Common challenges for coordinators:

- Staffing allocation for dedicated coordinator and back up support
- Technology & technical support
- Additional equipment needs – how to acquire?
- Patient buy in
- Identifying Physician champion
- Working equipment
- Workflows
- Scheduling
- Provider trust, specialist trust
- Interpersonal skills – super starters
- Reimbursement – how does billing work by plan, etc.
- Working with health plans, and how to obtain Health plan buy-in – how to prove the benefit to the health plans (access to care; describe the need, volume, specialties needed, and ability to succeed)
- How to get started – online training
- Physician buy-in (ROI)
- Support of leadership and admin staff
- No Show rates
- Reporting – pulling reports
- Patient call backs
- Understanding technology (and real-time fixes)
- Getting chart notes from the specialist
  - 3 models: Provider joins last few minutes; Patient only; f/u with PCP later; Contracted provider (RX rights in EHR)

What do telehealth coordinators need to be successful?

- Specialists who don’t require blocks of time
- Time management
- Back up
- Morning huddles
- Sales pitch for providers
- Executive champion
- Peer connections, continuing education opportunities with peers, peer to peer collaborative events
- Communicating new developments and best practices (via video, webinar, newsletter)
- Understanding of where telehealth fits into big picture
- Laptop
- Assertiveness with providers, patients, PCPs
- Dedicated time for telemedicine
- Training
- Presenting professionally to specialists
- Tip: take internal staff and promote to telehealth role
- Troubleshooting techniques
- For experienced coordinators:
  - Learn how to delegate
  - Project management skills
  - Create break-even program – project reimbursement
- Support from other staff (med techs)
- Time during provider meetings to do sales pitches
- Senior leadership support, organizational commitment
- Promotional materials
- Provider buy-in, clinician champion
- Strategies to prevent no-shows
- Good working relationship with referral coordinator
- Personality traits: thick skin, resilient, creative, IT savvy, big picture
What resources are most useful or would you like to see developed?

- Useful: CPCA, CTRC, Health Plans, CTN, Grants / learning community
- How have they been useful (or not)?
  - Expanding outside of clinic
  - 4 walls (limiting / reimbursement / barriers for patients)
  - Health plans restrictions – finding specialty
- Need to develop:
  - Curriculum - Online training (Free, Certificate)
  - Hands-on at facility to get trained together – do it early
  - On-site training
  - 101 guide to telehealth
    - Checklist
    - How to get started
    - More specific workflow: Scheduling, Preparation, Specialists
  - Stock photos
  - Live demos
  - Frequent conferences, webinars
  - Strong relationship with doctors
  - Understanding of big picture
  - Funding for position
  - Time with experienced coordinators, interact with other clinics
  - Job description
  - Training for managers
  - Grant opportunities – ongoing funding support for equipment after grant ends
  - Articles
  - Template for workflow

Methods of support:

- Online: More flexible, lower cost, Continuing ed
- Hands-on – get started – site visit (onsite training with “own” equipment)
- In-person training – once established
- Zoom training (more general)
- Sharing contacts
- Site visits to high performing sites
- Monthly or 2xmo webinars
- “TH4TH”
- Conferences
- Best practice guides
- Coordination of records, work flow, steps to complete the process

Topics for training curriculum:

- How to use equipment and peripherals
- Troubleshooting
- Laws
- Contracts and contracting models
- Grants
- Reporting
- Billing – reimbursement
- Consent
- HIPAA
- Scheduling
- Services from plans
- How to sell the patient
- Guidelines
- Roadmaps
- Presentation
- Modalities
- Technology
- Workflow
- Patient presentation techniques for each specialty
- Best practices
- How to room patients
- Do’s and don’ts for videoconferencing
- Admin
- Telemed 101 – what is telemedicine and what are the various modalities (live, S&F, etc)
- Reducing no show rate
- Enhancing productivity for sustainability