



New York State
Family Planning
Training Center
nysfptraining.org

STEP 3: Optimizing Telehealth Workflows

Instructions

To use this worksheet, you will review seven areas of your telehealth workflow with any and all staff involved in telehealth visits. This may include schedulers, health educators, clinicians, or RNs. It is helpful to shadow a patient's experience receiving telehealth for each family planning service you review, noting issues that come up frequently.

Considering your takeaways from Step 1 and Step 2 of this toolkit, identify 2-3 areas of your agency's telehealth workflow that you would like to improve. Ideally, these should be areas that already have support from clinicians and that would help your agency strive towards an increased level of telehealth maturity. You will be able to synthesize these takeaways and create a plan for improvement using Step 4 of this toolkit, the Toolkit Synthesis Worksheet.

Use the template below to complete your assessment. Across each column header, choose a few family planning services your family planning agency offers via telehealth to focus on, and jot down common issues encountered during their delivery via telehealth. Please refer to the **Sample Optimizing Telehealth Workflows Worksheet** for an example of a completed worksheet.

Workflow Area	Family Planning Service #1:	Family Planning Service #2:	Family Planning Service #3:
<p>Telehealth scheduling Scheduling the patient for virtual visits by front desk scheduler and/or staff. Often follows the same process as in person scheduling.</p>			
<p>Telehealth onboarding Ensuring the patients know what technology to use and how to use it prior to the time of the appointment (“tech check”).</p>			
<p>Telehealth rooming A process to connect patient and provider(s) for a visit. Clarify what information is needed for an appointment and how it is collected; technical support available.</p>			
<p>Telehealth visit Space and technology for providers to use for telehealth, as well as provider needs during a visit (e.g. read test results, if applicable review vitals, patient education, etc.).</p>			
<p>Telehealth post-visit A process for prescriptions, labs, tests, referrals, any post visit patient needs.</p>			
<p>Telehealth follow-up A process to book follow-up visits and/or complete the virtual visit in person.</p>			
<p>Telehealth billing Billing for telehealth services, documentation requirements, acceptable CPT codes, and any other payer-specific information.</p>			