UnitedHealthcare telehealth visit guide

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Telehealth overview

UnitedHealthcare believes that telehealth can extend every practice's reach to meet members where they are. The telehealth visits guide is meant to help your practice build your telehealth capabilities and support your telehealth journey. This guide outlines the basic steps to prepare a practice to deliver telehealth, offers tips and best practices and suggests tools to measure telehealth's effectiveness for the practice.
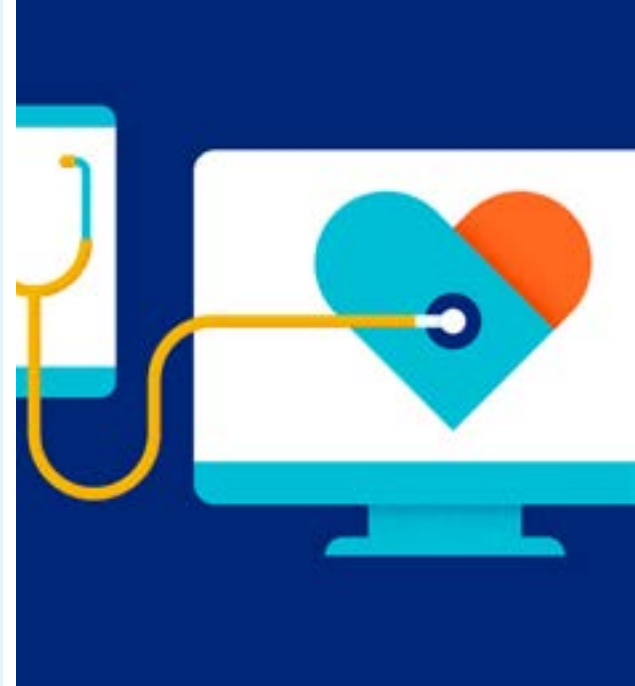
340%

Increase in physician telehealth adoption based on 2019 physician survey*

9/10

Americans over the age of 40 would be comfortable using at least one type of telehealth service for themselves or a loved one**

Telehealth creates another avenue for providing quality care that makes good use of clinicians' limited time, while deepening their patient relationships.
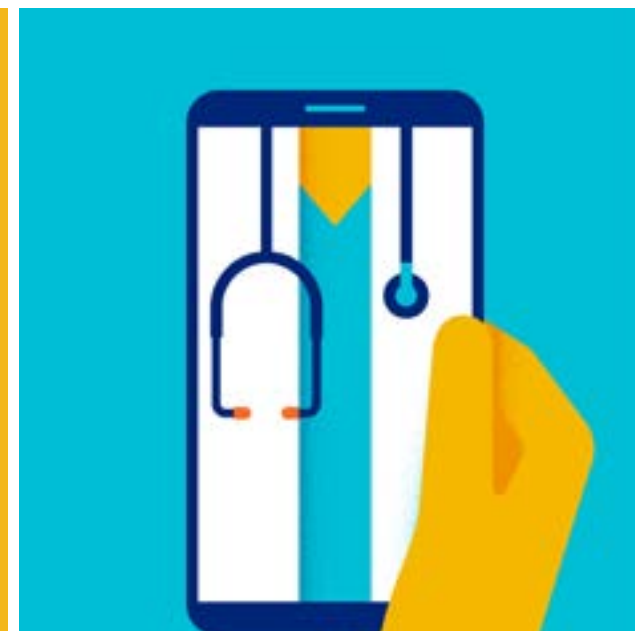
* American Well. Telehealth Index: 2019 Physician Survey
** Associated Press: 2018 Long Term Care Poll

Why use telehealth?

Telehealth can help improve access to services from providers and increase convenience for members.

Telehealth may attract patients who prefer access to providers outside traditional business hours, creating appointment scheduling flexibility.
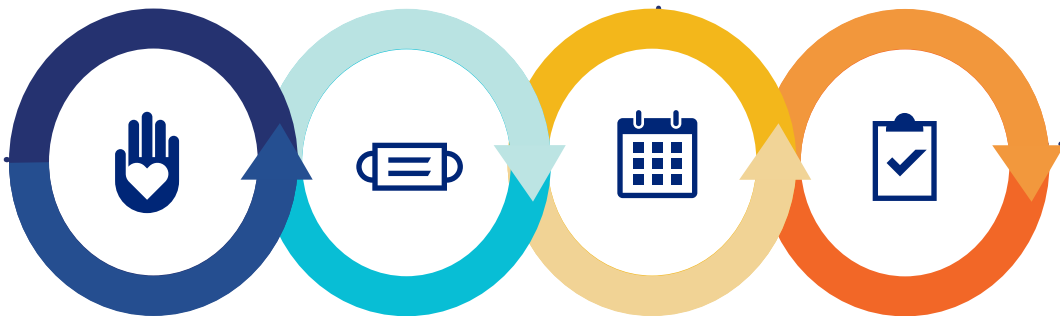
Telehealth visits have the potential to decrease providers' risk of exposure to infectious agents that are potentially introduced during a visit in a public health setting.

Telehealth can help establish and build better relationships between providers and members, making it easier for care coordination.

Telehealth is sparking innovation that brings improved health, a better care experience and greater efficiency.

Technology requirements

Patient records and other related information are protected by the Health Insurance Portability and Affordability Act (HIPAA) and its governing regulations as well as federal encryption and security requirements.

Please note: Due to COVID-19, the U.S. Department of Health and Human Services Office for Civil Rights (OCR) is exercising enforcement discretion and waiving penalties for HIPAA violations against health care providers that serve patients in good faith through everyday communication technologies. Providers are responsible for providing telehealth services in accordance with OCR's notice.

Technical requirements for telehealth visits*

Telehealth technology must comply with HIPAA and meet security and confidentiality requirements for electronic member information set by federal and state agencies.*

Telehealth technology must enable interactive patient-provider exchanges by transmitting audio and video in real-time. These standards align with guidelines published by the American Medical Association and Federation of State Medical Boards.

Other telehealth technology considerations

There are many options for telehealth technology that can increase patient ease of use and make telehealth more integrated into the provider visit process.

*Unless otherwise noted by U.S. Department of Health and Human Services Office for Civil Rights during the national public health emergency.
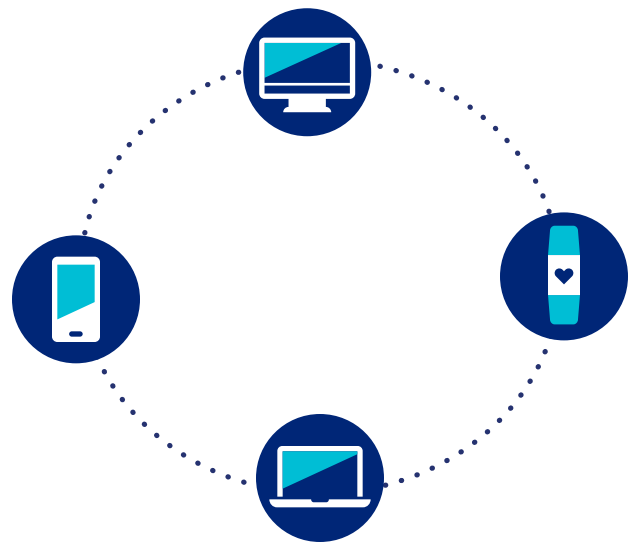
A telehealth solution that's compatible with a wide variety of internet browsers and devices will allow providers and their patients to conduct telehealth visits from the device of their choice, such as a smartphone, tablet or personal computer.

Telehealth systems that integrate with an EMR system enable ease of data collection and documentation during the visit and avoid duplicate documentation.

Telehealth solutions that integrate with a scheduling system also allow scheduling staff to seamlessly schedule appointments.

Technology solutions that offer a method for verifying patient eligibility and collecting copayment prior to the visit make the telehealth visit workflow more seamless for the office administrative staff.

Learn more about telehealth technical infrastructure.

Please note: State telehealth technology rules and regulations apply.

Telehealth clinical use cases

The health care industry is continually discovering new uses for telehealth. Each provider practice will need to decide how telehealth will fit into their clinical model and how it can be used to meet patient needs. Some common examples may include:*

- Chronic condition management:
  - Newly diagnosed diabetic education
  - Routine follow-up appointments
  - Medication management and education

- Behavioral health, including behavioral health visits offered by the primary care provider:
  - Attention-deficit/hyperactivity disorder check-ins
  - Symptom tracking and medication management
  - Screenings (e.g., PHQ-9)

- Surgical follow-up:
  - Wound assessment and management
  - Wound care education
  - Care coordination

- Same-day appointments for minor illnesses and injury (low-risk urgent care)

- Transitional care management services

*Coverage for clinical services may vary by plan.

Telehealth scheduling

Thoughtful incorporation of telehealth visits into a practice's schedule and scheduling operations is integral for a successful telehealth program. You should carefully review different approaches to scheduling telehealth visits as you choose the optimal option for your practice and patients. Three common scheduling approaches include:

1

Integrate visits seamlessly within the existing schedule.
Good fit for:
- Low volume of telehealth encounters.
- Practices that have established operational support roles of the clinic staff that can "room" patients and perform parallel roles to an in-person visit

2

Dedicate a portion of the workday.
Good fit for:
- Consistent volume of telehealth encounters.
- Early morning or late-day visit time blocks that can be dedicated to patients who can't attend appointments during traditional office hours

3

Dedicate one team to telehealth services
Good fit for:
- Large volume of telehealth encounters
- Same-day and one-time services to support the primary care provider team, think of this as virtual triaging

Schedule telehealth requests by phone/triage line

Preparing the practice's scheduling staff to identify visit requests that are appropriate for telehealth services can be a pivotal step toward successful telehealth operations.

1. Provide scheduling staff an algorithm that filters on visit type and reason for visit. Or connect with your scheduling platform representative to identify telehealth scheduling solutions and capabilities.

   Some examples that can be programed into an algorithm:

   - Follow-up visits to review the impacts of medications, discuss results of a visit to a specialty provider or to adjust care plans based on patient feedback
   - Requests for same-day appointments to address sub-acute symptoms like cough, congestion, sinus pain, headache, rash, etc.
   - Conditions identified by practice specialty providers such as ADHD follow-up appointments, diabetic follow-ups with endocrinologists, evaluation of chronic skin conditions, etc.

2. Verify patient eligibility for telehealth services by reviewing their insurance coverage.

3. Offer a telehealth appointment as an option to the patient. Assess the patient's comfort level with telehealth and their access to telehealth technology. Determine if the patient requires translation services.

4. Schedule the visit within the practice scheduling system, and note that it is a telehealth visit.

5. Provide the patient with instructions to access the telehealth visit. Provide a web link to the practice website where telehealth instructions are available. Then, email or text an appointment confirmation with the link to them.

Schedule as a follow-up to an in-person visit

Scheduling telehealth visits following an in-person visit could help improve follow-up compliance and improve patient experience.

- When care providers are completing their visit with a patient, they can recommend telehealth for a follow-up visit to the in-person visit. At this time, the provider would be able to address patient concerns about the care they can receive during a telehealth visit.

- During the checkout process, the clinic front desk staff can review and mention telehealth as an option for a follow-up visit.

- Front desk staff can schedule the telehealth visit in the practice scheduling system and note that the appointment is a telehealth visit.

- Front desk staff can also provide the patient with instructions to access the telehealth visit. Provide the patient with printed instructions to access telehealth visits and email/text an appointment confirmation with the telehealth instructions link.

Online scheduling
Available telehealth appointment slots can be made visible to patients on a practice website or patient portal, if available. Care providers can choose to release several of their appointment slots to telehealth and allow patients to schedule through applicable online platforms.

Patient guidance

Communication of services

Actions to increase awareness of telehealth services could be taken during an in-person visit, on the practice website, through fliers, emails, patient portal messages and more.

Additional items to consider regarding communication:
- Remember that it's just as important that the practice staff are aware of the available telehealth services as it is for patients to learn about them.
- Create a reference document for staff members to identify which types of services may be conducted by using telehealth.
- The level of marketing and communication to patients will depend on your practice model. Determine if you'll allow patients to request telehealth visits, or if providers and front office staff will strictly direct scheduling.

Patient selection criteria

Establishing clear clinical criteria for telehealth visits can help ensure your practice is efficiently using telehealth services for the right patients. Some examples of criteria to consider include but may not be limited to:

- Patients with an established relationship with their physician and who have been seen in person at least once within the last year.
- Patients who are registered patient portal users.
- Patients with access to a device with video capability, such as a smartphone, tablet or desktop computer.
- Patients with technology literacy, as well as a data plan or an internet connection, to support video calls.

Patient barriers to telehealth visits

While telehealth can be a very valuable tool, it's important to acknowledge that barriers do exist for some patients.

Technology barriers:
- Patients may live in a location with insufficient internet speed for a video visit or may not be able to afford to use the data services required to complete a visit.
- Patients may not possess the technology or understand how to use the technology required to do a video visit. The provider practice can establish support processes in place for these patients. View our Telehealth Experience section for more information.

Patient barriers:
- Patients who have hearing and visual impairments may experience difficulty using telehealth without accommodations.
- Patients with a primary language that differs from their care provider. These patients should be offered the option of interpreter services.
- Patients that may not feel comfortable receiving their health care through a telehealth visit or may not feel comfortable with the video component of a visit.

Training for care providers and staff

It's important to consider who the training is for and the key pieces of information the audience will need to successfully support a telehealth visit. This may require different trainings targeted for specific staff, such as schedulers, front office staff, medical assistants, nurses and physicians.

Including mock consultations as part of the training will help give office staff and care providers valuable practice prior to their first telehealth visits with patients. In addition to mock consultations, here's a list of topics to include in a training program for care providers and staff.

Eligibility

Provide information on checking eligibility and assessing patients. Example details to include to help identify patient eligibility:

- How, when and with whom telehealth visits will be offered and conducted.
- How patients qualify for a telehealth visit and how they can schedule telehealth appointments.
- How to check patients' insurance benefits through the telehealth solution, if the feature is available.

Service

Consider the following:

- How to manage issues that prevent a consultation from being completed.
- Provide instructions on what to do if, for example, a clinician realizes partway through a consultation that the patient should be seen in person or if a technological problem prevents the consultation from being completed.
- Professionalism while conducting a visit:
  - Providers to introduce themselves at the beginning of the visit with patients.
  - Maintaining a professional environment that respects the patient's privacy and confidentiality.
  - Making sure the area that can be seen on camera is neat and organized, with distracting photos and inappropriate decor eliminated.
  - Ensuring cellphones and office phones are muted.
  - Providers letting the patient know if they're working on a second screen, so the patient doesn't feel the provider is inattentive.

Telehealth technology

Provide an orientation of the functionality of the technology so the front office staff, support staff and clinicians know how the technology works from start to finish. Examples of the technology details include:

- Which web browsers and devices are compatible with the telehealth platform
- What the patient sees, and what notifications they may receive
- What to do if internet connection isn't fast enough or working properly during a visit
- Who to call for technical support

Processes and workflows

Consider the following:

- Provide an explanation of staff roles in telehealth scheduling and visits to help ensure every staff member understands what their role is.
- How care providers will be reimbursed and what patients are responsible for paying.
- How to handle follow-up appointments and/or services (schedule appointments, refer to specialists, fill prescriptions, order labs, document in EMR, etc.).
- How and where to document notes. Because providers may have to engage with the patient while simultaneously documenting the visit, they may want to learn how to best position applications on their screen.

Preparing for a telehealth visit

A high-quality telehealth interaction can occur when the patient and the provider feel prepared and comfortable with the telehealth visit. Below are a few actions to consider taking when preparing for and conducting a telehealth visit.

Advice to share with patients
- Recommend the patient find a quiet, well-lit space in their home.
- If the patient will be using a phone or tablet, recommend that they prop it up so their hands are free.
- Recommend that the patient wear comfortable clothes that will allow them to show their provider areas on the body they will need to assess.
- Have the patient log into the telehealth application 10-15 minutes prior to the visit so they are able test out the sound and camera on their device. To prepare for the visit, the patient should also:
    - Have their complete medication list available or have medication bottles available to view during the visit.
    - Write down their list of questions for the provider.
    - Obtain basic vital signs (weight, heart rate, respiratory rate) just prior to the visit.

Tips for telehealth visits delivered from a clinic setting
- Designate a patient room or another private space for telehealth appointments.
- Consider having a medical assistant or nurse "room" for a telehealth visit, similar to an in-person visit.
    - Greet the patient and review the purpose of the visit.
    - Gather any vital signs the patient has done at home or guide them through taking their vital signs.
    - Review medication list.
    - Inform the patient that their care provider will join them shortly.
- Care providers should look into the computer camera to create the impression of eye contact. The providers should let the patient know when they are looking at a second computer screen, so the patient knows why they are looking away from the video visit screen.
- Refer the patient to laboratory, imaging and specialty services as appropriate.
- Send an email with care instructions or direct the patient to the patient portal for the visit summary and care plan.
- Following a telehealth visit, have front desk staff contact the patient to schedule necessary follow-up appointments.

Provider visit location set-up
Have a private, well-lit area that is designated for telehealth visits. Indicate that a visit is in progress with a flag on the office or exam room door. Do not have any personal health information from other patients visible to the patient. Providers should clear their desk and close computer screens not in use that may be angled toward the camera. Set up the video visit on the same screen or directly next to a screen where you'll be viewing the patient's chart. Be sure to mute all phones and personal devices.

Conducting a telehealth visit

Telehealth clinical workflow

Schedule a patient visit and verify that the patient's medical policy covers telehealth.

Be sure the patient gives consent to conduct the telehealth visit.

Verify the patient has access to your preferred telehealth platform.

Provide patients with step-by-step instructions on how to access your telehealth platform.

Assign support staff to confirm that the patient can access the telehealth platform and understands how to use the technology prior to their scheduled visit.

Meet the patient in their home virtually and conduct the visit.

After the visit, consider scheduling a follow-up visit using telehealth, if appropriate.

Complete the relevant documentation about the visit.

Submit the claim with the place of service code and a telehealth modifier, as appropriate.

Telehealth visit considerations

- Providers should connect with laboratory and radiology facilities to perform tests and send results back to the practice when ordered for a telehealth visit.
- Interacting with members who have a health care power of attorney or caregiver attending the visit:
    - Make sure to direct questions to the appropriate person in the encounter.
    - Although it may seem unnatural, looking directly into the camera rather than at the individual will help patients and their loved ones feel they're connecting with you.
- Interacting with members who speak a different language:
    - Traditional video conferencing with translation services will not work.
    - Providers who use translator phone lines with three-way calling capability are more likely to have a meaningful interaction with their patients.
- Enlist family members or caregivers to support and assist patients with low technology literacy to use telehealth.
- Not all patients may be good candidates for telehealth, such as:
    - Patients without access to technology platforms
    - Patients with vision and/or hearing impairments
- Encourage audio and video whenever possible.

Mandates and requirements

Telehealth services should be coded and billed in accordance with applicable state laws and regulations, UnitedHealthcare requirements, plan type and by using the appropriate coding guidelines.

Documenting and coding telehealth visits

Telehealth visit documentation should include a statement that the service was provided through telehealth, as well as noting the patient and provider locations, and the names and roles of anyone participating in the visit.

Any condition that affects care or influences treatment should be accurately documented and coded to the highest level of specificity during a telehealth visit.

Rules regarding coverage of codes, modifiers and place of service may vary by payer, patient population and regulatory entity. When coding a telehealth visit, it's important to review all rules and regulations so telehealth encounters can be billed for eligible providers.

To be eligible for payment, a telehealth visit must be conducted by an eligible care provider using secure, real-time, interactive audio and visual technology.

Please continue to review UnitedHealthcare's telehealth reimbursement policies for each line of business to determine if other forms of technology assisted interactions are reimbursable, such as e-visits and virtual check-ins.

Patient financial responsibility and benefit eligibility

A telehealth visit is treated like an in-person visit when it comes to patient financial responsibility and care provider payment. UnitedHealthcare members are responsible to pay a copayment or coinsurance as they would for an in-office visit.

Because telehealth visits are treated similarly to office visits for both provider payment and patient financial responsibility, practices should confirm patient eligibility the same way they do today (e.g., real-time eligibility check).

Employers have the option to exclude telehealth from their benefit coverage. This selection will be noted under the copay/vendor coverage information or within detailed benefits information when checking eligibility.

Use UnitedHealthcare Eligibility and Benefits on Link to verify member eligibility, help determine telehealth coverage, view care plans and get digital ID cards. You can also call the number on the back of the member's ID card for more information.

> "Use UnitedHealthcare Eligibility and Benefits on Link to verify member eligibility."

Mandates and requirements (cont.)

Insurance

While medical malpractice insurance typically covers the delivery of care through telehealth technology, we encourage care providers to verify specific coverage with their insurers.

Providers should also verify that their medical malpractice insurance extends beyond state lines to cover telehealth services provided to patients who reside or are traveling across state lines.

Licensure

Just as for in-person visits, all professional staff delivering patient care or consultations through telehealth technologies should be certified or licensed in their applicable specialty or have a level of certification, licensure, education and/or experience in accordance with state and federal laws.

Providers should consult their state medical board or the Federation of State Medical Boards to determine the licensure requirements for their state.

Regulatory

Federal and state laws related to telehealth are constantly evolving. It's important to understand payer reimbursement policies and state parity laws. Each state has a different set of rules and requirements related to telehealth. To stay up-to-date on the most recent information for your state, consult your state Department of Health website or these websites:

- Center for Connected Health Policy: cchpca.org
- American Telemedicine Association: americantelemed.org
- Telehealth Resource Center: telehealthresourcecenter.org

Implementation plan at a glance

Implementing telehealth visits across your physician practices means many moving parts. In this section, you'll find an overview of implementation phases and tasks, with a corresponding sample project plan that serves as a starting point for your organization.

1
Mobilize

The implementation process kicks off here, as you organize people and resources, determine the clinical scope for telehealth visits and execute key agreements, which includes the purchase or licensing of the technology that will support telehealth services.

2
Prepare

Key operational decisions are made and capabilities are put into place during this phase. During this phase, you also may want to begin to inform eligible patients of the coming service.

3
Launch

Prior to go-live, you'll test technology and processes to make sure things are consistently working well. Once you're confident they are, it's time to activate telehealth visits.

4
Sustain

Once telehealth visits are underway, monitoring operations, performance and satisfaction will help you identify opportunities for improvement. You'll also want to consider ongoing adoption and promotion efforts for physicians and patients.

Implementation Roadmap

Key phases and activities

A key first step in a successful implementation is defining your overall telehealth strategy. Establishing a strategy along with guiding principles and measures of success prior to implementation allows for clear direction and alignment across all departments involved. Once you've established strategy and guiding principles, it's time to implement. We've broken out implementation into four key phases:

1. Mobilize

The implementation process kicks off here, as you organize people and resources, determine the clinical scope for telehealth visits and execute key agreements, which includes the purchase or licensing of the technology that will support telehealth services.

You're encouraged to name a leader whose role is to drive the effort for the provider group, include the right people, oversee the planning and launch of telehealth visits and keep the program going over time.

Get experts to be involved in your organization likely include legal, clinical, scheduling, claims/billing, information technology and marketing professionals.

Practices who have a strong team supporting their telehealth efforts have more success in establishing official processes and maintaining operations in the future.

2. Prepare

Key operational decisions are made and capabilities are put into place during this phase. Critical steps to consider include:
- Defining performance metrics and how they will be measured and reported
- Identifying the right technology
- Planning electronic medical record (EMR) integration
- Defining workflows
- Scheduling processes
- Staff training
- Understanding the regulatory landscape in your state
- During this phase, you also may want to begin to inform eligible patients of the coming service

3. Launch

Prior to go-live, you'll test technology and processes to make sure things are consistently working well. Once you're confident they are, it's time to activate telehealth visits.

4. Sustain

Once telehealth visits are underway, monitoring operations, performance and satisfaction will help you identify opportunities for improvement. You'll also want to consider ongoing adoption and promotion efforts for physicians and patients.

Measurement plan

Determining how you will measure success is a key activity prior to the launch of telehealth visits. Some areas to measure are patient satisfaction, provider satisfaction, clinical outcomes, cost reduction and operational metrics. A brief sample scorecard is provided below.*

Success Metric Summary		Measurement	Metric Owner	Baseline	Target	Week 1	Week 2	Week 3
Patient Experience								
Net Promoter Score	Likelihood to recommend telehealth to a friend or family member	Percent						
Voice of the Patient	Post visit survey results Q1	Percent						
	Post visit survey results Q2	Percent						
	Post visit survey results Q3	Percent						
Access to PCP	Percent of time patients see their PCP vs. clinic staff	Percent						
Provider Experience								
Net Promoter Score	Likelihood to recommend telehealth to another physician	Percent						
Voice of the Provider	Post visit survey results Q1	Percent						
	Post visit survey results Q2	Percent						
	Post visit survey results Q3	Percent						
Quality of Visit	Score based on telehealth vs. office visit	Percent						
Reimbursement	Cost of care - claims	Dollar Value						
Clinical Outcomes								

[Full sample measurement plan](#)

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* Chart adapted from Semantic Scholar. Development of the Telehealth Usability Questionnaire (TUQ). 2016. semanticscholar.org

Patient feedback survey

Tracking patient feedback is an essential piece of developing an effective telehealth program. The feedback will provide actionable information for improvement. A comprehensive patient survey gathers patient feedback on many elements of a telehealth encounter, such as usefulness, ease of use, effectiveness, reliability and satisfaction. When survey results indicate negative feedback, process improvement plans can be created.

Patient surveys can be hosted directly on a telehealth platform and administered after a telehealth visit. Surveys can also be sent to the patient using other modalities, including email or mail. Surveying the patient as soon as possible after a visit is ideal for accurate results.*

[Sample telehealth patient feedback survey](#)

Sample Telehealth Patient Feedback Survey

A comprehensive patient survey gathers patient feedback on many elements of a telehealth encounter, such as usefulness, ease of use, effectiveness, reliability and satisfaction. When survey results indicate negative feedback, process improvement plans can be created. Surveys can also be sent to the patient using other modalities, including email or mail. Surveying the patient as soon as possible after a visit is ideal for accurate results.*

Sample Telehealth Patient Feedback Survey			
Usefulness			
Telehealth improves my access to health care services.	Yes	No	Unsure
Telehealth saves me time traveling to a hospital or specialist clinic.	Yes	No	Unsure
Telehealth provides for my health care needs.	Yes	No	Unsure
Ease of Use			
It was simple to use this telehealth system.	Yes	No	Unsure
It was easy to learn to use the telehealth system	Yes	No	Unsure
I felt comfortable using the telehealth system.	Yes	No	Unsure
Effectiveness			
I could easily talk to the clinician using the telehealth system.	Yes	No	Unsure
I could hear the clinician clearly using the telehealth system.	Yes	No	Unsure
I felt I was able to express myself effectively to the clinician.	Yes	No	Unsure
Using the telehealth system, I could see the clinician as well as if we met in person.	Yes	No	Unsure
I felt the clinician was able to assess my condition as well as they could have in person.	Yes	No	Unsure
Reliability			
I was satisfied with the voice and video quality of the visit.	Yes	No	Unsure
I was satisfied with the length of time it took to set up the visit and connect with my provider.	Yes	No	Unsure
Satisfaction and Future Use			
I feel comfortable communicating with the clinician using the telehealth system.	Yes	No	Unsure
Telehealth is an acceptable way to receive healthcare services.	Yes	No	Unsure
I would use telehealth services again.	Yes	No	Unsure
Overall, I am satisfied with using telehealth for my visit.	Yes	No	Unsure

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* Chart adapted from Semantic Scholar. Development of the Telehealth Usability Questionnaire (TUQ). 2016. semanticscholar.org

Resources

Additional considerations

- Have a telehealth champion present in the office location when telehealth visits are newly implemented in a practice. The champion can help set up the first visits, review provider questions following the visit and encourage other staff members to promote telehealth services.
- Update clinic workflows to include telehealth.
- Have schedulers and front office staff set up a mock video visit in a patient role so they can better describe technology set-up to patients.

Online training sessions and support for care providers and staff

- American Medical Association (AMA) Stepsforward: Telemedicine: Facilitate Access to Care For Your Patients
- Thomas Jefferson University: Telemedicine: Conducting An Effective Physical Exam
- Center for Connected Health Policy: cchpca.org
- American Telemedicine Association: americantelemed.org
- Telehealth Resource Center: telehealthresourcecenter.org

More information? Visit **UHCprovider.com/telehealth**

Thank you.

1 PwC Health Research Institute. "Top Health Industry Issues of 2016: Thriving in the New Health Economy," December 2015.
   Retrieved May 2017.
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   Retrieved May 2017.
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   TrendWatch, January 2015. Retrieved May 2017.

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