



Bridging Patient Access:

Best Practices for **Community Health Workers**
Providing **Telehealth Services**

As telehealth services continue to bridge patient access to health services, it is important for health centers to focus on best practices that ensure excellent delivery of care. This guide includes helpful information about telehealth service delivery, tips to providing good virtual care, and how Community Health Workers (CHWs) can engage in telehealth.

What is Telehealth?

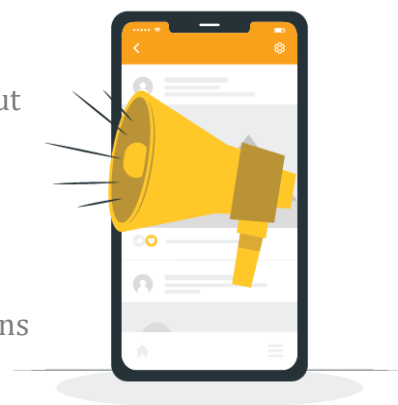
Telehealth refers to virtual care, including clinical services, patient education, and consultation, between a health professional and patient. This virtual care is commonly delivered using video conferencing or messaging, through a secured platform. Telehealth is available for most types of care, including dentistry, pharmacy, dermatology, and mental health.¹

Telemedicine refers to clinical services that are delivered virtually, and is a subgroup of telehealth (though the terms are often used interchangeably). This virtual care allows health professionals to evaluate, prevent, and diagnose patient disease and injury at a distance.²

Types of Telehealth Services

Virtual care occurs on a smart device/computer, through a secured platform. There are **four telehealth delivery types** that occur between health providers and patients:^{3,4}

1. **Live video conferencing:** Real-time video appointment/consultation between a patient and health professional (e.g., virtual healthcare visit)
2. **Messaging health information:** Exchange messages about patient information (e.g., clinical results; sending referral information to another provider)
3. **Remote patient monitoring:** Collect health data (e.g., blood pressure, heart rate) from patients remotely and transmit that data to health professional/provider. It is commonly used for providers to monitor chronic conditions (e.g., diabetes)⁵



¹ <https://www.hrsa.gov/rural-health/telehealth>

² <https://www.healthit.gov/faq/what-telehealth-how-telehealth-different-telemedicine>

³ <https://www.telehealthresourcecenter.org/resource-documents/>

⁴ <https://hiteqcenter.org/Resources/Telehealth-Telemedicine/safer-at-home-using-remote-patient-monitoring-for-patient-care>

⁵ <https://www.ncbi.nlm.nih.gov/books/NBK459384/>

4. **Mobile health (mHealth):** Provide support on smart devices (e.g., smartphones, tablets, etc.) to promote healthy behaviors, educate patients, and send appointment reminders.⁶

Benefits of using telehealth

There are many benefits to using telehealth services, particularly for patients and communities with limited physical access to health care. Major benefits include: ⁷

- ✓ **More convenient health care visits**
 - Shorter wait times (i.e. no long wait; no in-person waiting room)
 - Easier to schedule appointments around personal schedules
- ✓ **Increased access to care**
 - Access appointments *virtually* (i.e. no need for physical transportation to clinic)
 - Easier access to speciality care via virtual appointments (i.e. no need to drive faraway to a specialist)
- ✓ **Lower patient costs**
 - No travel costs to clinic
 - Reduces time off for appointments requests for in-person clinic visits
- ✓ **Better patient experience**
 - More direct, eye-to-eye contact as medical staff use computers to access patient information⁸
 - More comfortable in the at-home setting
- ✓ **Overall safety**
 - Reduced exposure to airborne viruses (e.g., influenza, COVID-19)
 - Reduced exposure to hazardous environmental conditions

Barriers to using telehealth

Although there are many benefits to telehealth services, there are still legal, financial and technological barriers that limit the integration of telehealth in many settings. Major barriers include: ⁹

- **Reimbursement**
 - Different state-level coverage and reimbursement policies for telehealth services
 - Reimbursement can be lower for virtual services¹⁰
- **State-level provider policies:**
 - Not all types of visits or providers are covered for telehealth service delivery

⁶ <https://isalushealthcare.com/blog/the-different-types-of-telehealth/>

⁷ <https://telehealth.hhs.gov/patients/understanding-telehealth/#benefits-of-telehealth>

⁸ <https://www.ajmc.com/view/patient-and-clinician-experiences-with-telehealth-for-patient-followup-care>

⁹ <https://www.hrsa.gov/rural-health/telehealth>

¹⁰ <https://www.healthaffairs.org/doi/10.1377/hpb20160815.244795/full/>

- Providers may be limited in their ability to provide telehealth services across state lines
- Some states require an initial in-person consultation before initiating any telemedicine services¹¹
- **Connectivity issues:**
 - Implementing telehealth requires IT support and potential investment into training and hiring IT staff ¹²
 - Patient populations may have limited access to broadband required for telehealth visits due to financial, educational, geographical, or mobility limitations
 - Need to educate patients and medical staff on proper use of telehealth technology

Impact of COVID-19 on Telehealth

As a result of COVID-19, there has been a considerable increase in attention towards telehealth. The National Association of Community Health Centers (NACHC) reported that **98% of health centers had used telehealth services during the pandemic, compared to 43% in 2018.**¹³ COVID-19 has driven the substantial increase in telehealth as many services have switched to being remote. Additionally, increased use has come from federal policy changes that resulted from the pandemic. These policy changes ease many challenges to telehealth expansion but may be temporary for the duration of the COVID-19 emergency. However, they set a model for future telehealth policy, and some may become permanent changes. The more considerable COVID-19 telehealth policy changes include:

- Removal of geographic restrictions to allow telehealth services to be provided and received from any location (e.g., patients receive assistance from home)
- Medicaid reimbursement rates are equal to that of in-person visits
- Phone visits and consultations qualify as telemedicine
- There has been loosening of HIPAA restrictions on telehealth¹⁴

As mentioned, these COVID-19-specific policy changes are temporary but have accelerated the use of telehealth. Experts in the field are hoping that these temporary changes either lead to permanent change or, at a minimum, help health care professionals re-evaluate the role of telehealth within their health centers. There are many benefits to the use of telehealth, and while it will not replace in-person care entirely, it can be a meaningful complement.

¹¹ <https://www.ncbi.nlm.nih.gov/books/NBK207146/>

¹² https://www.chlpi.org/wp-content/uploads/2013/12/Telehealth-and-CHWs_March-2018.pdf

¹³ <https://www.nachc.org/wp-content/uploads/2020/06/Telehealth-FS-2020-BPHC-Final.pdf>

¹⁴ <https://www.cchpca.org/resources/covid-19-telehealth-coverage-policies>

Community Health Workers and Telehealth

Given the growth and range of telehealth services, there are many opportunities to include CHWs in its delivery.¹⁵ As trusted members of their community, CHWs provide culturally-informed care that empowers and educates their patients.¹⁶ CHWs provide a range of services, such as health education, insurance enrollment support, or referrals to care. These services can be easily administered through telehealth technology.¹⁷

How can CHWs deliver telehealth?

CHWs are more commonly integrated in telehealth services via live video conferencing or mHealth applications (e.g., reminders or messages). Through telehealth care, CHWs:

- Deliver health education
- Connect patients to resources or care (e.g., referrals)
- Support patients to meet goals
- Monitor health metrics (e.g., A1C levels)
- Keep patients up-to-date on medical care (e.g., appointment reminders)
- Train patients on how to use telehealth platforms

As health educators and facilitators, CHWs are a natural fit for connecting patients to telehealth services.



A CHW explains how to use an application with community members.

¹⁵ <https://chwtraining.org/the-coronavirus-is-changing-the-community-health-workforce-the-shifts-may-be-here-to-stay/>

¹⁶ <https://mhpsalud.org/our-chw-initiatives/community-health-workers/>

¹⁷ <https://pubmed.ncbi.nlm.nih.gov/30839244/>

Telehealth Best Practices

Connecting patients to platforms is a crucial part of effective telehealth delivery. In this section, we will discuss best practices and common traps to avoid in the delivery of telehealth services.

Connecting patients to platforms

One of the most important aspects of telehealth is successfully connecting patients to the platforms that deliver the telehealth services. Different populations may face different challenges connecting to telehealth platforms. Consider the following when serving patients:

- **Patients from rural communities:** Individuals living in remote areas may have issues accessing proper broadband. Consider equipping CHWs with mobile hotspots or setting up a hotspot in a community center, so residents can go there to receive telehealth services.
- **Older patients:** Older patients may have difficulty utilizing certain types of technology or may not have access to certain technologies (such as smartphones). It is crucial to provide training for CHWs so that they are ready to guide patients.
- **Patients with lower socioeconomic status:** According to a 2019 Pew Research study, only 54% of individuals making less than \$30,000 a year have a desktop or laptop, but 71% have a smartphone.¹⁸ If your organization is looking to establish a telehealth program for low socioeconomic status patients, consider delivering telehealth services through smartphones instead of laptops.
- **Patients with physical disabilities:** Consider the range of physical disabilities that can limit access to telehealth. For example, a visually impaired person may have difficulties with visual equipment, or a person with arthritis may not be able to type on a keyboard. One way to alleviate this burden is to have CHWs do home visits to help the individual set up their equipment in a way that is most intuitive to their situation. It is also important to recommend equipment that is best suited to each scenario. For example, a touch screen phone may work better than a physical keyboard for an individual with arthritis.
- **Pediatric and young patients:** CHWs interacting with pediatric patients may have difficulty maintaining the child's attention through telehealth technology. To assist in maintaining a young patient's focus, you can integrate interactive features (e.g., games, pictures, etc.) into the technology to capture the child's attention.

¹⁸ <https://www.pewresearch.org/fact-tank/2019/05/07/digital-divide-persists-even-as-lower-income-americans-make-gains-in-tech-adoption/>

Service delivery tips

Once you have thought through how to overcome any telehealth barriers that your clients may face, you can focus on general best practices:



Have an established training in place for CHWs on using telehealth

This training should explain how to use the equipment and software utilized in the program. Topics can include how to interact with participants through technology (i.e., how to act as a facilitator through Zoom as compared to in-person) as well as training on operating technology. Situational training, in which CHWs run through simulations using technology in real-life scenarios, can be a crucial training tool.



Consider what type of software/equipment is best for maintaining confidentiality

Zoom and Webx can be good options, as they are encrypted and HIPAA compliant. Google Hangouts, on the other hand, is not HIPAA compliant and can present privacy issues. What other kinds of software will your program use to handle sensitive information?



Have options for different modalities to provide services

Allow participants to have different technology and software options. For example, allow participants to have the option to use Zoom on a laptop or receive service through a phone call.



Provide patients with the option for in-person or virtual care when applicable

You may need to set some limitations on what services warrant in-person or virtual visits. For example, participants receiving diabetes education services could have the option for virtual or in-person education, whereas support groups for domestic violence victims may be required to be in-person for safety issues. It is important to consider *both* the patients' and the professionals' preference, when helping set-up appointments.¹⁹

¹⁹ <https://www.cms.gov/files/document/general-telemedicine-toolkit.pdf>

Do's and Don'ts

While telehealth can be an extremely effective tool, common assumptions can detract from your program's success. Consider these tips when delivering care:

Do	Don't
<p>Have telehealth-specific policies in place to ensure that privacy is upheld.</p> <p>For example, consider creating rules on handling phones to ensure that patient confidentiality is achieved and HIPAA guidelines are followed.</p> <p>Policies should be adapted to fit your organization's specific needs. For example, a program assisting domestic violence survivors may need to have additional measures to ensure privacy.</p>	<p>Assume that your existing privacy policies will easily carry over to telehealth services.</p>
<p>Ensure client safety and privacy no matter the setting.</p> <p>Telehealth can bring safety issues for patients who are discussing behavioral health issues outside of a private office.</p> <p>For example, an individual may be in a public space accessing a computer or be at home around family, increasing the chances of other people hearing the conversation.</p> <p>One method to combat this is establishing a safe word for patients so that if they are in a compromising situation, they can alert the CHW discreetly.</p>	<p>Assume that patients have access to safe and private settings to receive telehealth services.</p>
<p>Decide who is going to be the "IT support" for CHWs in the case that there are technical issues.</p>	<p>Assume that CHWs will never run into technological issues in the field.</p>

<p>Encourage positive client/patient experiences.</p> <p>Clients that have a positive experience once will be more receptive to telehealth in the future.</p>	<p>Assume that telehealth is less effective than in-person care.</p>
<p>Maintain a professional set-up, including:</p> <ul style="list-style-type: none"> • Establish an adequate broadband connection to avoid lag. • Use a professional background for your video calls, with minimal distractions. Avoid using spaces where many people are moving in the background. • Minimize external sound through the use of a headset. Mute yourself while the patient is speaking if you are in a noisy environment. • Ensure that your camera is set up at an appropriate height to capture your face.²⁰ 	<p>Forget the basics needed for successful virtual conferencing.</p>

Telehealth is a flexible tool that can be adapted for many different purposes. Telehealth can play a role in education delivery, visits with providers, and support groups. With careful attention to technological training, privacy, and accessibility, you can set up a successful telehealth delivery program with positive outcomes for your providers and patients.

²⁰ <https://leanforward.hms.harvard.edu/2020/06/04/best-practices-for-patient-engagement-with-telehealth/>

Resources and Training

If your health center or organization is looking for support integrating CHWs into a telehealth platform or improving your current telehealth program, consider these training and technical assistance (T/TA) opportunities:

- **[Health Information Technology Training and Technical Assistance Center \(HITEQ\)](#)** provides technology training and support for health centers, including T/TA on telehealth integration and optimization.²¹
- **[The National Telehealth Technology Assessment Resource Center](#)** provides technology assessment services to create better-informed telehealth programs.²²
- **[Northwest Regional Telehealth Resource Center](#)** provides T/TA, program support, and education to Telehealth Networks.²³
- **[MHP Salud's Training and Consulting Packages](#)** provide T/TA on creating, improving, and evaluating CHW programs.²⁴

²¹ <https://hiteqcenter.org/Resources/Telehealth-Telemedicine>

²² <https://telehealthtechnology.org/>

²³ <https://nrtrc.org/>

²⁴ <https://mhpsalud.org/how-we-can-help-you/guided-implementations/>



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