A Road Rally Through Your
Telehealth Torture Track:

HOW DOES YOUR PRACTICE STACK UP?

A ROAD RALLY THROUGH YOUR TELEHEALTH TORTURE TRACK:

How Does Your Practice Stack Up?

Patients navigating your telehealth delivery process may feel they are driving a road rally, with multiple stops, challenges and obstacles. Each stop or checkpoint either reinforces a positive experience or strengthens a negative perception.

How does your practice stack up? To help answer that question, we've created a virtual telehealth road rally that tracks each step of the typical telehealth process through a practice. At each stop, best practice delivery is outlined, and you can score your own performance from 1-5 against that yardstick.

Each stop also includes a "What You Can Do" section with pointers on how to improve your score in that area.

This course has 13 stops, each scored from 1-5, for a total possible perfect score of 65. Here's how the scoring stacks up:

Perfect Score:	65
Excellent:	52-64
Good:	39-51
Need a pitstop:	38 and below

It's important to note how much goes into creating a positive telehealth experience before the actual visit. In this rally, the provider visit is #10 out of 13 total stops. This is consistent with recent research that shows patients love their providers but dislike most of what goes on around the visit. Download *How to Remove the 'Hate' From Patients' Love/Hate Attitude Toward their Doctors – 5 Proven Paths*.

Pull on your driving gloves, sharpen your pencil, and let's get started.
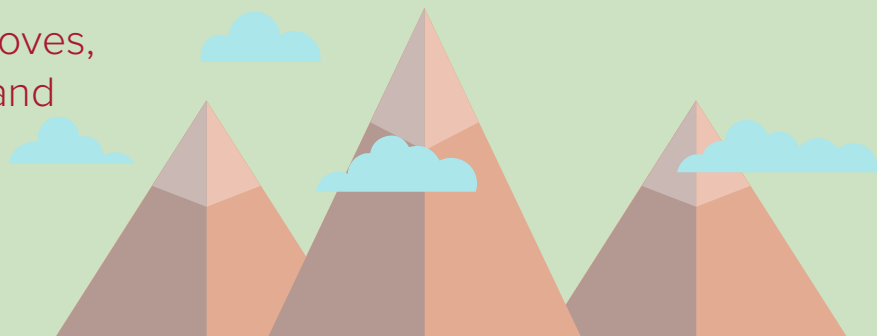
Start: Online Search

Recent surveys consistently confirm that 75% of patients go online to find a healthcare provider and information about medical care.[1] This is an area where your practice must shine, not only to capture your share of new patient flow, but to also satisfy the telehealth desires of these more tech-savvy people.

To test your performance, go to a search ____window and type "find (your specialty) near me." For example, if you are a pediatrics practice, search "find pediatrician near me." (Note: DO NOT enter your practice name or provider names - that's cheating). A page of search results will come up. Look for your practice in the non-paid advertising middle section.

The scoring for this step is the inverse of the page you show up on.

Page 1 = 5 Points
Page 2 = 2 Points
Page 3 or deeper = 0 Points

My Score: _____

What You Can Do

If you score 2 or below, your website and online presence need some attention. Unless you have the skills to improve 'organic' search in-house, consider hiring a professional SEO agency to help optimize search terms, content on the site, etc. Many agencies offer excellent help scaled to the needs and budget of your practice. Additionally, positive reviews are a major contributor to higher search rankings. For free, and something you can do yourself, consider simply claiming and/or updating your Google listing after you find your Google Business listing in your search results. Look for the "Own this business?" or "Manage this listing" links. See Stop #2.

[1] https://www.patientpop.com/blog/online-reputation-reviews/what-patients-want-results-from-the-patientpop-2020-patient-perspective-survey/

Stop #2. Check Online Reviews

Quality ratings are the #1 criteria used by consumers (72%) in selecting or switching doctors. Nearly 60% of patients will ignore a practice with less than a 4-star rating. These ratings often relate specifically to telehealth experience.

To test your performance, search your practice online and check the average 5-star ranking. Score as follows:

5 Stars = 5 points
4 Stars = 4 points
3 Stars = 1 point
2 or 1 Stars = 0 points

My Score: _____

What You Can Do

If your average rating is 3.5 stars or lower, your online reputation needs attention. Follow these steps as a starting point:

Utilize an automated reputation management system, preferably integrated with the practice management system so you can survey patients and ask for feedback. Leading systems offer this capability.

Improve processes to seek and nurture positive reviews from patients. See step #13 for details.

Focus here immediately. It's one of the most important and easiest to address.

Stop #3: Go to Website

Patients will next go to your website. For telehealth visits this is what they will be looking for:

- Telehealth and scheduling spotlighted prominently on your homepage = 1 point
- Brief, upbeat summary of telehealth delivery in your practice: thorough, private, simple, covered by insurance, etc. = 1 point
- Link to more detailed educational materials and information = 1 point
- 'What to expect' 2-minute video explanation = 1 point
- HIPAA-compliant testimonial stating that your telehealth process is easy, effective, great experience, etc. = 1 point

My Score: _____

What You Can Do

If you scored 2 or below, work with your website agency to add content and simplify navigation to feature telehealth more prominently. A score of 3 or 4 gives you room to add additional details or video that research shows improves engagement 5x over static content.

Stop #4: Schedule a Telehealth Visit

From the homepage or patient portal link, schedule a telehealth visit as if you were a patient. Look for these features:

- Simple and clearly defined one-click access to telehealth scheduling = 1 point
- Scheduling options include by provider and by location (if applicable) = 1 point
- Waitlisting "or call me back" is included for telehealth requests = 1 point
- Phone number listed prominently for those who prefer phone scheduling = 1 point
- Phone telehealth scheduling is seamless, and offered proactively by staff, particularly for visit types identified as telehealth priority = 1 point

My Score: _____

What You Can Do

Ensure your scheduling system is fully functional online (portal) and telehealth is a seamless visit type within the system. Virtually all features of a robust scheduler should be available for telehealth visits. For phone scheduling, train staff to offer telehealth options for specific visit types that fit your practice's goals.

Stop #5: Telehealth Onboarding

Pre-visit onboarding process:

Automated process populated by pre-built 'packages' of documents triggered by visit type, and accessed on the portal by patients = 1 point

Completely paperless option to complete intake documents on an iPad or kiosk if visit type changes to in-office = 1 point

Able to track patient administrative progress to ensure completion of all pre-visit requirements in advance of appointment = 1 point

Automated reminders go out via patient's preferred method (text or email) to patients = 1 point

Completed intake information goes automatically to the appropriate area of the EHR = 1 point

My Score:

What You Can Do

Robust EHR systems include all these automated features that should be a part of your process. They save staff time, maximize visit efficiency, and please patients. A low score may indicate the need for a system upgrade.

Stop #6: Telehealth Visit Reminders

Significantly reduce no-shows:

Reminders are fully automated (text or email/patient preference) on a pre-set schedule (e.g. 2 days prior, day of, etc.) = 1 point

Reminder includes telehealth instructions (e.g. pointers on lighting, camera angle, sound/privacy control, etc.) and links to educational details = 1 point

Instructions clarify that this is an actual visit, not simply a call or free consult = 1 point

Includes prominent links and phone numbers for help in initiating the call, with trained staff to respond = 1 point

One-click link to start the visit at the appointed time = 1 point

My Score:

What You Can Do

Automated reminders are part of leading telehealth systems or are integrated with existing EHR reminder technology. Ensure upgrades and/or integrations deliver these functions. Add complete instructions and information links to reminders. It's best to over-communicate, assume things will go wrong, and put backup processes in place.

Stop #7: Change/Reschedule Telehealth Visit

Patients often need to change visit schedules. These points minimize staff and patient impact:

Schedule/reschedule link is simple to find on the portal or website = 1 point

Reschedule link included in reminder text/email = 1 point

Full range of options available: locations, providers, waitlist, etc. = 1 point

Simple option to change appointment type to in-office visit = 1 point

Phone number included for any questions or concerns = 1 point

My Score: _____

What You Can Do

Rescheduling is a subset of a strong scheduling solution. Ensure your system is capable and make these adjustments to smooth schedule changing for patients.

Stop #8: Insurance Verification

Verify telehealth eligibility with these best-practice features:

Fully automated verification based on schedule and patient insurance information in the practice management system = 1 point

Verification automatically runs 24 hours prior to visit for both new and returning patients = 1 point

Automated notification of rejection sent to patient and staff = 1 point

Specific process to resolve issues with patient prior to visit = 1 point

Escalation path for urgent/unusual situations = 1 point

My Score: _____

What You Can Do

This piece of automation is one of the most revenue-positive, yet most underutilized in private practice. Make sure your EHR and practice management systems are capable and be relentless on consistent implementation.

What You Can Do

Optimize waiting room, payment and pre-visit tech check processes to ensure a smooth patient experience and maximize provider time. If your telehealth system or module is glitchy or clunky in integrating these features, review other system options.

Stop #9: Initiate Telehealth Visit

It's finally time to meet with the doctor! Get started right:

Single click, foolproof visit initiation from reminder text/email = 1 point

Help links, phone numbers/trained staff to resolve technology snafus = 1 point

Collect payment prior to visit initiation, including co-pay and estimated patient portion charges = 1 point

Virtual waiting room facility to accommodate provider schedule lag = 1 point

Staff pre-check of video and sound quality, suggest changes to lighting, positioning, etc. = 1 point

My Score: _____

Stop #10: Telehealth Visit with the Provider

An ideal telehealth visit with the provider includes:

Simple one-click access for the provider from the schedule = 1 point

Full EHR integration. All notes, histories and medications are readily available. No double entry from telehealth to main EHR system = 1 point

Fast and seamless access to prescriptions, labs and images within your system = 1 point

Patient education resources delivered through your patient portal as recommended in the visit = 1 point

Provider camera, sound, screen/keyboard facilitate both good eye contact and information access = 1 point

My Score: _____

What You Can Do

Full EHR, labs, prescriptions, histories, demographics and telehealth processes are unified within that same system is a must for maximum workflow efficiency. Reevaluate your technology solution and upgrade as necessary if you score low on this stop.

Stop #11: Multi-participant Telehealth Collaboration

Visits often need to accommodate additional participants.

In scheduling and/or reminder process, assess the need for additional participants and collect contact information = 1 point

Simple process to add a specialist or other professional to the telehealth visit (including scheduling, reminders, tech support) = 1 point

Simple process to add a family member virtually to the visit (including scheduling, reminders, tech support) = 1 point

Technology supports implementation of HIPAA regulations = 1 point

Family members have access to educational information and follow up processes = 1 point

My Score: _____

What You Can Do

Full EHR, labs, prescriptions, histories, demographics and telehealth processes are unified within that same system is a must for maximum workflow efficiency. Reevaluate your technology solution and upgrade as necessary if you score low on this stop.

Stop #12: Seamless Checkout

Make the virtual checkout process simple and painless.

Payment + co-pay are simple online processes (if not collected prior to visit) with multiple payment options including all major credit cards, PayPal = 1 point

Advanced payment features, like credit card on file and payment plans = 1 point

Prescription instructions clearly communicated and verified with patient = 1 point

Education links confirmed with all parties involved (patient, family/care givers) = 1 point

Follow-up scheduling can be easily set up for next visit or recurring schedule of visits according to protocol (e.g. 2 weeks, 30 days, 60 days, etc.) = 1 point

My Score: _____

What You Can Do

Implementing advanced payment features can significantly improve the experience for patients, and positively impact cash flow and collection for practices. These features are now available in leading practice management and billing systems. For more details on payment plans, see our Patient Pleaser Triple Play eGuide.
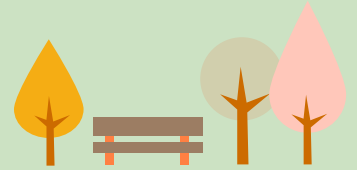
Stop #13: Follow Up and Reviews

Top-notch follow-up goes well beyond clinical items, since the majority of quality complaints center on non-provider interface issues.

Visit summary available in the patient's portal account = 1 point

Automated online review request can be sent with embedded link to review site = 1 point

Follow-up call within 24 hours to ask what went well, what could be improved, ask for an online review = 1 point

Implement process for workflow improvement based on feedback = 1 point

Respond directly to negative reviews and feedback: Search rankings are boosted by proactive response, and patient satisfaction is boosted 276% = 1 point

My Score: _____

What You Can Do

Implement a proactive protocol for follow-up calling paired with automated reviews management. Leading EHR platforms offer reputation management systems for reviews integrated with practice management and patient portal functions, ensuring consistent information and streamlining workflow.
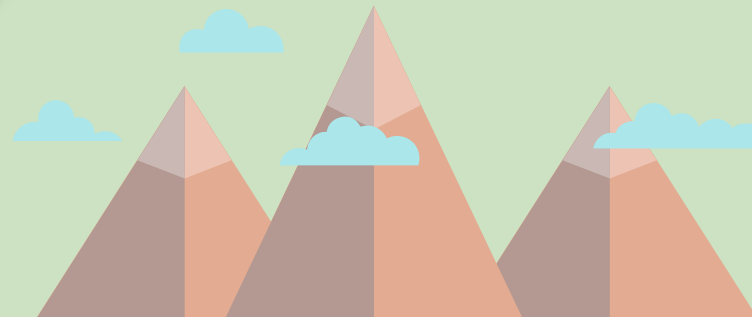
YOU MADE IT!

How happy is your patient? Tally up your score and see how you stack up on the 65-point scorecard. If you're near the top, it's time to celebrate. If not, go back and identify the lowest score areas where focus and system upgrades could make a significant difference.