

E-BOOK

A Guide to Telehealth in Private Practice: Make the world your office

June 2019





What is Telehealth?

In addition to being an excellent way for clinicians to expand their practice, Telehealth allows providers and clients to meet through live, synchronous video chat over the internet.

With **Telehealth by SimplePractice™**, you can interact with your clients remotely using any device equipped with a webcam. It's simple to schedule appointments, conduct sessions, communicate with clients, and keep records from a single, easy-to-use platform.

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PART 1

Getting Started

Know the rules

Considerable resources are available to alleviate your fears about licensing, legality, insurance, technology, training, and the other inevitable questions you may have. Specifically, get familiar with the free and easily accessible resources you can use right now like [The Telehealth Resource Center](#), a government-funded center designed to increase the usage of Telehealth. Additional resources might be available from your licensing body and any of your affiliated professional societies.

Stay up-to-date on Telehealth laws:

- Familiarize yourself with whether your state has a parity law covering telemedicine by visiting the American Telemedicine Association (ATA)'s [State Policy Center](#) and [The Center for Connected Health Policy's \(CCHP\)](#).
- Visit the [Medicare Telehealth Payment Eligibility Analyzer](#) to see what you can expect in terms of reimbursement.
- Check out our webinar on billing insurance for Telehealth [here](#).

Is Telehealth HIPAA Compliant?

FaceTime, Skype, and other similar systems do **not** meet HIPAA's standard. [Telehealth by SimplePractice™](#) is **100% HIPAA compliant**. With SimplePractice, you can be certain that your sessions, notes, and communication are protected by HIPAA-compliant technology.



Benefits of Telehealth



Increased access

Approximately 123 million Americans live in an area with limited access to healthcare.¹ Telehealth can play an important role in these communities by increasing accessibility.



Better work/life balance

In a 2015 survey of clinicians, 79% said offering video sessions promotes a more flexible work-life schedule.²



Better client experience

Telehealth eliminates the time wasted traveling and sitting in the waiting room.



Reduced costs for clients

Nearly all research suggests Telehealth saves money when compared with traditional approaches to providing care. For clients, this often means lower copays, transportation costs, less time missed from work, and less money spent on child care expenses.



Reduced cost for providers

Adding Telehealth to your practice can increase efficiency of your office and reduce the overhead costs. It allows you to see more clients in less time.



Same-level client care

No client outcome difference was found between Telehealth appointments and face-to-face office visits.³

CHALLENGES



New technology

Some clients may not be ready or willing to try Telehealth.



Learning curve for you

As with any new technology you incorporate into your business, you will need to learn as much as you can about it before using it with clients.



Reimbursements can be difficult

Check your payer's policies and know how to get reimbursed.

¹ Bureau of Health Workforce, Health Resources and Services Administration (HRSA), U.S. Department of Health & Human Services, *Designated Health Professional Shortage Areas Statistics: Designated HPSA Quarterly Summary*, as of December 31, 2017.

² American Well (2015). *Telehealth Index: 2015 Physician Survey*. American Well Blog. Available online at <http://info.americanwell.com/telehealth-index-2015-consumer-survey>.

³ Hilty, Ferrer, Parish, Johnston, Callahan & Yellowlees. (2013). *The effectiveness of telemental health: A 2013 review*. *Telemedicine Journal and e-Health*, 19, 444–454.

PART 2

What to Do Before a Session

We're here to provide you with the tools to address the moving elements involved in preparing for a video session. It's normal to feel nervous or uncertain. Even seasoned providers have reported feeling hesitant about offering Telehealth sessions. We will walk you through what you need to do and know to run a successful Telehealth session.

Understand the granting and regulation of professional licenses

Make sure that your licensing credentials are current. Providers must be licensed in the state where the patient is located, follow the guidelines of their licensure boards, and practice within the regulatory scope of their license.

Review reimbursement policies with your paneled insurance companies

Most payers are willing to cover Telehealth services. Call the insurers you work with while you prepare to offer Telehealth to learn more about their reimbursement policies and any procedures you may need to follow to get reimbursed. If a code modifier is necessary for payment, make sure you're aware of that before submitting a claim.

Set up your technology

Prior to the session, you must test that all your technology is working. We recommend following these five steps before every video session:

1. Restart your computer
2. Close unnecessary background programs
3. Use a high-quality webcam and set it up to the eye level
4. Confirm that the webcam, microphone, and speakers are working, and the audio is not muted
5. Confirm connectivity

Check your internet connectivity

A strong, reliable internet connection is essential for Telehealth. Google provides an easy way to test your connection on the device you plan to use:

1. Simply google [internet speed test](#).
2. Click the blue button that says [Run Speed Test](#).

For an optimal experience, you should have speeds at or above 10 Mbps. If the speed of your internet connection is below 10 Mbps, contact your Internet Service Provider (ISP) to discuss options for improving your current connection. This usually requires upgrading to the highest speed connection available.

TIP: Use a wired connection whenever possible.

Set up your environment

One benefit of offering video visits is that you can technically do them from anywhere, as long as you're in a quiet, secure, and private space that complies with HIPAA guidelines. However, it's best to have a dedicated space. This space should be free from distractions and clutter and private enough that others won't be able to hear you discussing sensitive client information.

Some ways to prevent potential distractions include: silencing your cell phone, confining a loud pet in another room, putting a note on your doorbell to prevent solicitors, notifying any staff members not to enter your office, closing all apps and social media, and anything else that may prevent you from providing the best possible care to your clients.

Dress professionally

Dress professionally as you would for any appointment so the client feels that a video visit is no less professional than a face-to-face appointment.

Prepare lighting

Proper lighting is also essential. Don't sit with your back to any light source, including natural light like the sun. Instead, it helps to face the light source, which should be in front of you. If you do need to use a lamp or other artificial light, again make sure to place the lamp in front of you.

We find that LED bulbs tend to work best as an artificial light source, but take the time to test the artificial and natural sun lighting in a few different settings. During your testing, check your webcam to make sure your entire face is illuminated on-screen. This may require adjusting where you sit or setting up additional lighting.



Do: Good eye contact, professional clothing, soft light source in front, neutral wall color.



Don't: No eye contact, casual clothing, light source behind person, in a public space.

Obtaining client consent

Before the session, determine what the policies and requirements are for your state regarding consent. [The Center for Connected Health Policy \(CCHP\)](#) and the [American Telemedicine Association \(ATA\)](#) provide overviews of current state policies.

Most states require clinicians to obtain some form of informed consent. Usually “informed” means educating the client about the possible risks of Telehealth, possible benefits of Telehealth, and alternatives to Telehealth.

You will also need to go over a client’s rights in regards to Telehealth, specifically the right to end treatment at any point.

NOTE: Written consent is standard of care. You can also obtain consent by sending the ready-to-go Telehealth consent template in SimplePractice to your client through the Client Portal. As a best practice, please review any signed documents.

SCRIPT: OBTAINING CONSENT

You: There are some potential risks to this technology, including connection failures, unauthorized access, and general technological hiccups. Computers, tablets, cell phones, web cameras, microphones, etc. can create problems if they don’t work as expected.

There are also many potential benefits. For example, you saved time and travel costs by not having to drive to my office. Based on the risks and benefits I just described, you have the option to discontinue this or any future Telehealth appointment at any time. If that is the case today, or at any point during treatment, let me know so we can make other arrangements.

Client: Okay.

You: Before we proceed, I need to get your [verbal] consent for the use of Telehealth as an acceptable mode of delivering services. Do I have your consent?

Client: Yes, I consent.

PART 3

Conducting a Telehealth Session

This section covers some common state Telehealth requirements. To help new providers feel confident and prepared for and during each session, we also included some sample language you can use to meet these requirements. Plus, we created a helpful checklist to use in your next video session.

1. Schedule through SimplePractice

After your client has completed their intake paperwork in the Client Portal, send the link to join the Telehealth session.

2. Go over insurance

At the first session, communicate to the client the information you received from their insurance company so there are no surprises.

3. Ask your client to “attest” to their location

You will need clients to “attest” to their current location, and you should document this for each session.

4. Confirm client is in a safe, private space

Audio should only be loud enough so the client can be easily heard, but not loud enough that people outside the room can overhear it. There may be some cases where it’s advantageous to use headphones. A safe, private space is an important detail to keep the client’s protected health information secure.

You: Before we continue, I want to confirm you are in a safe, private location. This is very important because I want you to be able to speak openly without having to worry that someone else is listening. Do you feel like you have enough privacy where you’re located?

5. Go over your process

If you plan to type or handwrite notes during the session, mention this to prevent the client from thinking you are not listening.

You: You may see me look away for a few seconds throughout the session. This is only to take a brief note. It doesn’t mean I’m not listening.

6. Have a back-up plan

Clients should be aware of what steps to take if the connection fails. Usually, the clinician and client will agree to connect by telephone if this happens.

You: I have (333) 333-3333 as your current phone number. Is that the best number to reach you at today if we encounter connection problems?

7. Have a safety/emergency plan

According to the [Washington State Telehealth Implementation Guidebook](#), a safety plan is a documented process of specific steps to be followed during emergencies. It should outline exactly what will happen in the event of an unexpected or emergency situation.

A safety plan should also identify and document the client's physical location, emergency contact, and local police and hospital addresses and phone numbers. This information will be required if emergency services are needed. You can collect this information via the SimplePractice Client Portal, so you always have it on hand.

At the beginning of your first session, you may need to confirm that the information in the safety plan is still accurate.

You: Now let's review the safety plan in case there is an emergency. I asked you to list a person who you would like me to call in the event of an emergency. You listed [NAME] at (333) 333-3333. Is this still the person you would like me to contact? You also listed the phone number of your local police and the nearest hospital. Based on your current location at [1234 Street, City, ST], is this still true?

To address this moving forward, you can ask in the following sessions,

You: Are there any changes to your safety plan information?

Telehealth Checklist

BEFORE THE SESSION

- ☐ Restart your computer. Close background programs.
- ☐ Test your internet connection speed. Speeds of 10mpbs will provide the best experience.
- ☐ Confirm that the webcam, microphone, and speakers are working.
- ☐ Make sure the audio is not on mute.
- ☐ Remove clutter and tidy office.
- ☐ To prevent interruptions during the session, set your cell phone to silent and consider hanging a “Do not disturb” sign.
- ☐ If necessary, contact a client’s insurance to obtain payment coverage authorization.

Disclaimer: This sample document is provided only as a reference for practices developing their own materials and should be adapted to local needs. You should consult an attorney who is knowledgeable about the laws of your state.

START OF SESSION

- ☐ Confirm client is in a safe, private place to talk.
- ☐ Review the safety plan with client. Document the client’s current address.
- ☐ Review the back-up plan in case the connection fails. Confirm phone number on file is best number to reach client.
- ☐ Inform the client of the potential risks and limitations of receiving treatment via Telehealth.
- ☐ Remind client that there are alternative, non-video, therapy options.
- ☐ Obtain verbal or written consent, if necessary, from the client for the use of Telehealth.
- ☐ Emphasize the importance of consistent therapy attendance and homework completion.
- ☐ Review the protocol of the Telehealth visit and explain what the client can expect.
- ☐ Give client opportunity to ask questions about the session.

PART 4

Documenting Telehealth Services

Telehealth sessions should be documented using the same standard as if the client had been seen face-to-face. However, there are some additional things you will want to include:

1. Client's location
2. Client's continued agreement and satisfaction with the use of the chosen technology
3. Any technical problems that occurred during the session

The example to the right is a progress note template. Use it to begin your notes for a video appointment.

TIP: You might find it helpful to copy and paste this into your standard progress notes template in SimplePractice.

Check with an informed, local attorney who specializes in Telehealth and your licensing body to verify that all aspects of your practice are in compliance with state law.

SAMPLE: Progress Note for John Doe

Appointment was conducted via video.

Client was located at [FILL IN LOCATION].

The provider was located at [FILL IN LOCATION].

At the beginning of the visit, client was provided with the following information:

1. The nature of Telehealth and its benefits and risks
2. Confidentiality and its limits
3. The safety plan, which has been established and agreed upon with the client
4. Alternative, non-video options
5. The importance of consistent attendance and homework completion

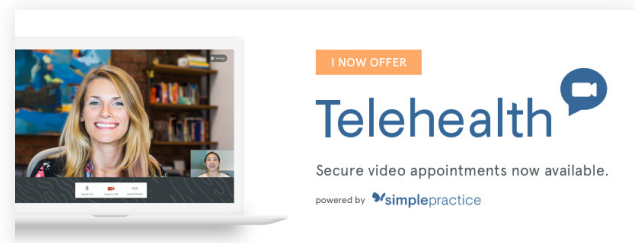
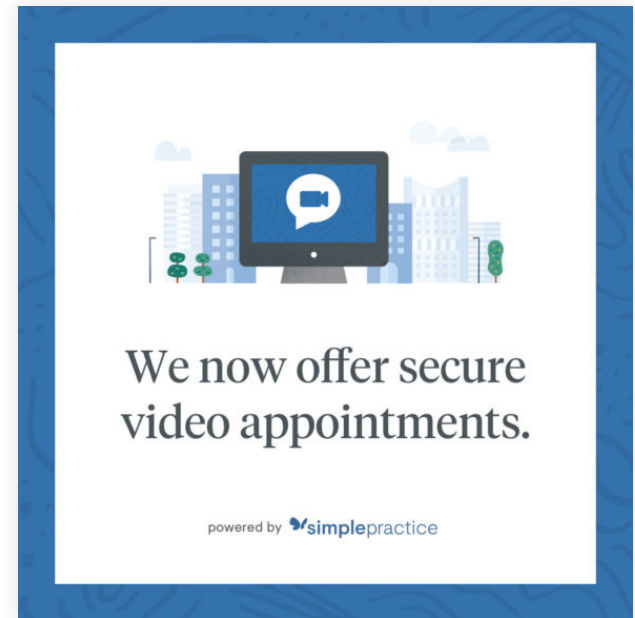
The client provided verbal consent to the above items.

PART 5

Spreading the Word

When it comes to marketing Telehealth to your clients, human interaction is key—make sure you are prepared to promote this feature in all communication channels. Here are some tips:

- Send clients this [recruitment letter](#) to let them know that Telehealth is now an option.
- Download and share these [Telehealth graphics](#) for your practice from the SimplePractice blog.
- Promote Telehealth as an option for clients on your website, in your practice newsletter, via email, and on your social media page.
- If clients call to book or reschedule appointments, offer Telehealth as an alternative.
- Ask current clients if they would be interested in trying Telehealth for their next session.
- Put up signs in your waiting room to encourage people to ask about using Telehealth.
- Make sure [online booking](#) is enabled so clients can select that option when making an appointment.



ABOUT SIMPLEPRACTICE

Industry leader SimplePractice empowers health & wellness professionals to run their businesses more efficiently, streamlining administrative tasks, enabling regulatory compliance, and improving documentation and payments.

Offering features like a mobile app, paperless intake, customizable progress notes, Telehealth, secure messaging, integrated credit card processing, client scheduling, a template library, and more, SimplePractice is a HIPAA compliant, fully integrated practice management platform.

Headquartered in Los Angeles, CA, the company was ranked as the “[#1 Most Popular Mental Health Software](#)” on Capterra for both 2017 and 2018, and has collected over \$2.78 billion in revenue for its customers.

LEARN MORE: www.simplepractice.com