

## TelePrEP Readiness Assessment Tool for Organizations

The TelePrEP Readiness Assessment Tool guides the planning process for program managers regarding the implementation of TelePrEP programs. This tool draws on reports from Clinical and non-clinical settings that have successfully implemented TelePrEP programs. This assessment tool was built using best practices developed by clinics, community based organizations (CBOs) and Health Departments that provide both services in the TelePrEP sector and access to a variety of tools important to TelePrEP.

Successful TelePrEP programs consider nine core elements

1. Program Purpose and Scope
2. Program Sustainability
3. Technology and IT Support
4. Compliance and Regulation
5. Claims, Billing, and Reimbursement
6. Scheduling and Workflow
7. TelePrEP Peer Navigation
8. PrEP Laboratory Testing
9. Community Engagement

### Instructions

Each section has a set of key questions that are based on elements of TelePrEP best practices. These questions will help program managers plan the execution of each element. For each key question, there will be a column to fill-in.

1. **Defined:** The Health Care Organization (HCO) is currently **prepared** and has a defined plan and understanding of the element. Please review the **Helpful Hints** to identify any gaps for the current answer.
2. **In Progress:** The HCO has not finalized the element answer and will need to return to this with a more defined answer. Please list the current information and answer and note the possible modifications to be made and resources needed.
3. **Undefined:** The HCO must return to this answer after more research, effort, and resource pulling. More significant collaboration within the organization is necessary before having a defined answer. Please list the current information and answer you have and note the possible modifications to be made and resources needed.
4. **Helpful Hints:** Recommended elements to consider and helpful hints to better define the organization's planning and design for TelePrEP. Please review the **Helpful Hints** to identify any gaps for the current answer.

| Program Purpose and Scope  | Yes | No |
|--|-----|----|
| Do you have a defined scope and purpose for your TelePrEP program? |     |    |
| Have you identified how TelePrEP will benefit your organization?   |     |    |
| Do you have a start date for your TelePrEP program?                |     |    |
| Have you created a project timeline for your TelePrEP program?     |     |    |
| Do you know the population demographics for your TelePrEP program? |     |    |
| Do you have a target population to start TelePrEP with first?      |     |    |
| Do you have target payers identified to start TelePrEP?            |     |    |

| Program Purpose and Scope  |         |             |             |  |
|--|---------|-------------|-------------|--|
| Key Questions  | Defined | In Progress | Not Started | Helpful Hints  |
| What is the purpose for your TelePrEP program?                                       |         |             |             | <ul style="list-style-type: none"> <li>• Is your organization looking to have more of a virtual presence?</li> <li>• Do you think that TelePrEP is a better fit for your client population?</li> <li>• Is your organization looking to incorporate more digital health services into their clinical services?</li> </ul> |
| What are you trying to achieve by creating a TelePrEP program for your organization? |         |             |             | <ul style="list-style-type: none"> <li>• Do you think that TelePrEP is a service preferable for your client population?</li> <li>• Are there providers that would prefer to work remotely some days of the week who are still willing to provide PrEP evaluations in person?</li> </ul>                                  |

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|  |  |  |  | <ul style="list-style-type: none"> <li>• Are you looking to have a virtual option so that if there is another public health crisis, your organization is ready to go completely virtual?</li> </ul>   |
| How will TelePrEP bring value to your organization?                                  |  |  |  | <ul style="list-style-type: none"> <li>• Will TelePrEP help access specific populations that are resistant or lack resources to visit your facilities in person?</li> <li>• Do you think that having a virtual option for PrEP will improve compliance with medication refills and routine HIV screening?</li> <li>• Do you think TelePrEP would be a good alternative for people who desire more confidentiality regarding their treatment by having their PrEP services virtual?</li> </ul> |
| What will be the tentative target start date?  |  |  |  | <ul style="list-style-type: none"> <li>• Do you have a certain deadline to initiate TelePrEP for your organization due to funding or access for clients?</li> </ul>   |
| Do you have a timeline for specific milestones for the project?                      |  |  |  | <ul style="list-style-type: none"> <li>• Have you considered creating a TelePrEP project timeline resource?</li> <li>• How long do you expect the TelePrEP program planning and implementation to take?</li> </ul> <p>*Note: most programs take 3-6 months to implement a program and another 3-6 months to adopt into practice</p>   |
| What client populations does your organization currently serve for PrEP or TelePrEP? |  |  |  | <ul style="list-style-type: none"> <li>• Does your program consider migrant, indigenous, BIPOC, LGBTQ, transgender, rural, uninsured, undocumented, low income, MSM, heterosexual males or females, youth, elderly, drug-users, and incarcerated individuals?</li> </ul>  |
| Who will be included in the eligible client population at the start of the program?  |  |  |  | <ul style="list-style-type: none"> <li>• Who is eligible and not eligible in this phase?             <ul style="list-style-type: none"> <li>○ Your organization may wish to expand in the future.</li> </ul> </li> </ul>  |

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|   |  |  |  | <ul style="list-style-type: none"> <li>■ If you are new to TelePrEP, we suggest starting with the 18+ population and consider their dependent status. For example , what insurance types, uninsured, i.e. (maybe actually a whole area for scope and eligibility)</li> </ul> |
| What payment type/payer type will you be initially accepting at the start of your TelePrEP program? |  |  |  | <ul style="list-style-type: none"> <li>● What insurance types, grant funding, special federal or state funding options are available?</li> </ul>   |
| What other related social determinants of health (SDOH) resources will this program provide?        |  |  |  | <ul style="list-style-type: none"> <li>● What sexual health education, patient education, referrals to primary care providers (PCPs), referrals to social resources, and group meetings will be offered?</li> </ul>  |

| Program Sustainability   | Yes | No |
|--|-----|----|
| Do you know how much your TelePrEP program will cost to start and maintain?                                    |     |    |
| Have you identified the external and internal staff required for TelePrEP program planning and implementation? |     |    |
| Do you have goal metrics to determine if the program is successful?  |     |    |
| Do you have metrics to monitor progress throughout the implementation process and program start?               |     |    |
| Have you considered what might impede adequate success of the program and created contingency plans?           |     |    |

| Program Sustainability   |         |             |             |   |
|--|---------|-------------|-------------|---|
| Key Questions  | Defined | In Progress | Not started | Helpful Hints   |
| How are you funding your TelePrEP Program including technology and staff requirements? |         |             |             | <ul style="list-style-type: none"> <li>It is important to consider not only the one-time purchases and costs but also to consider licensing subscriptions, maintenance of the technology, internal staff resource cost, and other predictable budgetary items.</li> </ul>       |
| Who are the executive stakeholders for the TelePrEP program?                           |         |             |             | <ul style="list-style-type: none"> <li>Executive stakeholder may be someone in your organization such as the CMO, CEO, CIO, CCO and then implementation champion: The person who is identified with time and resources to successfully implement and provide support</li> </ul> |
| Who are the program champions and who are they accountable to?                         |         |             |             | <ul style="list-style-type: none"> <li>Program champions are team leaders who could be supervisors, directors, program managers,</li> </ul>   |

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|  |  |  |  | <p>and/or other staff involved in implementing and planning the TelePrEP program that would be the liaison to the executive stakeholders. Champions advocate for the initiative within the work environment, facilitate reflection, serve as a team leader, motivate staff, engage in planning activities, educate and train staff, and are accountable for keeping track of the program and supporting forward momentum.</p> |
| Who will be supporting the providers during the implementation?  |  |  |  | <ul style="list-style-type: none"> <li>• Will you need other staff from other internal/external departments such as IT, compliance, legal, quality assurance needed for provider support with TelePrEP?</li> <li>• Will they be available during the provider working hours?</li> </ul>   |
| Who will be your TelePrEP provider champion(s)?  |  |  |  | <ul style="list-style-type: none"> <li>• Are there providers who would help lead with implementation design and be the first to implement the program?</li> </ul>   |
| Are there any staff that may need more attention during implementation to ensure smooth TelePrEP adoption? |  |  |  | <ul style="list-style-type: none"> <li>• Are there particular staff that may need more touch points and support for the adjustments associated with TelePrEP program implementation?</li> <li>• How may you be able to provide this support and build their confidence?</li> </ul>  |
| How will the success of the program be measured, i.e., metric tracking?                                    |  |  |  | <ul style="list-style-type: none"> <li>• Some examples of these metrics are # of TelePrEP encounters, percentage of demographic adoption of TelePrEP, prescription compliance, reimbursement trends, surveys to clients or staff, and retention.</li> <li>• How are you keeping track of these metrics?</li> </ul>  |

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| <p>How will the value of the program be demonstrated?</p>                                  |  |  |  | <ul style="list-style-type: none"> <li>• Will you be relying solely on the success metrics above or will there be other ways of proving the value of the program such as access to TelePrEP, community partnerships, client engagement, etc.?</li> </ul>   |
| <p>How does TelePrEP fit into the current programs and services of your organization?</p>  |  |  |  | <ul style="list-style-type: none"> <li>• Is there a specific population that you already serve that needs TelePrEP services?</li> <li>• Do you offer programs centered around prevention of communicable disease?</li> <li>• Do you offer other programs in sexual health education and management?</li> </ul> |
| <p>What is the process for tracking and determining quality improvement?</p>               |  |  |  | <ul style="list-style-type: none"> <li>• Can you run reports within your EMR platform to track certain metrics?</li> <li>• Are there grants that you currently track measures for, which you might need to do the same for this program?</li> <li>• Do you have a quality improvement department?</li> </ul>   |
| <p>How will you assess the impact of TelePrEP regarding quality measures and outcomes?</p> |  |  |  | <ul style="list-style-type: none"> <li>• How are you planning to assess the success and growth of your TelePrEP program?</li> <li>• Do you know how you will measure the success of the TelePrEP program?</li> <li>• Do you have someone responsible for tracking the progress?</li> </ul>                     |

| Program Technology and IT Support  | Yes | No |
|--|-----|----|
| Do you have existing technology devices to support a TelePrEP program?                           |     |    |
| Do you have to purchase new technology devices for your TelePrEP program?                        |     |    |
| Do you have video conferencing software for TelePrEP services?                                   |     |    |
| Has your IT department committed to providing support to your staff for TelePrEP implementation? |     |    |
| Is your staff trained to use the technology required for the TelePrEP program?                   |     |    |
| Do you know how you will maintain the technology required for your TelePrEP program?             |     |    |

| Technology and IT Support  |         |             |             |   |
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| Key Questions  | Defined | In Progress | Not Started | Helpful Hints   |
| Is there a specific person in charge of purchasing decisions for software, hardware and technology?          |         |             |             | <ul style="list-style-type: none"> <li>Who will need to be consulted about technology hardware purchases, software licensing, data security, administrator access on computers, internet access, and virtual desktop management?</li> </ul>   |
| Will your providers need new laptops, home desktop computers, and/or other technologies to provide TelePrEP? |         |             |             | <ul style="list-style-type: none"> <li>Is your EMR system on a virtual desktop?</li> <li>Does your staff who would be working remotely have access to EMR records on their home computers?</li> <li>Does your internet security policy allow staff to use their own computers for work?</li> <li>Do you have organization-owned computers that</li> </ul> |

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|   |  |  |  | are portable and are able to be used remotely?<br><i>(Please see the Technology Implementation Workflow)</i>   |
| Is your organization currently experiencing technology barriers?                                |  |  |  | <ul style="list-style-type: none"> <li>Data storage issues, technology storage, no IT department for troubleshooting, EMR is antiquated?</li> </ul>  |
| Does your staff have accessibility needs that need to be considered in your program design?     |  |  |  | <ul style="list-style-type: none"> <li>Broadband access, safe place to store technology, Phone service</li> </ul>  |
| Do your clients have accessibility needs that need to be considered in your program design?     |  |  |  | <ul style="list-style-type: none"> <li>Broadband access, safe place to store technology, Phone service</li> </ul>  |
| If your providers are working from home, do they have reliable internet access?                 |  |  |  | <ul style="list-style-type: none"> <li>For a small physician practice (2-4 physicians) – the minimum internet speed is 10 Mbps</li> <li>Internet supports practice management functions, email, and web browsing</li> <li>Allows simultaneous use of EHR and high-quality video consultations</li> <li>Enables non real-time image downloads</li> <li>Enables remote monitoring</li> <li>Makes possible use of HD video consultations</li> </ul> |
| For those providers or staff that do not have reliable internet access, what do you plan to do? |  |  |  | <ul style="list-style-type: none"> <li>There are ways to boost your internet and cellular reception including installing cell signal boosters or hot spots.</li> </ul>   |

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| <p>Does your organization have an EMR system for client documentation with an integrated video visit option to use for TelePrEP?</p>                                    |  |  |  | <ul style="list-style-type: none"> <li>• If you have an option for video visits within your current EMR system, it is recommended to still evaluate if it is the right fit for your organization including:             <ul style="list-style-type: none"> <li>• Cost for software</li> <li>• Technology burden on staff and client resources (connectivity, requires app or login)</li> <li>• Quality of technology, IT support, ease of use and security issues.</li> </ul> </li> </ul> |
| <p>If you do not have an option with your current electronic medical record (EMR) system, what video conferencing platform will you use for the telemedicine visit?</p> |  |  |  | <ul style="list-style-type: none"> <li>• <i>Please reference the video conferencing matrix to help determine the right video conferencing software for your organizational needs.</i></li> </ul>  |
| <p>Will you need support from the technology platform available for providers during the time of implementation?</p>  |  |  |  | <ul style="list-style-type: none"> <li>• Identify if you will need increased IT support for the technology platforms and if there are additional resources you can request from the technology provider for your staff and clients.</li> </ul>  |
| <p>Who will be verifying the compatibility and interoperability of the technology and the hardware devices?</p>   |  |  |  | <ul style="list-style-type: none"> <li>• The IT department may need to confirm compatibility with the current EMR, remote desktop and firewall settings.</li> <li>• System requirements may vary with each technology and should be confirmed for short-term and long-term upgrades.</li> </ul>   |
| <p>Will you need IT support from your organization during the implementation process and onboarding for the platform and workflow?</p>                                  |  |  |  | <ul style="list-style-type: none"> <li>• New programs especially involving new technology and client technology adoptions often require assistance for troubleshooting technology adoption.</li> </ul>  |

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| <p>What reports will you run through the video conferencing platform to assess the impact of TelePrEP vs in office PrEP visits on quality measures and outcomes?</p> |  |  |  | <ul style="list-style-type: none"> <li>In order to track the success of your video conferencing platform, it is good practice to be able to track # of visits completed via video, how often the visit was interrupted due to connection/technology, failed attempts to start a video visit, the types of devices used for video visits.</li> </ul>             |
| <p>What changes to the EMR or chart templates are needed for documenting TelePrEP care?</p>  |  |  |  | <ul style="list-style-type: none"> <li>Chart templates are common for PrEP and will likely need to be customized for certain documentation requirements regarding TelePrEP including the consent, safe and confidential location, confirming identity, identifying differences between in person and virtual visit care delivery, and time tracking.</li> </ul> |
| <p>Will you need to create additional data collection tools in your EMR?</p>   |  |  |  | <ul style="list-style-type: none"> <li>In order to track certain data associated specifically with TelePrEP encounters, information may need to be collected in different parts of the ERM. I.e. Location of client/provider, time spent on call, type of communication used by each party (phone call, video visit, asynchronous).</li> </ul>                  |
| <p>Will your IT department be available during hours of TelePrEP implementation for technology support?</p>  |  |  |  | <ul style="list-style-type: none"> <li>It is important that IT support be available when the staff needing support are acutely having problems or questions.</li> </ul>   |
| <p>Who will be providing support to clients for technology adoption?</p>   |  |  |  | <ul style="list-style-type: none"> <li>Will other staff need to be trained on the technology and how to troubleshoot the technology with the client? (I.e. TelePrEP navigator, NP, etc.)</li> </ul>   |

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| What supportive documentation for troubleshooting that the staff involved in TelePrEP can reference throughout the implementation? |  |  |  | <ul style="list-style-type: none"> <li>Job aides and tips and trick sheets are very helpful with alleviating simple problems and to enhance learning how to use new technology.</li> </ul> |
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| Compliance and Regulations   | Yes | No |
|--|-----|----|
| Do you have a compliance and regulation department?  |     |    |
| Do you know regulations regarding telemedicine specific to the state(s) you provide TelePrEP to?   |     |    |
| Do you have ways of remaining compliant with technology security and storing/sharing medical information if your staff and clients are both virtual (not on site)? |     |    |
| Do you know how malpractice insurance and client billing is different when providing TelePrEP?   |     |    |
| Do you have a legal department?  |     |    |
| Do you know how you will protect client privacy and records?   |     |    |

| Compliance & Regulation   |         |             |             |  |
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| Key Questions   | Defined | In Progress | Not Started | Helpful Hints  |
| Who will be responsible for knowing the regulations for TelePrEP, telemedicine, and compliance for your organization? |         |             |             | <ul style="list-style-type: none"> <li>Telemedicine and TelePrEP regulations have changed significantly since the adoption of telemedicine. It is important that your</li> </ul> |

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|  |  |  |  | organization remain updated and will require active monitoring for changes.   |
| What are the federal and state regulations regarding TelePrEP or telemedicine for your organization and client population? |  |  |  | <ul style="list-style-type: none"> <li>• There are numerous resources to find the regulations federally and specific to a state. Make sure to provide to your staff pertinent information affecting TelePrEP delivery.</li> </ul>                         |
| How are you protecting client privacy and records in your TelePrEP program?  |  |  |  | <ul style="list-style-type: none"> <li>• Do you have a business associate agreement with all vendors that might have access to protected health information (PHI)?</li> <li>• Is your EMR accessed through a virtual desktop or secure server?</li> </ul> |
| Are there any other compliance considerations that need to be reviewed?  |  |  |  | <ul style="list-style-type: none"> <li>• i.e. malpractice insurance coverage for telemedicine, medical licensing and malpractice information for other states your population may be in when care is delivered</li> </ul>                                 |
| Who is responsible for pulling demographic information for reporting?  |  |  |  | <ul style="list-style-type: none"> <li>• Most organizations do need demographic information for reporting and routinely must update information</li> </ul>  |
| Who is responsible for credentialing TelePrEP providers?   |  |  |  | <ul style="list-style-type: none"> <li>• Typically there is someone routinely maintaining credentialing for providers with insurance providers, public health funding, and hospital privileges.</li> </ul>  |
| Who is responsible for malpractice for TelePrEP providers?   |  |  |  | <ul style="list-style-type: none"> <li>• Those who will be responsible for malpractice insurance coverage will need to be involved when providing telemedicine, as there are multiple considerations involved for determining coverage.</li> </ul>        |

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| <p>Do you have a legal department?</p>   |  |  |  | <ul style="list-style-type: none"> <li>• Legal department is where internal/external contracts need to be reviewed, organization messaging examined, and protocols for highly sensitive data are examined.</li> <li>• It is important to know who they are and how to contact them.</li> </ul>                                   |
| <p>What is the turnaround time for compliance updates?</p>   |  |  |  | <ul style="list-style-type: none"> <li>• How often is reporting and maintenance of compliance done?</li> <li>• Will there be contingency plans for changes to regulations?</li> </ul>  |
| <p>Will the legal department need to be involved in approval of the telemedicine consent form or TelePrEP scope of practice?</p> |  |  |  | <ul style="list-style-type: none"> <li>• Many of the documents you provide to clients in person will now have to be delivered and completed virtually which may require changes to the current documents.</li> </ul>   |
| <p>Do you know what circumstances you will need to involve legal counsel?</p>  |  |  |  | <ul style="list-style-type: none"> <li>• When organizations collaborate with new lab facilities, partnership organizations, payer types, and funding programs.</li> <li>• Legal is usually required to review contracts and other materials.</li> </ul>  |
| <p>Do you have a method to maintain confidentiality for clients on someone else's insurance?</p>                                 |  |  |  | <ul style="list-style-type: none"> <li>• Explanation of benefits (EOBs) tend to go to the insurance beneficiary and often organizations cannot control those forms of communication but billing from the organization can be transmitted via a more confidential route.</li> <li>• Do you have methods of doing this?</li> </ul> |

| Claims, Billing, and Reimbursement  | Yes | No |
|---|-----|----|
| Are the services you are providing billable?  |     |    |
| Are there quality or incentive measures this program can support?   |     |    |
| Will you be leveraging grant funding or other funding streams to support the use of telehealth?             |     |    |
| Do you have a plan for how you will be able to assess value, impact, and return on investment for telePrEP? |     |    |
| Do you have a plan for financial sustainability of this program?  |     |    |
| Do you know the appropriate ICD-10 codes to bill TelePrEP to ensure insurance coverage?                     |     |    |
| Do you know how you will collect payments for TelePrEP?   |     |    |
| Do you have a protocol for when a visit reimbursement is denied?  |     |    |
| Do you have payment models for uninsured clients?   |     |    |
| Do you know the appropriate CPT codes to bill TelePrEP to ensure insurance coverage?                        |     |    |
| Do you have payment assistance for clients who cannot afford PrEP?  |     |    |
| Do you have a method to respect confidentiality for a client within a household if there is a bill?         |     |    |
| Are you using the 340B-318 drug-pricing program?  |     |    |

| Claims/Billing/Reimbursement  |         |             |             |  |
|---|---------|-------------|-------------|--|
| Key Questions   | Defined | In Progress | Not Started | Helpful Hints  |
| Is there someone in your organization that will help providers with billing and coding for their TelePrEP visits? |         |             |             | <ul style="list-style-type: none"> <li>Do you have billing within your organization or contract out to a billing company?</li> <li>Do you have someone who audits the TelePrEP visits for appropriate documentation and coding?</li> </ul>   |
| What are the ICD-10 codes typically used in TelePrEP visits?  |         |             |             | <ul style="list-style-type: none"> <li>Consider most likely scenarios such as screening for STDs, Ruling out underlying disease, starting PrEP treatment, maintenance of PrEP treatment, monitoring organ function, behavioral health codes, lifestyle codes</li> </ul>  |
| What are the CPT codes typically used in TelePrEP visits?   |         |             |             | <p>Consider most likely scenarios such as:</p> <ul style="list-style-type: none"> <li>New client management</li> <li>Returning client</li> <li>Complex clients</li> <li>Education</li> <li>Counseling</li> <li>Medication management</li> <li>Additional time spent with client</li> <li>Additional documentation review time</li> <li>Timed phone calls</li> <li>Virtual check-ins</li> <li>Asynchronous care management regarding e-visits</li> </ul> <p>Care coordination</p> |

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| <p>Do the providers determine the CPT billing code for the TelePrEP visit?</p>   |  |  |  | <ul style="list-style-type: none"> <li>• Are providers choosing the evaluation and management (E/M) code for their TelePrEP visits or is it being applied after the provider closes the note?</li> </ul>   |
| <p>What originating site codes will you be using?</p>  |  |  |  | <ul style="list-style-type: none"> <li>• There are a variety of point of service (POS) codes associated with the type of originating facility rendering the service.</li> </ul>  |
| <p>What modifier codes will you have to use?</p>   |  |  |  | <ul style="list-style-type: none"> <li>• There are modifier codes especially for services rendered via synchronous telecommunication.</li> </ul>   |
| <p>Is there a different in reimbursement when it comes to phone vs. video?</p>   |  |  |  | <ul style="list-style-type: none"> <li>• Usually, yes, but you can be reimbursed for both.</li> </ul>  |
| <p>Does your state have parity? Meaning are payers required to reimburse at the same rate for telehealth as in person.</p> |  |  |  | <ul style="list-style-type: none"> <li>• Look at CCHPCA, Illinois Billing tool of PrEP codes</li> </ul>  |
| <p>Who will be managing claim denials? In addition, What is the workflow for claim denials?</p>                            |  |  |  | <ul style="list-style-type: none"> <li>• This role often will review claims for missing information or incorrect coding to be resubmitted or billed to the client</li> <li>• If insurance denies the claim, what are the next steps to collect payment?</li> </ul> |
| <p>What is the workflow for non-insurance-based reimbursement for TelePrEP services?</p>                                   |  |  |  | <ul style="list-style-type: none"> <li>• If a grant program is funding the client, is there a different workflow for claims?</li> </ul>  |

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| Who handles the finance strategy for uninsured clients?   |  |  |  | <ul style="list-style-type: none"> <li>• This can sometimes be the TelePrEP navigator and involve billing.</li> </ul>  |
| What are your cash fees for TelePrEP?   |  |  |  | <ul style="list-style-type: none"> <li>• Are the fees discounted if paid the same day of the visit, do you have a sliding scale payment system?</li> </ul>   |
| Will there be reimbursement with lab draws and lab testing that will need to be reconciled within the billing department as well? |  |  |  | <ul style="list-style-type: none"> <li>• If your organization performs labs and testing, you will need support to handle the billing reconciliation for denied claims.</li> </ul>  |
| Are there restrictions on where the provider or client needs to be located?   |  |  |  | <ul style="list-style-type: none"> <li>• Usually providers and clients have to be in the same state for TelePrEP.</li> </ul>   |
| Which provider/licensure types are eligible for telehealth in your state?   |  |  |  | e.g. maybe occupational therapy isn't  |
| What are your strategies for your TelePrEP program financial sustainability?  |  |  |  | <ul style="list-style-type: none"> <li>• Have you considered federal grant funding sources such as 340B-318 funds?</li> <li>• Have you looked at state grant funded opportunities?</li> <li>• Can you add a line item to your budget to keep the program as an integral part of your services?</li> <li>• Do you have recurring grants that support the program's sustainability?</li> <li>• What is the predicted reimbursement for TelePrEP visits during implementation?</li> </ul> |

| Scheduling and Workflow   | Yes | No |
|---|-----|----|
| Do you have established workflows for staff for PrEP that can be used for TelePrEP?                 |     |    |
| Do you have established telemedicine workflows for your organization that can be used for TelePrEP? |     |    |
| Have you created the staff schedule for TelePrEP based off workflows?                               |     |    |
| Will you need to hire more staff for your TelePrEP Program?   |     |    |
| Do you have workflows for staff for TelePrEP follow-up visits and adherence counseling?             |     |    |
| Will you have clients who are new to your organization start with TelePrEP?                         |     |    |
| Do you have existing job aides for your staff?  |     |    |
| Do you have client workflows for TelePrEP?  |     |    |
| Have you created documentation templates for TelePrEP?  |     |    |

| Scheduling and Workflow                               |         |             |             |  |
|---|---------|-------------|-------------|--|
| Key Questions   | Defined | In Progress | Not Started | Helpful Hints  |
| Who will be overseeing delivery of TelePrEP services? |         |             |             | <ul style="list-style-type: none"> <li>Usually a program manager or office manager will be managing how the program is being implemented.</li> <li>It is important to have some cross training in this role to have someone supporting the program.</li> </ul> |

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| Where will the clients be physically located?  |  |  |  | <ul style="list-style-type: none"> <li>• Will your clients be in neighboring states?</li> <li>• Will your clients be comfortable informing you what where they are?</li> <li>• Are there locations that your client population be frequently traveling that are outside the provider's licensing states?</li> </ul> |
| Where will the TelePrEP providers be physically located?   |  |  |  | <ul style="list-style-type: none"> <li>• Where will the providers be located when delivering TelePrEP, i.e. home, office, remote site, while traveling?</li> </ul>  |
| What software will need to be open on the provider's desktop while providing TelePrEP?             |  |  |  | <ul style="list-style-type: none"> <li>• Will there be multiple platforms to use for TelePrEP or multiple windows required to be open at the same time for TelePrEP care delivery?</li> </ul>   |
| Will you have full time TelePrEP providers and/or part time TelePrEP providers?                    |  |  |  | <ul style="list-style-type: none"> <li>• Will you have multiple providers managing a client's TelePrEP?</li> <li>• How will the continuum of care be maintained?</li> </ul>   |
| Do you have Nurse Practitioners and/or Physician Assistants providing TelePrEP?                    |  |  |  | <ul style="list-style-type: none"> <li>• Different states have different regulations affecting how mid-level providers practice medicine and it is important to know what those differences are from MDs or DOs.</li> </ul>   |
| What is the TelePrEP clinic's schedule?  |  |  |  | <ul style="list-style-type: none"> <li>• Workflows and resource management are much easier to plan when you know the schedule and the</li> </ul>  |
| What staff is involved when starting a new client with TelePrEP?                                   |  |  |  | scheduler, scribe, medical assistant, nurse, TelePrEP navigator, provider, billing, IT support  |
| What is the workflow for the staff to enroll a new client in TelePrEP services prior to the visit? |  |  |  | <ul style="list-style-type: none"> <li>• Will they be enrolling with a live person and will it be virtually or in person?</li> <li>• Do you have online scheduling?</li> </ul>  |

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|  |  |  |  | <ul style="list-style-type: none"> <li>• Do you have a triage system for enrollment into the TelePrEP program?</li> <li>• How will you verify insurance and collect client demographics?</li> <li>• Do you provide PrEP education prior to the appointment?</li> <li>• Will clients also need to be enrolled in insurance?</li> <li>• Are you enrolling clients in medication payment assistance in this step?</li> </ul> |
| What is your workflow for engaging in a TelePrEP visit for your staff?                                       |  |  |  | <ul style="list-style-type: none"> <li>• Consider all staff involved from the start of the visit to the end when the video visit is ended and what each person needs to be doing.</li> <li>• Sometimes this helps to create a visual similar to a swim lane diagram where you can show what each staff member is doing at the same time.</li> </ul>   |
| What is the workflow for engaging in a TelePrEP visit for the client?  |  |  |  | <ul style="list-style-type: none"> <li>• It is important to know what the steps your client has when engaging in a TelePrEP visit.</li> <li>• It helps to identify the client touchpoints with each staff member</li> <li>• Identify areas where the process could be more efficient and where troubleshooting may be needed</li> </ul>   |
| What is the workflow for the client after a TelePrEP visit?  |  |  |  | <ul style="list-style-type: none"> <li>• Is there anything that the client will be expected to do such as provide information about preferred lab locations, financial information, or portal access?</li> </ul>  |
| What is your workflow for staff associated with client follow up specific to the most recent TelePrEP visit? |  |  |  | <ul style="list-style-type: none"> <li>• Are there steps specific to the provider that need to be done once the visit is ended?</li> </ul>  |

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|   |  |  |  | <ul style="list-style-type: none"> <li>• What steps associated with the most recent TelePrEP visit is the PrEP navigator responsible for?</li> <li>• Are there steps associated with labs, financing, medications, and referral?</li> <li>• Do you have documentation templates for these encounters?</li> </ul> |
| Do you have a different enrollment workflow for same day appointments vs booked in advance?             |  |  |  | <ul style="list-style-type: none"> <li>• Does any part of the enrollment workflow require omission or delay when the appointment is the same day?</li> </ul>   |
| What staff is involved during the TelePrEP visit?   |  |  |  | <ul style="list-style-type: none"> <li>• scheduler, scribe, medical assistant, nurse, TelePrEP navigator, provider, billing, IT support</li> </ul>   |
| Who is responsible for supporting providers and clients for technology troubleshooting?                 |  |  |  | <ul style="list-style-type: none"> <li>• Are these people scheduled to work in real time with when TelePrEP will be delivered?</li> </ul>  |
| What is your protocol for virtually confirming a client's identity and obtaining consent for the visit? |  |  |  | <ul style="list-style-type: none"> <li>• There are multiple checklists and templates to do this step intentionally and to enforce proper identification and consent in a virtual setting.</li> </ul>   |
| Do you have a document outlining provider/staff etiquette on TelePrEP encounters?                       |  |  |  | <ul style="list-style-type: none"> <li>• It is important to not assume your staff knows how to engage with clients during a virtual visit. It is important to highlight how to set a safe and comfortable space for clients as well as providers during a TelePrEP visit.</li> </ul>                             |
| What templates have you created in your EMR for TelePrEP visits?  |  |  |  | <ul style="list-style-type: none"> <li>• There is a standard for documenting telemedicine visits and for documenting PrEP care.</li> <li>• Documentation is extremely important and will improve the efficiency of visit documentation.</li> </ul>   |

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| <p>What is your workflow for when lab results are received?</p>                             |  |  |  | <ul style="list-style-type: none"> <li>• Who reviews the lab result, who decides what to do in response to the result and who delivers the results to the client?</li> <li>• How is this documented and by who?</li> <li>• Do you have documentation templates for these encounters?</li> </ul>   |
| <p>What is your workflow for when clients have questions outside of the TelePrEP visit?</p> |  |  |  | <ul style="list-style-type: none"> <li>• Do they have a specific number they call?</li> <li>• Can they reach the organization through the online portal?</li> <li>• Is there someone who triages the question first?</li> <li>• How is this interaction documented?</li> <li>• Do you have documentation templates for these encounters?</li> </ul>   |
| <p>Will there be other services provided at times from the TelePrEP provider?</p>           |  |  |  | <ul style="list-style-type: none"> <li>• Do your providers also deliver healthcare related to other programs in your organization such as STD prevention, Hepatitis treatment, treatment for other disease states, behavioral health, drug dispensing on-site? Alternatively, high-risk lifestyle education?</li> <li>• Do you have documentation templates for these unique encounters?</li> </ul> |
| <p>For which tasks will staff need to be cross-trained?</p>                                 |  |  |  | <ul style="list-style-type: none"> <li>• It is always encouraged to cross-train staff for important responsibilities that might be limited by schedule or # of staff working.</li> </ul>  |
| <p>Will you need to hire new staff for positions associated with TelePrEP?</p>              |  |  |  | <ul style="list-style-type: none"> <li>• It is important to plan for training new staff, especially when current staff is trying to implement a new program. It is good to have job aides for each position and schedule in shadowing with staff that are already competent in their role.</li> </ul>   |

| TelePrEP Peer Navigation   | Yes | No |
|--|-----|----|
| Do you know who will be doing TelePrEP navigation in your organization?                      |     |    |
| Are your navigators trained to assist clients with cost?                                     |     |    |
| Do you have workflow for your TelePrEP navigators?   |     |    |
| Do your TelePrEP navigators know their responsibilities?                                     |     |    |
| Do you have a way for TelePrEP navigators to virtually communicate with clients?             |     |    |
| Do you have a way for TelePrEP navigators to virtually communicate with staff and providers? |     |    |
| Do you know how the TelePrEP navigators will be supported when they are working virtually?   |     |    |
| Do you have electronic resources for TelePrEP navigators to distribute to clients?           |     |    |

| TelePrEP Peer Navigation                                     |         |             |             |   |
|--|---------|-------------|-------------|---|
| Key Questions  | Defined | In Progress | Not Started | Helpful Hints   |
| Who will be coordinating TelePrEP services?                  |         |             |             | <ul style="list-style-type: none"> <li>Who will be involved in the client journey throughout the TelePrEP program?</li> </ul>                             |
| Who will be responsible for client linkage to TelePrEP care? |         |             |             | <ul style="list-style-type: none"> <li>Typically, this staff member will be responsible for the pre-engagement process of TelePrEP navigation.</li> </ul> |

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| Will there be training on PrEP required?  |  |  |  | <ul style="list-style-type: none"> <li>• Is there a standard training that your TelePrEP navigators are using?</li> <li>• There are many PrEP curriculums you could offer staff</li> </ul>   |
| What reference materials and templates do you have for TelePrEP navigators to use and/or reference for a client?                      |  |  |  | <p>Do you have resources and templates</p> <ul style="list-style-type: none"> <li>• Technology troubleshooting, adherence tools, education materials?</li> <li>• Do you have electronic versions of your education documents and resources to use on Zoom or virtually deliver to the client?</li> </ul> |
| Who will be responsible for client follow-up and retention?   |  |  |  | <ul style="list-style-type: none"> <li>• Decide if a navigator will help clients at every step or if certain navigators will assist with certain tasks</li> </ul>  |
| How do you ensure your PrEP navigator performs client encounters with cultural competency and delivers trauma informed communication? |  |  |  | <ul style="list-style-type: none"> <li>• PrEP Navigators responsibilities are respecting client confidentiality, maintaining professional boundaries, understanding field safety. It is important to have systems in place to maintain these important standards.</li> </ul>                             |
| How are you ensuring HIPAA compliance for navigator visits?   |  |  |  | <ul style="list-style-type: none"> <li>• Using the same secure systems that providers use</li> <li>• Training navigators on HIPAA compliance</li> </ul>  |
| Will your PrEP navigators be educating the client on how to maintain a private and secure environment?                                |  |  |  | <ul style="list-style-type: none"> <li>• It's imperative that clients are in a safe, private space during TelePrEP visits, calls with navigators and anything else related to their care</li> <li>• Navigators must be aware of their own surroundings when contacting clients.</li> </ul>               |
| How will information be shared between the navigator and the client?  |  |  |  | <ul style="list-style-type: none"> <li>• It is important to know the technology and ways your staff is communicating with the client and maintain HIPAA compliance and confidentiality for the client</li> </ul>   |

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| How will information be shared between the navigator and the provider?   |  |  |  | <ul style="list-style-type: none"> <li>• There are often a few ways in which information can be shared, often in the EMR, through encrypted email, or specialized communication apps for healthcare workers that are HIPAA compliant, or fax.</li> </ul>  |
| Is the navigator responsible for pulling demographic information for reporting?  |  |  |  | <ul style="list-style-type: none"> <li>• These versions are helpful for reviewing with the client on virtual visits and to provide a more connected environment virtually.</li> </ul>   |
| Will you be using seasoned PrEP navigators or training new TelePrEP navigators?  |  |  |  | <p>PrEP Navigators have to have a breadth of capabilities relating to:</p> <ul style="list-style-type: none"> <li>• Insurance enrollment</li> <li>• Medication payment assistance</li> <li>• Linking clients to a PrEP care location</li> <li>• Linking clients to other support services</li> <li>• Providing follow-up and adherence support</li> </ul> |
| Who will be supporting the PrEP navigator virtually within the organization?   |  |  |  | <ul style="list-style-type: none"> <li>• It is important to have a pathway to provide support to your TelePrEP navigators in case they need help with a client.</li> </ul>  |
| How will you be monitoring your navigator?   |  |  |  | <ul style="list-style-type: none"> <li>• Feedback surveys</li> <li>• Shared documents with notes</li> <li>• Meetings with providers and navigators</li> </ul>   |
| Do you have processes in place to emotionally support your staff if they feel overwhelmed with a client encounter where the TelePrEP program can still operate as usual? |  |  |  | <ul style="list-style-type: none"> <li>• Do you have contingency plans for TelePrEP staff to take a break if they are overwhelmed with a client and need a break?</li> </ul>  |
| Do you have a cheat sheet for your prep navigator to navigate insurance  |  |  |  | <ul style="list-style-type: none"> <li>• It is a good idea to have resources and reference material for your TelePrEP navigator to reference</li> </ul>   |

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| issues, billing problems, how to talk to the lab to understand billing, pharmacy issues with coding or navigation |  |  |  | for unique situations associated with client challenges.   |
| What is your workflow for supporting financing for uninsured clients?   |  |  |  | <ul style="list-style-type: none"> <li>Usually this involves an assessment of the client's financial status and if they qualify for certain funding for services and drug assistance.</li> </ul> |
| How will navigators deliver PrEP Basics education?  |  |  |  | <ul style="list-style-type: none"> <li>Will this be on video, telephone, by asynchronous correspondence?</li> </ul>  |

| PrEP Laboratory Testing   | Yes | No |
|---|-----|----|
| Are you using confidentiality measures to not "out" clients when shipping labs? |     |    |
| Are your staff trained to complete Mail-In self-tests?                          |     |    |
| Are your staff trained to complete HIVST?                                       |     |    |
| Do you know who is relaying results to clients?                                 |     |    |
| Do you know how you will fund your laboratory testing for TelePrEP clients?     |     |    |
| Does your organization take clients that do not have insurance or labs?         |     |    |
| Do you know all your lab-testing options for clients?                           |     |    |

| PrEP Laboratory Testing  |         |             |             |   |
|--|---------|-------------|-------------|---|
| Key Questions  | Defined | In Progress | Not Started | Helpful Hints   |
| What are your lab testing options for clients?   |         |             |             | <ul style="list-style-type: none"> <li>• More options give more access and options for clients to complete their labs</li> <li>• Are you only completing labs at your organization or are there other 3<sup>rd</sup> party options?</li> <li>• What testing company will your organization partner with?</li> </ul> |
| Are you using or considering 340B as a funding option?                                       |         |             |             | <ul style="list-style-type: none"> <li>• It is important that the purchase of these items ensure compliance with the 340B program.</li> </ul>   |
| Are you offering the HIVST and mail-in self-Testing?   |         |             |             | <ul style="list-style-type: none"> <li>• Think about window periods, funding for your organization, and adding on other platforms staff have to access</li> </ul>   |
| If you have an internal lab for your TelePrEP program, what is your workflow for lab draws?  |         |             |             | <ul style="list-style-type: none"> <li>• Often with TelePrEP, it is convenient to use a lab near the client. If you have a lab at your organization, how do you coordinate the lab draw for the client?</li> </ul>  |
| Shipping materials have been selected to make sure clients receive their labs confidentially |         |             |             | <ul style="list-style-type: none"> <li>• Use a plain white box when shipping or sending out HIVST or Mail-In tests.</li> </ul>  |
| Do you know who is relaying the results to clients?  |         |             |             | <ul style="list-style-type: none"> <li>• Depending on insurance status providers must relay the results to the client</li> </ul>  |

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| Will you be using insurance as a funding option for your TelePrEP labs?                                |  |  |  | <ul style="list-style-type: none"> <li>To be billed through the client's insurance, the mail-in HIV and STI self-tests need to be in-network and ordered by a healthcare provider</li> </ul>  |
| If you have HIVST and or/ Mail-in testing, what is your workflow for labs?                             |  |  |  | <ul style="list-style-type: none"> <li>This workflow will be quite different then internal labs as there are additional platforms, new staff tasks, etc.</li> </ul>   |
| Do you have staff with the capacity to add new tasks to their workflow?                                |  |  |  | <ul style="list-style-type: none"> <li>Accessing the mail-in testing platform, ordering labs, communicating with the client, zoom calls with clients, data collection for the test kit, relaying results to both the client and provider</li> </ul> |
| If a client has a positive result what is your workflow for this?                                      |  |  |  | <ul style="list-style-type: none"> <li>Who is allowed to relay positive results?</li> <li>How is treatment being ordered?</li> </ul>  |
| Are staff trained to review and interpret results?   |  |  |  | <ul style="list-style-type: none"> <li>Who is allowed to receive results, interpret them and relay?</li> </ul>  |
| Have you identified your collaborators for additional pick-up location, linkage to care and referrals? |  |  |  | <ul style="list-style-type: none"> <li>Will you have collaborators when it comes to HIVST and mail-in testing.</li> </ul>   |
| Where will mail-in self-tests be shipped to?   |  |  |  | <ul style="list-style-type: none"> <li>Will they only be allowed to be sent to client's home or will there be other safe sites to pick up the mail-in tests?</li> </ul>   |
| How will navigators or providers confirm the   |  |  |  | <ul style="list-style-type: none"> <li>Confirm with client where testing will occur</li> <li>Make safe spaces available</li> </ul>  |

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| client has a safe space to complete testing? |  |  |  |  |
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| Community Engagement   | Yes | No |
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| Do you have specific partnerships identified for referring clients?  |     |    |
| Do you plan to collaborate with partnering organization associated with TelePrEP or you client population? |     |    |
| Do the organizations you plan to work with have the technology for TelePrEP visits?                        |     |    |
| Are you planning to create "remote TelePrEP sites" for clients?  |     |    |
| Do you know the specific role the organization(s) will have in your TelePrEP program?                      |     |    |
| Will the community organization be referring clients to you?   |     |    |

| Community Engagement   |         |             |             |   |
|--|---------|-------------|-------------|---|
| Key Questions  | Defined | In Progress | Not Started | Helpful Hints   |
| Are there specific community partnerships that will be referring clients to your TelePrEP program? |         |             |             | <ul style="list-style-type: none"> <li>Make sure to have a referral workflow for the community partnership and your own organization</li> </ul> |
| How will your organization collaborate with partners?  |         |             |             | <ul style="list-style-type: none"> <li>Create a workflow and an agreement with your partners so everyone know their role.</li> </ul>            |

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| <p>Have you secured locations for partnerships?</p>  |  |  |  | <ul style="list-style-type: none"> <li>• These could include: bath houses, libraries, community resource centers</li> </ul>   |
| <p>Are there practices that are not able to provide TelePrEP that would be interested in collaborating with your organization to expand these services to their clients?</p> |  |  |  | <ul style="list-style-type: none"> <li>• TelePrEP has increased access including having remote sites for accessing technology to TelePrEP services and promoting PrEP awareness.</li> </ul>                   |
| <p>Are there community organizations that can provide accessory resources that TelePrEP clients commonly need?</p>   |  |  |  | <ul style="list-style-type: none"> <li>• Think about wrap around services and what other organization can offer</li> </ul>  |
| <p>How can your organization leverage community partners to increase awareness of your TelePrEP program?</p>   |  |  |  | <ul style="list-style-type: none"> <li>• Are there access points that your population often engage with where collaborative efforts can promote awareness and engagement in your TelePrEP program?</li> </ul> |