Telehealth services implementation process

**TELEHEALTH:** it’s more than an option, IT’S A SOLUTION!
Vision and background

The telehealth services implementation process developed by the FNQLHSSC aims to ensure improved planning and a better understanding of the activities to be undertaken in order to implement remote health services. Indeed, considering the fact that the field of telehealth is relatively new and requires complementary multidisciplinary expertise, it remains difficult to identify all the aspects to consider for the development and implementation of such services. Too often, this leads to an underestimation of the scope of the project itself as well as the time and resources (human and financial) that are needed to carry it out and ensure its success.

The model was first developed as a reference tool for internal use that is based on the principles and the management cycle of the project. The literature in the field of project management and the implementation of new technologies was taken into consideration. Also, the experience gained during the implementation of telehealth services has allowed for integrating the lessons learned and considering certain aspects in order to ensure that the model can be adapted to the diverse First Nations contexts. The tool is intended as an inventory of activities to be considered for the implementation of telehealth services. The inventory of activities is not comprehensive; these may vary according to the services to be implemented.
The telehealth services implementation process includes six phases:

1. **Development**
2. **Planning**
3. **Implementation**
   - Pre-implementation
   - Operationalization
   - Support and follow-up
4. **Review of the lessons learned**
5. **Project closure**
6. **Sustainability**

Each phase includes various activities that are divided among three complementary areas: administrative, clinical and technological.
A project idea is usually related to the identification of a need. The development phase is a stage of design and reflection relating to a project’s structure. It can consist of searching for information or conducting a needs assessment or a feasibility study.

It is at this stage that a first authorization is needed for the organization to continue the reflection and planning work.

**ACTIVITY EXAMPLES**

**Administrative areas**
- Feasibility and risk analysis on the financial, geographical, political, legal, social, cultural, environmental, organizational and economic levels
- Analysis of the results and recommendations for other projects
- Sustainability and viability analysis
- Interest survey

**Clinical and technological areas**
- Information monitoring and participation in conferences, congresses, etc.
- Search and inventory of best practices (literature, expertise)
- Visiting sites that have implemented similar projects
- Needs analysis
- Validation of the needs among users
- Feasibility and risk analysis
- Infrastructure profile
- Profile of the services
- Profile of the service trajectories and service corridors

- **Collection of lessons learned (factors of success and failure)**

After one cycle or more

Analysis of the results and recommendations of the evaluation as well as a report on the lessons learned from the project followed by the application of the recommendations to each phase.

**Tool**
- Readiness Assessment
Planning

The planning phase is used to specify the project and define the parameters and scope, that is to say the activities, duration and budget. The governance structure is identified as well as the risks and conditions to be implemented for the follow-up and success of the project.

It is at this stage that approval is needed to carry out the project.

Approval of the project’s plan and funding

ACTIVITY EXAMPLES

**Administrative area in collaboration with the clinical and technological areas**
- Establishment of project governance (working group, committees) with defined roles and responsibilities for the stakeholders - appointment of a project manager
- Definition of the user selection criteria
- Development of the project plan
- Project definition
- Stakeholder analysis
- Sustainability and viability plan
- Change management plan
- Project communication plan
- Risk plan
- Planning chart
- Funding proposal

- Collection and analysis of lessons learned (factors of success and failure)
Implementation

The implementation phase is the stage of execution and implementation of the project's planning. It encompasses the steps of pre-implementation and service launch as well as support and follow-up.

Pre-implementation

Pre-implementation refers to the preparatory activities for deployment.

Operationalization

Operationalization is when the service is in effect and being offered to the public.

Support and follow-up

Related to the pre-implementation and operationalization

Support and follow-up provides for user support as well as the monitoring and control of the project's progress and quality of service.
Implementation

Pre-implementation

ACTIVITY EXAMPLES

Administrative area
Presentation of the project to the stakeholders
Selection of the users
Adherence and support of the band council
Updating of the local project plan
Drafting and signing of the service agreements (service corridors, collective prescriptions, etc.)

Clinical area
Presentation of the project to the clinicians
Organization of the service corridors
Development and validation of the training, collective prescription
Training accreditation application
Creation, adaptation and validation of the procedures and documents (clinical protocol, consent form, guide, checklist, etc.)
Change management
Training and certification
Training evaluation and accreditation applications for the professionals
Case simulation

Technological area
Technology analyses and choices
Training development and validation
Creation, adaptation and validation of the procedures and documents (generic procedure in case of equipment or material breakdown or failure, user guide, etc.)
Purchase of equipment
Site preparation and installation
Equipment testing and configuration
Change management
Training and evaluation of the training
Case simulation

• Collection of lessons learned (factors of success and failure)

Tool

• Teleconsultation Room Design Guide
Implementation
Operationalization

ACTIVITY EXAMPLES

Administrative, clinical and technological areas
Scenario in a real clinical context

- Collection and analysis of lessons learned (factors of success and failure)

Implementation
Support and follow-up
Related to the pre-implementation and operationalization

ACTIVITY EXAMPLES

Administrative area
List of telehealth activities in an information management tool
Follow-up on the state of progress
Evaluation of the relevance
Deployment review
Evaluation of user satisfaction
Checking the quality and safety of the services
Establishment of a complaint process

Clinical area
User support
Establishment of a support request registry

Technological area
User support
Establishment of a support request registry
List of technical incidents
Equipment management

- Collection and analysis of lessons learned (factors of success and failure)

Tool
- consent form

Tools
- User Satisfaction Survey
- Incident report
Review of the lessons learned

The review phase of the lessons learned is a time to gather all the lessons learned at each stage of the project and to take a step back with respect to the project and question the pursuit of it. In the case of a pilot project, a reflection must take place to determine if the service model can be maintained as is, if the service can be offered to other users, etc.

If the service must be modified or expanded (e.g., following a pilot) Go back to the beginning of the implementation cycle, to the Development phase.

ACTIVITY EXAMPLES

Administrative, clinical and technological areas
Analysis of the factors of success and failure
Recommendations and implementation (if necessary)

If the service must be integrated into the day-to-day operations: Moving towards the Closure project phase
Project closure

The project closure phase is the transition stage of a project’s status to a service that is integrated into the day-to-day operations of the organization. Before withdrawing, the project team finalizes the transfer of knowledge and responsibilities to ensure service continuity and maintenance.

ACTIVITY EXAMPLES

Administrative area
Establishment of conditions that allow the integration of new practices into the operations over the long term (transfer of responsibilities, staff redeployment, reallocation of resources, etc.)

Administrative, clinical and technological areas
Sharing of the knowledge and expertise
Trainer and superuser training

- Collection and analysis of lessons learned (factors of success and failure)
Sustainability

Sustainability is the continuation of the activities required for the maintenance of the established services, that is to say the monitoring, management, support and updating of the knowledge required to ensure the appropriateness, safety and quality of a service.

ACTIVITY EXAMPLES

**Administrative area**
Management, follow-up and renewal of the service agreements (inter-institutional, service corridors, provider)  
Evaluation of the relevance and impacts  
Dissemination of the evaluation results (sharing and visibility)

**Clinical area**
User support  
Scientific vigilance (practice change, updating of knowledge)  
Monitoring and renewal of the procedures (collective prescriptions)  
Continuing training  
Recertification of the professionals

**Technological area**
User support  
Equipment maintenance and renewal  
Software updating  
Continuing training

- Collection and analysis of lessons learned (factors of success and failure)

If the service must be modified or expanded (e.g. following a pilot)  
Go back to the beginning of the implementation cycle, to the Development phase
### Tools

<table>
<thead>
<tr>
<th>Development</th>
<th>• Readiness Assessment</th>
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<tbody>
<tr>
<td>Planning</td>
<td></td>
</tr>
<tr>
<td>Implantation</td>
<td></td>
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<tr>
<td>Pre-implementation</td>
<td>• Teleconsultation Room Design Guide</td>
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<td>Operationaliization</td>
<td>• Consent form</td>
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<td>Support and follow-up</td>
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<td>• User Satisfaction Survey</td>
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<td>• Incident report</td>
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<td>service launch</td>
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<td>Review of the lessons learned</td>
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