

THE
integrative
women's health
INSTITUTE



presents

Starting or Expanding Your Telehealth Coaching Practice

Dr. Jessica Drummond, DCN, CNS, PT, NBC-HWC



Why are we doing this now?

The “Why?”

- The world has completely changed overnight. You need this now more than ever.
- We were in the process of doing this anyway for our own company, so we have the opportunity to teach you along the way, and add even more services (and more cohesive service) for our clients than we had initially imagined.
 - The Endometriosis Virtual Clinic



Course Objectives

Objectives

- Who do you serve and what problem do you help them solve?
- Private client support or group support, which is best?
- What services do you want to provide? Coaching? PT/OT? Nutrition?
- Get Your Ducks in a Row: Legal, insurance, financial, tax, certification & license
- Technology set up
- Documentation and Cyber Security
- How Healthy are Your Boundaries / Working-Life Health in the age of Telehealth
- Marketing Your Telehealth practice



Who Do You Serve? What Problem Do You Help Solve?

- This is foundational, nothing else matters if you're not connecting with your IDEAL CLIENT.
- What is best in service of her needs?
- **You will not connect with her if you don't know who she is?**
- This is even a legal standard:
 - There is not a lesser standard of care in telehealth application.
 - You will be held to an optimal standard of care for telehealth.
 - **Some exceptions for emergencies.**
 - **How can you give even better service by telehealth?**



Who Do You Serve?

- **Who is your ideal client?**
- Think of her as a detailed character in a novel. Notice how you're drawn to characters. You relate to them, think of similarities to yourself, and to others. This will clarify to your audience if this is right for them?
- **Ideal client avatar worksheet:**

THE integrative women's health INSTITUTE

Avatar Worksheet

Kids / dependants + ages:

Occupation:

Work Hours:

Work Responsibilities:

Income:

Name

Age

Relationship Status



What Problem Do You Help Solve?

- Don't be all things to everyone.
- This is not a time to be reactive.
- Be grounded and in service.
- Lead with your strengths.
- What problems - that are most in need right now - do you have the best skillset to help solve? Start there.
- **FOCUS (don't be distracted by chasing shiny objects.)**



Private Client (1-on-1) or Group Support?

- Start with private clients (unless you're already comfortable in a group model.)
- **Once you gain experience, the answer to this is simple - which container is the best in service of your ideal client?**
- Do they need individualized attention, or will benefit most from your personalized mindful listening?
- Will community support enhance the experience?
- Are there specific recommendations that will vary a lot person-to-person, or is there is generally useful protocol that needs limited variation based on individual factors?



What Service(s) Do You Want to Provide?

- **Health Coaching?**
 - Most flexibility.
 - Best if certified. (NBC-HWC ideal)
 - Global reach
- **Physical or Occupational Therapy?**
 - In-State only practice.
 - Education/ coaching vs. skilled care
- **Nutrition?**
 - Ideally in-state practice
 - Less rigid because nutrition practice acts are variable.



Get Your Ducks in a Row: Legal

- **As a business owner, you must have an attorney.**
- This is not optional. I am not a lawyer.





Get Your Ducks in a Row: Legal

- **Recommendations:**
- Lisa Fraley (<https://lisafraley.com/>) - great for health coaches, templates for website T&C's, program & product T&C's, and health coach program agreements.
- Peter Hoppenfeld (<https://www.peterhoppenfeld.com/>) - great with events, supplements, products, more complex digital marketing companies.
- Erin and Connor Jackson (<https://jacksonllp.com/>) - great to licensed services: PT, OT, nutrition



Get Your Ducks in a Row: Legal

- Licensure issue: If you are providing licensed service. You must be licensed where the patient is located.
- There are some exceptions for travel.
- Need informed consent for your licensed service (such as PT, OT, or clinical nutrition.)
- You also need informed consent for telehealth itself.
- **Health Coaching is not licensed in any state, and that can be OK. BUT, I strongly recommend that you get an NBC-HWC eligible certification.**



Get Your Ducks in a Row: Why a Health Coaching Certification?

- **Follow the money...** The largest companies that are being venture funded (by very wealthy groups who want a return on their investment) are hiring NBC-HWC's to provide the coaching services (or at least those with an NBHWC approved coach certification if not yet board certified.)
- **Outside the box idea:** Could you as a PT/ OT/ nutritionist create offer skilled visits, protocols, systematic processes, etc. that health coaches could deliver to your ideal clients more widely?
- **Outside the box idea:** What services could you offer to serve your clients very well in this changed environment that you could offer as a health coach?



Why a Health Coaching Certification? What do Health Coaches Do?

- **Skilled mindful listening + Reflections + Powerful questions.**
Practice for a day... don't tell anyone what to do. Think **ONLY** in questions.
What surprising things do you learn?
- **Elicit** healing solutions (often surprising!) from their clients.
- Offer health **education, resources**, and support to their clients.
- Identify your client's **barriers to change** (intrinsic are often more problematic than extrinsic - beliefs, fears, overwhelm, boundaries, inner critic, values conflicts, etc.)
- Support your client to consistently **overcome her barriers to change** in order to make long term, sustainable, meaningful health behavior change. *(example: sugar feeds viruses and inflammation, how healing if you could get your pain clients OFF sugar! **Notice** this is a behavior issue not a nutrition issue!)*



Do You Need a Telehealth Licensed Practice or Will a Health Coaching Practice Offer the Same or Better Healing For Your Ideal Client?

- This depends on who your ideal client is.
- This depends on the problem that you help your ideal client to solve.
- **Reality check:** This depends on how possible it may/ may not be to offer your licensed service (or for anyone to offer that service) to your ideal client in the next 12-18 months.



Get Your Ducks in a Row: Financial

- Do you have any funding to start a business?
- Businesses require funding.
- If not, for now - conserve, get a job, or bootstrap with your current resources (client list, time, creativity.)
- Think beyond capital resources... time, hustle, creativity, a computer, work ethic, writing/ speaking/ educating ability, etc.

What can you offer now, that people need that you can offer **now** given your current relationships? **Now... be in service as much as you possibly can.**



Get Your Ducks in a Row: Business Entity

- Set up a clear business entity, such as an LLC, to separate your work financially from your home finances.
- If licensed, set up in a state where you are licensed.
- If coaching, set up in the most beneficial state (from a tax perspective) that you can have an office in. (for example CT vs. TX)



Get Your Ducks in a Row: Tax

- From the beginning, work with an accountant and a bookkeeper (or bookkeeping software like quickbooks.)
- Keep your business payments and expenses separate from your personal.
- At minimum, use a separate credit card, and checking account.



Get Your Ducks in a Row: Insurance

- Telehealth is generally a part of your license liability insurance as long as you're practicing in the states where you're licensed (where the patient lives.)
- Or, under your national coaching certification.
- HPSO did verify this for me - for PT, nutrition, and wellness coaching.
- Get licensed in as many states as you can.



Get Your Ducks in a Row: Insurance

- Consider joining the PT Compact.
- Home state defined? As defined by Commission Rules, a licensee's home state means the person's true, fixed, and permanent home and is the place where the person intends to remain indefinitely, and to which the person expects to return if absent without intending to establish domicile elsewhere. Special exceptions this rule is provided for active duty military and their spouses.



Get Your Ducks in a Row: HIPPA

- If you are a cash practice, you are not a “covered entity” (held to HIPPA), still need to keep confidentiality per your state practice act.



Get Your Ducks in a Row: Billing

- Why we will remain a cash practice.
- Most of what we do is not covered by insurance/ Medicare anyway.
- When it is, it is poorly reimbursed.
- Difficult/ impossible to run a business at such low rates of reimbursement and paperwork roadblocks.
- I will run my business to my strengths in the highest service of my ideal clients. Not be excessively reactive.



Get Your Ducks in a Row: Billing

- BUT... if you do take Medicare, here is an important update on codes allowed at this time...
- G2061: Qualified non-physician healthcare professional online assessment and management, for an established patient, for up to seven days, cumulative time during the 7 days; 5–10 minutes
- G2062: Qualified non-physician healthcare professional online assessment and management service, for an established patient, for up to seven days, cumulative time during the 7 days; 11–20 minutes
- G2063: Qualified non-physician qualified healthcare professional assessment and management service, for an established patient, for up to seven days, cumulative time during the 7 days; 21 or more minutes.



Get Your Ducks in a Row: Reimbursement Generalities

- G2061 5-10 minutes, non MD established patient \$12.50
- G2062 11-20 minutes, non MD established patient (approximately \$21)
- G2063 >21 minutes, non MD established patient (approximately \$33)
- These fees are dependent on your local MAC and can vary.
- Medical nutrition therapy reimbursement: https://static1.squarespace.com/static/5409cc2ae4b090d48254b799/t/58b98590a5790aeaef933797/1488553362207/medicare_fee_schedule+%281%29+%281%29.pdf (\$15-\$30 for 15-30 minute codes)



Get Your Ducks in a Row: Billing

- Effective immediately, the HHS Office for Civil Rights (OCR) will exercise enforcement discretion and waive penalties for HIPAA violations against health care providers that serve patients in good faith through everyday communications technologies, such as FaceTime or Skype, during the COVID-19 nationwide public health emergency.
- <https://www.cms.gov/newsroom/fact-sheets/medicare-telemedicine-health-care-provider-fact-sheet>



Get Your Ducks in a Row: Resources on Billing/ Coding

- <https://thenonclinicalpt.com/telehealth-physical-therapy/>
- <https://www.apta.org/PTinMotion/News/2020/3/16/TelehealthCOVID19/>



Get Your Ducks in a Row: Regulation of Nutrition Practice

- Also consider licensure WHERE the client is located. But, much more gray in reality.
- American Nutrition Association (<https://theana.org/advocate>) - states where nutritionists and health coaches can legally support clients
- Council of Holistic Health Educators - legal and lobbying group for nutritionists and health coaches.



Technology Set Up

This is very fluid right now!

- Right now, don't even worry about the HIPPA compliance of your platform.
- But, most options are well aware and HIPPA compliant.
- I recommend being more vs. less privacy compliant.
- May also impact your insurance rates because of risks associated with Cyber Security of PHI.



Technology, Documentation, and Cyber Security

- Lots of great options.
- Spend some time to choose the best option for your needs.
- Every clinic is unique.
- Keep front and center the ease of use for your IDEAL CLIENT
- AND, ease of use for you and your team.
- Most EMR's are clunky at first, find what feels easiest.
- Most practitioners don't love tech.
- Learn to love it!



Technology, Documentation, and Cyber Security

- What do you need?
- What do you already have and can integrate with?
- Can you use fewer systems for the same results? **Cost?**

- Calendar/ scheduling
- Marketing sequences/ automation
- Telehealth/ video chat platforms
- Food journals
- Stress, Sleep, Mindfulness, Movement, etc. Patient Education (can you add your own?)
- Exercise programs
- Consent forms



Technology, Documentation, and Cyber Security

- What do you need?
- Intake forms
- Consent forms
- Programs - Individual or Groups?
- Care Plans
- Workflows
- Integration with Testing
- Integration with Supplement (or other materials) stores
- Customer support and set up
- Can have different team members/ specialties on the same system
- Nice interface for the patient user experience



Technology, Documentation, and Cyber Security

- Healthie
- Practice Better
- Living Matrix
- Zoom for Healthcare
- VSee
- doxy.me
- Charmtracker
- Jane app
- <https://therexportal.com/> (support a woman owned PT business)



Boundaries and Work/Life Balance in The Age of Telehealth

- Create a clear, comfortable workspace.
- Have work hours.
- Block schedule
- Most importantly: Be clear regarding when you are NOT working.
- Get dressed for work.
- How should clients contact you?
- Set up clear expectations re: where and how you and your team will respond to your clients.



Marketing Your Telehealth Practice

- Very clear ideal client strategy
- Talk directly to them (clear messaging)
- In front of other people's audiences
- Create your own audiences: Facebook groups, Instagram, You Tube, Live Speaking, Podcast, Blog
- **CALL TO ACTION**



Call To Action

- People are in fear.
- Not listening to recommendations (isolate, avoid sugar, eat healthfully, sleep, avoid the newsfeed, stress balancing techniques, etc.)
- Hiding and straining all aspects of their health.
- When you don't call to action, they will passively consume your information, ***but not put the essential health promoting behaviors into action!***



Low Cost Support The Right Container

- Pricing is more flexible now (but within healthy boundaries.)
- We need to be strong for each other.
- Will a group program be of better service? Can you offer it at lower cost without adding strain to your health?
- Are there some who need scholarships? Ask them to apply and accommodate as much as you can. Create a bilateral exchange of energy. Don't drag your clients along, keep offering to help.
- You may need some income, or not? Be in flow with your reality.



Build Your Telehealth Practice **With Us**

- Over the next 7 weeks, as originally planned, our team will be building The Endometriosis Global Telehealth Clinic.
- **Who do you serve and what problem do you help solve?**
- **Private client support or group support**
- **Legal, financial resources, insurance, tax, certification & license**
- **Technology set up**
- **Documentation and Cyber Security (are you cyber security insured?)**
- **How Healthy are Your Boundaries / Working-Life Health in the age of Telehealth**
- **Marketing Your Telehealth practice**



Build Your Telehealth Practice **With Us**

- **Who do you serve and what problem do you help solve?**
- **Private client support or group support**
- **Legal, financial resources, insurance, tax, certification & license**
- **Technology set up**
- **Documentation and Cyber Security (are you cyber security insured?)**
- **How Healthy are Your Boundaries / Working-Life Health in the age of Telehealth**
- **Marketing Your Telehealth practice**

<http://bit.ly/TeleHealthCoach>



Questions???

Join us: <http://bit.ly/TeleHealthCoach>

- **Can I offer cash based coaching in addition to insurance based PT?** Yes, these are two separate businesses. Set up as 2 lines of service or 2 completely separate business entities depending on your state.
- **I've wanted to drop insurances for for forever... not sure if this is the best time to start due to this sudden shift in our economy.** Still seems like a GREAT idea to me!
- **Where is the line between health coaching and physical therapy?** GRAY, but think about what you would need to assess, vs. what you could recommend without a personalized assessment in terms of health education. AND... remember that coaching is a very distinct communication skill set compared with PT. The goals are very different!



Questions???

Join us: <http://bit.ly/TeleHealthCoach>

- **Is there a difference with the type of liability insurance I need for coaching (including movement, nutrition, etc) versus physical therapy services.** Yes! This is why it's so ideal to have a true health coach certification.
- **What kind of consent forms/waivers of liability do I need to PT versus coaching and online versus in person?** Consent to specific treatment - PT or coaching, and you also need a telehealth consent.
- **Can I provide Coaching (given that I have a license in PT) across state lines without a PT license in other states? what about globally?** Yes, if you are a certified and insured health coach it lowers the risk.



Questions???

Join us: <http://bit.ly/TeleHealthCoach>

- **I feel like having that PT license is more of a barrier because of all the legalities rules about where I can practice. Is this really a barrier and do I really need to be concerned about offering coaching services in other locations besides where I'm licensed? Stick to where you're licensed unless you are a part of the PT Compact.**
- **Documentation differences between coaching and PT?** That is similar. SOAP notes, or forms that you can create or use templates.
- **Are there guidelines around Video- recording the sessions and being able to send them to clients (HIPPA rules)?** Not that I am aware of (Adds more work for you, but you could send as a part of the follow up note in your HIPPA compliant EMR.)



Questions???

Join us: <http://bit.ly/TeleHealthCoach>

- **I'm assuming I can allow clients to use HSA accounts for coaching?** If it's an allowable expense per their insurance provider. Remind them that they may need to show their receipts if audited by their insurance company.
- **Are HIPPA requirements the same for me when I provide coaching as I'm a PT and a "coach"?** It depends on your payment model, and whether or not you are a "covered entity" per HIPPA.
- **If I signed a BAA with Google (G-Suite) is Google Meet one of the services included in that agreement?** Yes, it seems so, and especially now.



Questions???

Join us: <http://bit.ly/TeleHealthCoach>

- **I have never done telehealth before and I would like to understand the differences between the providers and which one to choose ie zoom vs skype, etc.?** This is entirely dependent on the features that you need in your unique clinic. Do you need a HIPPA complaint platform (eventually), which is more user friendly for your audience, which is more reliable, does it need to integrate with your existing systems, will your clients be able to download software (are they tech savvy?)



Questions???

Join us: <http://bit.ly/TeleHealthCoach>

- **What has been your experience with conducting PT through telehealth?** I generally use it to do initial history, story-listening and clarifying, provide education, overcoming barriers to healing, resources, exercise education and programming, and follow up. However, now that all of us are required to see our clients by telehealth - and it's looking likely this will continue off and on for 18+ months, I plan to do more video education on self-assessment, self-myofascial release, and more "physical therapy" that I would traditionally refer out, or see in the office as my schedule allowed.



Questions???

Join us: <http://bit.ly/TeleHealthCoach>

- **Additionally, the internal examination is a key element of pelvic health PT. Do you have a way to manage these examinations remotely, or do you refer patients to local providers when you deem they need an internal examination?** In the past, and as possible in the future, I will personally refer these patients to local providers. I do believe that manual and in-person assessment has significant value, and my team and I have a unique skillset that most can't get from local providers, so we want to focus on nutrition and health coaching primarily. I strongly believe in a team approach. BUT... as we are required to physically distance for quite some time, we will all learn to adapt. (I've taught tampon insertion by Facetime. I've always said, what if you COULD NOT use your hands?)



Other Questions???

Join us: <http://bit.ly/TeleHealthCoach>