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Remote Patient Monitoring Purchasing Checklist

Whether you're considering remote patient monitoring (RPM) for the first time or have an existing program failing to meeting your goals and are thinking about switching vendors, this checklist is for you. It provides a comprehensive list of evaluation criteria to ask when vetting potential RPM partners.

The evaluation criteria is divided across the following 7 categories:

- Software Considerations
- Patient Adherence and Engagement
- Client Success and Customer Support
- Managed Services
- Devices / Equipment
- Expertise / Reputation
- Financial Impact

Questions to Ask about RPM Software

A remote patient monitoring solution, at bare minimum, starts with the software needed to track vitals, engage patients, and bill for services provided. That software should make your staff's life easier, not harder.

- ▢ How easy is it to add a new patient?
- ▢ Can I bulk upload new patients?
- ▢ How easy is it to view and triage readings?
- ▢ What type of alerts and notifications are built in for crisis and out-of-threshold readings?
- ▢ How can my monitoring team use the software to manage daily tasks?
- ▢ Is time spent caring for patients automatically tracked?
- ▢ How easy is it to communicate with patients from the platform?
- ▢ How do I document notes?
- ▢ How configurable are the settings so the software works for my practice's needs?
- ▢ How does the software help me increase patient adherence and engagement? Customizable reminders? Communication tools?
- ▢ Will the software incorporate regulatory updates?
- ▢ What tools, tracking, and documentation are available in case of an audit?
- ▢ How does the software track requirements needed to bill each code?
- ▢ How easy is it to submit billing?
- ▢ Does it integrate with my EHR?
    - ▢ What data is exchanged in the integration? How does it work?

Questions to Ask about Patient Adherence and Engagement

RPM is only successful (clinically and financially) if patients are taking readings and engaged in their treatment plan.

- ▢ How many patients take the required 16 days of readings per month on their platform?
- ▢ What is their patient retention rate?
- ▢ What tools does the software have to help with patient adherence?
- ▢ How easy is it to see and sort which patients are adhering to their treatment plans?
- ▢ How easy is it for patients to use the devices?
- ▢ How often do patients report issues with their devices?
- ▢ How do they help with the patient onboarding process?
- ▢ Do they provide onboarding and/or monitoring services if we do not have enough staff?
- ▢ How easy is it for our team to see data on patient adherence and engagement?
- ▢ Will they assign a Client Success Manager that regularly analyzes engagement data with us and helps us improve?

Questions to Ask about Client Success and Customer Support

The Client Success team at your RPM partner will be critical to helping you launch, maintain, and grow your program. Most companies will provide basic customer service to reactively respond to requests. But true Client Success fundamentally differs from customer service or support.

- ▢ How do they define Client Success and how is it different from Customer Support?
- ▢ Will we get a dedicated Client Success Manager (CSM)?
- ▢ What is the experience and background of their CSMs?
- ▢ How often will we interact with our CSM?
- ▢ Will they help us create a Success Plan?
    - ▢ When do we create the success plan?
    - ▢ What's included within it?
- ▢ Do they have implementation staff in addition to the CSM?
- ▢ What is the role of the implementation team vs. the CSM?
- ▢ What type of training do they provide?
- ▢ Do they provide onsite support for initial onboarding?
- ▢ How long should it take to onboard our first 20-30 patients?
- ▢ What type of patient growth and engagement data can we access?
- ▢ Do they schedule regular business reviews? What's on the agenda?

Questions to Ask about Managed Services

As your RPM program evolves, you may need more support or different processes. Your RPM partner should have the flexibility to add services if and when you need them.

Managed Service 1: Outsourced Monitoring

A strong partner-managed program will use licensed nurses that act as an extension of your own team.

- ▢ What is the experience level and credentials of their clinical staff?
- ▢ Will they assign specific staff members to us who get to know our patients or are calls handled by whomever is in the call center?
- ▢ Is their staff based in the US and licensed to practice in your state?
- ▢ How do they provide oversight / quality assurance for their staff?
- ▢ Given their staff credentials, are there any supervision requirements?
- ▢ How will they get to know our practice, culture, and processes?
- ▢ How do they handle patient escalations?
- ▢ Does their team have experience with health and wellness coaching?
- ▢ How do they communicate non-urgent patient updates?
- ▢ How successful are they in engaging patients?
- ▢ What clinical outcomes have they achieved?
- ▢ What financial outcomes have they achieved? What % of patients are hitting the threshold for each CPT® Code?
- ▢ How do they bill for monitoring services?
- ▢ Will they conduct an ROI analysis to determine if self vs partner managed monitoring is right for us?

Managed Service 2: Remote Onboarding

Some RPM vendors will have teams of experts capable of onboarding new patients into your RPM program remotely, saving you time in the process.

- ▢ Do they offer a remote onboarding service?
- ▢ How do they identify potential RPM patients at our practice?
- ▢ Do they screen for insurance eligibility?
- ▢ How do they contact patients and get consent?
- ▢ Do we get input on the patient script so phone calls and text messages to our patients match our culture?
- ▢ How do they get devices to patients?
- ▢ Do they conduct an onboarding appointment with each patient?
- ▢ What if the patient doesn't receive the device or doesn't use it?
- ▢ What happens after the onboarding appointment?
- ▢ How do they bill us for onboarding?
- ▢ Can we conduct our own in-office onboarding in tandem?

Managed Service 3: Eligibility Verification

RPM is no longer just for Medicare. As RPM has been proven to improve outcomes and avoid costly readmissions, more payors are covering RPM.

- ▢ Do they offer eligibility verification?
- ▢ Do they charge for eligibility verification?
- ▢ How does the process work?
- ▢ Does their process eliminate / reduce the need for pre-authorizations?
- ▢ Does their process eliminate or reduce denials?

Questions to Ask about RPM Devices

Devices should be easy for patients to use and match their technology comfort level, with clear steps for troubleshooting when things go wrong.

- ▢ What kinds of devices do they offer?
- ▢ Are all devices available in a cellular option (which doesn’t require WiFi or a mobile app)?
- ▢ How often do patients have difficulty with device setup?
- ▢ How do they support patients and staff with device questions?
- ▢ Do the devices come with a warranty?
- ▢ How do they handle device replacement if needed?

Evaluating the Vendor’s Expertise

As the RPM market has grown exponentially, so have the number of vendors offering RPM solutions.

- ▢ How long have they been in business?
- ▢ How many clients do they have?
- ▢ What is their client retention rate?
- ▢ What have their clinical results been for patients on their platform?
- ▢ What is their average client’s billability rate for each RPM CPT® Code?
- ▢ Can they provide references of practices that are similar to mine?
- ▢ How are they investing in their platform?
- ▢ What major enhancements and new services do they have planned?
- ▢ Where do they see the future of remote care and telehealth going and how are they preparing for that?

Questions to Ask about Financial Impact

Launching an RPM program is a financial investment that requires a full financial analysis.

RPM Revenues

- Are the reimbursement rates in the analysis specific to my geography?
- Is RPM covered by Medicaid in my state? With any restrictions?
- Does the analysis include commercial patients?
- Do I realistically have the staff to engage patients for enough time to bill codes at those rates?
- How does using a Managed RPM service impact reimbursement?

RPM Costs

- Is the software a per patient price and how do they define per patient?
- Do they bill for every enrolled patient even if they aren't taking readings, or only active patients?
- Are devices included in their per patient price?
- Do they offer multiple options to pay for devices (own, lease, finance)?
- Do they charge for device damage and replacement?
- What is their pricing structure for additional services, such as onboarding or monitoring support?
- Do they charge for services like eligibility verification and EHR integration?
- What level of Client Success and Implementation resources do they provide for the stated price?

Partnership: The Only Path to RPM Success

The most successful RPM programs are a true partnership between your practice and your RPM partner. Selecting an RPM vendor should be about the solution that provides the greatest value based on your specific needs. We hope this checklist helps you determine what the best value is for your practice during the evaluation process.

If you want to consider Optimize Health as a potential RPM solution, we are ready to answer all of the above questions and any more you may have.

Get started by [setting up a free consultation with our team].