



Striving for the highest level of care

Telehealth Toolkit

Key considerations for telehealth in RA

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How to use this toolkit

This toolkit is designed for you to use with your patients to make it easier and more time-efficient to practice telehealth, while integrating treat-to-target, in RA beyond the pandemic.



Navigate the key considerations and steps to a successful telehealth practice

Interactive content are as indicated and links are underlined or indicated with → symbol

Click on the popup or the close (X) button to close it before progressing to the next popup



Equip yourself or your patients with our practical tools:

- HCP telehealth checklist library
- Patient joint self-assessment video
- Patient journey workbook

RA, rheumatoid arthritis

Interactive contents page

Key considerations



Please note that these represent general considerations only, and may not be applicable or feasible in every setting/situation. Please select the relevant information and adapt these for use in your clinical practice



Key considerations

Who should deliver it?

Appropriate member of the healthcare team with adequate resources and training



Key considerations

What should it be?

A variety of telehealth techniques developed in collaboration with all stakeholders



Key considerations

Who should receive it?

Patients appropriate for telehealth; as a shared decision between the patient and rheumatologist

Best practices for telehealth

Tips to overcome barriers

Key steps

1 Setting up a telehealth visit

 Optional reading: Establish a telehealth framework

2 Identify patients for telehealth

 Optional reading: Prepare patients for telehealth

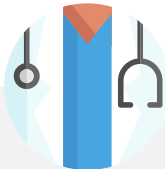
3 Conduct telehealth visit

4 Document and follow up

Optional reading:

 Regional guidance in telehealth

 Telehealth implementation (advanced resources)



Tools for HCPs

- Telehealth checklist library



Tools for HCPs to use with patients

- Patient journey workbook
- Patient joint self-assessment video

Interactive contents page

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Tools for HCPs

- Telehealth checklist library

- Setting up a telemedicine program in your practice (Medscape course)
- Telehealth implementation playbook (AMA, 2020)
- Regulatory approaches to telemedicine (GMC UK, 2020)
- Patient joint self-assessment video

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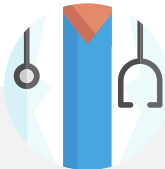
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Tools for HCPs

- Telehealth checklist library

- Asia**
APLAR recommendations (Ahmed S, et al. Int J Rheum Dis 2022;25:247-58)
- Europe**
EULAR points to consider (de Thurah A, et al. Ann Rheum Dis 2022;81:1065-71)
- Middle East and Africa**
Arab League of Rheumatology guidelines (Ziade N, et al. Rheumatol Int 2022;42:379-90)

APLAR, Asia Pacific League of Associations for Rheumatology; EULAR, European Alliance of Associations for Rheumatology

Best practices for telehealth

Key messages

- Telehealth may be used for treatment modification, non-pharmacological interventions, and monitoring in patients who have had ≥1 face-to-face visit
- Telehealth may also be used to screen new or existing patients to determine the urgency of a face-to-face visit
- Decision to use telehealth should be based on shared decision-making and the needs and preferences of the patient, and be supported by training and resources



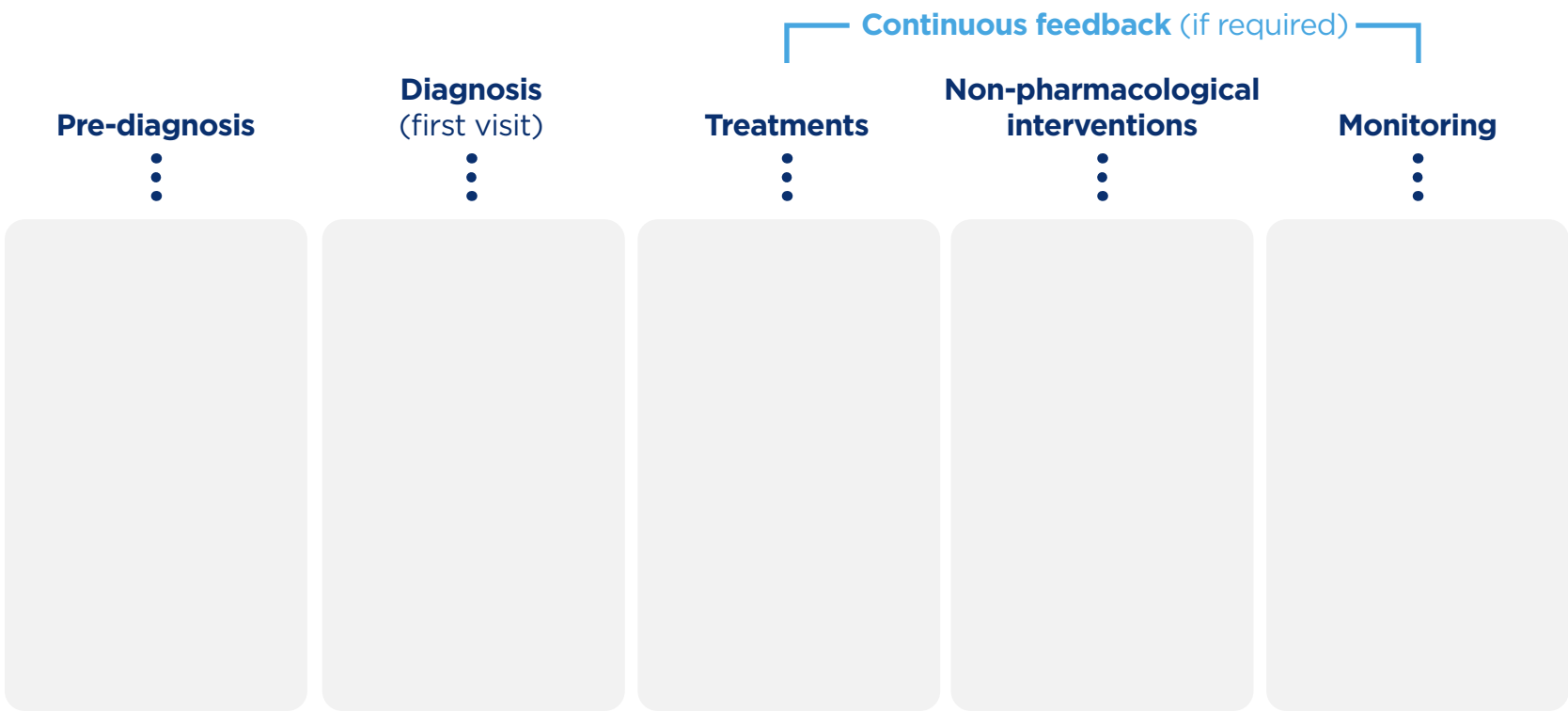
The first diagnostic visit should be conducted face-to-face whenever possible; with telehealth visits ideally reserved for patients who have been examined at least once at a face-to-face visit

1 Tailored care should combine remote and face-to-face attendance:

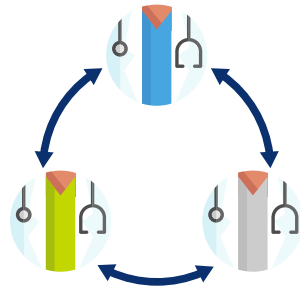
Key: (click icons to reveal further information)

Appropriate for telehealth

Face-to-face visit recommended



2 Decision should be based on:

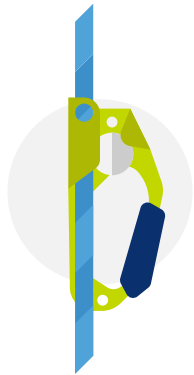
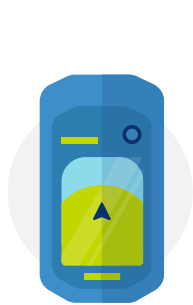


Shared decision-making



Needs and preferences of patients

3 Telehealth should be supported by:



Adequate training, equipment, and resources

DMARD, disease-modifying antirheumatic drug

de Thurah A, et al. Ann Rheum Dis 2022;81:1065–71; Ahmed S, et al. Int J Rheum Dis 2022;25:247–58

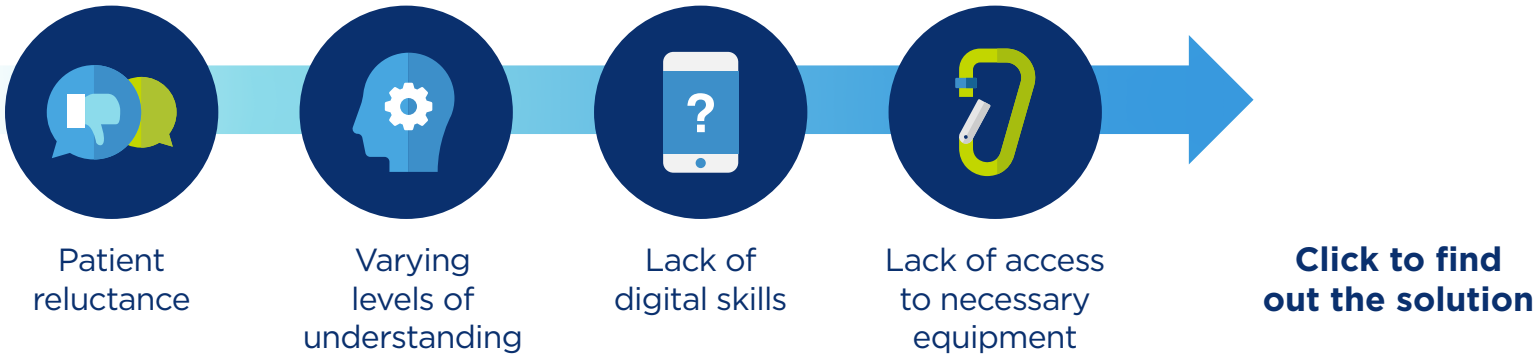
Tips to overcome barriers to a successful RA telehealth visit

Key messages

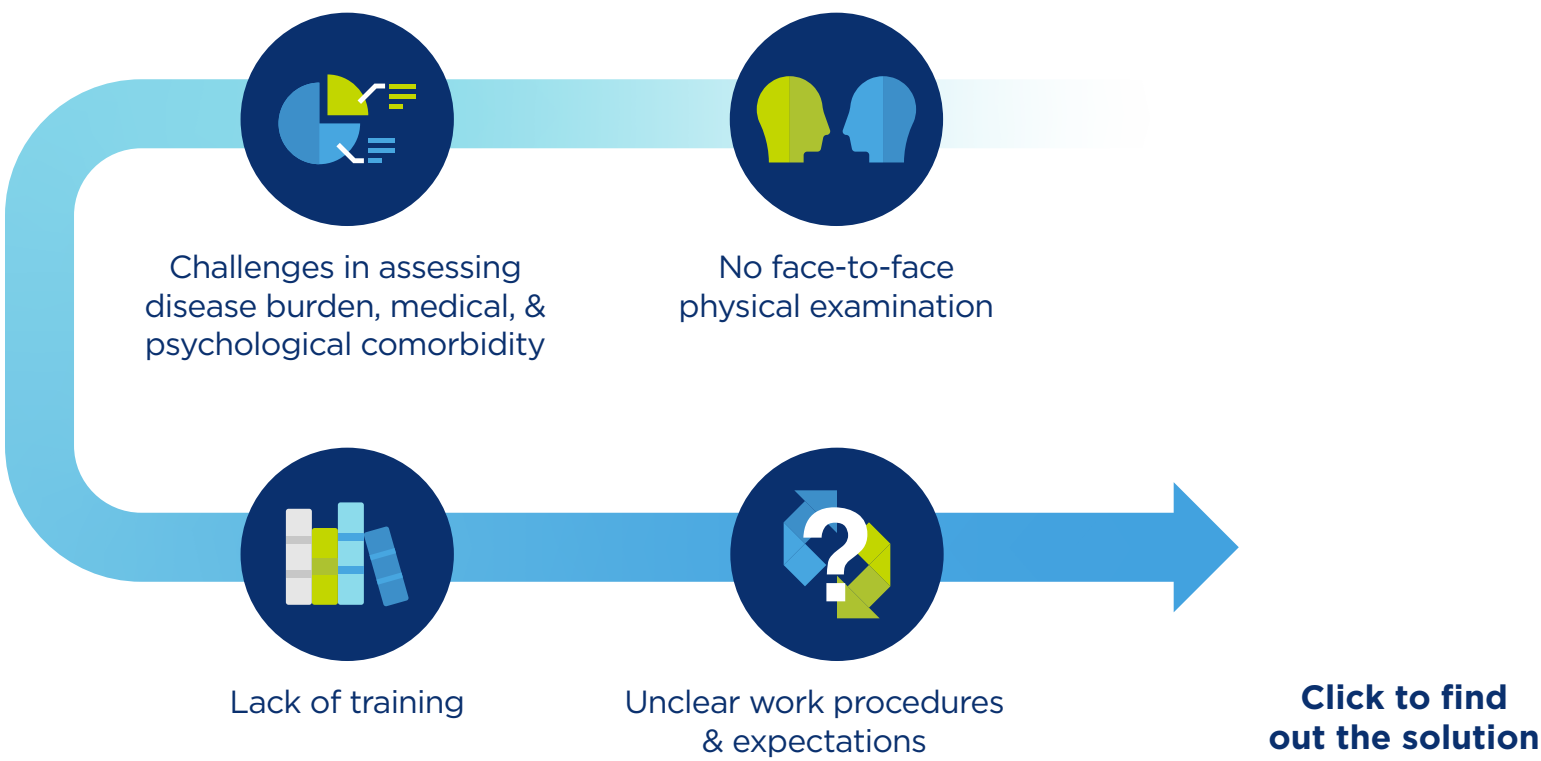
- Potential pitfalls and barriers associated with telehealth in RA may be overcome with:
 - Comprehensive patient assessment and education
 - Proper training of healthcare team
 - Compliance with local regulations

Barriers to a successful telehealth visit

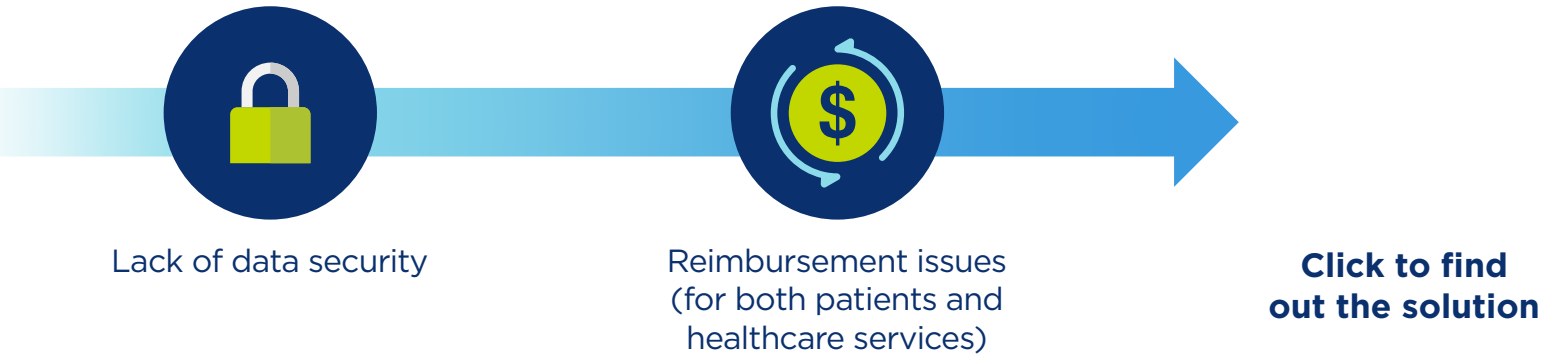
Patient



HCPs



System



de Thurah A, et al. Ann Rheum Dis 2022;81:1065–71; de Thurah A, et al. Ther Adv Musculoskelet Dis 2022;14:1759720X221081638

Optional: Establishing a telehealth framework

Key messages

- Establish a team/partnership to deliver telehealth care
- Choose a specialized telehealth platform (or a video conferencing platform) that best suits your practice settings and requirements
- Ensure compliance with local regulations, and the protection of patient confidentiality
- Integrate telehealth care with practice’s existing infrastructure

Setting up a telehealth visit

Key messages

- Create an environment that is conducive to conducting a teleconsultation



You may not always have the means to create an optimal environment for telehealth; the most important aspect is that you are able to communicate clearly with your patients

Click the icons to reveal further information

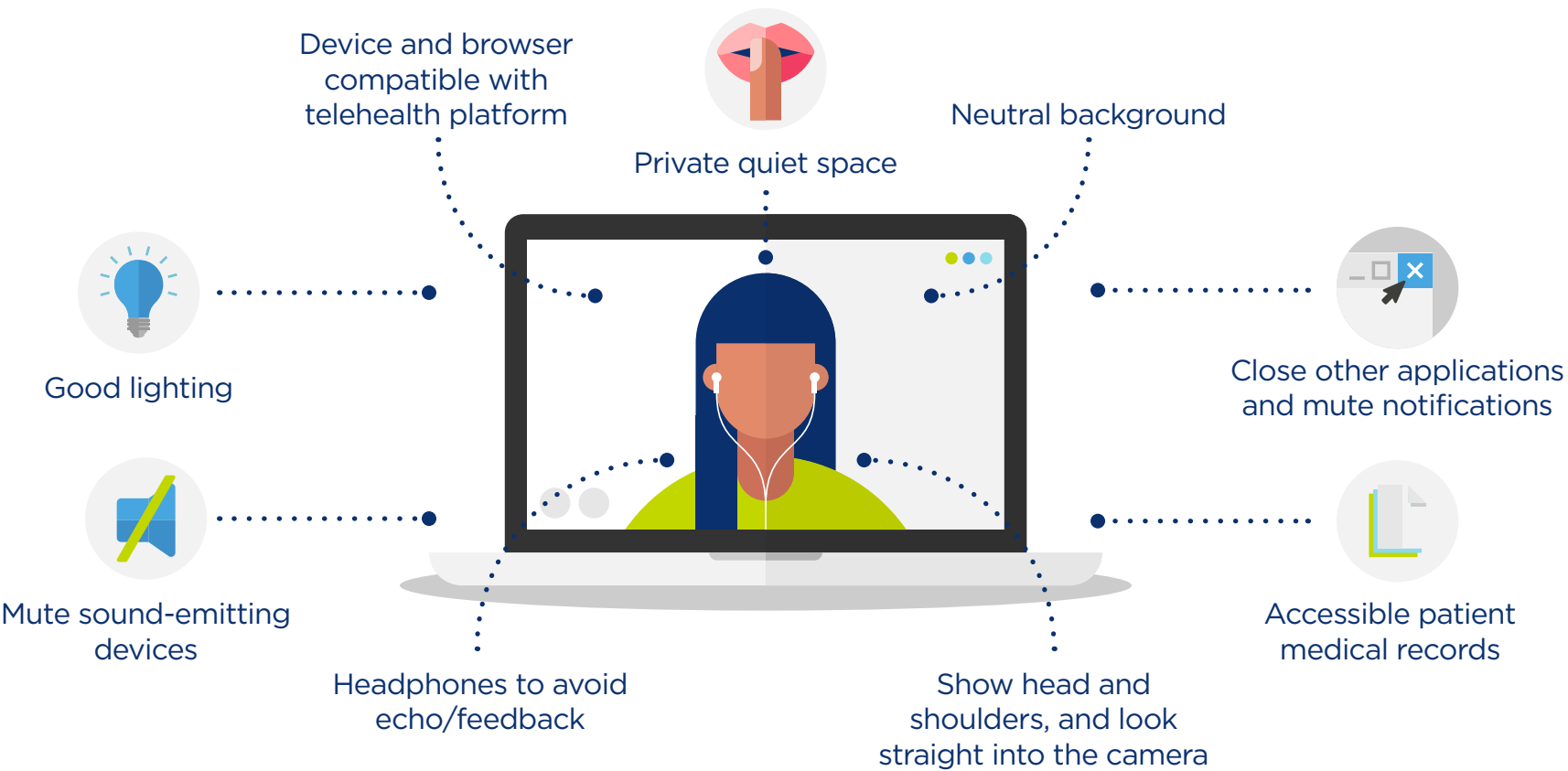
Establish team/
partnership

Select a telehealth
platform

Adhere to regulatory
& legal compliance

Integrate with
practice workflow

Tips for creating an optimal environment



Optional: Establishing a telehealth framework

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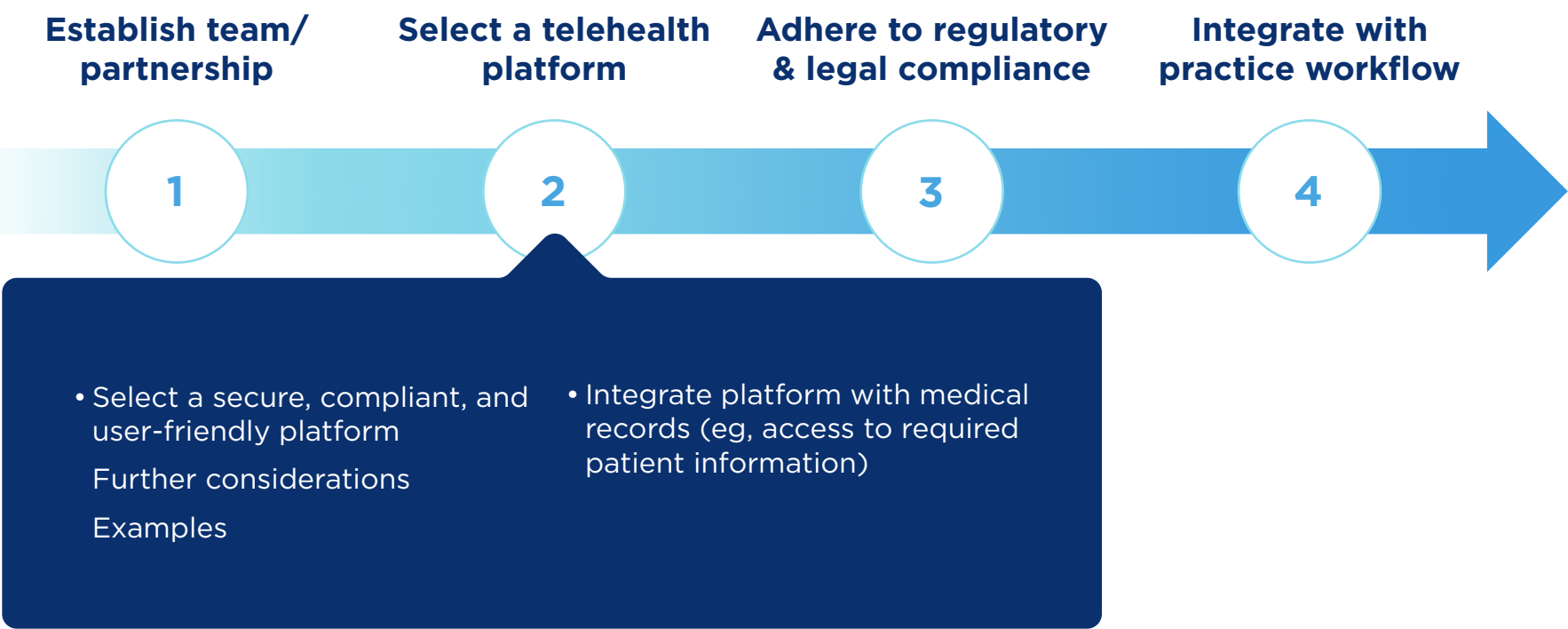
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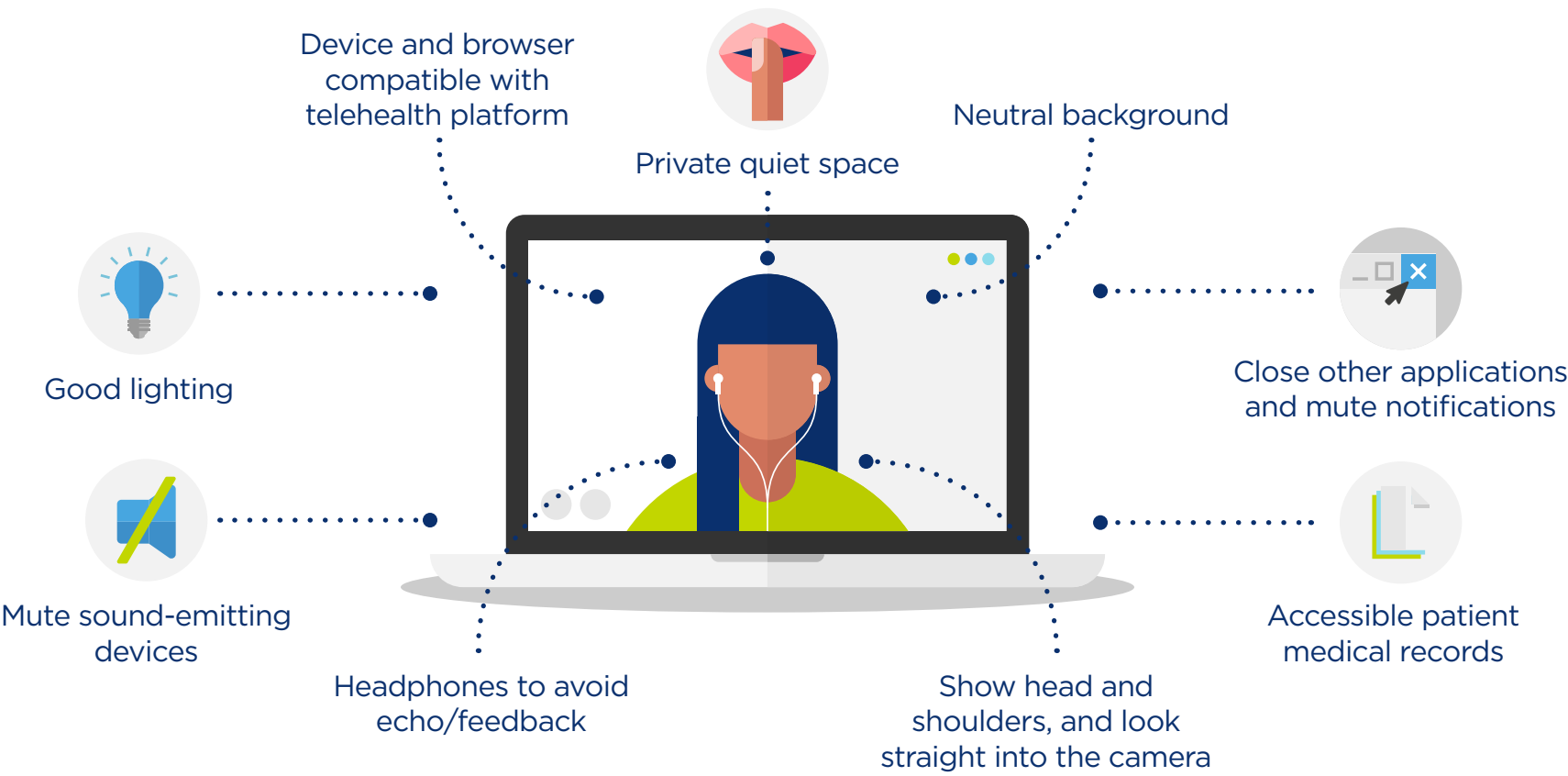


You may not always have the means to create an optimal environment for telehealth; the most important aspect is that you are able to communicate clearly with your patients

Roll over icons to reveal further information



Tips for creating an optimal environment



Establishing a telehealth framework

Part 1: Organizational considerations

Key messages

- Establish a team/partnership to deliver telehealth care
- Choose a specialized telehealth platform (or a video conferencing platform) that suits your practice settings and requirements

Roll over icons to reveal further information

Establish team/
partnership

1

Select a telehealth platform

Specialized telehealth platforms should be used where possible as they provide greater security and reliability for the provider and patient.

Video conferencing platforms, such as Zoom, can also be used with appropriate security considerations for selected telehealth platform.

Integration with existing IT systems (including EMR and scheduling) and workflow

Establishing a telehealth framework

Part 2: Technical aspects

Key messages

- Choose a specialized telehealth platform (or a video conferencing platform) that suits your practice settings and requirements
- Create an environment that is conducive to conducting a teleconsultation

Considerations for creating an optimal environment

2

Choose a telehealth platform

Specialized telehealth platforms should be used where possible as they provide greater security and reliability for the provider and patient.

Video conferencing platforms, such as Zoom, can also be used with appropriate security considerations for selected telehealth platform.

Private quiet space

Neutral background

Close other applications and mute notifications

Accessible patient medical records

Show head and shoulders, and look straight into the camera

Headphones to avoid echo/feedback

Mute sound-emitting devices

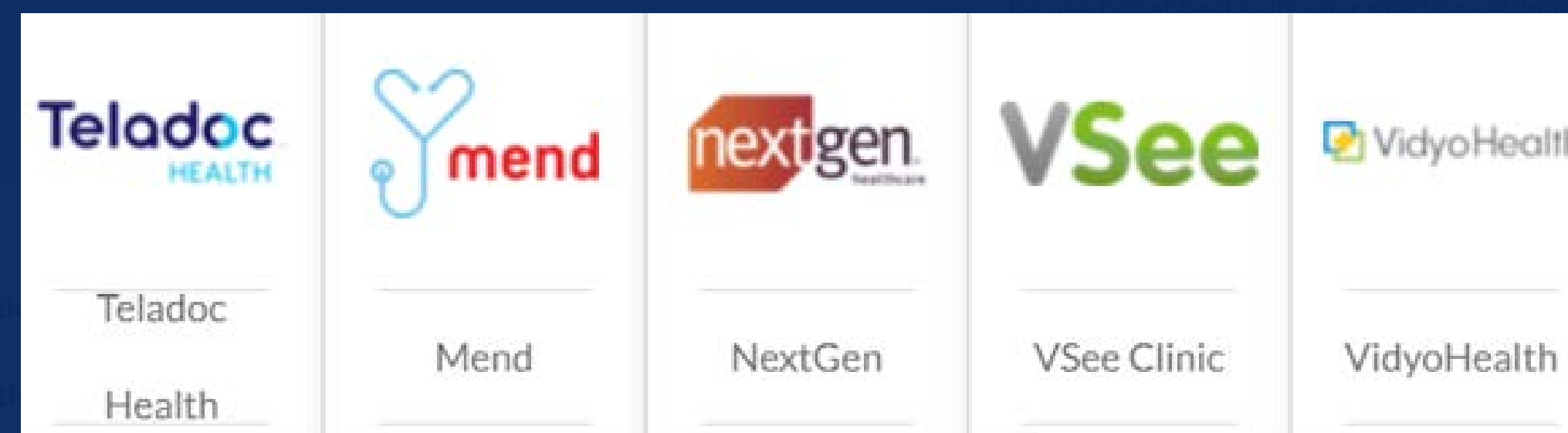
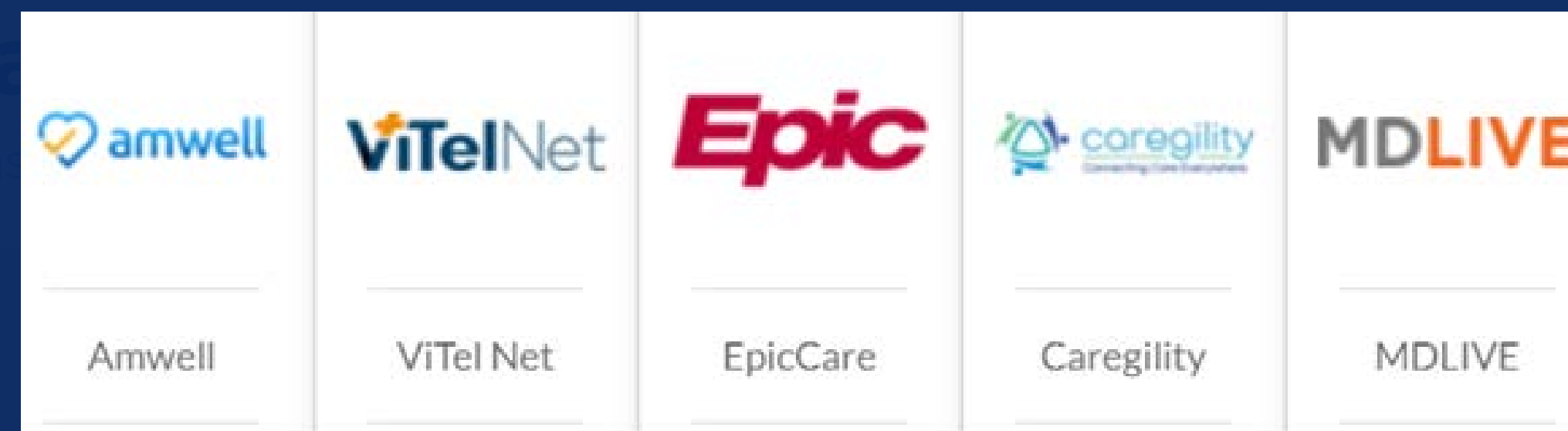
Establishing a telehealth framework

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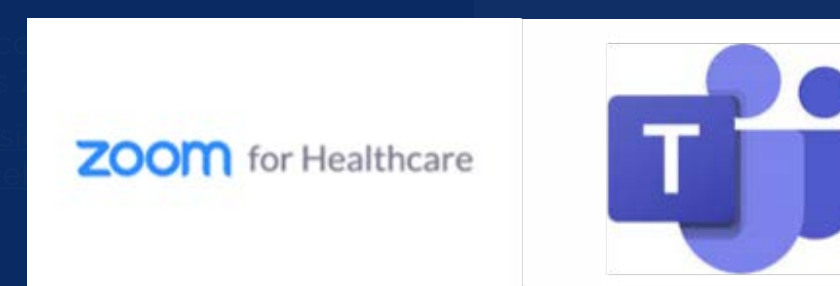
Key messages

- Establish a team/partnership to deliver telehealth care
- Choose a specialized telehealth platform (or a video conferencing platform) that best suits your practice settings and requirements

Preferred for security and compliance reasons whenever available



Specialized telehealth versions of general video conferencing platforms may also be available or appropriate



Ziade N, et al. Rheumatol Int. 2022;42:379–90.

Identifying candidates with RA for telehealth

Key messages

- Telehealth is not recommended for the first diagnostic visit; however, it may be used to screen and determine the urgency of a face-to-face visit for new patients
- Not every patient is suitable for telehealth; consider diagnosis, disease severity, access to technology, and individual preferences

Factors that support the use of telehealth visits:



Your patient has access to, and is comfortable using, telehealth technology; or has access to technical support (eg, family member or allied HCP)



Your patient's personal preference



You have an established relationship with your patient

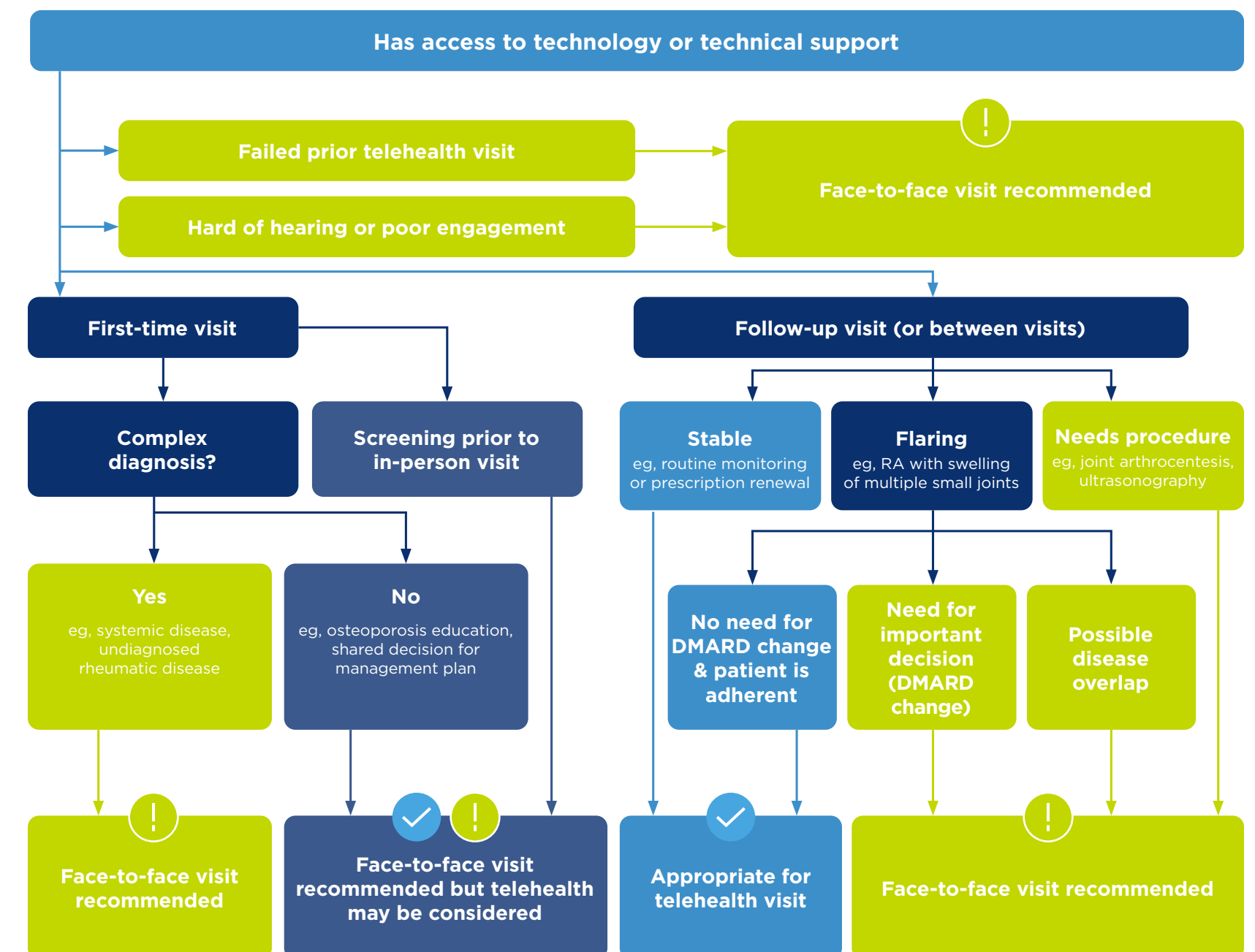


It is challenging for your patient to travel to in-office visits



There are limited physical resources in the healthcare setting

When is it appropriate to use telehealth visits? A triage system



Kulcsar Z, et al. Arthritis Rheumatol 2015;67(Suppl. 10): Abstract 2496; Ziade N, et al. Rheumatol Int 2022;42:379-90

Optional: Preparing patients with RA for telehealth

Key messages

- Provide instructions and reminders to help your patients prepare for telehealth visits
- Ask your patients to bring or return a record of their medical history, symptoms, and PROs
- Ask your patients to reflect on their treatment goals, expectations, and preferences, ahead of visits (via pre-visit questionnaires or apps, when appropriate)



Ask your patient to invite a family member/caregiver to attend the visit with them (if appropriate)

Inform your patient on who to contact for technical support

For a successful telehealth visit, help your patients...

1 Understand

2 Prepare

3 Record

4 Remember

Use the **COMPASS Patient Journey Workbook** to support patient preparation



Optional: Preparing patients with RA for telehealth

 Checklist (HCP) 

 Checklist (Patient) 

Key messages

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1 Understand

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3 Record

?

4 Remember

Ask patients to record their symptoms and PROs (eg, RAPID3, PASS, RAID) prior to the visit; leveraging pre-visit questionnaires or mHealth apps as appropriate

Integrating PROs in a telehealth setting

- PROs in virtual and outpatient management (Taylor PC. Nat Rev Rheumatol 2020;16:477-8)
- PROs and self assessment (de Thurah A. et al. Ther Adv Musculoskelet Dis 2022;14:1759720X221081638)

Optional: Preparing patients with RA for telehealth

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 Checklist (Patient) 

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Use the COMPASS Patient Journey Workbook to support patient preparation

For a successful telehealth visit, help your patients...

1 Understand

?

2 Prepare

?

Discuss the feasibility of telehealth visits; provide information on what to expect at, and how to prepare for, a telehealth visit

→ [Introduction to telehealth for patients](#)

Useful patient websites on telehealth in RA

→ [Preparing for rheumatology telehealth during the Coronavirus pandemic](#)

→ [Choosing telemedicine for rheumatoid arthritis](#)

4 Remember

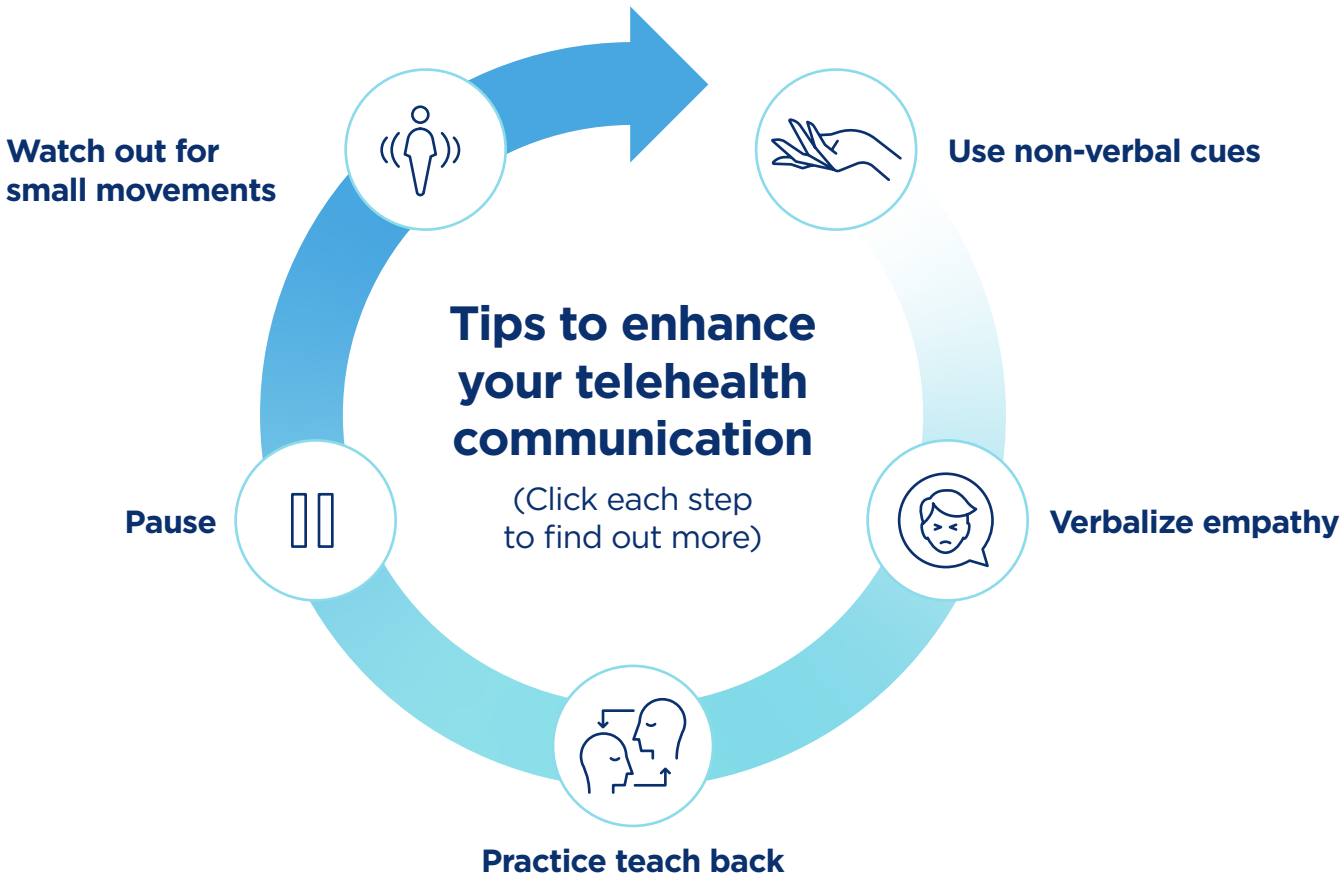
?

Conduct telehealth visit



Key messages

- A telehealth visit can be as effective as an in-person consultation with systematic assessments and target setting
- Communicate empathetically to help patients feel heard in a virtual setting



Conduct telehealth visit



3

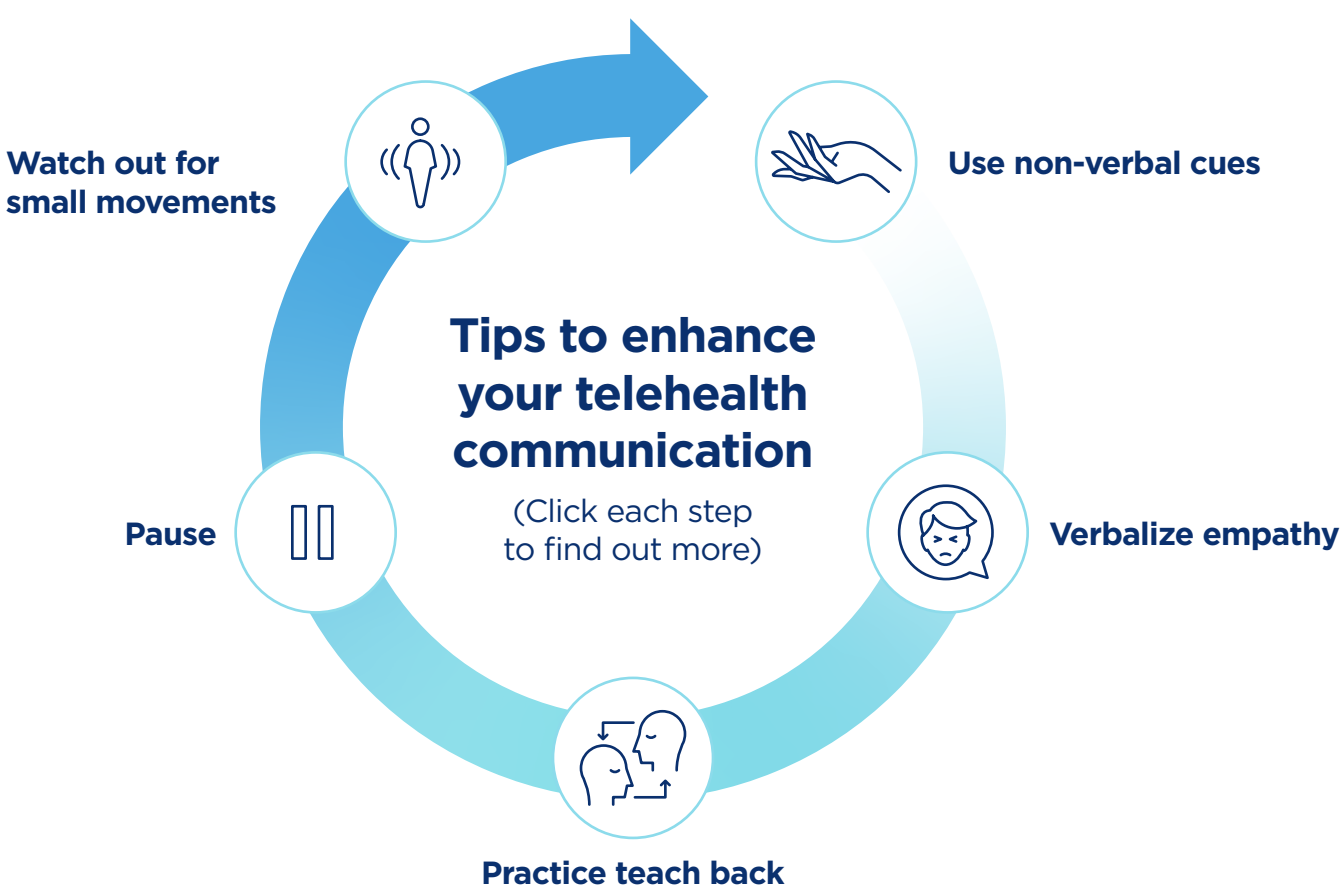
Conduct online physical examinations (if required)

Ask your patient to show you their joints and range of motion on camera and ask them to send pictures as needed

Please use the telehealth joint examination checklist and/or patient joint assessment video to support you with this

Key messages

- A telehealth visit can be as effective as an in-person consultation with systematic assessments and target setting
- Communicate empathetically to help patients feel heard in a virtual setting



Conduct telehealth visit



5

Review treatment goals/expectations and update treatment plan

Collaboratively develop the treatment plan with your patient using pre-visit questionnaires and conversation aids to guide discussions as needed

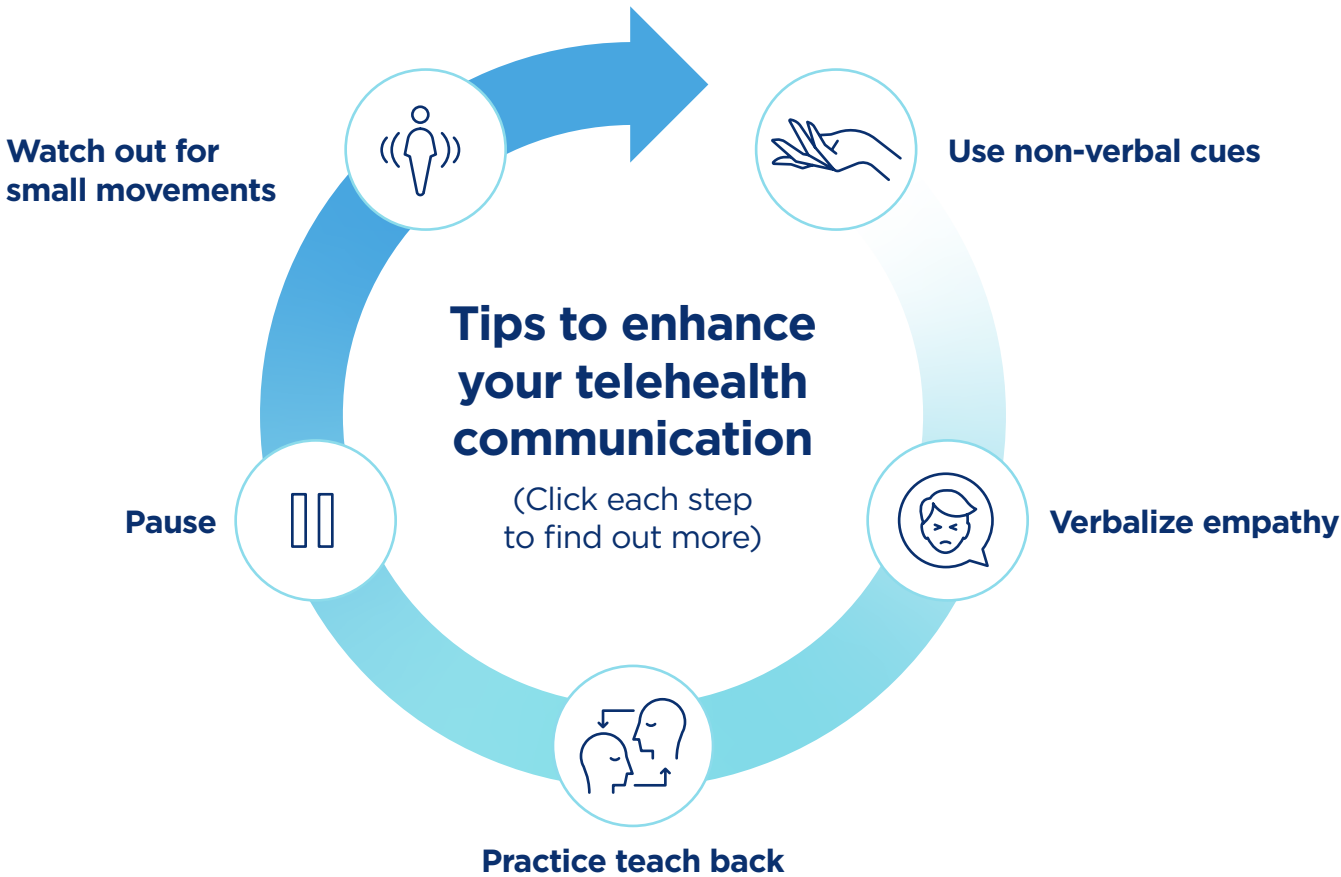


Help patients understand that they can be involved in decision-making even in an online setting to motivate them to manage their own health

Please use the COMPASS patient journey workbook and/or visual conversation aid to support you with this

Key messages

- A telehealth visit can be as effective as an in-person consultation with systematic assessments and target setting
- Communicate empathetically to help patients feel heard in a virtual setting



Document and follow up

Key messages

- Carry out any post-visit actions as you would after a face-to-face visit
- Patient monitoring and education should continue after the visit, using telehealth where appropriate

Immediate post-visit actions



Document and maintain EMR



Send prescription



Send imaging/lab requests



Send referrals



Complete financial documentation (if needed)

Ongoing telehealth support (may be facilitated by allied HCPs)



Monitoring (based on individual patient needs and priorities)



Patient education



Refer to GP or patient advocacy groups for additional support (if applicable)

Establish telehealth framework: Team, compliance, and integration



This may be completed by the practice, rheumatologist, another healthcare professional, or an administrative member of staff, depending on the local setting

Establish telehealth team

Determine model of telehealth care

(eg, patient alone; patient + general practitioner/primary care physician; patient + allied healthcare professional)

Select team members to deliver telehealth care

Provide training for the team

Ensure that all staff have been trained to assist in the relevant steps

Ensure adherence to regulatory & legal compliance

Review legal and regulatory requirements

Jurisdiction and licensing

Confidentiality, safety, and security

Ethical considerations

Develop patient consent form

Complete other relevant documentation (if applicable)

Integrate with practice workflow

Set up telehealth platform

Integrate telehealth platform with medical records

Ensure access to required patient information

Establish triage system for telehealth visits

Integrate telehealth visits with practice's schedule

Establish process for referrals and prescribing

Establish process for reimbursement (if applicable)

Ensure patients are aware of telehealth offering

Develop patient educational materials to support telehealth

Pre-visit checklist: Technical and environmental considerations



You may not always have the means to create an optimal environment for telehealth; the most important aspect is that you are able to communicate clearly with your patients

Set up your workspace for an optimal telehealth visit

- Dress professionally
- Ensure you are in an isolated, quiet space with no background noise
- Ensure any other sound-emitting devices are switched off or muted
- Check that your background is not distracting
- Check that there is adequate lighting in the room
- Ensure your patient's medical records are readily accessible

Complete a pre-visit technical check

- Select an appropriate device (laptop, desktop computer, tablet, or phone)
- Check that your device and browser support the platform
- Have a back-up in case you experience difficulties on the day
- Ensure that your device is plugged in and charging
- Check your internet is stable
- Close other applications and mute notifications
- Check the sound from your headphones or speakers
(Note: it may be helpful to use headphones or earphones to avoid echo/feedback)
- Set up your camera view to show your head and shoulders
- Check your webcam and microphone are set up correctly

Identify patient candidates

Review the most recent relevant medical data from your patient

Determine whether a telehealth visit is appropriate for your patient using the triage system (see figure)¹

Other considerations that support the use of telehealth may include:

Your patient has access to, and is comfortable using, telehealth technology; or has access to technical support (eg, family member or allied healthcare professional)

Your patient's personal preference

You have an established relationship with your patient

It is challenging for your patient to travel to in-office visits

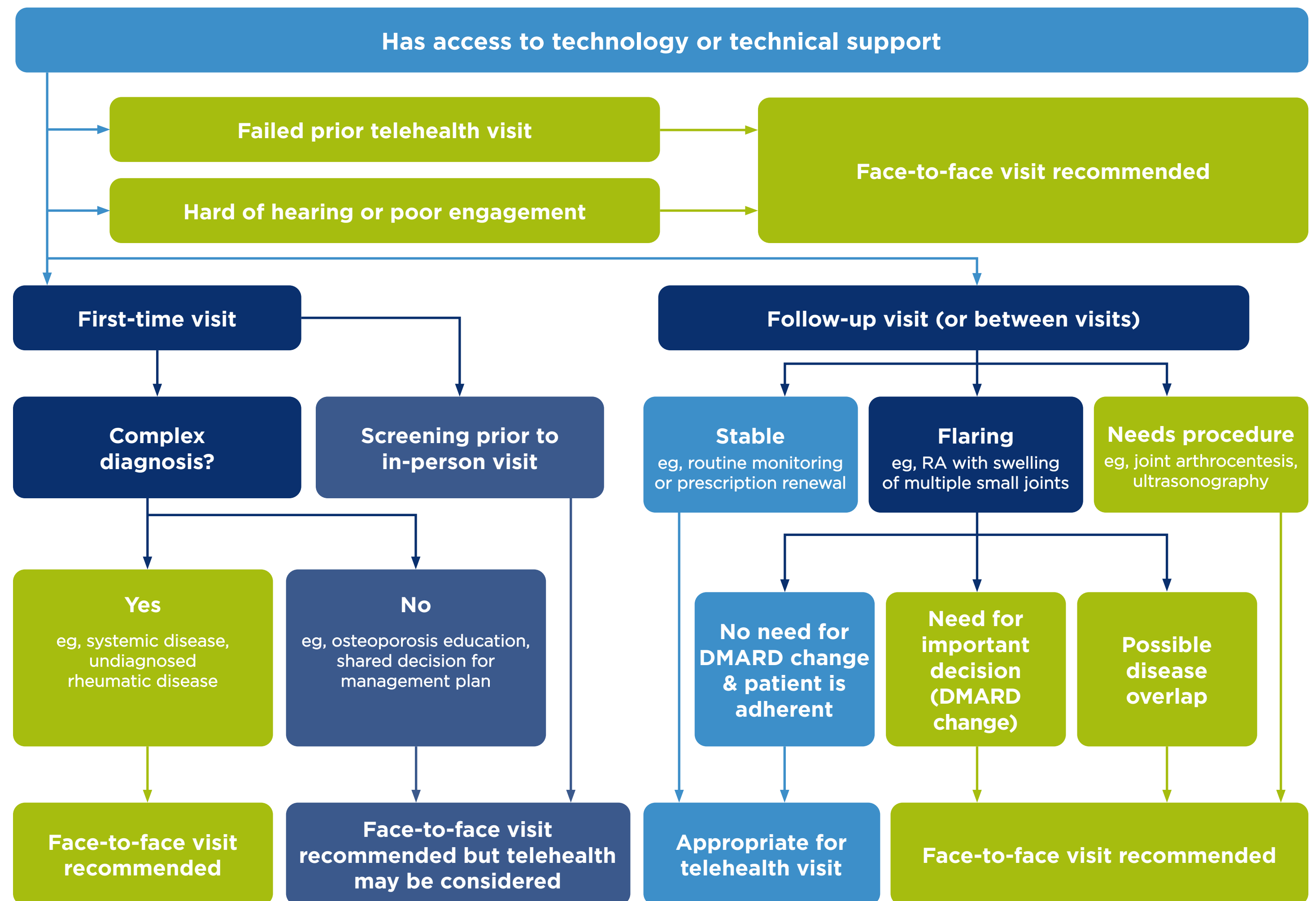
There are limited physical resources in your healthcare setting

Contact your patient and discuss the feasibility of telehealth

Obtain consent from your patient

Ask your patient whether they would like to invite a family member/caregiver to attend

Schedule a telehealth appointment



Pre-visit checklist: Prepare patients



This may be completed by the rheumatologist, another healthcare professional, or an administrative member of staff, depending on the local setting

Send your patient the weblink and instructions for the visit:

Inform your patient on what to expect during a telehealth visit

Instruct your patient on how to perform a joint self-assessment

Ask your patient to complete and return the relevant pre-visit questionnaires (if applicable)

- Medications, side effects, and comorbidities

- Symptoms

- PRO questionnaires (eg, HAQ-DI, RAID, RAPID3, PASS)

- Treatment goals and expectations

Instruct your patient on how to perform pre-visit technical and environmental checks (see Appendix)

Inform your patient on who to contact for technical support

Send text/email reminders to your patient

Appendix: Pre-visit checklist for patients



You may not always have the means to create an optimal environment for telehealth; the most important aspect is that you are able to communicate clearly with your physician. Please ask for help from family members, caregivers, friends, or the practice as needed to support you with this.

If applicable, ask your nominated family member/caregiver to attend the visit with you

Check that you have completed and emailed/brought your pre-visit questionnaires

Set up in a quiet and private space

- Switch off or mute other sound-emitting devices

- Check that there is adequate lighting in the room

- Check that you have a pen and paper nearby for taking notes (if applicable)

Set up your IT equipment

- Choose the most suitable device (laptop, desktop computer, tablet, or phone)

- Check that your device and browser support the telehealth platform or application

- Ensure that your device is plugged in and charging

- Check your internet is stable

- Close other applications and turn off notifications

- Log in to the telehealth platform using the weblink provided by your doctor

- Check the sound from your headphones or speakers

- Set up and test the sound on your microphone

- Set up your webcam to show your head and shoulders

- Check your webcam and microphone are set up correctly

At-visit checklist



Make sure you have your patient's contact information in case of technical issues. If you are disconnected during the appointment, you may need to call them back by telephone.

Introduce yourself and the technology (if applicable)

Ask your patient to introduce themselves and other individuals in attendance (if applicable)

Define the agenda with your patient

Ask your patient to share their symptoms and concerns in their own words

Discuss the following after reviewing your patient's pre-visit questionnaire (as needed):

- Medications

- Side effects

- Comorbidities

Conduct a virtual joint assessment (see next page)

Integrate PRO assessments from the pre-visit questionnaire

Discuss achievement of treatment target in the context of treatment goals and expectations

If applicable, revise treatment goals and RA treatment plan with your patient via shared decision-making, and agree on next steps

Discuss whether the next visit should be conducted face-to-face or via telehealth

Share the post-visit summary and action plan

- Include information on prescribing, referrals, or additional tests

- Share relevant patient educational materials

- Schedule follow-up visit

Post-visit checklist

Document visit and maintain EMR

Complete other relevant documentation

Send the following to the relevant stakeholders (as applicable):

- Prescription

- Imaging/lab request

- Referrals

- Reimbursement form

Organize process for patient monitoring and offer follow-up support

Offer patient education (if applicable)

Incorporate patient feedback into next appointment

A patient's guide on what to expect at telehealth visits

What is telehealth?

Telehealth allows you to have a medical consultation when you and your doctor are in different locations. Essentially, telehealth connects the two of you using telecommunications, usually via phone calls or video conferencing over the internet

- If you're new to video conferencing, don't worry—your doctor or nurse will give you all the information you need to set up prior to your appointment, including the video link so you can log in to the telehealth platform using the device (laptop, desktop computer, tablet, or phone) most suitable for you

- Before your telehealth visit, your doctor might send you a link to a video tutorial on a self-assessment technique or other information to help you prepare for your consultation
- Make sure your doctor or nurse has your correct contact information, as they may call you by telephone if you become disconnected during the appointment



Telehealth visits can be just as effective as a face-to-face consultation

On the day of your telehealth visit

- Make sure your computer or device is plugged in, charged, and switched on
- Check that your internet connection is working and you can access the telehealth platform
- Close all other applications that might slow down your internet connection or be a distraction
- If you are unsure how to access the consultation on your device, ask a family member or friend to check that everything is set up correctly;

you might also want them to be with you during the consultation in case of technical problems

- Make sure you are in a quiet place with as little background noise as possible
- Have your medications ready to check that you are taking them as your doctor has prescribed
- Make sure you are ready with the questions that you want to ask your doctor or nurse

During the consultation

- For some appointments, you might be required to confirm your identity and give a brief verbal consent to ensure you understand and are happy to continue the consultation
- Much like an in-person consultation, your doctor will review your medical records and ask you questions to evaluate your condition; they might also discuss your treatment goals and options with you, as well as the outcomes of any self-assessments or questionnaires you have completed
- Your doctor may want to watch you moving or doing specific activities, in which case they might ask you to stand your device on a chair or shelf, so they can see you better; they might also ask you to take a picture and send it to them

- Your doctor may write a prescription, which is then sent directly to a pharmacy for home delivery, or for you to collect
- Your doctor may request for additional tests (eg, laboratory, radiology tests), which are sent directly to the test provider who will then follow up with you
- You will have the opportunity to ask questions and to talk about any concerns you have with your RA or your treatment
- If you do become disconnected from your doctor during the appointment, they may call you by telephone

Follow-up

- After your telehealth consultation, you should receive any resources that you talked about with your doctor.

This might be a list of exercises you can practice or a link to a website with more information