

# The MedBridge Telehealth Implementation Guide

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A step-by-step guide to successfully operationalize the MedBridge Telehealth Virtual Visits platform at your organization.



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# What Are Telehealth Virtual Visits?

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MedBridge Telehealth Virtual Visits provide a HIPAA-compliant, efficient, and safe way for providers to expand remote healthcare access to patients. Organizations and providers can use Telehealth to virtually triage patients, efficiently manage patient care, and extend post-discharge care through live, synchronous video visits.

This Implementation Guide will walk you through the process of preparing, initiating, and supporting the adoption of MedBridge Telehealth Virtual Visits across your organization in 5 easy steps.

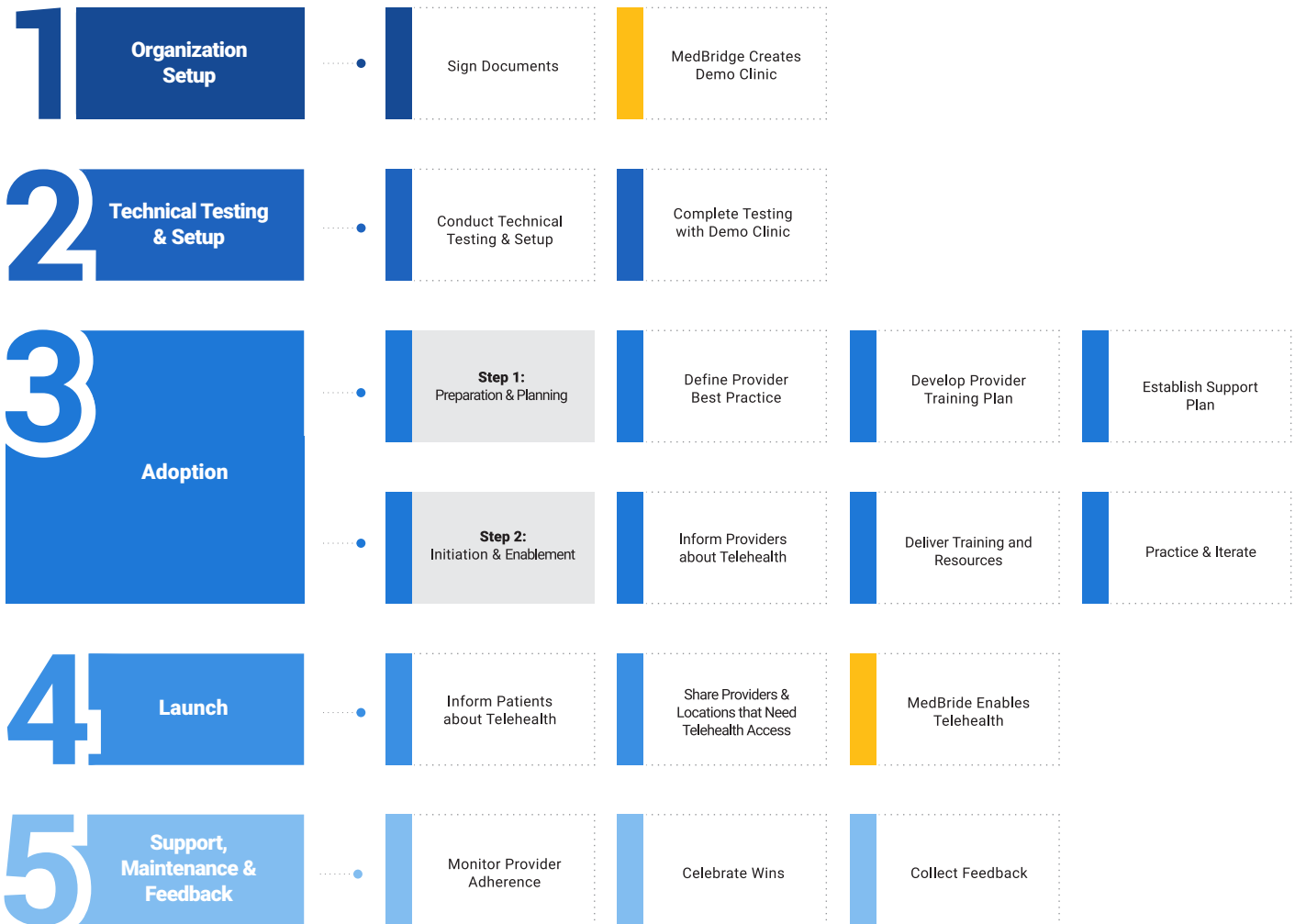
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## STEPS TO IMPLEMENTATION

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# Telehealth: Implementation Visualization



# 1. Organizational Setup

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As we get your organization ready to use Telehealth, our team will work with you to collect the following documents:

## Implementation Document Checklist

- Business Associates Agreement
- Patient Consent Form
- Telehealth Addendum to your existing MedBridge contract

Then, we will set up a Demo Clinic for selected users within your organization to begin testing and continue Telehealth setup.

# 2. Technical Testing


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## Initial Technical Setup

For an optimal Telehealth experience, you'll need to meet the following technical requirements:

## Telehealth Compatibility Checklist

- Access to laptop or desktop with a camera and microphone
- Up to date web browser (Google Chrome 58+ or Firefox 52+)
- High speed internet connection (25mb/second)

 You can use this tool to check your computer's compatibility with MedBridge Telehealth: [Tokbox Testing Environment](#)

Whether Telehealth visits will be conducted from your facility or from your provider's homes, make sure to test your equipment and internet connection *before* connecting with patients.

# 2. Technical Testing (cont.)

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## Telehealth Testing

Once we've completed the initial technical testing and setup, you can use your Demo Clinic and Users to test out the MedBridge Telehealth environment, making sure your organization is ready for real patients. Our team will help answer your questions and troubleshoot any issues that may arise during testing before the full roll out.

## Telehealth Testing Checklist

- Complete Telehealth call as provider from representative workstations (laptop or desktop computer, at home and at your facility)
- Complete Telehealth call as patient from representative workstations (laptop, desktop, and mobile)
- Complete exercise stream during video call
- Update an HEP during the video call
- Complete Telehealth call within integrated EMR (if applicable)

## Device Compatibility

For more information on device compatibility with MedBridge, refer to the [Provider FAQs](#).

## 3. Adoption

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In order to successfully operationalize the MedBridge Telehealth Virtual Visits platform at your organization, we recommend that you develop an adoption and implementation plan for your providers. Below, we've outlined the key phases of adoption.

### Phase 1: Preparation and Planning

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#### Define Best Practices

Establishing standardized Telehealth Virtual Visits best practices for your providers will ensure continuity of care for both in-person and virtual visits. Have a plan in place to create best practices around the following items:

- 1. Virtual Visit Protocol:** How will you start and end virtual visits? How will you handle patient privacy?
- 2. Provider Telehealth Etiquette:** Where should visits be conducted? Is there anything providers should always do or not do?
- 3. Technology Considerations:** Do providers have the equipment needed to conduct visits? What will you do if a call disconnects?
- 4. Patient Scheduling and Notification:** Who will be responsible for scheduling Telehealth appointments? How will patients know Telehealth is available to them?
- 5. Billing and Documentation:** What will providers need to document during a Telehealth visit? How will they bill their patients?

If needed, a detailed list of questions to answer before implementing Telehealth is available in [Appendix A](#).

#### Develop a Provider Training Plan

Once you've determined best practices for your organization, you'll want to develop a plan to train your staff on this new platform. MedBridge has a number of available resources to train your staff on Telehealth Virtual Visits. We recommend users watch all Tutorial Videos and review all job aids as part of their initial training. You may also want to include in-person training or demonstrations with your staff.

However you plan to train your staff, make sure you set clear expectations and timelines for what material will need to be reviewed and when training will occur.

To see all the resources MedBridge has available to you, visit the [Training and Resource page](#).

## 3. Adoption (cont.)

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### Establish a Support Plan

Implementing a new technology within your organization can bring about many questions from your team, so it's important to be prepared with responses ahead of roll out and to identify who will be fielding these questions. Refer to [Appendix B](#) for common provider questions.

Be sure to circulate the answers with your organization so everyone is on the same page.

- For general troubleshooting, refer to the [MedBridge Telehealth Training and Resources Page](#)
- For product questions and technical support, please contact MedBridge Support at [support@medbridgeed.com](mailto:support@medbridgeed.com) or (206) 216-5003 (Mon - Fri 7am - 5pm PST)



## Phase 2: Implementation and Enablement

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### Inform Providers About Telehealth

Successfully launching MedBridge Virtual Visits starts with clearly and concisely messaging the change to your staff. We recommend that this messaging come directly from key stakeholders at your organization and include the following elements:

- The decision to incorporate Telehealth into your organization and the reasons behind this change in status quo
- The expectations of your staff regarding the use of Telehealth
- The available resources for additional information and questions regarding this change

For a sample email template, see [Appendix C](#).

### Deliver Training and Resources

Now that you've announced Telehealth to your team, you're ready to roll out the training plan you've created to your providers. As you do, make sure you clearly communicate what training they will receive, the goals of training, and when you expect the training to be completed. Additionally, it's crucial to highlight the support plan and available resources to direct questions.



#### MedBridge Knowledge Tracks

If your organization has access to MedBridge's clinical education resources, a great way to roll out training is through MedBridge's Knowledge Tracks. For more information on how to use this tool to deliver your training, contact your MedBridge team.

### 3. Adoption (cont.)

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#### Practice and Iterate

##### Practice:

Engaging in practice sessions with your staff prior to launching Telehealth with patients will ensure that everyone is comfortable with the new technology and workflow. This will also allow you the opportunity to develop additional best practices based on any challenges in the provider or patient experience identified in these practice sessions.

Before a provider has their first Telehealth visit, make sure they have time to conduct a practice visit with one of their colleagues, ideally someone who already has experience with Telehealth Virtual Visits.

##### Iterate:

Regularly meet with your team to collect feedback on how Telehealth implementation is going. Use this time to identify solutions to regular challenges your providers are running into. If something isn't working about your existing processes, encourage your team to work together to find a new way of doing things. Once you find a solution, make sure to communicate it to the rest of your team.

As you begin your Telehealth implementation, schedule weekly meetings to collect feedback and troubleshoot challenges, or include it as an agenda item on an existing meeting.

### 4. Launch

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Once you've completed training with your team and they're feeling confident using this tool, you're ready to launch Telehealth at your organization!

Contact your MedBridge team and confirm which providers and locations should have access to Telehealth Virtual Visits. Our team will enable the appropriate users within our software so that you're ready to go.

### 4. Launch (cont.)

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#### Inform Patients About Telehealth

As you launch Telehealth at your organization, you'll also need to inform your patients about Telehealth as an option to continue their therapy. Some reimbursement models, such as an e-visit reimbursed through Medicare, require the patient to request the visit. Make sure your patients are aware and can participate in care even if they can't make it to an in-person visit.

MedBridge offers patient facing resources for you to communicate this change available on the Training and Resources page including flyers and social media assets. You can also encourage your providers to share patient versions of the Telehealth How-To Guide and FAQs with their patients ahead of their Telehealth visit.

For more information on this recommended workflow, refer to [\*\*MedBridge's Telehealth Provider How-To Guide\*\*](#).



#### Patient Awareness

Coordinate an education campaign at the organization level addressing patient awareness of Telehealth resources. Since e-visits must be patient-initiated, we recommend setting guidelines with staff on when it is okay to inform patients of their Telehealth options (e.g., if a patient were to cancel an appointment because they are unable to come in person).

Once guidelines are set, empower your providers to inform patients of the availability of e-visits and any other Telehealth services being offered by your organization.

## 5. Support, Maintenance, and Feedback

Now that you've launched MedBridge Telehealth at your organization, it's important to support and maintain adoption of this tool. This will be an ongoing process that will include monitoring adoption and adherence of Telehealth amongst your staff and celebrating wins along the way.

### Monitor Provider Adherence

Regularly connecting with your providers to monitor adherence to this new initiative will help keep Telehealth adoption as a staff priority, ensure expectations are being met, and allow you to hold staff accountable to those expectations. To most effectively track adherence, make sure to set clear expectations for how providers should be using Telehealth. Should it be used every week? With every patient? Following up with your providers on those expectations will help to improve adherence.

Collect constructive feedback on your provider's experience, troubleshoot any problems that may arise, and develop new best practices. [Don't forget to iterate!](#)

### Celebrate Wins

Celebrating wins regarding adherence and adoption of a new initiative, no matter how small, goes a long way in anchoring the new behavior into your organization's culture. Be sure to congratulate high performers with positive affirmation of their good work!



#### Celebrating Wins

There are lots of ways you can celebrate success at your organization. Some examples include:

- *Providing gift cards to providers who complete a target number of visits*
- *Appointing and recognizing new Telehealth champions*
- *Giving a shout-out at an all-staff meeting to a provider who identified a new best practice*

Find out what works best at your organization, and make sure to celebrate success.

### Summary

MedBridge is your continued partner as you incorporate Telehealth into your regular workflow. As you do so, we encourage you to collect feedback from your providers and patients on their Telehealth experience. This could be through regular check-ins and meetings or through a survey distributed amongst your team where they can share any feedback they hear from their patients.

As you implement Telehealth Virtual Visits, MedBridge will collect data that can help you improve your processes. MedBridge will also collect feedback from patients via a post-visit survey at the end of every Virtual Visit.

Contact your MedBridge team at any time to discuss this feedback. We're happy to work with you to improve the Telehealth Virtual Visits experience for your providers and patients.





## Appendix A: Provider Best Practice Checklist

**Virtual Visit Protocol:** A standardized visit protocol will make sure that all providers are delivering the same high-quality standard of care to their patients. A few things to consider standardizing are:

- How will HIPAA and PHI security measures be implemented and considered during a Virtual Visit? \_\_\_\_\_
- How long will an average visit last? \_\_\_\_\_
- How will you begin and end Virtual Visits? For a sample script, see [Appendix E](#). \_\_\_\_\_
- What will you do if your visit disconnects? For example, you may determine that if a patient doesn't connect for their visit within five minutes of the start time, you'll call their phone number. \_\_\_\_\_

**Provider Telehealth Etiquette:** Creating guidelines around where Virtual Visits are conducted can ensure a positive experience for your patients.

- How would you like to have your providers present themselves to patients during their Virtual Visit? Do they need to dress differently than what they typically wear at your facility? \_\_\_\_\_
- What can providers do or not do during a Telehealth Virtual Visit? \_\_\_\_\_
- Where will providers be conducting Telehealth Virtual Visits? At your facility, or at home? \_\_\_\_\_



### Creating an Ideal Virtual Visit Experience

Review [Appendix F](#) for tips to set up the space for an ideal Virtual Visit and ensure a positive experience for your patients.

**Technology Considerations:** Encourage providers to familiarize themselves with both the provider and patient Virtual Visit experience. The provider will be the main point of contact for the patient, so the provider should be prepared to address any technical challenges.

- Do providers have the appropriate equipment to be successful? \_\_\_\_\_
- How will patients be joining visits? Will they be using computers, mobile devices, or both? \_\_\_\_\_
- What should patients do if they have trouble connecting? \_\_\_\_\_
- How will you help patients with any technical issues? \_\_\_\_\_

## Appendix A: Provider Best Practice Checklist (cont.)

**Patient Scheduling:** Make sure to consider how the patient's scheduling experience will differ for a Virtual Visit.

- Which patients are appropriate for Telehealth? \_\_\_\_\_
- Who is scheduling the visits? \_\_\_\_\_
- How will the provider know this is a Telehealth Virtual Visit? \_\_\_\_\_
- How will the patient know this is a Telehealth Virtual Visit? \_\_\_\_\_



### Scheduling

Use your existing calendar or appointment system to schedule Telehealth Virtual Visits. Add a note or tag to indicate that an appointment is a Telehealth Virtual Visit rather than in-person. Adapting your existing system will ensure a seamless transition for providers and patients.

**Notifying Patients About Telehealth:** For some reimbursement models, the patient must request the Virtual Visit, so it's important to notify your patients about their Virtual Visit options.

- How can the patient request an appointment? \_\_\_\_\_
- Who is creating the patient in MedBridge and when? \_\_\_\_\_
- How will you let the patient know what to expect for their visit? \_\_\_\_\_
- Do you have patient's emails and/or phone numbers? \_\_\_\_\_
- How are you letting patients know about your Telehealth abilities? Email, website, social media? \_\_\_\_\_



### Patient Guidance

MedBridge provides a number of patient-facing documents and social media assets you can use to announce your new Telehealth capabilities to your patients. Check out our resource center [here](#).

**Billing and Documentation:** Remember to clarify for your team how documentation and billing will differ for Virtual Visits.

- How is your team expected to document a Telehealth visit? \_\_\_\_\_
- How will they bill for these visits? \_\_\_\_\_

## Appendix B: Provider FAQs

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Your providers will likely have questions for you as you roll out Telehealth Virtual Visits at your organization. Many questions can be answered by directing your providers to [MedBridge's Provider FAQ guide](#). We've also included answers to some common questions below.

### Common questions your providers may have:

**Q: Why are we rolling out this new technology?**

**A:** Your response might be, "To continue to provide exceptional care to our patients through this crisis." Or "To more effectively triage patients before they come in for a visit."

**Q: How will I reimburse Telehealth Virtual Visits?**

**A:** For up-to-date information on reimbursement, please visit the MedBridge blog article: [What We Know So Far About E-Visit Reimbursement for Therapy Providers Billing Medicare](#).

**Q: How will we document services?**

**A:** Follow the updated guidance on documenting and billing Telehealth services available from APTA, AOTA, and ASHA. Please also review your payor's policies and coverage regarding telehealth services for more information.

**Q: What will my patients do if they get disconnected?**

**A:** If a visit gets disconnected by the provider or patient, they can rejoin the call by returning to the Patient Portal.  
**A:** As an organization, determine who would be best to contact if a patient has trouble connecting. Make sure to circulate this information with your staff so they can inform their patients.

**Q: How do we schedule appointments?**

**A:** Determine what works best for your organization. We recommend using whatever system you use for scheduling in-person appointments also be used for Telehealth Virtual Visits.

**Q: What platforms can we and our patients use (desktop, laptop, browsers)?**

**A:** MedBridge recommends conducting Telehealth Virtual Visits from a desktop or laptop computer using Windows or Mac OS. We also recommend that you use the newest version of Google Chrome or Mozilla Firefox. Patients can also connect with their provider using the MedBridge Go app on their mobile device.

**Q: What training resources do we have (both provider and patient)?**

**A:** Many training resources can be found at [MedBridge's Training and Resources page](#).

## Appendix C: Telehealth Staff Announcement Email Template

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**To the right** you will find some ..... recommended language that you can use when communicating to your staff. Feel free to adapt this messaging to fit the specific needs of your organization.

In addition, we also recommend ..... communicating to your staff your expectations for using the MedBridge Telehealth Virtual Visit platform. For example, you might say something to the effect of:

It's also important to let your staff ..... know where to go with any questions they may have. Please adjust this messaging to best fit the needs of your organization.

Attention all,

Given the current public health environment, we want to continue to provide a high quality of care to our patients, while also following the CDC social distancing guidelines in order to limit the spread of COVID-19. To achieve that end, starting on **(DATE)** we will be incorporating MedBridge Telehealth Virtual Visits into our patient care workflow.

To start familiarizing yourself with this new platform, please review the attached How-To Guide for a breakdown of the ideal workflow and instructions on conducting a Telehealth Virtual Visit with your patients. For additional resources, refer to MedBridge's Telehealth Training and Resource Page at:

[https://www.medbridgeeducation.com/sign-in?after\\_signin\\_url=https://www.medbridgeeducation.com/resources/telehealth/training](https://www.medbridgeeducation.com/sign-in?after_signin_url=https://www.medbridgeeducation.com/resources/telehealth/training).

Make sure you let your patients know about the new Telehealth Virtual Visit opportunity as you are providing care.

If you have any questions, please don't hesitate to contact **(your organization's internal point person for questions)**.

For further questions related to the Telehealth Virtual Visits platform, you can also contact MedBridge support at [support@medbridgeed.com](mailto:support@medbridgeed.com) or (206) 216-5003 (Mon – Fri 7am – 5pm PST).



**[Telehealth Provider How-to Guide](#)**

**Note:** *If you are a white label organization, contact your MedBridge Customer Success Manager for your specific URL to the resources page.*

## Appendix D: Telehealth Implementation Checklist

Use the following checklist to make sure your efforts to adopt MedBridge Telehealth Virtual Visits will be successful at your organization.

### Organization Setup

- BAA signed
- Consent Form created
- Telehealth Contract Addendum signed

### Technical Testing and Setup

- Technical requirements reviewed
- Testing in real environment completed

### Telehealth Adoption

- Provider best practices defined
- Training program planned
- Support plan established
- Telehealth announced to staff
- Training plan delivered to staff
- Training program completed for all staff
- Telehealth practice completed for all staff

### Telehealth Launch

- Patients notified of Telehealth capabilities
- First Telehealth visits conducted
- Feedback collected from staff members

## Appendix E: Sample Telehealth Virtual Visit Script

Below is a sample script you can share with your providers as they train on how to conduct a Virtual Visit. Feel free to modify this script to fit the needs of your organization.

**Provider:** Hi there! Thanks for meeting with me today. Can you see and hear me?

**Client:** Yes, I can!

**Provider:** Okay great. Since we're going to talk about health information, I want to make sure that you're in a safe and private space. Is it okay to discuss your health information in this space?

**Client:** Yes, I'm okay to talk here.

**Provider:** Alright great. I know we shared some information about how to use this platform before this visit, but did you have any questions before we get started?

**Client:** Nope, everything has been pretty easy to understand.

**Provider:** Okay great. If for any reason our visit disconnects, just go back to this page and you should be able to rejoin momentarily. If you have any trouble connecting, give me a call at (*Organization contact number*).

**Client:** Okay great, thanks for that information.

**Provider:** Alright, let's get started. What brings you in today?

## Appendix F: Creating an Ideal Space for a Virtual Visit

Place your device's camera at eye level, with your subject centered and filling the frame. Use books or boxes to raise up your device so you are not looking down at the camera.

Make sure you have ample lighting so providers are easy to see during the Virtual Visit.

- Avoid overhead lighting. This can cast unflattering shadows and make the provider hard to see. Instead, rely on lamps and window light if possible.
- Make sure light sources are in front of the provider, not behind them.
- If you're using window light, make sure there will be adequate lighting regardless of weather or time of day.

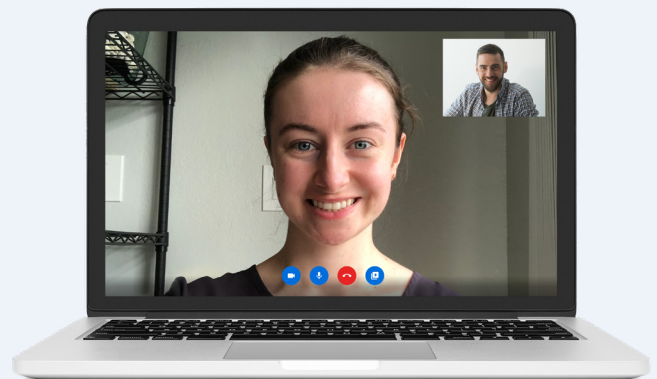
Set up in a quiet space. You want to avoid any areas where there will be foot traffic, open windows, or fans running.

- Even quiet noises like an air conditioner can be picked up by a microphone, so please avoid these if possible.
- Make sure you are close enough to your device that the microphone will pick up your voice and your patient will hear you.

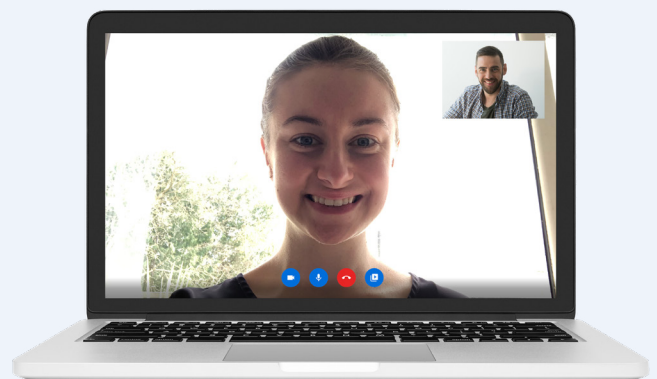
Be mindful of what your space looks like. Make sure that anything visible in the Virtual Visit is appropriate for the patient to see and that there won't be any unexpected interruptions (such as someone entering the room).



**Do:** Set your camera up with a neutral background and good lighting. Use what you have to raise your device up to eye level.



**Do:** Position yourself in front of a neutral background with a light source in front of you and make sure you are centered in the frame.



**Don't:** Position yourself in front of a bright light source or position your device below eye level.