitment
- Training
- Lack of medical staff dedicated/ telehealth coordinator
- Reimbursement concerns

Do you have any contracts with specialty care service providers?

- In-house
 - Within your organization, practicing at a different location
- In the community
- Providers in your referral network that would benefit from enhanced services provided via telehealth



Existing Technology Infrastructure and Equipment Inventory

- Tele-communications
 - Secure, medical-grade broadband in the staff meeting and clinic exam rooms? Is it wired or wireless?
- Equipment and peripherals
 - Videoconferencing equipment
 - Peripherals (exam camera, stethoscope, otoscope)
 - Computer with webcam, microphone, speakers
 - Store and forward software, digital camera

Have you conducted a Specialty Care Services Needs Assessment?

What services do you wish to provide?

Knowing your service needs is crucial. Knowing the services needs for your site before you contract for services will eliminate unneeded spending and allocating of your internal resources and staff.

This information will be helpful when it comes to contract negotiations, provider, equipment and software selections.

	In house providers	Outsourcing
Specialty Type	Monthly total	Monthly total
Psychiatry		
Primary Care		
Prenatal		
LCSW		
Chronic Disease Management		
Dentistry		
Dermatology		
Endocrinology		
Ophthalmology		
Podiatry		
SUD/MAT		

Why is this information important?

Knowing what stage your organization is in with implementing or starting services will play a huge role in sessions three and four when we explore service needs and contract negotiations

Implementation Workshop Sessions 2 - 4

02

Establishing & Defining Your Program *May 24th 12:00 noon – 1:30 pm*

CTRC will use the results from the assessments submitted by attendees to guide this session training. Topics may include program sustainability, telehealth team roles and responsibilities, clinical workflows, best practices for high engagement, considerations for vetting provider groups, and general telehealth technology guidance.

03

Program Implementation *June 21st 12:00 noon – 1:30 pm*

04

Program Improvements & Beyond the Basics *July 19th 12:00 noon - 1:30 pm*

Implementation Workshop Sessions 2 - 4

02

Establishing & Defining Your Program *May 24th 12:00 noon – 1:30 pm*

03

Program Implementation *June 21st 12:00 noon – 1:30 pm*

CTRC will review some general telehealth training in this session including techniques for good web-side manner and tips for improving patient and provider visit satisfaction. Participants will have space for peer learning when discussing clinical outcomes and performance goals.

04

Program Improvements & Beyond the Basics *July 19th 12:00 noon - 1:30 pm*

Implementation Workshop Sessions 2 - 4

02

Establishing & Defining Your Program *May 24th 12:00 noon – 1:30 pm*

03

Program Implementation *June 21st 12:00 noon – 1:30 pm*

04

Program Improvements & Beyond the Basics *July 19th 12:00 noon - 1:30 pm*

After assessing the initial performance of your program, considering service utilization, provider and patient satisfaction, and other key factors, let's begin to implement the quality improvement process that was developed during the planning and implementation process.

Need to Know

- [Telehealth Organizational Readiness Assessment](#)
- [Registration link for upcoming sessions](#)
- Assessment needs to be submitted by **5/10/2022**
- Upcoming sessions limited to the first **20 health centers (MAX 3 attendees per health center)**
- Registration will be confirmed after a completed assessment is received
- Participating organizations will receive a customized report with recommendations by July 29th
- Questions? Ask the CTRC team at CalTRC@ochin.org.
- For Telehealth Program Resources visit CalTRC.org

Any Questions?

Let's chat!

Survey Question

How helpful was today's session?

**“It takes six months to
implement a program ...
and 10 years to become an
overnight success!”**

Dean Germano, CEO, Shasta Community Health
Center, Redding CA



We're Here For You!



Contact us!
www.caltrc.org/contact/
or (877) 590-8144



Thank You



www.caltrc.org