Implementation Checklist

Starting a virtual clinic

1. *Identifying the need:* *What is an unmet need?*	*2.* *Building your team:* *Who should be involved?*

☐ Brainstorm opportunities that exist for improvement
☐ Prioritise ideas based on severity of need, value added, and fit with the overall practice goals
☐ Evaluate overall readiness for a telemedicine solution
☐ Envision expected outcome of a telemedicine solution
☐ Research digital health solutions that could deliver the desired outcome
	☐ Identify the key members of your team:
	  ☐ **Leaders** who are responsible for directing the project
	  ☐ **Decision makers** who direct key changes, provide approval, and drive alignment
	  ☐ **Consultant**s who provide perspective and guidance for strategy
	  ☐ **Ground teams** who run the day-to-day process
	☐ Communicate responsibilities required by the team
	☐ Set up regular meetings and key checkpoints

3. *Identifying key goals:* *What is success?*	*4.* *Finding the technology:* *What technology will fit?*
☐ Research the possible results from the solution ☐ Identify 3–5 key goals for your practice to achieve ☐ Identify appropriate metrics for assessing progress ☐ Institute a process to collect data and track progress ☐ Establish specific checkpoints for collecting data ☐ Set clear endpoint criteria to re-evaluate or scale ☐ Establish baseline metrics to compare against	☐ Make a list of required equipment and technologies ☐ Build a request for proposals that clearly outlines the practice goals ☐ Send probes to vendors that align to your goals ☐ Ask for demonstrations, case studies, and referrals ☐ Evaluate vendors on their attributes (ie, organisation, IT capabilities, usability, service, documented outcomes) ☐ Narrow your options to one or two preferred vendors to include in your proposal
5. *Define resources:* *How do you get buy-in?*	*6.* *Build a map:* *What is the plan for roll-out?*
☐ Define resources required for implementation (funds, staff, bandwidth, support, approvals…) ☐ Estimate required budget (vendor services, equipment, marketing, education, and staff) ☐ Estimate the value and return on investment your solution will get if goals are achieved ☐ Align your initiative with organisational goals ☐ Compile proposal to management to obtain approval and resources	☐ Secure approvals to proceed with contracting ☐ Negotiate specifics (ie, financial investment, customer support, upgrades, and success metrics) ☐ Document measurable definitions of success ☐ Identify timeline for current contract and outline when terms will be renegotiated ☐ Outline the plan to scale your programme ☐ Collaborate with legal, financial, procurement, or IT teams to get the contract signed

7. **Design the Workflow:** *How will it work?*	8. **Preparing the Staff:** *Who will use this solution?*
☐ Outline an optimised workflow of coordinated effort between the patient, administrative team, and clinician ☐ Identify updated procedures such as patient identification, patient training, device management, data monitoring and analysis, interventions, and billing ☐ Define protocols for signalling clinically relevant data ☐ Ensure bandwidth to implement new initiative (streamline processes, automate, outsource, hire staff) ☐ Develop resources to support new workflow	☐ Secure training support from vendor ☐ Identify staff who can help disseminate training or act as ongoing trainers for other staff ☐ Develop training materials (scripts, guides, reference documents) for quick reference ☐ Educate staff on new workflow, clinical protocols, operation of the new solution, training patients, and troubleshooting ☐ Give clear and structured direction on staff roles ☐ Institute ongoing feedback system
9. **Preparing the Patient:** *How will this be received?*	10. **Implementing the process:** *How did it go?*
☐ Develop a wide variety of patient training materials to support different learning styles ☐ Set clear expectations about the initiative ☐ Create eligibility criteria for programme participation and identify eligible patients ☐ Identify patients who are likely to succeed ☐ Enrol and strategically engage interested patients ☐ Ensure you are prepared to initiate workflow	☐ Officially launch the programme with eligible patients ☐ Support patients with technical issues ☐ Ensure patient data is being recorded as intended ☐ Act on data to improve patient outcomes, whether through interventions or adjustments to care plan ☐ Solicit feedback from staff and patients; adjust procedures as necessary ☐ Ensure you are tracking key success metrics
11. **Evaluating Success:** *Did it work?*	12. **Scaling the Initiative:** *How to improve it?*
☐ Gather data used to track key success metrics and compare with baseline metrics ☐ Gather compelling success metrics into expansion proposal ☐ Collect feedback from your team and debrief ☐ Revisit your initial goals and evaluate your success ☐ Identify hurdles to success, reworking as necessary ☐ Align on goals for next phase of the programme	☐ Resolve any improvement opportunities ☐ Broadcast the programme's success to generate enthusiasm and further buy-in ☐ Plan to appropriately scale the programme ☐ Budget and secure financing for growth ☐ Negotiate your partnership with your vendor ☐ Engage, enrol, and train new patients ☐ 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.pdf2020. Accessed September 2020.

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