

# OPTIMIZING HYPERTENSION MANAGEMENT IMPLEMENTING VIRTUAL CARE SERVICES



April 18, 2023 | presented by Christian Milaster

## WEBINAR SERIES

Optimizing Hypertension Management  
With Virtual Care

Thu,  
Feb 23

Interactive Patient Care  
for Optimizing Hypertension Management

Thu,  
Mar 2

Remote Physiological Monitoring:  
People & Processes

Tue,  
Mar 21

Remote Physiological Monitoring:  
Technology & Vendors

Mon,  
Apr 3

Implementing  
Virtual Care Services

Tue,  
Apr 18



# AGENDA

-  Virtual Care & Hypertension
-  Implementing & Launching Virtual Care
-  RPM People, Processes, Tools & Technology
-  Case Study #1: AdvantageHealth
-  Case Study #2: Sun River Health
-  Implementing Innovation
-  Q&A & Wrap Up



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# ABOUT CHRISTIAN



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# MY OBJECTIVES FOR TODAY

“Bringing it all Together”  
“Making it Real”



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## YOUR PERSONAL ARCHIVE



Please find below the webinar recordings and links to the presentation slides (click on the image to open the PDF).

You will also find instructions on how to schedule your organization's consulting session as well as additional resources.

For any questions contact [Christian](mailto:christian.milaster@ingeniumadvisors.net) at christian.milaster@ingeniumadvisors.net or (657) 464-3648.

### Optimizing Hypertension Management With Virtual Care

Optimizing Hypertension Management  
With Virtual Care

OPTIMIZING  
HYPERTENSION MANAGEMENT



password  
chcans



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# VIRTUAL CARE

Telehealth

Telemedicine

Video Visits

RPM

7

VIRTUAL CARE

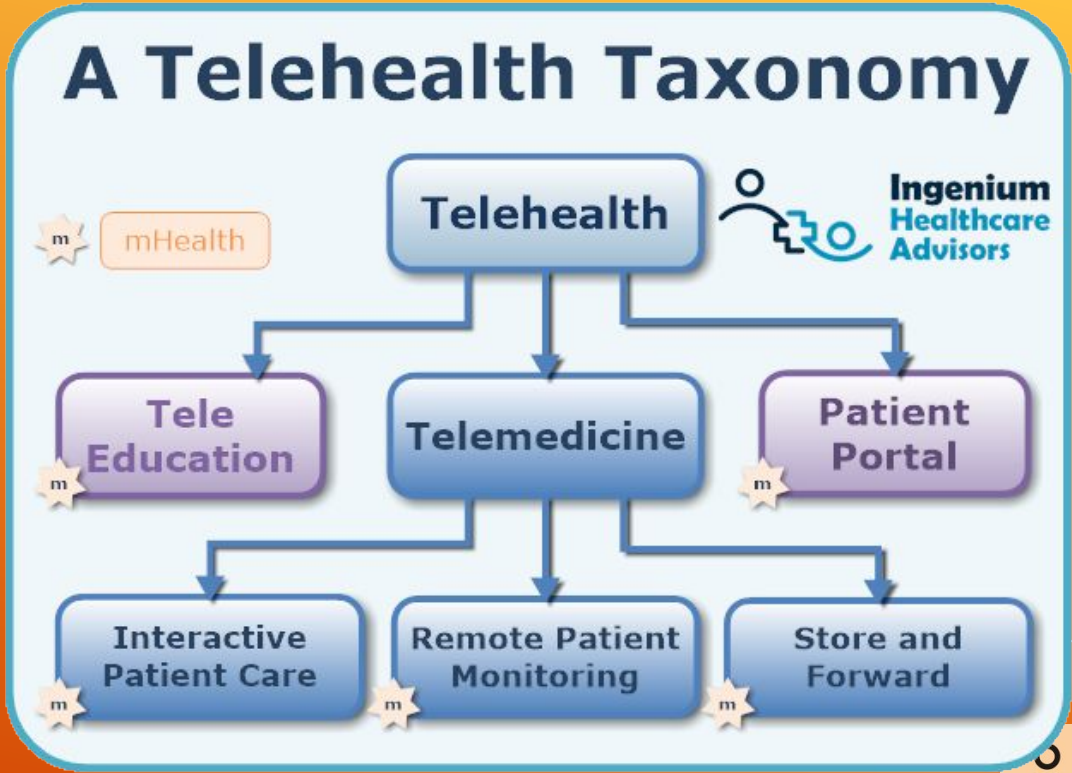
## Telehealth

Delivering Care at a Distance

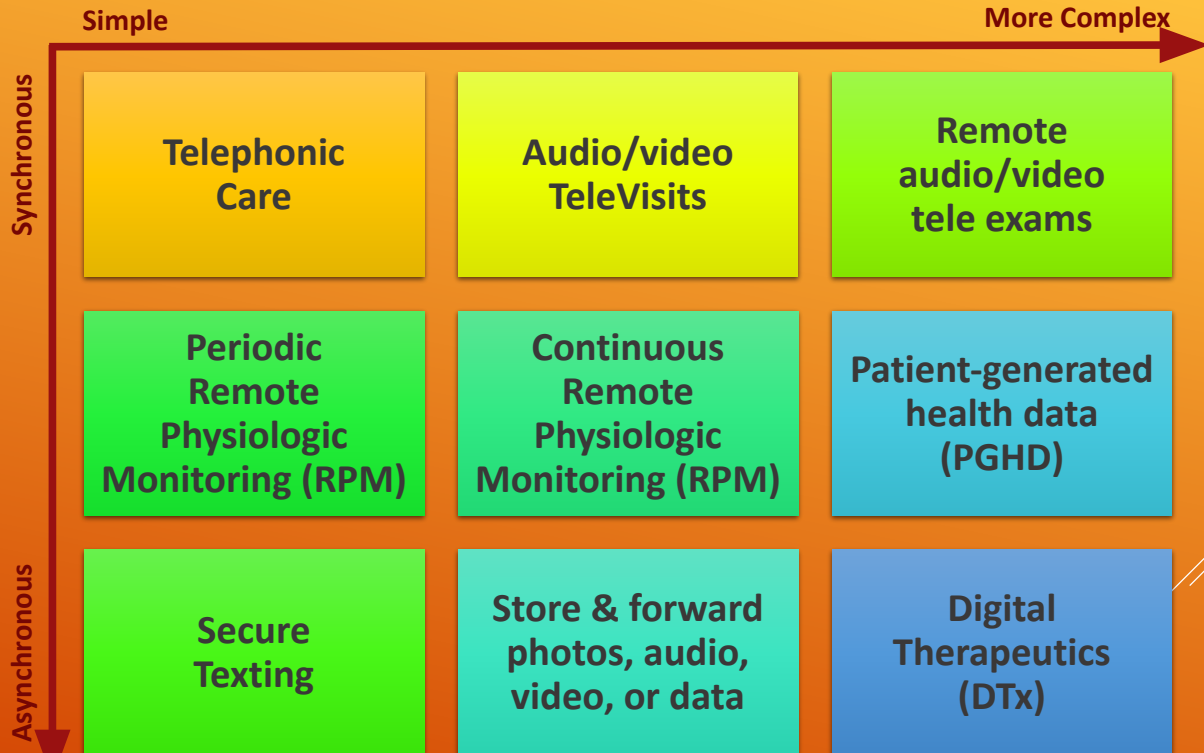
## Telemedicine

Practicing Medicine at a Distance





# VIRTUAL CARE MODALITIES





# HYPERTENSION MANAGEMENT

Controlled Blood Pressure  
in a patient population.

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## New Definition of Hypertension

Systolic BP greater than or equal to 130 mmHg, and diastolic BP greater or equal to 80 mmHg, or currently taking medications.

**130 : 80**

For an adult 45 years of age without hypertension, the 40-year risk for developing hypertension is 93% for African Americans, 92% for Hispanics, 86% for whites, and 84% for Chinese adults.

*J Am Coll Cardiol* 2018;71:e127-e248.

MEDICINE of THE HIGHEST ORDER



Source:  
CHCANYS Webinar  
April 2022

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## HTN is a significant contributor to CVD morbidity and mortality

Clinical trials have shown that treatment of hypertension reduces the risk of cardiovascular disease outcomes:



MEDICINE of THE HIGHEST ORDER



Source:  
CHCANYS Webinar  
April 2022



## Limited or Lack of



# BARRIERS TO MANAGING HYPERTENSION

# The Evolution Of Patient Care Participation

**Compliance**

**Adherence**

**Engagement**

**Activation**



**COMPLIANCE:**  
Submitting to a  
Wish, Request, or Demand

**ADHERENCE:**  
Sticking to a Plan  
or Regimen

**ENGAGEMENT:**  
Participation and contribution  
to achieve agreed-on objectives

**ACTIVATION:**  
Self-motivated, proactive  
actions to achieve personal goals



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## WHY LEVERAGE VIRTUAL CARE FOR HYPERTENSION MANAGEMENT?

Integrate virtual care modalities to transform your care model to

- ▶ improve access to care
- ▶ activate patients to actively participate in their care
- ▶ increase patients' awareness and knowledge
- ▶ improve patient and provider engagement and satisfaction
- ▶ improve HTN management efficiency and outcomes
- ▶ enhance competitiveness in a modern care delivery landscape
- ▶ meet patients' needs and expectations



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# IMPLEMENTING VIRTUAL CARE SERVICES FOR OPTIMIZED HYPERTENSION MANAGEMENT

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## IMPLEMENTING INNOVATION: A MULTI-DISCIPLINARY APPROACH



Leadership

Project  
Management

Change  
Management

Agile  
Approach

Design  
Thinking

Workflow  
Centric

# CHANGE MANAGEMENT

Change Management

- ▶ Biggest Breakdown in Innovation Adoption is not managing the Change
- ▶ Resistance to Change is part of Human Survival
- ▶ Need to appeal to Emotions, to Logic and to Social Acceptance/Herd



# ADKAR<sup>®</sup> FRAMEWORK

Change Management

## Raise **A**WARENESS

- Define the Vision, promote the Solution

## Create **D**ESIRE

- Demonstrate the Benefits

## Supply **K**NOWLEDGE

- Use experienced advisors & train adequately

## Build **A**BILITY

- Provide opportunities for Learning

## Supply **R**EINFORCEMENT

- Ensure Accountability, Continuity, Support



# WITHOUT CHANGE MANAGEMENT...

Change Management

- ▶ Clinicians
- ▶ Staff
- ▶ Patients
- ▶ Leadership

can become

- 1) confused
- 2) embarrassed
- 3) frustrated
- 4) reluctant
- 5) resistant



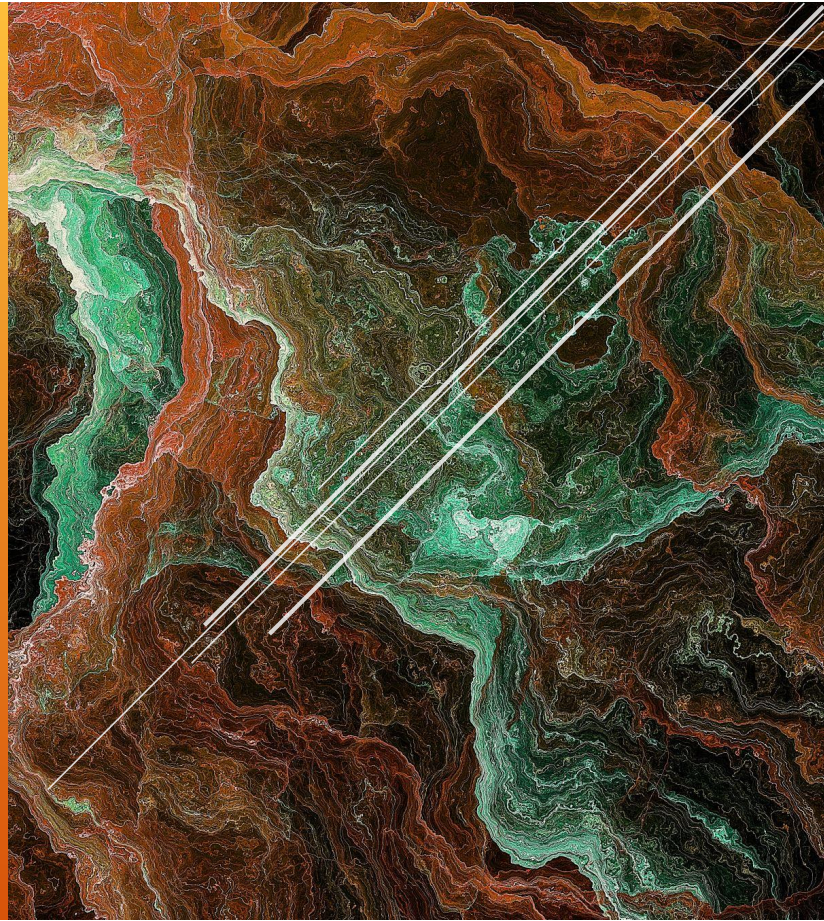
# ADKAR MODEL FOR SUCCESSFUL, SUSTAINABLE CHANGE





# LAUNCHING VIRTUAL CARE SERVICES

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Service Verification



Service Definition



Service  
Validation



Service  
Implementation

Ingenium  
Telehealth Service  
Launch Process





# Ingenium Telehealth Service Launch Process

## Service Verification

Strategic  
Case

Business  
Case

Clinical  
Case

Service Definition

Service  
Validation

Service  
Implementation



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## STRATEGIC CASE

Strategic  
Case



- ▶ Defines the alignment with strategic objectives
- For HTN Management:
- ▶ Defines efficacy and impact on hypertension mgmt., including patient activation



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# BUSINESS CASE

Business  
Case

1

- ▶ Defines the business model and/or financial return-on-investment calculation

## For HTN Management:

- ▶ Tie outcomes to quality measures or grant success criteria



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# CLINICAL CASE

Clinical  
Case

1

- ▶ Defines the clinical efficacy of the intervention

## For HTN Management:

- ▶ Describe impact on patient activation/adherence, impact on health status



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# Ingenium Telehealth Service Launch Process

## Service Verification

Strategic  
Case

Business  
Case

Clinical  
Case

## Service Definition

Workflow

Technology

Operatio-  
nalization

Service  
Validation

Service  
Implementation

2



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## WORKFLOW

Workflow

2

- ▶ Prior to selecting the technology, define the desired experience for patients, providers, and staff:
  - ▶ Become an Informed Buyer
  - ▶ Look at all 7 elements
  - ▶ Focus on Happy Day Scenario first



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# TECHNOLOGY

Technology

2

- ▶ Armed with a set of expectations, evaluate existing technology or review new technologies/vendors
- ▶ Adjust Workflows according to the Vendors' capabilities
- ▶ Incorporate new ideas from innovative vendors



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# OPERATIONALIZATION

Operationalization

2

Define how this new telehealth service (e.g., video visits with patients in the HTN Mgmt. RPM Pgm.) will be operationally and technically supported.

Identify legal barriers, financial constraints, staffing challenges, awareness building, etc.



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# Ingenium Telehealth Service Launch Process

4

## Service Verification



## Service Definition



## Service Validation



## Service Implementation



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4

# NO MORE PILOTS! USE PROOF OF CONCEPTS.



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4

# VALIDATE ASSUMPTIONS

Proof-of-  
Concept

The purpose of a Proof-of-Concept is to  
Validate Assumptions

1. Identify all Assumptions (incl. hidden ones)
2. Define Metrics to validate Assumptions
3. Establish Measurement Systems
4. Launch PoC on a small scale
5. Tweak workflows, technology, training, etc.
6. Conduct PoC until confidence in validation



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3

RECAP:  
RPM PEOPLE & PROCESSES

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# RPM DEFINITION

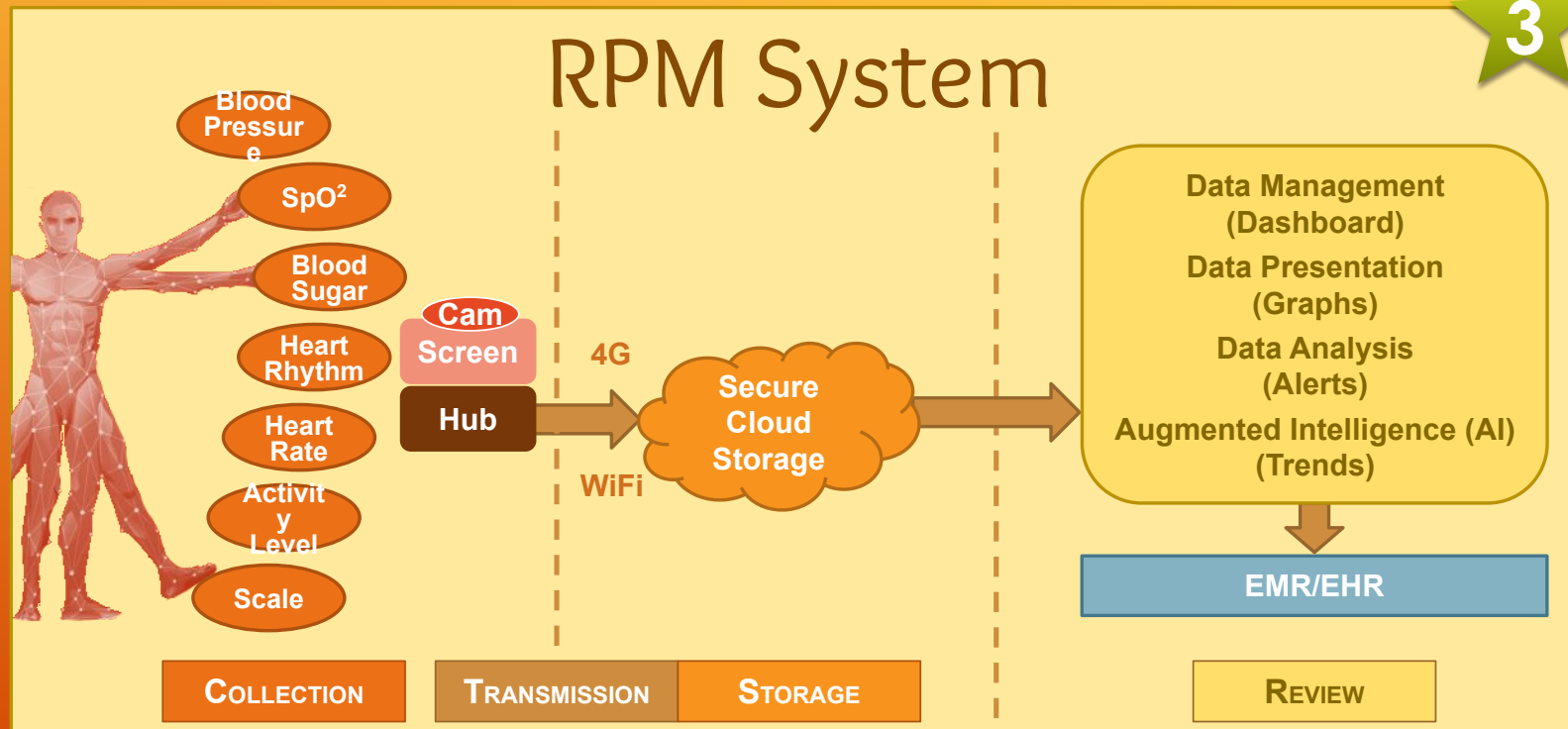


## Remote Patient Monitoring Remote Physiological Monitoring

The continuous or periodic collection, transmission and review of physiological data to inform care decisions.



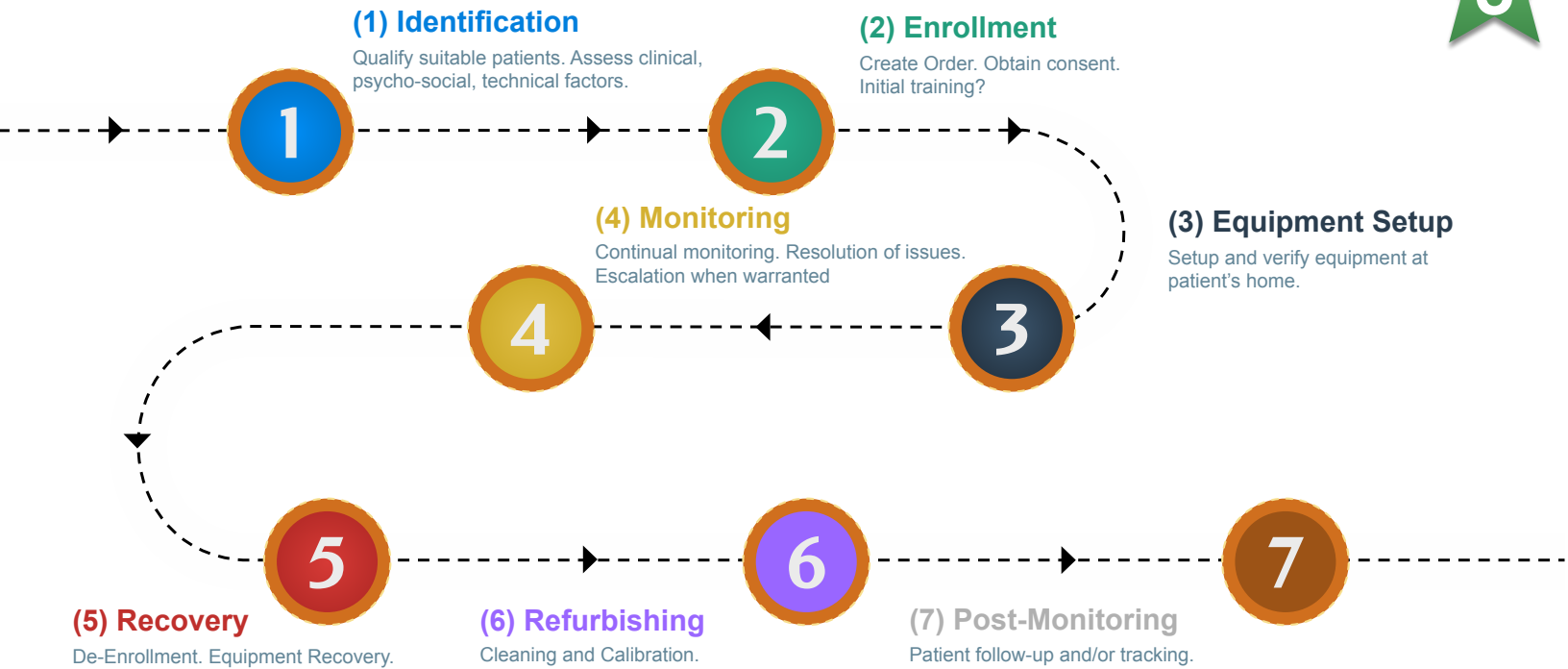
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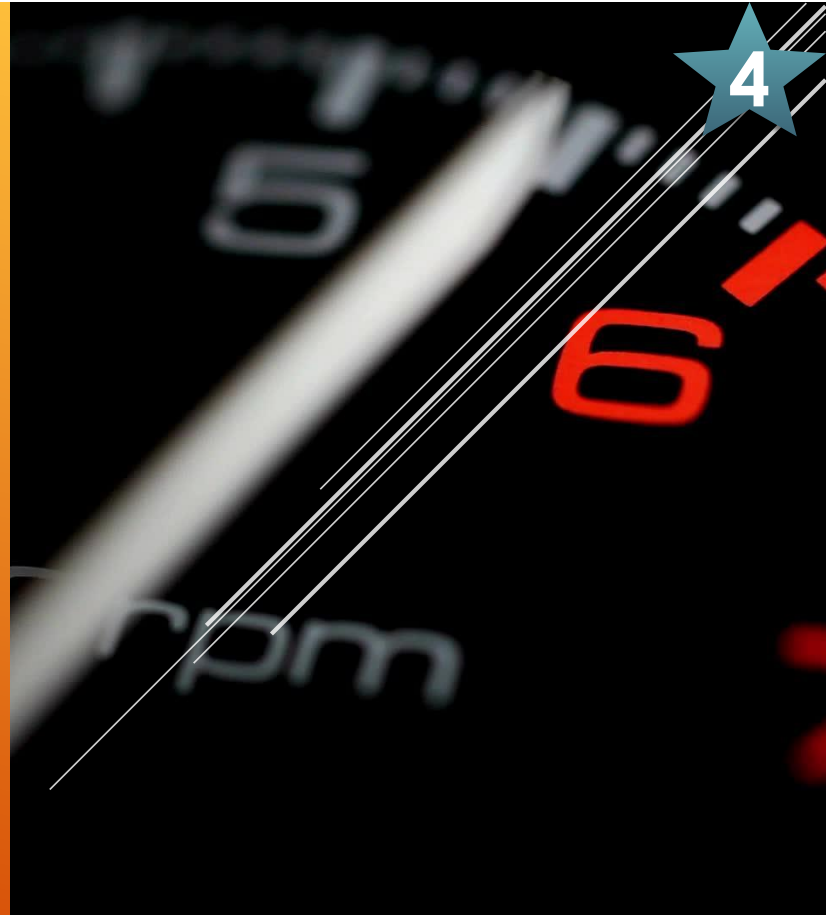
# RPM Workflow Roadmap



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## RPM TECHNOLOGY OPTIONS



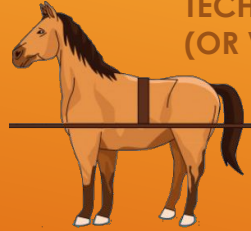


# WORKFLOW DRIVES TECHNOLOGY



□ Don't put the horse behind the cart

WORKFLOW  
(User Experience)



TECHNOLOGY  
(OR VENDOR)

Everybody Practices  
on Top of their License!  
*“Do only the things  
that only they can do.”*

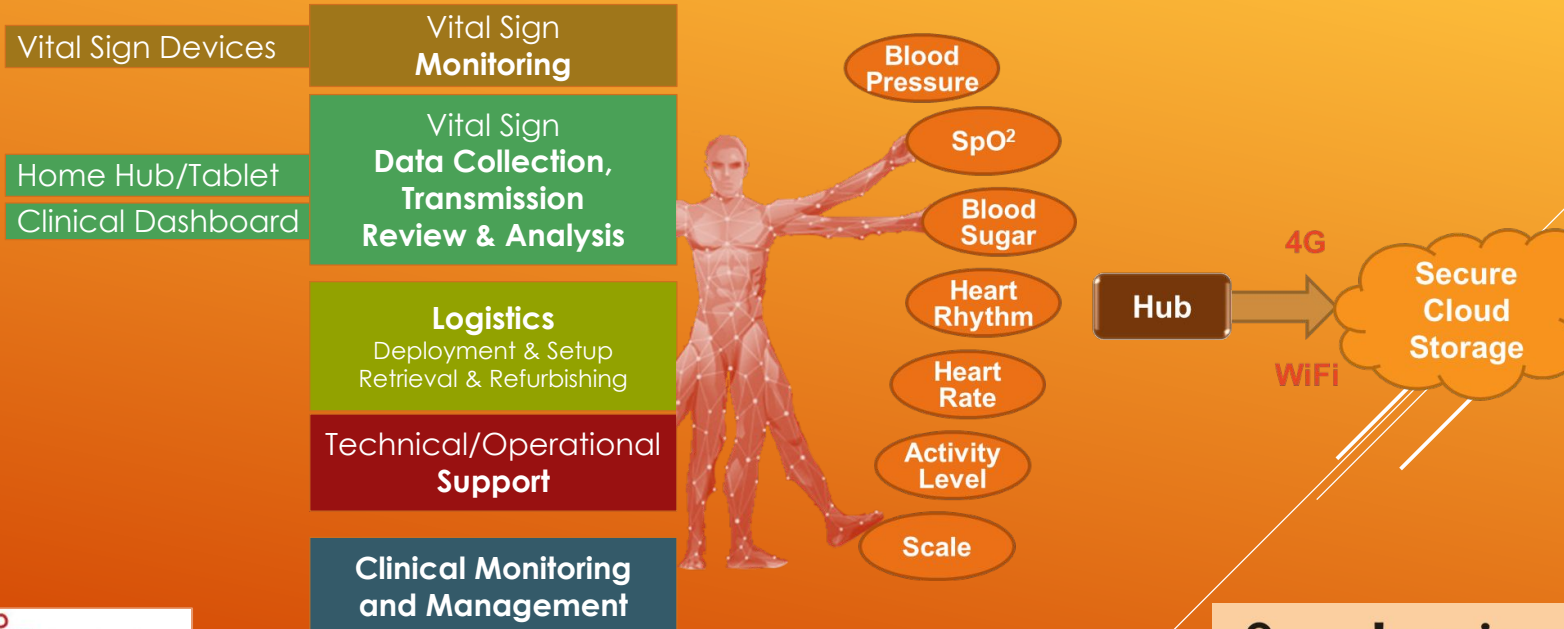
- First, design your clinical, operational, and financial workflows
- Then select the technology or service that best fits your needs



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# RPM SYSTEM ELEMENTS



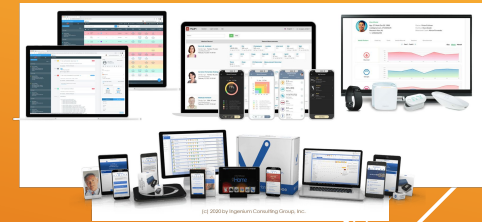
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# RPM VENDOR OPTIONS

- ▶ Vital Sign Monitors (Bluetooth, Cellular)
- ▶ RPM Platforms (Dashboards, Analytics)
- ▶ RPM Kits
- ▶ RPM/CCM Vendors

Weight Scale (250 kg)	Body Composition Scale (180 kg)	BP Monitor
2-in-1 Monitor (BP & BG)	Multimeter (BG, Uric Acid, Cholesterol, Beta-Ketone)	ECG



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# RPM SYSTEM OPTIONS

Vital Sign Devices	<b>Vital Sign Monitoring</b>	BYOD	Purchased	Leased
Home Hub/Tablet	<b>Vital Sign Data Collection, Transmission Review &amp; Analysis</b>	BYOD		RPM Vendor
Clinical Dashboard		Call In	Wireless (Bluetooth) Automated	
	<b>Logistics</b> Deployment & Setup Retrieval & Refurbishing			
	<b>Technical/Operational Support</b>	DIY	RPM Technology Vendor	RPM Service Provider
	<b>Clinical Management</b>	Internal (RNs)	External (RNs)	
		Internal (Physicians)		



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# CASE STUDY #1



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## AdvantageCare Health Centers



- ▶ **RPM Program Overview**
  - ▶ Clinical Aims
  - ▶ Equipment
- ▶ **RPM Program Challenges**
  - ▶ Discussion

# CASE STUDY #2



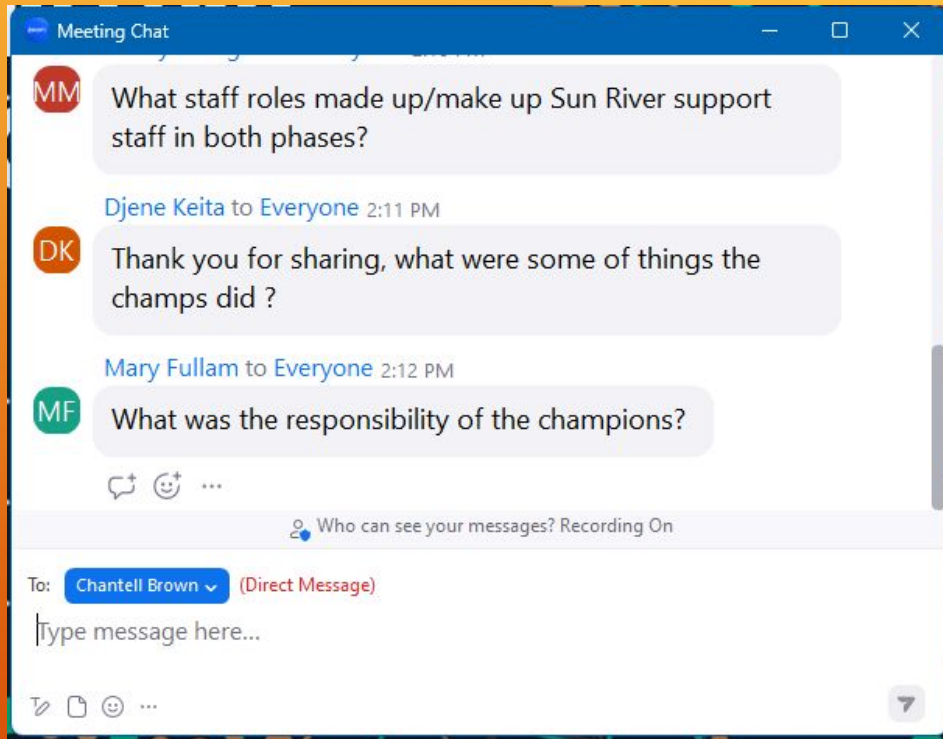
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## Sun River Health



- ▶ **RPM Program Overview**
  - ▶ History & Previous Phases
  - ▶ Current Clinical Design
  - ▶ Technology & Processes
- ▶ **RPM Program Challenges**
  - ▶ Discussion





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# IMPLEMENTING VIRTUAL CARE SERVICES FOR OPTIMIZED HYPERTENSION MANAGEMENT

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# IMPLEMENTING INNOVATION: A MULTI-DISCIPLINARY APPROACH



Leadership

Project  
Management

Change  
Management

Agile  
Approach

Design  
Thinking

Workflow  
Centric



## LEADERSHIP

Leadership 

- ▶ Communicate the Vision
- ▶ Create Inspiration
- ▶ Set Expectations
- ▶ Achieve Priorities
- ▶ Provide Resources



# PROJECT MANAGEMENT

Project Management **1**

- ▶ Plans are useless, but Planning is essential
- ▶ Project Management as a Communication and Work Synchronization Tool
- ▶ Agile Project Management



# ADKAR MODEL FOR SUCCESSFUL, SUSTAINABLE CHANGE

Change Management

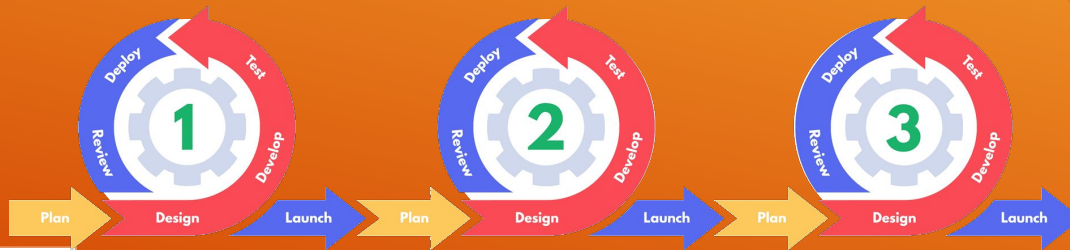


# AGILE APPROACH

- ▶ Risk Mitigation through Risk Taking
- ▶ Embrace Ambiguity
- ▶ Get the Voice of the Customer
- ▶ Iterative Approach

Agile Approach

What's the simplest thing that could possibly work?

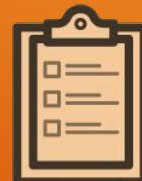


# DESIGN THINKING

- ▶ Focused on User Experience: *Patients, Clinicians, Staff*
- ▶ Focused on Observations
- ▶ Think Outside the Box

Design Thinking

Empathize   Design   Ideate   Prototype   Validate



# WORKFLOW CENTRIC

Workflow  
Centric

- ▶ Workflow FIRST
- ▶ Technology SECOND



2

## Happy Day Scenario

Typical, 80% of the time

## Alternate Scenario

Expected Variations

## Exception Scenario

possible breakdowns



Telehealth  
Workflows



# WORKFLOW DESIGN BY SCENARIO

Telehealth Scheduling  
Alternate Scenarios

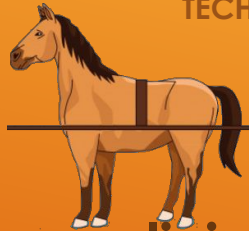


# WORKFLOW DRIVES TECHNOLOGY

□ Don't put the horse behind the cart

SERVICE

TECHNOLOGY



**Everybody Practices on Top of their License!**  
*“Do only the things that only they can do.”*

- First, design your clinical, operational, and financial workflows
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## IMPLEMENTING INNOVATION: A MULTI-DISCIPLINARY APPROACH

Leadership

Project Management

Change Management

Agile Approach

Design Thinking

Workflow Centric





# LAUNCHING REMOTE PHYSIOLOGICAL MONITORING

## Ingenium Telehealth Service Launch Process

### Service Verification

Strategic  
Case

Business  
Case

Clinical  
Case

### Service Definition

Workflow

Technology

Operatio-  
nalization

### Service Validation

Proof-of-  
Concept

### Service Implementation

Organizational  
Change  
Methods

Deploy-  
ment

# RPM LAUNCH PROCESS



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## 4 RPM SERVICE DESIGN & DEVELOPMENT



1. What is the desired, 'happy day' workflow?
2. What are the alternate & exception scenarios?
3. What are the features we expect from the Technology?
4. What Technology(s) can implement this service?
5. How do we operationalize the processes?



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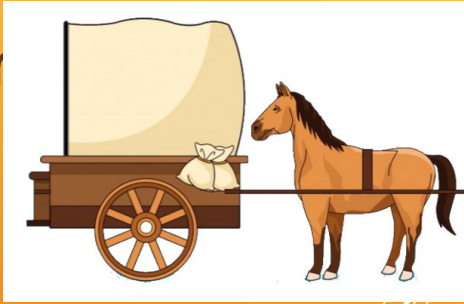


# TECHNOLOGY SELECTION

Technology

## ▶ Don't put the Horse behind the Cart

Define workflows & requirements first, then select a solution.



## ▶ Requirements include

- ▶ User Experience: Clinicians, Patients, Staff
- ▶ Features & Capabilities: e.g., copays, assessments, in-visit/post-visit communication, etc.
- ▶ Integration Needs: e.g., EHR, Scheduling



**After the Q&A**

Key Takeaways  
Action Items  
Next Steps

### Contact Info:

[Christian.Milaster@IngeniumAdvisors.net](mailto:Christian.Milaster@IngeniumAdvisors.net)

[IngeniumDigitalHealth.com](http://IngeniumDigitalHealth.com)

657-Ingenium (464-3648)







# PLEASE COMPLETE THE SURVEY!

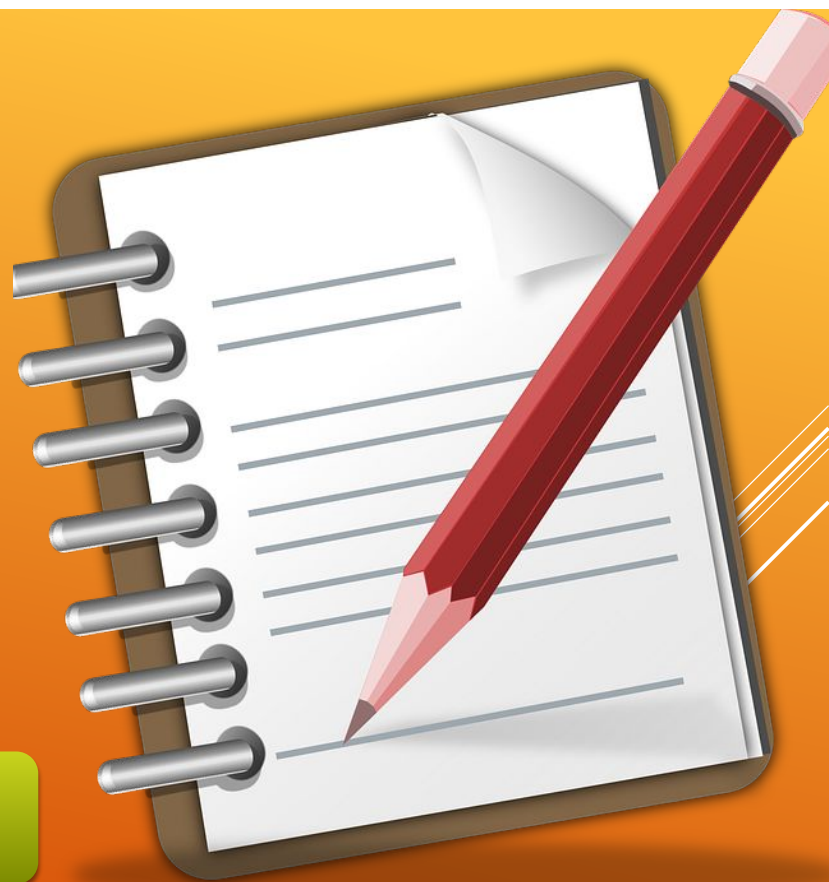
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## WHAT ARE YOU MOST INTERESTED IN LEARNING?

- ▶ How to begin implementing a virtual care program with HTN
- ▶ What does it take to implement a HTN Mgmt. Program with RPM?
  - ▶ Are there external services that we could utilize if we do not have the internal capacity to manage such a program?
- ▶ Learning new strategies to expand RPM modalities
- ▶ How to achieve compliance with BP measurements
- ▶ How often is dashboard checked?
- ▶ What resources can you use to monitor vital signs remotely?
  - ▶ 1) How is the equipment supplied?
  - ▶ 2) How are technical problems dealt with?
  - ▶ 3) How does the information get inputted into ECW?
  - ▶ 4) Is this billable for nursing visits?
  - ▶ 5) How to get RPM equipment to my patients
  - ▶ 6) How to incorporate RPM into patients' care

# KEY TAKEAWAYS

Put your Major Insights,  
Learnings into the Chat.



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## 7 KEY TAKEAWAYS

1. Think about Implementation as an Undertaking in Change Management (ADKAR Model)
2. Develop a Strategic Case, Business Case, Clinical Case
3. Don't put the horse behind the cart: First define workflow and requirements, then evaluate & select the technology.
4. Success is achieved through well-documented workflows (happy day scenario & alternate scenarios)
5. Start with small Proof-of-Concept to Validate Assumptions
6. Leadership support & Clinician Leadership is critical
7. Performance Management from Day 1 is key to success.



# ACTION ITEMS

Jot down 1-3 Action Items you will take on now!  
Share in the Chat, if you'd like.

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## SUGGESTED ACTIONS

E.g.,

- ▶ Discuss how to apply ADKAR to the rollout or improvement of your program
- ▶ Develop your Strategic, Business & Clinical Case
- ▶ Define your key Workflows
- ▶ Develop success metrics and implement a measurement system and accountability

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## NEXT STEPS

- ▶ Reach out to CHCANYS to explore
  - ▶ additional education options
  - ▶ forming cohorts / facilitated community
  - ▶ sponsored coaching/advisory/consulting
- ▶ Reach out to me for further discussion or to explore how we can help your organization.



[Christian.Milaster@IngeniumAdvisors.net](mailto:Christian.Milaster@IngeniumAdvisors.net)

[IngeniumDigitalHealth.com](http://IngeniumDigitalHealth.com)

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# 7 ELEMENTS OF SUCCESSFUL VIRTUAL INTERACTIVE CARE SERVICES



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## TELEHEALTH AND THE 7 THWORFS



Telehealth Scheduling

Telehealth Onboarding

Telehealth Rooming

Telehealth Visit



Telehealth Post Visit

Telehealth Follow Up

Telehealth Billing



2

# Happy Day Scenario

Typical, 80% of the time

# Alternate Scenario

Expected Variations

# Exception Scenario

possible breakdowns



Telehealth Workflows



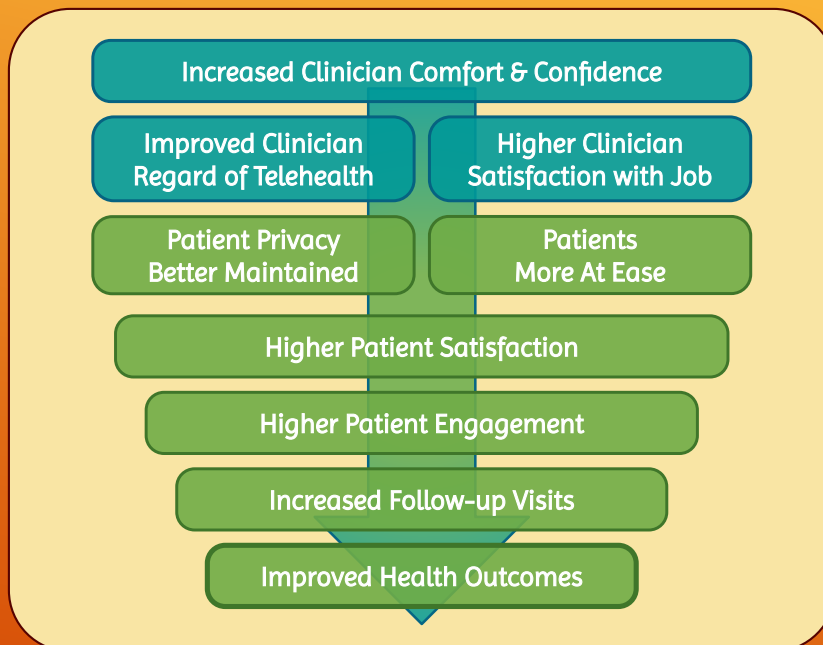
Telehealth Scheduling  
Alternate Scenarios

## WORKFLOW DESIGN BY SCENARIO

2

# VALUE OF MASTERING “VIDEO CARE”

Webisode Manners & Virtual Exams



2

# WEBSITE MANNERS CHEAT SHEET

Webside  
Manners &  
Virtual Exams

## CLINICIAN SETUP

Background

Camera  
Position

Looking  
Elsewhere

Before the Visit

Eye Contact for 30 seconds

## ACKNOWLEDGE

Background

Noises

Newness

Benefits

At the Beginning

Periodic Eye Contact

## ENSURE PATIENT

Comfort

Privacy

Body Language:  
Leaning Back & Leaning In

During the Visit



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2

# TELEHEALTH SUPPORT

Telehealth  
Support

Operational  
Support

Technical  
Support

Optimization  
Support

Launch  
Support



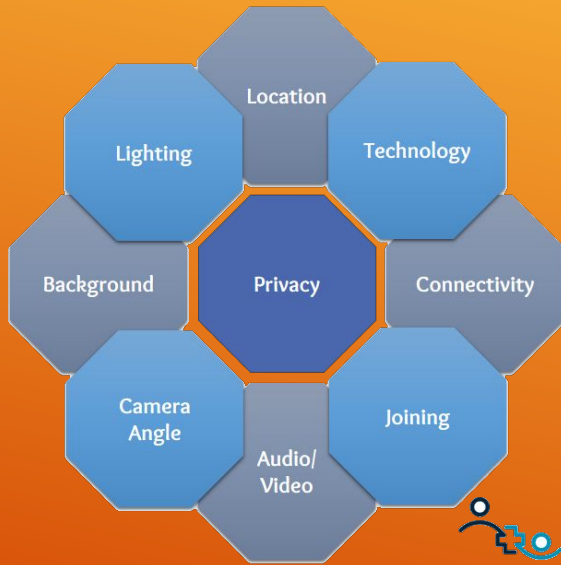
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2

## Telehealth TechCheck<sup>SM</sup> Checklist



- ▶ Mostly for first time telehealth users
- ▶ Ideally a few days ahead of time
- ▶ Multiple Objectives:
  - ▶ Minimize distractions, frustrations
  - ▶ Increase patient confidence, satisfaction
  - ▶ Decrease provider frustration (*no more "clinicians as tech support"*)
  - ▶ Increase the quality of the consult: the technology fades into the background

Telehealth Support

## TELEHEALTH TECHCHECKS



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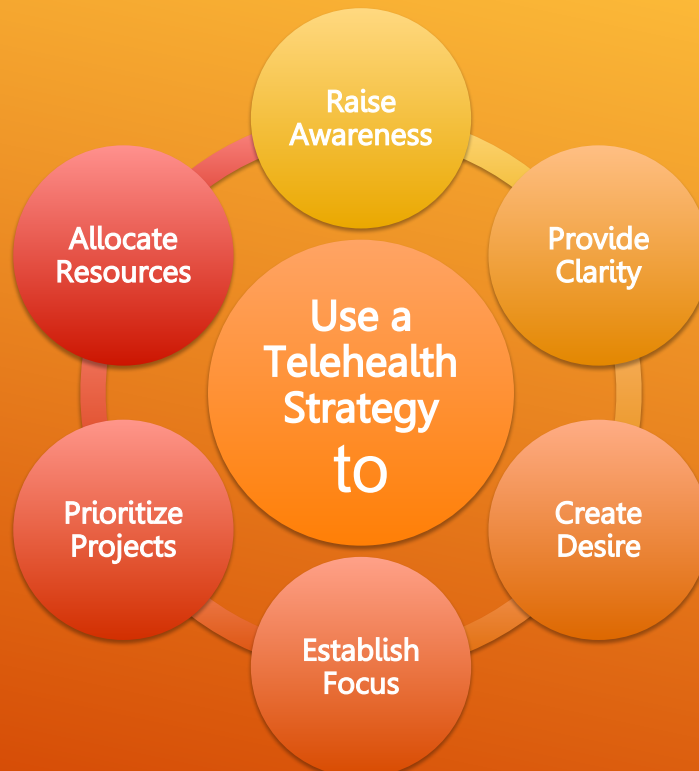
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2

## WHY USE A TELEHEALTH STRATEGY?



Telehealth Strategy



2

# TELEHEALTH STRATEGY ELEMENTS

Telehealth Strategy

Telehealth Vision

Telehealth Mission

Strategic Themes & Strategies

Alignment with Organizational Strategy

Service

Quality

People

Finance

Growth

Community

2

# 7 LEVELS OF TELEHEALTH TRAINING





CEO  
Opening Remarks  
(Strategy)



CMO  
Opening Remarks  
(Strategy)



Tele Visit Workflow  
Review



Technology  
Training



Clinical Guidelines  
Review



Policy Review



Webside Manners  
Training



Virtual Exam  
Overview

# TELEHEALTH CLINICIAN TRAINING AGENDA



COMMUNITY  
HEALTH CARE  
ASSOCIATION  
of New York State

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