

Telehealth Playbook:

Automated Communication Workflows to Drive Adoption



Background

WELL is the last-mile patient communication infrastructure for healthcare. We enable health systems and vendors to communicate with patients securely across any channel, including text messaging, email, telephone, and live chat. With WELL, patients receive all of their healthcare communication from one trusted source — their provider. The platform empowers service representatives to seamlessly converse with patients in real time, ensuring patients feel heard while driving staff efficiency and increased revenue.

Overview

Due to the COVID-19 outbreak, a significant volume of patient appointments are being cancelled. We have seen a concurrent spike in the number of telehealth visits completed. Regulatory changes that cover reimbursements and privacy have further enabled a shift toward telemedicine.

Increased Telehealth Visits

Our client data also shows a significant increase in the number of telehealth visits completed. Between February and March 2020, WELL clients saw the number of telehealth visits increase 10 fold.

Increased Cancellations

Our client data shows increasing numbers of patient cancellations, with a consistent 60%+ increase in patient requests to cancel and reschedule since the beginning of the outbreak.

Regulatory Announcements

Recent provisions related to telehealth released by CMS and HHS ensure that an extended population of Medicare beneficiaries are able to access telehealth services during this crisis.

Parity Laws: Effective for services starting March 6, 2020 and for the duration of the COVID-19 Public Health Emergency, [Medicare will broaden access to telehealth services](#). Additionally, Medicare will consider telehealth visits the same as in-person visits and reimburse at the same rate as regular, in-person visits. Other payors are making similar moves.

Privacy Laws: Recent [announcements by the HHS](#) for extensions for Medicare Telehealth services and reimbursements allow covered health care providers to use any non-public facing audio or video communication technology that is available to communicate with patients to provide telehealth services. Additionally, OCR will not impose penalties for noncompliance with the regulatory requirements under the HIPAA Rules against covered health care providers in connection with the good faith provision of telehealth during the COVID-19 nationwide public health emergency



Opportunity

The current situation presents an opportunity to convert regular, in-person visits to virtual visits. This reduces viral transmission, reduces the number of medical staff required, supports a higher number of patients, allows you to continue caring for patients in the event of an office closure, and reclaims lost revenue.

WELL is uniquely positioned to effectively communicate appointment changes to patients, maximize the percentage of patients who enroll in virtual visits, and coordinate telehealth appointments from outreach to completion.

WELL is vendor agnostic, and can direct patients to any virtual health service with no telehealth integration required.

Recommended Workflows

WELL supports multiple telehealth workflows, including converting existing appointments to telehealth, onboarding patients to telehealth, managing delays, and providing support when patients have technical questions.

Conversion to telehealth

WORKFLOW #1: Proactive Outreach

One week prior to an appointment, proactively ask patients with eligible event types if they want to switch to a telehealth visit. Here is sample language:

"For your convenience we are offering you the option to switch your appointment to a video visit. Be assured that if you do opt to come in to our office we are taking every precaution to ensure your safety. Please text back #VIRTUAL if you would like to switch to a video visit."

WORKFLOW #2: Reschedule as Telehealth

When a patient chooses to cancel or reschedule their visit, automate a response that asks patients with eligible event types if they want to schedule a telehealth visit instead. Here is sample language:

"We received your request to cancel or reschedule. If you prefer, we can offer a telehealth visit at the same time from the comfort of your home. Respond to this message with #VIRTUAL to switch to a virtual visit."

Note: For some WELL clients, when the patient cancels their appointment in WELL, it is automatically cancelled in the EMR. You can have this function turned off if desired. Work with your WELL CSE for assistance.

WORKFLOW #3: Create Telehealth User Groups

Create an enterprise user group devoted to telehealth and automate mentions to this group when a specific keyword is used by patients. In this workflow, WELL will send notifications to this group when a patient responds with #VIRTUAL. This group can help convert patients from onsite to virtual visits. Here is sample language:

"Your message has been forwarded to our telemedicine team. We will update your appointment to a virtual visit, and you will receive a confirmation text once complete."



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WORKFLOW #4: Post Appointment Followup

Following a telehealth appointment, send a message to patients thanking them for their visit and encouraging them to book future virtual visits. Here is sample language:

"Thank you for completing a virtual visit with our health system. If you or a family member require additional medical attention, please text us back and we would be happy to help you schedule another telehealth visit."

Telehealth onboarding

WELL improves patient onboarding to telehealth appointments in the same way your office staff welcomes patients to your clinic and directs them to their room.

WORKFLOW #5: Download Instructions for Telehealth App

Send an Instant Automation when visits are switched from in-person to virtual, inviting patients to download instructions for the telehealth service and encouraging them to text #HELP if they are having issues. Here is sample language:

"Thank you for scheduling your virtual visit with us. Please download the telehealth app from the following link and be prepared for your visit five minutes early. Respond to this message with #HELP if you have questions. www.healthsystem.com/telehealthlink"

WORKFLOW #6: Appointment Reminder

One hour before a virtual visit (excluding same-day appointments) remind patients of their upcoming appointment. Here is sample language:

"As a reminder, your appointment is at 2:00 p.m. today. This will be a video visit. Please make sure you have downloaded our telehealth app at www.healthsystem.com/telehealthlink"

WORKFLOW #7: Session Launch

Fifteen minutes before a virtual visit, send a message reminding the patient to launch their session. Here is sample language:

"Your virtual visit will begin in approximately fifteen minutes. Please be prepared and find a quiet space. Have your video and audio on and launch the visit a few minutes prior to 2:00 pm. LINK: {telemed link}"



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WORKFLOW #8: Create Help Desk User Group

Create an enterprise user group devoted to help desk issues and automate mentions to this group when a specific keyword is used by patients. In this workflow, WELL will send notifications to this group when a patient responds with #HELP. This group can help resolve patient issues with your telehealth system. Here is sample language:

"Your message has been forwarded to our help desk, and they will get back to you as soon as they can."

Postponing appointments

To be used when patients are not eligible, or choose not to utilize your telehealth option.

WORKFLOW #9: Ineligible

For appointments that are ineligible for telehealth, when a patient taps "cancel" or "reschedule", proactively ask the patient to reschedule their appointment for a future date when you anticipate COVID-19 to be under control. Here is sample language:

"We have received your request to cancel or reschedule. Due to the national healthcare crisis with COVID-19, we are rescheduling appointments beginning after April 13th. Do you have a preferred day of the week to reschedule?"

WORKFLOW #10: Decline Telehealth

For appointments where your patients are eligible for telehealth but decline the option, encourage them to reschedule their appointment for a future date when you anticipate COVID-19 to be under control. Here is sample language:

"Your cancelation is being processed. We are rescheduling in-person appointments beginning after April 13th. Would you like assistance finding a new time?"

Help Desk

WELL's bidirectional texting capability supports your staff in providing assistance for telehealth technical challenges.

WORKFLOW #11: Help

Use the Keyword Action #HELP to re-route patients to the telehealth help desk team when they have an issue with telehealth.



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WORKFLOW #12: Virtual

Use the Keyword Action #VIRTUAL to re-route patients to the telehealth team to update the event type in your PM/EMR.

Action Items

You can begin implementing these wrap-around solutions for your telehealth visits immediately. Here's what you need to do to get started:

1. Prepare an exclusion list of event types that are not eligible for telehealth.
2. Identify and prepare a list of users to include in the VIRTUAL VISIT enterprise user group who will respond to inbound #VIRTUAL and are able to convert onsite appointments to virtual appointments where appropriate.
3. Prepare a list of users to include in the HELP DESK enterprise user group. Identify and train a group of users that will respond to inbound #HELP and are able to answer technical questions and quickly respond to patients with questions or concerns while preparing for or connecting to a virtual visit.

All of the suggested workflows can be implemented directly by your team in the WELL console, provided they have "Enterprise" user access. If you have questions or would like assistance, please reach out to your WELL CSE who will guide you through implementing these suggestions.



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