

Implementation Checklist

Starting a virtual clinic

1. Identifying the need: <i>What is an unmet need?</i>	2. Building your team: <i>Who should be involved?</i>
<ul style="list-style-type: none"> <input type="checkbox"/> Brainstorm opportunities that exist for improvement <input type="checkbox"/> Prioritise ideas based on severity of need, value added, and fit with the overall practice goals <input type="checkbox"/> Evaluate overall readiness for a telemedicine solution <input type="checkbox"/> Envision expected outcome of a telemedicine solution <input type="checkbox"/> Research digital health solutions that could deliver the desired outcome 	<ul style="list-style-type: none"> <input type="checkbox"/> Identify the key members of your team: <ul style="list-style-type: none"> <input type="checkbox"/> Leaders who are responsible for directing the project <input type="checkbox"/> Decision makers who direct key changes, provide approval, and drive alignment <input type="checkbox"/> Consultants who provide perspective and guidance for strategy <input type="checkbox"/> Ground teams who run the day-to-day process <input type="checkbox"/> Communicate responsibilities required by the team <input type="checkbox"/> Set up regular meetings and key checkpoints
3. Identifying key goals: <i>What is success?</i>	4. Finding the technology: <i>What technology will fit?</i>
<ul style="list-style-type: none"> <input type="checkbox"/> Research the possible results from the solution <input type="checkbox"/> Identify 3–5 key goals for your practice to achieve <input type="checkbox"/> Identify appropriate metrics for assessing progress <input type="checkbox"/> Institute a process to collect data and track progress <input type="checkbox"/> Establish specific checkpoints for collecting data <input type="checkbox"/> Set clear endpoint criteria to re-evaluate or scale <input type="checkbox"/> Establish baseline metrics to compare against 	<ul style="list-style-type: none"> <input type="checkbox"/> Make a list of required equipment and technologies <input type="checkbox"/> Build a request for proposals that clearly outlines the practice goals <input type="checkbox"/> Send probes to vendors that align to your goals <input type="checkbox"/> Ask for demonstrations, case studies, and referrals <input type="checkbox"/> Evaluate vendors on their attributes (ie, organisation, IT capabilities, usability, service, documented outcomes) <input type="checkbox"/> Narrow your options to one or two preferred vendors to include in your proposal
5. Define resources: <i>How do you get buy-in?</i>	6. Build a map: <i>What is the plan for roll-out?</i>
<ul style="list-style-type: none"> <input type="checkbox"/> Define resources required for implementation (funds, staff, bandwidth, support, approvals...) <input type="checkbox"/> Estimate required budget (vendor services, equipment, marketing, education, and staff) <input type="checkbox"/> Estimate the value and return on investment your solution will get if goals are achieved <input type="checkbox"/> Align your initiative with organisational goals <input type="checkbox"/> Compile proposal to management to obtain approval and resources 	<ul style="list-style-type: none"> <input type="checkbox"/> Secure approvals to proceed with contracting <input type="checkbox"/> Negotiate specifics (ie, financial investment, customer support, upgrades, and success metrics) <input type="checkbox"/> Document measurable definitions of success <input type="checkbox"/> Identify timeline for current contract and outline when terms will be renegotiated <input type="checkbox"/> Outline the plan to scale your programme <input type="checkbox"/> Collaborate with legal, financial, procurement, or IT teams to get the contract signed

7. Design the Workflow: <i>How will it work?</i>	8. Preparing the Staff: <i>Who will use this solution?</i>
<ul style="list-style-type: none"> <input type="checkbox"/> Outline an optimised workflow of coordinated effort between the patient, administrative team, and clinician <input type="checkbox"/> Identify updated procedures such as patient identification, patient training, device management, data monitoring and analysis, interventions, and billing <input type="checkbox"/> Define protocols for signalling clinically relevant data <input type="checkbox"/> Ensure bandwidth to implement new initiative (streamline processes, automate, outsource, hire staff) <input type="checkbox"/> Develop resources to support new workflow 	<ul style="list-style-type: none"> <input type="checkbox"/> Secure training support from vendor <input type="checkbox"/> Identify staff who can help disseminate training or act as ongoing trainers for other staff <input type="checkbox"/> Develop training materials (scripts, guides, reference documents) for quick reference <input type="checkbox"/> Educate staff on new workflow, clinical protocols, operation of the new solution, training patients, and troubleshooting <input type="checkbox"/> Give clear and structured direction on staff roles <input type="checkbox"/> Institute ongoing feedback system
9. Preparing the Patient: <i>How will this be received?</i>	10. Implementing the process: <i>How did it go?</i>
<ul style="list-style-type: none"> <input type="checkbox"/> Develop a wide variety of patient training materials to support different learning styles <input type="checkbox"/> Set clear expectations about the initiative <input type="checkbox"/> Create eligibility criteria for programme participation and identify eligible patients <input type="checkbox"/> Identify patients who are likely to succeed <input type="checkbox"/> Enrol and strategically engage interested patients <input type="checkbox"/> Ensure you are prepared to initiate workflow 	<ul style="list-style-type: none"> <input type="checkbox"/> Officially launch the programme with eligible patients <input type="checkbox"/> Support patients with technical issues <input type="checkbox"/> Ensure patient data is being recorded as intended <input type="checkbox"/> Act on data to improve patient outcomes, whether through interventions or adjustments to care plan <input type="checkbox"/> Solicit feedback from staff and patients; adjust procedures as necessary <input type="checkbox"/> Ensure you are tracking key success metrics
11. Evaluating Success: <i>Did it work?</i>	12. Scaling the Initiative: <i>How to improve it?</i>
<ul style="list-style-type: none"> <input type="checkbox"/> Gather data used to track key success metrics and compare with baseline metrics <input type="checkbox"/> Gather compelling success metrics into expansion proposal <input type="checkbox"/> Collect feedback from your team and debrief <input type="checkbox"/> Revisit your initial goals and evaluate your success <input type="checkbox"/> Identify hurdles to success, reworking as necessary <input type="checkbox"/> Align on goals for next phase of the programme 	<ul style="list-style-type: none"> <input type="checkbox"/> Resolve any improvement opportunities <input type="checkbox"/> Broadcast the programme's success to generate enthusiasm and further buy-in <input type="checkbox"/> Plan to appropriately scale the programme <input type="checkbox"/> Budget and secure financing for growth <input type="checkbox"/> Negotiate your partnership with your vendor <input type="checkbox"/> Engage, enrol, and train new patients <input type="checkbox"/> Continue tracking key metrics for ongoing impact

Reference:

American Medical association. Telehealth Implementation Playbook. 2020. Available at: <https://www.ama-assn.org/system/files/2020-04/ama-telehealth-implementation-playbook.pdf>2020. Accessed September 2020.

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