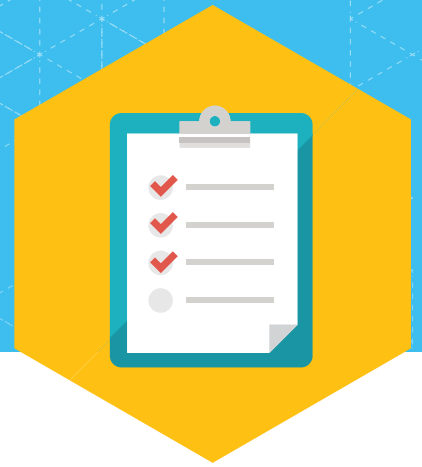




STEPSforward®



Telehealth Strategic Planning Checklist

Use this checklist as a guide throughout your planning process.

Identify a clinician champion

Name(s): _____

Identify an administrative champion

Name(s): _____

Identify your practice's goals for telehealth integration

- Improve access
- Maintain continuity of care
- Increase market share
- Improve outcomes
- Reduce infectious disease exposures
- Other: _____
- Other: _____

Decide which types of services to offer (see STEP 2)

- Scheduled live visits
- On-demand live visits
- Asynchronous communication
- Remote patient monitoring

Decide where physicians will be using telehealth

- Home
- Office or clinic
- Distant sites or facilities (separate credentialing or privileging could be required)

Consider where patients might use telehealth

- Home
- School
- Nursing or long-term care facilities
- In the state where physician practices
- Outside of the state where physician practices (separate licensing may be required)

Identify a potential telehealth platform (see STEP 3)	Electronic health record (EHR)-integrated platform Stand-alone platform
Decide on the team-based telehealth model (see STEP 4)	Synchronous real-time support Asynchronous support
Decide who will staff the various models (see STEP 4)	Physicians Nurse practitioners Physician assistants Clinical psychologists or social workers Clinical social workers Registered dietitians Nurse-midwives Supporting care team members (nurses, medical assistants, etc)
Decide which non-clinical team members will be involved (see STEP 4)	Schedulers or registration staff Billing and legal and compliance officers IT team members Quality team members
Develop telehealth workflows (see STEP 4)	
Train clinicians, care team members, and staff on new workflows	
Decide on a payment model for telehealth services	Fee-for-service Self-pay Alternative payment models Contracted models
Notify liability provider about telehealth services	
Develop patient marketing and educational materials to assist patients using telehealth services	

Want more content like this? Check out the complete [Telehealth Integration and Optimization Toolkit](#) and more at stepsforward.org.

From the AMA STEPS Forward® Toolkit Series: Telehealth Integration and Optimization—Telehealth Strategic Planning Checklist, v. 1.0. Last updated 2022-12-09.

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