BEFORE THE TELEHEALTH ENCOUNTER

Make sure the care team member coordinating the encounter asks the patient to have the following materials available for reference during the Telehealth encounter:

• Completed Action Plan from previous visit
• ACTs/equipment (if conducting demonstration/evaluation)
• Pen and paper for notes

5 STEPS OF A SUCCESSFUL TELEHEALTH ENCOUNTER

These five steps to a successful telehealth encounter were based on the insights and experiences of the IMPACT Advisory Team. You can follow all five of the steps below, or tailor the encounter to meet the individual needs of your patient. You will find instructions and additional resources to support each step on the corresponding tabs.

STEP 1 REVIEW

Review adherence to Action Plan (ACTs and Educational Resources), and capture feedback on prescribed ACTs.

STEP 2 EVALUATION

Observe and evaluate the patient demonstration of ACT techniques and skills, and identify opportunities for remediation/education.

STEP 3 REMEDIATION

Provide detailed instruction on the correct techniques and treatment protocol.

STEP 4 EDUCATION

Provide patients with educational resources that are age appropriate and address their needs.

STEP 5 GOALS

Provide the patient with clear, measurable goals and recommendations based on the Telehealth visit, and schedule follow-up.

INTRODUCTION

• This Telehealth Guide was developed to provide structure and resources for patient encounters, focused on reinforcing the right skills when performing Airway Clearance Therapies (ACTs) and encouraging adherence to ACTs
• Designed to be a quick reference tool during your telehealth encounters, it can also be used to follow up with your patients during in-person visits and/or annual reviews
• This guide is meant to be flexible. Follow the five outlined steps, or just focus on the sections that are most relevant/appropriate for your patient at the time

REMEMBER
THE BEST ACT IS THE ONE YOUR PATIENT DOES!
**STEP 1**

**IMPACT ACTION PLAN REVIEW**

**DIRECTIONS**
Pull up your copy of the patient's completed Action Plan from your previous encounter and ask them to do the same. Also pull up their ACT Personal History for reference.

**ACTION PLAN**
Ask the patient to describe their ACT routine for the last week. Did they follow the prescribed ACTs in the Action Plan and review the recommended educational resources? If the patient identifies new barriers and/or provides feedback that requires a change in prescribed ACTs, capture the changes on a new Action Plan.

**ACT PERSONAL HISTORY**
Update the patient's Personal History form with any patient feedback on prescribed ACTs.

Work with your EHR team to create a "flow sheet" so that the entire care team can access and update the patient information.

**UPDATING THE ACTION PLAN**

- **IMPACT CF Action Plan**
- **IMPACT BE Action Plan**
- **ACT Personal History**

**EDUCATIONAL RESOURCES**

- **Bronchodilators**
  - Pulmicort®
  - QVar®
  - Proventil®
  - Ventolin®
  - Monarch®
  - ProAir®
  - Xopenex®
  - Serevent®
  - Fostair®
  - BecloMeter®
  - Symbicort®
  - Albuterol®
  - Alupent®
  - FloVent®
  - Alupent®
  - Alupent®
  - Alupent®

- **Inhaled Corticosteroids**
  - Pulmicort®
  - Xopenex®
  - Serevent®
  - Fostair®

- **Inhaled Antibiotics**
  - Cayston®
  - Multibac®
  - Tobramycin®

- **Mucolytics (Mucus Thinners)**
  - Hypertonic Saline
  - Hydration
  - Aerosolized HME
  - Mucolytic Medications

- **Bronchial Dilators**
  - Nebulizers
  - PDE Isobutyrate Inhalers
  - PDE Isobutyrate Inhalers
  - PDE Isobutyrate Inhalers

- **PEP**
  - Positive Expiratory Pressure
  - PEP Mask
  - PEP Valve

- **Oscillating Positive Expiratory Pressure (OPEP)**
  - The Vest®
  - InCourage®
  - AffloVest®
  - Acapella Choice®

- **Postural Drainage & Percussion**
  - Huff Coughing
  - Postural Drainage
  - Percussion

- **Airway Clearance Techniques**
  - Active Cycle of Breathing Techniques (ACBT)
  - Postural Drainage & Percussion
  - Huff Coughing
  - High-Frequency Chest Wall Oscillation
  - Oscillating Positive Expiratory Pressure (OPEP)

- **Exercise**
  - Aerobics
  - Yoga
  - Resistance Training

- **Set-up Treatment Cleaning**

**TIP**

- Probe for any barriers and make sure the patient is not over-burdened.

**IMPACT CF Action Plan**

**IMPACT BE Action Plan**

**ACT Personal History**

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The IMPACT Advisory Team is a group of qualified physicians and allied professionals engaged in airway clearance research and development in coordination with and under the auspices of International Biophysics Corporation. The IMPACT Program was created in partnership with the IMPACT Advisory Team and is sponsored by International Biophysics Corporation, manufacturer of the AffloVest.

This information should not be used for diagnostic purposes. The information is provided for reference at home. Retain a copy in the patient's chart for review during the next visit.

Your care team recommends that you read the following materials at: www.IMPACT-BE.com/Resources

Your care team recommends that you watch the following videos at: www.IMPACT-BE.com/Video-Library

YOUR ACTION PLAN

- **Action Plan**
- **IMPACT CF Action Plan**
- **IMPACT BE Action Plan**
- **ACT Personal History**

**DIRECTIONS**

- **IMPACT CF Action Plan**
- **IMPACT BE Action Plan**
- **ACT Personal History**

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**TIP**

- Probe for any barriers and make sure the patient is not over-burdened.

**IMPACT CF Action Plan**

**IMPACT BE Action Plan**

**ACT Personal History**
STEP 2

PATIENT DEMONSTRATION / EVALUATION OF TECHNIQUE

DIRECTIONS
Ask your patient to demonstrate how they set up and conduct their respiratory therapies. Afterward, ask them to talk you through how they clean/disinfect their equipment. Capture notes on the Evaluation Checklist so that you can refer back to them and efficiently conduct your remediation/educational encounters.

TIP
Do not provide any input or coaching while they are demonstrating.

EVALUATION CHECKLIST
While the patient is demonstrating their knowledge/technique, quickly take notes of correct/incorrect techniques on the Evaluation Checklist.

EVALUATION CHECKLIST

PATIENT & THEIR ENVIRONMENT
• Patient characteristics and non-verbal gestures
• Caregiver/family characteristics
• Where equipment and treatments are stored

TREATMENT
• Correct order of therapies
• Posture
• Duration
• Technique
• Frequency

EQUIPMENT
• Set-up
• Size fits patient
• Settings

EQUIPMENT CLEANING/DISINFECTING
• Process
• Frequency
• Storage

SOME THINGS TO LOOK FOR AND ASK ABOUT AFTER PATIENTS HAVE FINISHED THEIR DEMONSTRATION:


Download Evaluation Checklist
Step 3: Remediation

Directions
Help remediate any problems with the patient’s skills or techniques. Begin with any positive behaviors/maneuvers that you noticed. Then, help them fix what they performed incorrectly. Provide feedback in a positive, non-judgmental manner. Demonstrate the proper technique first, then ask them to demonstrate correctly any step that was initially performed incorrectly.

Positive Language
Examples of how you can frame remediation using positive language:

- "Think of me as your coach. I am here to help you get the most out of your treatments!"
- "I really liked the way you ____________, but let’s go back for a moment to the ____________ step and try it again.”
- "Watching someone else demonstrate the steps is often a quicker way to learn."

Tips:
- Reinforce what patients are doing correctly before addressing what they did incorrectly.

Demonstration Videos
If you would like to share age-appropriate videos of the correct techniques with your patients, go to IMPACT-CF.com/resources/treatments/ACTs

Respiratory Treatments & Therapies
Videos on: Bronchodilators, Hypertonic Saline, Mucolytics, Exercise, ACTs, Inhaled Antibiotics, and Inhaled Corticosteroids.

About ACTs
Videos on: Why ACTs are so important, order of therapies, cleaning and disinfecting equipment, and more.

Airway Clearance Therapies
Videos on: PEP, OPEP, Vest Therapy, Huff Coughing, Percussion and Postural Drainage, Active Cycle Breathing Technique, and more.

Pull up the videos on your screen during the telehealth encounter by "sharing your screen," or send patients the link in your After Visit Summary.
STEP 4
EDUCATIONAL RESOURCES

DIRECTIONS
Educate your patient on any gaps in knowledge that were uncovered during Steps 1 and 2. Also, discuss the barriers they identified for particular ACTs, and see if you can generate a solution together. Share your own educational resources and videos or use the ones we have curated from reputable sources in the pulmonary community.

EDUCATIONAL RESOURCES
If you would like to share educational resources with your patients that address gaps in knowledge or barriers to adherence, go to IMPACT-CF.com/resources. You can also scan the QR codes on the following page to go directly to a particular topic area.

Pre-load the resources into your EHR, or pull up the resources during the telehealth encounter and share your screen.
STEP 5
GOALS & NEXT STEPS

DIRECTIONS
Review what was discussed during the Telehealth encounter, and work with the patient to set goals and schedule the follow-up visit. Document any remediation that was conducted during Step 4 in the patient’s ACT Personal History or directly in their EHR.

GOALS
Work with the patient to create goals that are specific, measurable, and attainable. Capture their goals in the ACT Personal History or in the patient’s EHR.

FOLLOW-UP TIMING
Schedule the follow-up during the Telehealth encounter if possible. Recommended timing for follow-up should be based on the session outcome; some suggested timing and methods of follow-up are listed in the table below.

<table>
<thead>
<tr>
<th>ACTION TAKEN</th>
<th>RECOMMENDED FOLLOW-UP</th>
<th>METHOD</th>
</tr>
</thead>
<tbody>
<tr>
<td>New ACT recommended</td>
<td>1 month or at next visit</td>
<td>Via EHR, phone, or telehealth</td>
</tr>
<tr>
<td>Educational video/resource</td>
<td>At next visit</td>
<td>In person (or via telehealth)</td>
</tr>
<tr>
<td>Remediation technique</td>
<td>1 month or at next visit</td>
<td>Via EHR, phone, or telehealth</td>
</tr>
</tbody>
</table>

Let the individual patient drive the goal-setting process. Consider using methods like Problem-Solving or Motivational Interviewing.

Schedule follow-up date and instructions directly in EHR.
RECOMMENDED TELEHEALTH RESOURCES

Telehealth Implementation Playbook (PDF)
American Medical Association
https://www.ama-assn.org

Sample Forms and Guidelines
California Telehealth Resource Center
https://www.caltrc.org

Virtual Encounter Sample Workflows
American Academy of Pediatrics
https://www.aap.org/

Provider Telehealth Toolkit
Telehealth HHS
https://telehealth.hhs.gov

Telehealth Program Documents
National Consortium of Telehealth Resource Centers
https://www.telehealthresourcecenter.org

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