

2021 AAHA/AVMA

Telehealth Guidelines

for Small-Animal Practice



Incorporating Connected Care



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Abstract

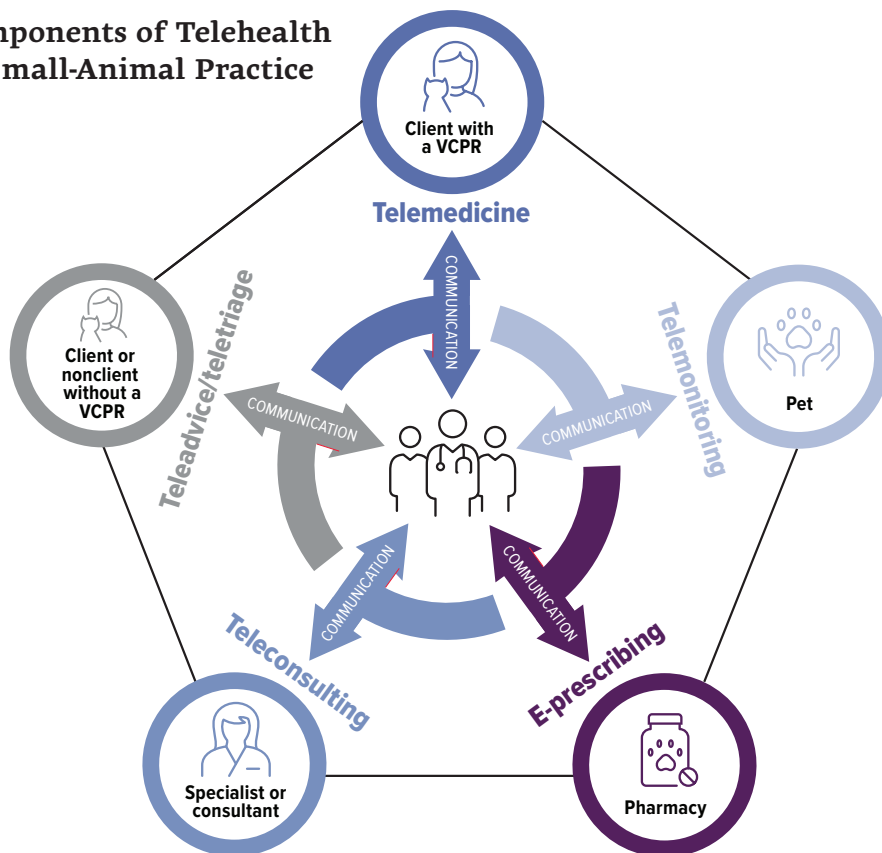
AAHA and the AVMA are very pleased to present these jointly produced Telehealth Guidelines for Small-Animal Practice in response to member requests.

They are designed to support the AVMA's *Guidelines for the Use of Telehealth in Veterinary Practice*, which can be found at avma.org/telehealth. Understanding how COVID-19 accelerated consumer expectations for on-demand and virtual services in every aspect of life, a Task Force of experts was convened to develop this content and ensure its relevance for veterinary practices. The result: a "how-to" resource offering step-by-step, ready-to-implement recommendations to better integrate Connected Care (telehealth) into small-animal practice. Topics include considerations for technology and platform selection, external and internal marketing strategies, and a look at how new technologies have the potential to improve patient outcomes. How to identify a

Telehealth Champion, streamline workflow, and monetize services are also discussed. Throughout, references are made to components of telehealth, including teleadvice, teletriage, telemedicine, telemonitoring, and teleconsulting (see Figure 1). For additional resources, visit aaha.org/telehealth.

Establishing a veterinarian-client-patient relationship (VCPR) is not discussed within this document. For information about state-level VCPR requirements, please contact your state board of veterinary medicine. Veterinarians must follow federal VCPR requirements for extralabel drug use and issuing Veterinary Feed Directives.

FIGURE 1 | Components of Telehealth in Small-Animal Practice



Dear Colleagues:

There may never have been a more challenging, or more appropriate, time to increase our attention to patient- and client-centered Connected Care than right now. We've all had to think beyond our norms and beyond our walls to meet patients and clients where they are while protecting and leveraging our healthcare teams to the fullest.

There's been renewed consideration of how Connected Care utilizes familiar digital tools, including texts, video messaging, websites, and social media to interact remotely and on-demand 24/7.

But by fully engaging your practice in Connected Care—which integrates digital technologies for improved communication, diagnosis, and monitoring—you can open up even bigger opportunities and propel your practice into a more competitive future.

Ask yourself, are we using

- streaming video in exam rooms to allow owners to be “present” as diagnoses and decisions are made?
- photos and videos of patients to support our assessments?
- video systems to monitor patients' behavior in their homes?
- remote monitoring technology to track patients' vital signs, glucose levels, exercise, and sleep?
- artificial intelligence to support our diagnostic work?

What about online patient education that establishes you as a trusted authority available for ongoing, personalized healthcare guidance, as opposed to a random web search? Or how about new technologies that enable you to consult with specialists anywhere in the world, expanding the value of your connected practice?

The key to making Connected Care work is involving your entire healthcare team. Veterinary technicians and assistants can share their expertise and skills, providing support on everything from housetraining puppies to appropriate nutrition to how to administer insulin injections.

And Connected Care means the front-desk staff has time to offer that extra word of encouragement a client might need because the practice has streamlined routine scheduling, forms, histories, and billing to make client relations a priority.

Integrating the tools of Connected Care into your practice is not difficult. You can choose to use as few or as many as you like over time. You want to choose what is right for *your* team and *your* circumstances to meet *your* goals.

Step one is getting started, and that's why we've put together this resource to support your success.

There are practical, step-by-step recommendations for approaching each decision point and tips based on the experiences of others. Each section can stand alone, or you can read this start to finish, and you might even pick up some pointers you hadn't thought about for things you're already doing. We encourage you to pass this resource around your practice to start conversations on how you all can embrace Connected Care more fully.

There is no better time to take that first step.



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Introduction

Telehealth is not something that's coming—it's here! And the truth is you're already doing it, whether you're currently using video technology to connect with your clients and patients or not. Every phone call, email, and text is part of telehealth. Automating prescription refills or sending a radiograph for a second opinion—telehealth. Electronic transfer of medical records—telehealth.

What most practices don't have, however, is a well-thought-out approach that streamlines processes to make Connected Care seamless for staff, clients, and patients. We understand that even thinking about telehealth can be exhausting these days, but to remain competitive it's a must.

That's where this resource can help, by offering step-by-step outlines to follow. It will take you from assessing your needs to considering technology

products (including platforms), and from developing workflows to creating marketing messages. Naturally, we hope you will read this cover to cover, but you can also choose which sections are most relevant to you. You can return to a topic when you have questions, or review others as needed. Whenever you see this symbol  you'll find helpful tips from our experts.

And there's something for those of you who have already embraced telehealth and its many components as well. No matter how far along you are in integrating Connected Care, there's always a next step to consider to improve the health of your patients, your relationship with your clients, and the sustainability of your practice.

Every phone call, email,
and text is part of telehealth.



Aspiring to Connected Care

“Connected Care” is the integration of digital technologies to enhance and support the veterinarian-client-patient relationship to facilitate continuity of care through improved communication, diagnosis, and monitoring. It is about patient- and client-centered practice. It’s about meeting your clients and your patients where they are, rather than limiting your connection to the few minutes they spend in your exam room.

Digital tools provide an opportunity to identify potential or real health concerns in patients more quickly, to more accurately pinpoint the cause of those concerns, and to initiate earlier intervention, monitor owner compliance with veterinary recommendations, and track patient progress in a more timely and consistent way.

Review the following scenarios. Which actions are you already taking? Which others could benefit your practice?



Examples of When Telehealth Might Be Used



When clients call to ask for advice and you determine that an in-person visit is not required, consider offering a telehealth consult to allow the client the chance to interact with the doctor and resolve any concerns they may have about their pet.



When tech-savvy clients express interest in wearable tech for their pets, ask how you might help them interpret the data.



When considering a specialist consult, offer clients a three-way teleconsult between them, you, and the specialist.



Ask your diagnostic service providers if they are utilizing artificial intelligence (AI). Offer to send them data (with appropriate security protections) to feed into their AI systems to help make them “smarter” and clinically useful.



When pets have hospital stays (dentals, surgery, boarding), have your team text clients frequent status updates so they know how their pet is doing.



When your veterinary healthcare team delivers a specialized service, consider making those paid services and determine which ones might be facilitated as a telehealth service.



When scheduling follow-up assessments, consider whether a paid video consult would be appropriate and offer that to clients as a convenient means to continuity of care.



Before clients leave the hospital, be sure to forward-book their next appointment so they know you care about the long-term health of their pet.

Integrating Telehealth into Your Practice

These seven steps serve as a foundation to help with practical implementation, whether you are just beginning to consciously structure your telehealth services or are expanding your offerings. They are enhanced with examples to deepen your understanding of the choices you have in adapting telehealth to meet the goals for your practice. The following three topics—technology products, including platforms; monetization; and communicating the benefits of telehealth services—each have their own section after these steps.

1. **Identify a Telehealth Champion**
2. **Determine Needs and Opportunities**
3. **Develop Service Plans**
4. **Design the Workflow**
5. **Prepare Your Team and Clients**
6. **Implement Your Program**
7. **Evaluate and Improve**



TIP: Buying equipment is not the first step! You should start with a Telehealth Champion to demonstrate value for your staff and to engage their support toward common goals.

STEP ONE

Identify a Telehealth Champion

Implementing or expanding Connected Care is an organizational change, and the success of your program will depend more on people than it will on technology. Certainly, selecting the right technology is vital for service delivery, but it is your team who facilitates change and ensures consistency with the vision and mission of your practice.

ACTION ITEMS

- Identify a Telehealth Champion who is a true agent of change with the vision and passion to bring it about, instill enthusiasm in others, and lead your team (see Figure 2).
- Recognize that your Telehealth Champion is the primary advocate for your program and that success depends upon the full support of the wider organization—do what is necessary to ensure the Telehealth Champion and other advocates succeed.
- Assess available resources (e.g., time, funds, equipment, training).

FIGURE 2 | Telehealth Champion

Successful Telehealth Champions:

- ✓ Solve problems
- ✓ Support effective workflow
- ✓ Keep their focus on the goals
- ✓ Communicate often and clearly
- ✓ Provide training
- ✓ Motivate
- ✓ Multitask



For additional resources to support your Telehealth Champion, visit aaha.org/telehealth

Your Telehealth Champion is your team's key enthusiast for telehealth, point person for troubleshooting during the implementation process, and continuing advocate for its successful marketing to clients and staff.

Any practice member who believes in telehealth can be the Telehealth Champion! Whether it's a practice manager, customer service representative, technician, or veterinarian, it just takes enthusiasm and the willingness to help with selecting technology products, determining the telehealth workflow and staffing, and assisting with problems as they arise.

STEP TWO

Determine Needs and Opportunities

Telehealth has a wide variety of applications and uses from front-desk scheduling, prescription refills, and billing all the way to patient evaluations and follow-ups. Understanding your practice's specific needs and your clients' aspirations is central in the planning phase to making wise telehealth service choices.

ACTION ITEMS

- Convene a focus group that includes a cross section of your clients and veterinary team members to better understand what they see as opportunities and areas of need.
- Determine which of the identified areas can be addressed by telehealth. *Examples* of pain points might be barriers to in-person visits, hours of current operation, low compliance with follow-ups, staff shortages, and compassion fatigue. *Examples* of opportunities might be integrating AI-assisted diagnostic services, ongoing remote monitoring to improve patient assessments and outcomes, or teleconsultations with specialists to expand

Any practice member who believes in telehealth can be the Telehealth Champion!

your services beyond your clinic walls for complex cases.

- Identify anything that would impact your ability to move forward with delivering telehealth services and consider possible solutions. *Example:* You would like to identify an appropriate location to conduct telehealth consultations and recognize you will need proper lighting, quality audio, a viewing monitor, and potentially other electronic equipment. You would also like to incorporate an exam table for those times when the patient may be present in your practice and you want to communicate with an owner remotely. One option is to outfit an existing patient exam room appropriately so that it may be used for both in-person visits and telehealth consultations. Reviewing space use, however, you see you also have two part-time staff on alternate schedules who could share an office, freeing space for repurposing.
- Assess your available resources and prioritize your telehealth options and objectives around the most urgent needs or greatest demand.



TIP: Start small by focusing on your top priority, then scale into others as team and client adoption increases.

STEP THREE

Develop Service Plans

At this point, you are ready to make a decision about which telehealth services you want to implement based on priorities assigned during your needs and opportunities assessment. To move forward with the best chance of success, you must first understand what will be necessary organizationally, clinically, and technologically to develop your telehealth program. And, it's very important that everyone understands what the goals are and how success will be measured.

ACTION ITEMS

- Identify 3–5 short- and long-term goals, with measurable metrics, that are most important to your practice.
- Determine what data are needed to assess progress and how you will collect and evaluate it and at what frequency.
- Consider what capabilities and functions you need to deliver your desired telehealth services.
- Identify what technology and equipment are needed and if you can use existing resources or if you want or need to evaluate external providers (see the Considerations for Choosing Telehealth Technology section for more detail).
- Keep in mind that the best equipment or technology for your program might not necessarily be the most expensive or elaborate.
- Determine what telehealth services should be billable and at what rates. Decide which financial model associated with the delivery of telehealth you prefer (see the Monetizing Telehealth in Your Practice section for more detail).



TIP: When partnering with technology providers, select a vendor that is worthy of a long-term relationship. Ensure they will provide support throughout your implementation and remain motivated to support successful outcomes for your practice.

STEP FOUR

Design the Workflow

Implementing new telehealth services in your practice may require modifying your workflow to ensure a positive experience for clients, patients, and the veterinary team. Logistics such as work and exam space; appointment scheduling; data monitoring; and management, staffing, and communication may

need to be adjusted. If you're just starting to expand, you may want to begin with appointments as that may create the least amount of workflow disruption, especially in the early stages.

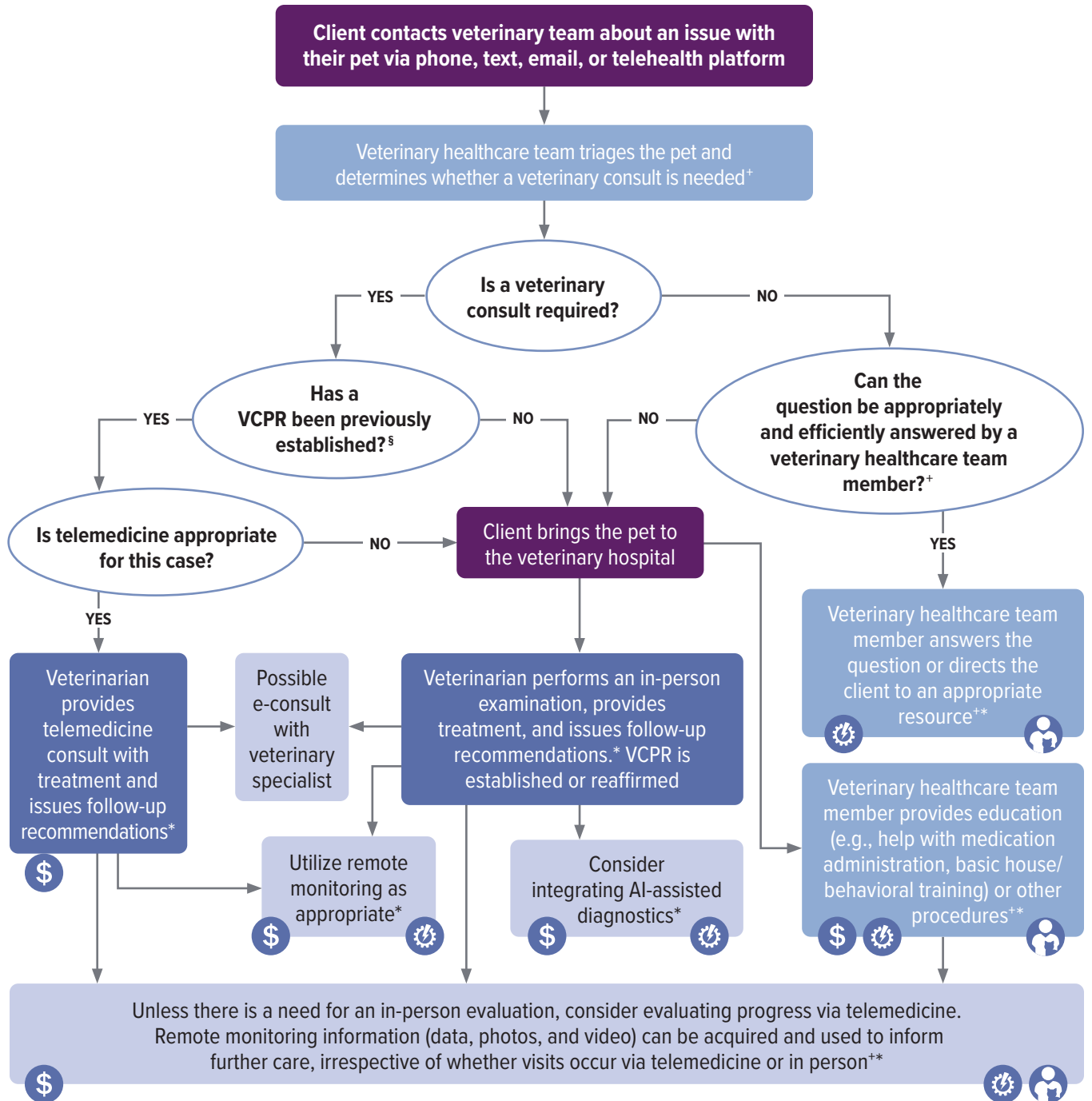
ACTION ITEMS

- Review your existing clinical processes and workflow.
- Determine how you need to modify your workflow, then incorporate necessary changes to integrate telehealth into daily practice operations (Figure 3).
- Develop resources to incorporate the modified workflow within your practice, including policies, procedures, and protocols for when using telehealth tools is appropriate or not.
- Identify any standard operating procedures that will need to be modified (e.g., scheduling, approach to diagnostic workups, forms and reminders, staff training, consent, communication templates, invoicing).
- Determine how and when telehealth services will fit into your schedule (certain days, specific hours each day, exams at particular times with call-backs at others).
- Create a physical environment that will support successful delivery of the telehealth services you have chosen to integrate (e.g., ensure appropriate Wi-Fi connections and internet bandwidth; provide a visually appealing, well-lit, and quiet space for audio and video consultations).
- Develop client educational materials or source them from your vendors, if applicable, to help set expectations.



TIP: Create telehealth policies, procedures, and protocols that are as close as possible to the practice's protocols for other types of services; recognizable protocols will lead to consistent clinical results and will instill comfort and confidence in your veterinary team.

FIGURE 3 | Sample Practice Workflow



+ Any assessment or procedures performed by a member of the veterinary healthcare team must be within their scope of practice
 § Veterinarians should consult state requirements to determine whether it is possible to establish a VCPR electronically. If so, they will still need to comply with federal requirements for the VCPR when using drugs extralabel or issuing Veterinary Feed Directives
 * All interactions should be captured in the medical record



STEP FIVE

Prepare Your Team and Clients

Successful implementation or expansion of a telehealth program is a team effort. Success depends on buy-in and return on investment for both your veterinary team and your clients, and it's important that your patients actually benefit as well. Your goals should be for your team and clients to be engaged and active advocates of your telehealth services.

A client-centered approach to both education and adoption is important. How can you ensure the transition is seamless and frictionless? Think through the telehealth experience from the client's perspective and be prepared to respond to questions about when the use of telemedicine is appropriate, how to access the technology, and how to make appointments or schedule follow-ups. When introducing telehealth technology (e.g., wearables for remote monitoring) into your diagnostic or treatment plan, make sure clients understand how this technology has the potential to improve patient outcomes. Or, when you choose to integrate AI-assisted diagnostics to support in-house capabilities or share ECGs, radiographs, or lab results with specialists for a teleconsultation, point out how this expands your practice to a world of global experts.

ACTION ITEMS

Team Members

- Educate staff on the new workflows, clinical protocols, and operations.
- Ensure there is clarity about individual roles and responsibilities for team members (e.g., veterinarians, veterinary technicians, client service representatives).
- Identify the types of training needed and who is going to provide it.
- If you are introducing new technologies and your staff resources are limited, ask vendors about training support.
- Have one or more staff members who are unfamiliar with the technology test it. If they cannot easily use it, the technology may be too complicated.
- Conduct internal telehealth appointment “dry runs” prior to seeing actual clients. Use these as rehearsals and to make adjustments or troubleshoot any technology that needs to be recalibrated or repositioned, or for which additional training is needed.



TIP: Start by engaging your most enthusiastic team members to build momentum and collect successful case studies to share as encouragement for other team members.

Clients

- Develop marketing messages to highlight telehealth's benefits, including greater accessibility, convenience, more timely and accurate diagnosis, increased access to specialty care, and faster response times. Create or source from vendors client educational materials on how to use communication platforms; how to share photos, videos, and data from remote monitors for assessment; and best practices for successful appointment outcomes.
- Ensure client enthusiasm for telehealth by setting clear expectations up front—from what tools are available and how they can be used, to invoicing, to how technologies and consultations integrate with and support in-person visits.



TIP: Consider having a team member offer less digitally savvy clients a practice telehealth session to help them prepare for their appointment.

STEP SIX

Implement Your Program

You are now ready to implement your program. All aspects should have been tested and tweaked.

ACTION ITEMS

- Be prepared to offer additional workflow and technical support to team members and clients during initial visits. Have a capture system for issues and comments alerting the Telehealth Champion to things that may need to be addressed.
- Be flexible and revise processes as you learn what works best. Communicate changes to everyone to ensure consistent quality.
- Communicate with clients at multiple touchpoints to promote continuing awareness and to drive engagement with your new offerings. *Example:* Use front-desk reminders, notes on invoices and receipts, videos on monitors in the waiting and exam rooms, and articles in newsletters. Email success stories and post testimonials on websites and on social media. When sharing success stories, be sure that you have complied with requirements for client/patient confidentiality and obtained written permission to share.



TIP: Plan additional appointment time during the infancy of your program, or when you expand offerings, to allow for technology troubleshooting and getting comfortable with this new approach to patient evaluation and client interactions.

Success depends on buy-in and return on investment for both your veterinary team and your clients, and it's important that your patients actually benefit as well.

STEP SEVEN

Evaluate and Improve

Define success early on and collect data from the beginning of your program. Starting with a clear vision of success allows the practice to highlight improvements made with each metric and, ultimately, the overall success of its telehealth services.

ACTION STEPS

- Data collection does not have to be difficult, especially when it is integrated as a part of workflows and operational processes up front. Some technology products have the means to track metrics built in.
- If a formal quality improvement process already exists in the practice, use it. Otherwise, develop one to regularly review performance, client and provider satisfaction and utilization, then evaluate the data and forward results to the appropriate staff for any needed adjustments.
- Each practice should identify its own metrics, but suggestions include numbers of telehealth interactions overall and broken down by the type of visit (e.g., surgical follow-up, dermatology consult, gastrointestinal issue, hospice care) or service (e.g., prescription refill, AI-assisted diagnostics, review of data from a remote monitoring device). Additionally, practices may want to log increased traffic on websites, blogs and vlogs, social media references, and client phone inquiries. Gathering demographics is important to gauge which groups your telehealth services are appealing to most so you can identify ways to share telehealth's value with those who may be less frequent users. Staff will be interested in ways telehealth is streamlining their work, allowing technicians to better utilize their skills, and improving positive results for patients.
- Electronic survey options are available that enable you to ask clients about their visit and can help you secure testimonials at little or no cost. Again, be sure you have obtained permission to use your clients' comments in any marketing material.
- Make sure while you are tracking client satisfaction, you are also tracking patient outcomes. Better patient care and results not only support your professional mission, they are also one of your best marketing tools.
- Review data with an open mind and adjust as necessary.



TIP: Join forums for networking and connect with colleagues who have implemented telehealth in their practice to share ideas and lessons learned. Celebrate every success!

Gathering demographics is important to gauge which groups your telehealth services are appealing to most so you can identify ways to share telehealth's value with those who may be less frequent users.



Frequently Asked Questions: Implementation

Q There are so many telehealth options to consider. Which ones should our practice start with?

A Because every practice is unique, there is no universal telehealth strategy. Asking clients what they need or want and identifying the challenges they want solved is a must, as is determining what is likely to best support better outcomes for your patients. Additionally, you must determine your practice goals as well as the problems you want to solve. For example, are you trying to attract millennials who account for the largest segment of pet ownership and are comfortable with technology? Are you wanting to overcome staff frustrations and administrative bottlenecks? Or are you hoping to introduce a new area of care, such as hospice care or behavior consults? Or do you want to expand your use of technology to remotely track patient activity for more accurate assessment and diagnosis? Once you have evaluated your resources and practice goals, you can tailor your approach. Remember there is no one right way to offer telehealth, and it must fit your practice, circumstances, and goals.

Q I'm already overwhelmed. Now you're telling me I should spend time setting up telehealth?

A First, remind yourself you're already doing telehealth and the objective is not to go from some uses to all possible choices at once, or maybe ever. Start slowly and grow as your comfort level and needs dictate. Identifying a Telehealth Champion to help set goals, evaluate and select technologies, train and motivate staff, and monitor effectiveness will be a huge help and a big factor in your success. Done well, telehealth can spread client touchpoints so they take place in the most efficient manner possible. Consider that telehealth allows you to leverage skilled technicians, your website, and other resources to provide information at times most convenient for you and your clients. More and better information and more frequent interactions can support improved preventive care and treatment compliance, meaning better outcomes for your patients. And, you can get compensated for many of the interactions you have been giving away for free.



Considerations for Choosing Telehealth Technology: Products and Platforms

After conducting a self-assessment and identifying the types of client services and interactions you want your practice to offer, your next big challenge is choosing the appropriate technology. There is no one-size-fits-all option, but there are choices that will work for you.

Telehealth technologies, including but not limited to communication platforms, AI-assisted diagnostic services, and wearable remote monitoring devices, are numerous and ever changing; new features may be added quickly and new products are created frequently. Consequently, this section will not discuss specific vendors but rather offer recommendations for how to evaluate them and determine which one might be right for you.

Review your assessment for what human and technology resources you currently have available, to help you determine what you can manage short term and where you'd like to be long term. You must also understand who is going to be using your technology and how you hope it will fit into your normal practice workflow.

A Few Fundamental Choices

- **What do you want now and in a year?**
 - Finding technology that offers the essentials for immediate use, but also includes more advanced tools you can grow into, is a great way to start. As with any new technology, the platforms are constantly adapting and new features are added on a regular basis, so check with the providers to understand what their upgrade deployment plans are to evaluate if they meet your practice's needs and goals.
 - Your telehealth team can be a single doctor or include every member of your staff. Starting

small is recommended. If you need more than one team member contributing to your telehealth services, ensure any technology you are considering allows multiple log-ins and roles.

- **Do you want your communications to be asynchronous, synchronous, or both?**
 - Asynchronous communication, or communication between parties that is not live, may allow practices to be more efficient in managing their schedules by eliminating phone and email tag. It also provides more opportunities for marketing and engagement. Younger generations often prefer asynchronous communication like texting.
 - Synchronous communication may be required or be more appropriate for specific services including triage, video patient evaluations, real-time behavior observations, or compassionate quality of life consults for clients with pets receiving hospice care. Older clients may be more comfortable with phone and in-person communication. Some clients and veterinarians prefer live telemedicine evaluations because they feel more like an in-person visit.
 - Understanding how these forms of communication differ and what is appropriate in each situation is critical to achieving the goals of your telehealth program. (See Figure 4 for pros and cons of asynchronous and synchronous communication.)

Some clients and veterinarians prefer live telemedicine evaluations because they feel more like an in-person visit.

FIGURE 4 | Pros and Cons of Asynchronous and Synchronous Communication

Synchronous or asynchronous communications—or both? Reaching out to your clients requires different approaches and technologies depending on the circumstances. Many factors go into your choice including the urgency and complexity of your interaction, your need for audio or visual evaluation, your available tools and equipment, the demographics of your clients, and the level of interaction required. Pros and cons of each method are shown below.

Asynchronous Communication (text, email, voice messages, etc.)

Pros



Delayed reply may allow the veterinarian to gather all information and add clinical context (e.g., data review, consult with specialist).



It minimizes interruptions, which may improve individual productivity.



Information communicated in another language can be translated through various applications.



Information is generally stored and can be readily retrieved for medical record documentation.



Photo or video can be retaken to send best image (view, lighting).



It gives the ability to record image/video when pet is most clearly displaying clinical signs.



It allows transmission of images or large amounts of data for review at a convenient time (e.g. specialist consults; technologies that collect data over time, such as glucose monitors).

Cons



Delays in response may translate to delays in evaluation and treatment.



It is less personal—if communication is only via text, chat, or email, you miss the opportunity to ask clarifying questions and foster the relationship.



It may result in a lack of clear intent (inability to detect facial/vocal cues).



If a text, chat, or email is overlooked, it might leave the client with the impression that their message is not important or not urgent. This can lead to gaps in patient care, as well as miscommunication and frustration among the involved parties.



The animal owner interprets which images are needed/best, which may not be what is needed by the veterinarian.



It does not support use of more interactive remote monitoring technologies.

Synchronous Communication (live two-way audio/video)

Pros



It allows more in-depth interaction. Iterative interaction allows efficient exchange of information about the pet and the assessment. It provides the opportunity to acquire details pertinent to care during the session, seek additional information or data, and, potentially, make clinical decisions in real time.



It allows for simultaneous, three-way engagement of veterinary specialists, primary veterinarian, and owner.



It provides immediacy—real-time access to the veterinarian that supports response to urgent situations, even those that the client may not recognize as urgent.



It allows for better clarification of intent (facial/vocal clues).



It supports the use of interactive remote monitoring technologies.



Audiovisual contact with client/patient may be required for prescribing of controlled substances.



It allows for simultaneous engagement of language translators.



Photos, videos, and documents can be uploaded by an owner before a scheduled appointment so the veterinarian can review; in some cases, the veterinarian can utilize screenshare to show the client abnormal findings found on images.



It better maintains the concept of the veterinarian-client-patient relationship through real-time interaction.



Synchronous video allows real-time monitoring of hospital patients.



It provides the ability to see an animal's environment when needed (behavioral assessments).

Cons



Poor lighting, noise, and other distractions may impact the quality of communication.



Pets may not be immediately cooperative.



Video transmission may be affected by internet quality.



It may be less amenable to transmission of large-set or longer-term remote monitoring data.



Depending on the application used, interaction may not be automatically stored to support documentation for medical records.



Integration with your practice management system (PMS) is variable and may have to be done manually.

- **What do I need to think about when selecting a platform for communicating with my clients?**

- Make sure the platform you choose works with everyone's technology.
 - Do you practice in an area with great internet service, or in a rural area with no, low, or inconsistent signal strength? Attempting to integrate live video in an area with limited to no internet service is likely to fail, but text messaging might be possible.
- Check to see if your platform works on all operating systems.
 - Some platforms are app-based only while others provide both downloadable content and applications for desktop use. Test usability on mobile phones and tablets. Make sure applications are compatible with Microsoft, Android, and Apple products. Downloading an application may be a barrier to use for some less tech-savvy clients.
- Does the platform integrate with my practice management system (PMS), and what are the pros and cons of that?
 - Platforms that are compatible with your PMS can make you more efficient and usually provide a better experience for both the client and the practice team, but they are typically more expensive.
 - Platforms that integrate with your PMS may not adopt new features as quickly as those that do not.
 - When choosing a platform, ask if you can speak with current customers about their experiences.

- **How do I charge the client?**

- If you are using Zoom or FaceTime, you'll need to find a separate payment provider, or your customer service representative can collect payment prior to or immediately following the appointment.
- Many telehealth platforms have built-in payment systems, allowing you to automatically charge your client before or after the consultation, set pricing for different appointment types,



apply coupon codes, or charge by time. Some platforms may integrate more easily than others with your PMS.

- If you are planning to offer services that include AI-assisted diagnostic services, ask the providers if they charge extra for that service or if it is included with the routine services you already receive from them.
 - If you are incorporating wearable remote monitoring devices into patient monitoring programs, you'll need to consider whether your fees for analyzing the patient data can be captured within existing service fees or if a separate fee makes sense for how you manage this at your practice.
- **How will the third-party provider charge?**
 - Some platforms charge per use, per doctor, per month, or a combination. Make sure you ask about fees and ensure there are no unexpected charges.

- There may be fees for both the platform vendor and for the credit card processor, so make sure you understand what you will be billed for each visit.
- You can expect higher costs for platforms that communicate directly with your PMS.



TIP: Before you purchase any technology, ask for a full capability demonstration.

Security

While veterinary practices and veterinarians don't currently have to be HIPAA compliant, client confidentiality is required under many state veterinary practice acts, and business requirements for protecting the privacy of personal and financial information also apply. Therefore, practices should ensure communication and internal record systems, whether they are handling patient and client contact and health information or financial information, are secure and data are kept private.

- Data security implies protecting your essential business data from potential destruction caused by malware.
- Before deciding on a technology product, including platforms, be sure to ask how the data used by the system is accessed, stored, and secured.
- Pay particular attention to ensuring the security of your clients' credit cards and banking information.
- Ask providers what they do with the practice's and patients' data. Inquire if they are used for internal research and/or sold to third parties.

Auxiliary Vendor Services and Support Teletriage and Teleadvice

Some client communication platform providers offer third-party general advice to your clients. This can be during normal business hours or after hours to help clients avoid unnecessary visits to the emergency

clinic and instead redirect them to your practice for an evaluation. While this does add to the cost of the platform, it may be a valuable service that benefits clients, patients, and practices.

Education and Marketing Support

Providers may offer free flyers, calendared social media posts, and educational and promotional support. They may also offer training and materials for team members as well as community educational items at little or no cost. Ask whether you can add your practice name or logo to educational websites or materials.

Evaluation Tools

- In addition to your own metrics, you may be able to take advantage of the data analysis tools that some technology providers offer to ensure you and your team are thoughtfully and appropriately utilizing the technology and tracking performance, including patient outcomes, client satisfaction, and financial return on investment.
- A good question to ask potential technology providers is how they measure their own accuracy and success and how they use that information to improve their products.

Continuing Support

- Ask providers about their customer service support:
 - Will representatives be available to you during implementation and for ongoing support? You want to make sure if you encounter a problem, they are committed to helping fix it.
 - Ask how often software updates happen and how they ensure minimal disruptions in service when updates are deployed.



TIP: Ask for a trial period for the technology you are considering. Most vendors will be happy to let you try the system before committing to buy.



Frequently Asked Questions: Platforms

Q Do I have to use a “dedicated” platform to support telehealth communications?

A No! Many practices use a prepaid cell phone for the practice to provide text-based asynchronous telehealth services (including sending pictures and videos) and then use a free synchronous video platform (Zoom or FaceTime). You can start with these free solutions while you investigate established platforms that allow integrations with your PMS, schedulers, and payment systems.

In all cases, be sure that security protections associated with the technology/software meet ethical and regulatory requirements, and that you are appropriately integrating information gained through these communications into your patients' medical records.

Q What is the procedure for retaining medical records when I use a free audiovisual service?

A If you are utilizing a product that integrates directly into your PMS, this likely happens seamlessly between systems. However, if you are utilizing products or services that do not integrate into your PMS, you should create a process that allows you to capture information gained from or shared during your telehealth interactions (e.g., client communications, AI-assisted diagnostics, remote monitoring, specialty consultations) and either write summary notes in or append them to the patient's medical record as appropriate for your recordkeeping practices.



Considering Other Technologies

Advances in telehealth technologies are helping shape the future of veterinary healthcare. Telemedicine consults, remote monitoring devices, and AI are all evolving to provide healthcare teams new ways to gain deeper levels of patient information that enhance diagnosis and treatment decisions, while also fostering client relationships.

- **Considerations for Remote Monitoring and Wearable Devices**
 - These devices can collect and analyze data both synchronously and asynchronously.
 - Data may be retrieved from remote locations on multiple devices including smartphones, personal computers, laptops, and tablets.
 - Tracking trends can help identify warning signs and trigger interventions before problems reach an acute stage.
 - The information obtained from these devices helps healthcare providers to identify

appropriate preventive care and manage chronic medical conditions such as diabetes, heart disease, and arthritis.

- Real-time facts can help clients understand the importance of adherence to medication and other treatment regimens, which may reduce hospital admissions and readmissions, leading to better outcomes and patient health.
- **Considerations for AI-Assisted Diagnostics**
 - Recent advances in AI research are now working their way into AI-assisted veterinary diagnostic services. Ask your diagnostic service providers which AI-assisted services they have available for use today.



TIP: If clients have purchased wearables or remote monitors for their pet(s), discuss if, how, and when you would like to receive data and how you would use that information as part of a wellness or treatment plan.



Monetizing Telehealth in Your Practice

Veterinarians are comfortable charging for in-person services but have a long-held tradition of providing phone consultations and responses to email and text questions for free. And even though most understand their advice and assessments don't lose their value because they're delivered virtually, it remains a challenge for many practices to monetize telehealth services.

Are clients really willing to pay? Which services would I charge for and how much for each service? Who bills and who collects, and what about security? What if I find on an initial assessment that my patient needs to be seen in person? So many questions—all with relatively straightforward answers.

Let's start at the beginning. Yes, clients are willing to pay for telehealth. Experiences with human telehealth are driving comfort with such services, and clients generally see the value in veterinary telehealth as they are able to more easily and conveniently access professionals they trust. A live video recheck that means not having to leave work to bring a dog across town or being able to get after-hours reassurance via phone about a cat under hospice care is valuable. Being able to send an e-prescription refill request on one's lunch break or email data for interpretation is valuable. Being able to update a patient history prior to an annual physical using a phone app or signing onto a three-way teleconsult with the veterinarian and an oncology specialist are valuable as well.

How to Charge and How to Collect Payment

There are numerous models available that can assist in monetizing your telehealth services.

- Charges can be based on
 - time spent
 - specific procedures
 - skill level of healthcare team member(s) involved
- Services can be incorporated
 - in wellness plans
 - in subscription bundles
 - in palliative care packages
 - or charged per use

ACTION ITEMS

- Determine your fees for telehealth services based on the time spent by the veterinarian and by members of the veterinary healthcare team, the cost of the services to the practice, the value of the services to the patient and client, and competitive considerations in the marketplace. Remember that your advice does not lose all value just because it is not provided in person.
- In general, most third-party platforms will have the client enter payment information when the appointment is scheduled (much like many on-demand transportation services obtain and retain your credit card information). Some platforms will automatically process the payment when the appointment begins; others will allow you to modify the fee or capture the payment at the end of the appointment. If you use a platform like Zoom or FaceTime, then you will need to determine if your customer service representative will collect payment at the time the appointment is scheduled or once it is completed.
- Make sure your staff and clients understand how appointments are billed. If you are concerned that a client may be a "no-show" for a virtual visit, then you may want to have the customer service representative collect payment when the appointment is scheduled.
- If you charge a technician fee for nutritional consultations or other services delivered by your support team members, consider the expanded range of services that you can make available through a telehealth service.
- As was discussed earlier in the context of implementing telehealth plans, it is important to

have policies and procedures for payments in place before monetizing any telehealth services. Will there be different fees for after-hours services? What happens if, while you are conducting a telemedicine evaluation, you determine the patient needs to be seen in person? Should you consider giving some type of credit for the in-person physical exam? What if there are technical difficulties during the virtual visit?

- If diagnostic service providers are charging additional fees for utilization of AI-assisted services, determine if those fees are reflected in the fees your practice charges your clients or if additional service fees should be added as part of your expanded offerings.



TIP: Create and circulate a script so everyone uses the same information when talking about fees for telehealth services. And, if charging for telehealth is a new process, pilot collecting fees internally before introducing services to clients.

Make sure your staff and clients understand how appointments are billed.

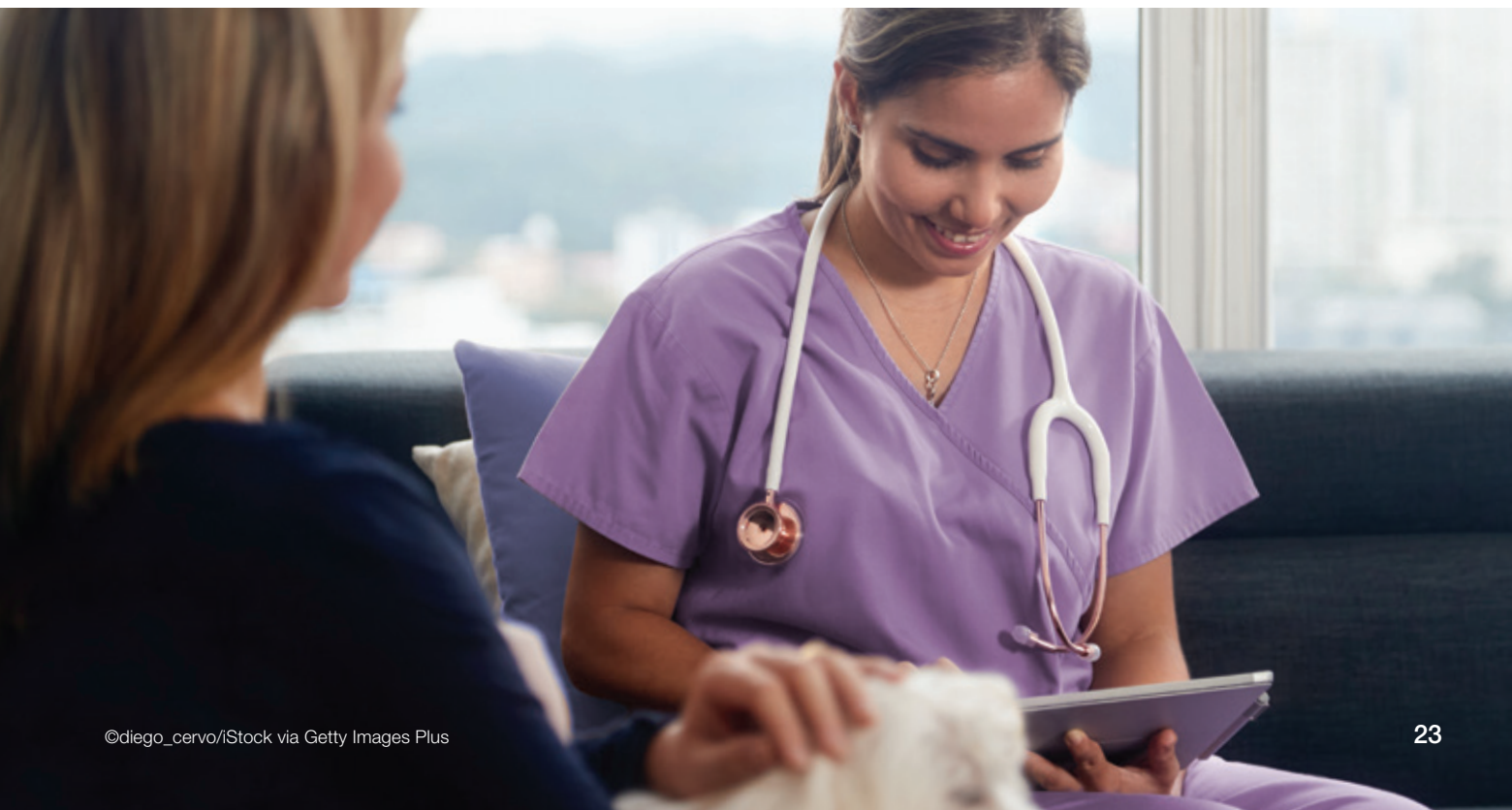
Strong Client Relationships Pay Off

Telehealth interactions done well can leave pet owners feeling valued and that their pets' well-being is truly the focus of your practice. This influences client loyalty, which returns significant value through client retention for your practice.

You Are Worth It

Your medical knowledge is valuable no matter whether delivered in person or through telehealth.

Pet owners today have access to a nearly infinite amount of information via the internet, but they desire and are willing to pay for reliable, personalized guidance from their veterinarian. You have the advantage of knowing the client and the pet, and this relationship, coupled with medical advice they can trust because of your training and experience, is worth paying for.





The Benefits of Loyalty

Being available to your clients outside of the practice walls in their time of need can increase their loyalty to you and drive a positive sequence of events:

- Having more touchpoints and communication builds trust.
- Clients who trust you are more likely to approve your recommendations, saving time and potentially leading to faster interventions.
- Clients who trust you may comply with treatment recommendations for better outcomes.
- Client retention improves when they trust you and can access your knowledge and compassion.

Consider this situation that typifies communications a practice might receive from a client:

I first noticed a raised, red sore on my cat's thigh two weeks ago after a recent vaccine appointment. It started getting smaller and looked less inflamed, but tonight, it looks bigger and angrier than it did when I first saw it. He doesn't seem to be in pain, but he is licking it a lot. I was wondering if there is an email I could send pictures to in order to avoid an in-person appointment. If it does need to be biopsied or to be examined in person, I will make an appointment, but he gets really nervous when he has to go in his carrier, so I'd prefer to avoid that unless it's necessary.

Until recently, such a client would only have had one option: to bring their pet to the clinic for an assessment. This client, however, can now be seen via a telemedicine appointment with the veterinarian and be provided with the facts needed to make the best decision for their cat. The appointment can also reinforce the veterinarian's authority as the trusted source of information for the client to turn to first in the future. Furthermore, the veterinarian can be compensated for the services.

Communicating the Benefits of Telehealth

Many people see telehealth solely as a live audio or video service, but conducting remote consultations is actually only a very small part of what telehealth is about. Instead, provision of telehealth services is most successful when it is focused on easing communication bottlenecks, improving clients' access to care and information, and capturing revenue usually given away for free.

Connected Care seeks to integrate all digital technologies to enhance and support the veterinarian-client-patient relationship through improved communication, diagnosis, and monitoring. It is thus of immense value for clients, patients, and the practice. In this section, you will find suggestions for promoting the benefits of telehealth to staff and clients.

Effective marketing relies on promoting the benefits, not the features, of telehealth.

External Marketing

When marketing to your clients through social media, newsletters, email blasts, fliers, blogs, or direct mail, the benefits fall into four categories:

Convenience

- The ability to communicate asynchronously (at separate times as with texts or online forms), allows for the exchange of information at convenient moments without having missed callbacks or delays.
- Clients can send photos, videos, or reports from remote monitors, which can be reviewed and responded to or used to identify the need for an in-person examination. This ensures rapid feedback and timely intervention.

- Using available software technology, clients can also schedule appointments, fill out pre-examination histories, or request prescription refills when it works for them, whether that is late at night, while riding public transit, or during a break at work.
- When a veterinarian can arrange a live teleconsult with a specialist, the veterinarian and clients can get expert advice simultaneously without having to wait. This allows for earlier intervention.

Access

- If clients have disabilities, or they find it hard to take off work, hate traffic, live at a considerable distance, lack child care, or have a challenging pet to get into a carrier or a fragile one under hospice care, then telehealth services can help improve access.
- When your practice leverages technicians and assistants to provide results, instructions, or patient information via phone, text, or video conferences, clients have more touchpoints with the practice, which strengthens that relationship.
- Whether you use telemedicine to provide after-hours care or educational information, be sure to make clients aware of these opportunities.
- Beyond the walls of your practice, you can schedule teleconsultations with various specialists. This access to specialty care can potentially benefit patient treatment, recovery, and quality of life, which has significant value.

Time and Cost Savings

The tools and touchpoints mentioned above can cut down on clients' coming in for unnecessary appointments, saving them time and money and freeing up the practice schedule for patients that

need in-person exams. Other savings potentially can come through virtual rechecks or creating subscription pricing models for clients using telehealth.

Improved Diagnostics and Patient Monitoring

Clients pay attention to technology trends happening with their own healthcare and often ask their veterinarians which of these might be appropriate for their pets. With some of the new veterinary AI-assisted diagnostic services and remote monitoring devices, there is now an opportunity to promote these to your clients as an extension of your practice's services. The benefits of more accurate diagnoses, earlier intervention, and improved client compliance all support improving treatment outcomes for your patients and enhanced client experiences.

Internal Marketing

Your Telehealth Champion is responsible for internal marketing to staff, ensuring everyone understands how telehealth is being used to help clients and patients. Ideally, you'll want all staff to become enthusiastic advocates.

Improved Patient Care and Outcomes

The Telehealth Champion needs to share stories and metrics illustrating improved patient outcomes resulting from earlier intervention, better client compliance, and more timely follow-ups. It's important to track and

tell how remote monitoring data collection, specialist consults, and compassionate care for hospice patients are some of the ways technology and Connected Care are supporting the practice healthcare team deliver personalized patient care.

The Telehealth Champion also needs to track and share examples of the following benefits for the practice:

- **Client Relations**
 - Reduced bottlenecks, leading to more streamlined communications with clients
 - More time to show interest and compassion for patients and clients
- **Practice Sustainability**
 - Monetizing more client interactions
 - Opportunities for staff to use more of their skills
 - Potential for some staff to work remotely
 - Potentially greater control over work-life balance through improved workflow



TIP: Your marketing doesn't have to be costly. Messages to both staff and clients just have to be clear and consistent, conveying that competence and caring are valued.





Frequently Asked Questions: Marketing

Q How can I make sure everyone in our practice can speak effectively about our telehealth efforts?

A Your Telehealth Champion should keep staff members informed about the services being offered, and any changes to those services. This can be done by circulating staff memos, creating scripts for support in answering specific questions (Figure 5), or developing lists of frequently asked questions (FAQs) with answers for distribution. Everyone loves success stories and you will need quotes for testimonials to support your marketing, so ask the staff to share these with your Telehealth Champion as well. Again, be sure to respect client and patient confidentiality and that you have obtained permission to use your clients' comments in any marketing material.

Q I've never done video sessions and wonder how I can convey a good “websiteside” manner during a telehealth visit. I want to be the person my clients will feel confident in and comfortable with.

A Before you start seeing patients and communicating with clients using video consultations, put the video in record mode and rehearse in front of the camera. Play it back to see how you come across. It may take several rehearsals before you feel at ease. It can be harder to exude warmth and create a personal connection when body language clues are limited. Show your client you're listening by nodding every so often when they are speaking. Make eye contact by looking into the camera lens, not at the client image on the screen. When you have to look away to consult a record, be sure to let your client know and ask permission as a courtesy. Watch for visual clues from your client and be mindful of the ones you are expressing. After your first few sessions, review the exam videos to see what you might want to improve, but know that as with anything else, you will naturally get better with practice.

FIGURE 5 | Sample Script for Marketing the Benefits of Telehealth Services to Clients

When introducing new procedures to clients, lead with a clear value proposition to support their adoption.

For example: We know it's difficult for you to get off work to bring your dog in, so how about we schedule a telemedicine appointment for you and Rex? You can send photos or a video of his surgery site to the doctor, who can see how things are healing before your virtual visit. That way, you won't have to come in if all is OK, which will save you time. Are you available this Thursday between 10 am and noon?



Conclusion

Demand for telehealth services is accelerating, and veterinary practices need to keep pace to remain relevant. The goal is not to replace necessary in-person consultations and exams, but to consider using technology for such services as

- Client education
- Some types of preventive care
- Postsurgical follow-ups
- Behavioral consults
- Monitoring chronic conditions
- Palliative/hospice care
- Nutritional consults
- Prescription and pet food refills
- Triage
- Specialist consults

The goal is offering improved access and convenience that provide pet owners with excellent customer service and high-quality patient care leading to better patient outcomes and increased client retention. The goal is using technology to streamline care so staff don't burn out, internal processes flow efficiently, and everyone's skills are maximized and monetized.

As we hope you can see, telehealth is not about the gadgets, it's about results and relationships.

Staying connected with your clients and patients is critical. You want your clients to think of calling you first when they have questions or concerns. You want to be able to provide your clients answers and reassurance when they need it 24/7. Plan to provide telehealth services on your time and potentially use a third-party provider after hours so you don't have to always be on call and your clients can still receive services.

You don't have to take on all of telehealth at once. Assess your situation, your clients, your patients, and your resources. Determine how to incorporate Connected Care into your practice and what your desired return on investment looks like. Feel confident that making small adjustments now will provide huge dividends in improved patient outcomes, client retention, and staff satisfaction in the future.

The most important step you can take today is your next one! Visit aaha.org/telehealth for more resources.

A photograph of a middle-aged Black man with a short beard and mustache, smiling warmly. He is wearing a white lab coat over a light blue collared shirt and a dark blue tie. A black stethoscope is draped around his neck. He is holding a white tablet computer in his hands. The background is a blurred indoor setting, likely a hospital or clinic, with vertical lines suggesting a doorway or window frame.

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Established in 1933 by leaders in the veterinary profession, AAHA is best known for its accreditation of companion-animal veterinary practices. To become accredited, companion-animal hospitals undergo regular comprehensive evaluations by AAHA veterinary experts who evaluate the practice on approximately 900 standards of veterinary care. AAHA also develops publications and educational programs and resources designed to help companion-animal hospitals thrive. Today, more than 4,000 practice teams (15% of all veterinary practices in the United States and Canada) are AAHA accredited. For more information about AAHA, visit aaha.org.



The American Veterinary Medical Association, founded in 1863, is one of the oldest and largest veterinary medical organizations in the world, with more than 96,500 member veterinarians worldwide engaged in a wide variety of professional activities and dedicated to the art and science of veterinary medicine.