



Starting a School-Based Clinic Using a Telehealth Hub-and-Spoke Model: A Checklist

There are many similarities between starting an in-person school-based clinic and planning for the delivery of school-based healthcare services to a new school location using telehealth. Youth Healthcare Alliance developed [Opening a School-Based Clinic in Colorado, A How-To Manual](#) to provide useful information on planning for a brick-and-mortar school-based clinic. Much of this information, including needs assessment and community and partner engagement tools, can be used in planning for the expansion of school-based care using telehealth models. Below is a checklist of specific considerations to aid in the planning of a hub-and-spoke model of telehealth delivery of care in schools that do not have an existing school-based clinic. **Many of the steps outlined will happen concurrently rather than being a linear, sequential process.**

Grantees of Colorado Department of Public Health and Environment's (CDPHE) School-Based Health Center program are encouraged to review the program-specific [telehealth hub-and-spoke standards](#) for additional guidance.

For this document, the hub-and-spoke model of telehealth defines the hub as a brick-and-mortar clinic where the provider is located and where patients may go to access in-person care, and a spoke site as a location on school grounds where healthcare services are accessed virtually by patients. We recognize and encourage innovative and creative adaptations to this model of care delivery.

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Needs assessment

- Identify how expanding school-based healthcare using a hub-and-spoke model of telehealth service delivery can support/enhance your organization
 - What benefits can this model bring to patients, staff, and the organization?
 - What current challenges and/or goals might this model help with?
- Conduct a needs and asset assessment for possible spoke site locations
 - This will be very similar to an assessment for a new SBHC site, adjusted to reflect a focus on telehealth delivery
 - Provide opportunities to educate parents, youth, school and district staff on how telehealth services could look and offer Q&A opportunities before distributing needs assessment surveys
 - Ensure community input includes input from parents, youth, school and district staff
- Identify how expanding school-based healthcare using a hub-and-spoke model of telehealth service delivery can support/enhance your organization
 - What benefits can this model bring to patients, staff, and the organization?
 - What current challenges and/or goals might this model help with?
- Assess organizational, staff, and patient readiness for telehealth services
 - What are hesitations? What is already in place? What is well received? What education and training are needed? What operational and logistical planning is needed? Are there other models of telehealth that might support your efforts?
 - Consider completing a telehealth readiness assessment such as this [assessment tool by Maryland Health Care Mission](#) or [Health Management Associate's Telehealth Readiness Questionnaire](#)

Identify the school to host SBHC spoke services (continuation of needs assessment)

- Reference Colorado Health Institute (CHI)'s resource, [Identifying Opportunities for School-Based Health Care in Colorado](#) to aid in identification of schools with need
- Ensure planning conversations include district AND school-level staff
- Explore student and family receptivity of and questions regarding telehealth
- Assess school capacity for supporting telehealth delivery
 - Broadband support
 - IT support
 - Space
 - Staff (promotion of services, getting students to/from appointments, distributing paperwork, facilitating visit set-up, role in crisis response)
- Confirm designated, secure, HIPAA compliant space for services
- Consider how scope of services and population served impact school selection

Define scope of services to be provided at the spoke site using information gathered from needs and readiness assessments

- Define patient population to be served
 - Determine if you will serve established and/or new patients, school staff, all students enrolled in the district, siblings of students at the spoke site, families, etc.
- Determine what visit types will (and will not) be offered at spoke site
 - Consider primary care (preventive, follow-up, sick visits, education, reproductive health, vaccinations, etc.), behavioral health (screening, intake, ongoing therapy, psychiatric services), and oral health (screening, assessment) etc.
 - Identify space, staff, technology, supply, and storage needs for these services
- Identify technology and supply needs and acquire as needed
 - Consider space and what is needed to secure equipment and supplies in the telehealth space provided by the school.
 - The type of technology needed will be directly related to the services provided. This can range from a tablet or laptop for a video-only visit to a telehealth cart with peripherals to plug-in for collecting vitals and visual exams.
 - When selecting a telehealth unit, such as a cart, compare vendors and ask for demonstrations.
 - Learn about IT support offered through the vendor for initial and on-going help
 - Consider how the technology interfaces with existing clinic workflows such as EHRs, screenings on tablets, and telehealth processes to include a parent/guardian in one location and patient in another.
 - Several resource guides linked at the end of this document offer considerations for selecting a telehealth vendor.
 - Ensure communication with school on all space and technology needs (internet connection, outlets, furniture, privacy, storage) as part of the planning process.

Design processes and procedures specific to hub-and-spoke delivery of school-based care

- Create processes for distributing and obtaining paperwork (enrollment, consents, ROIs) to students and families. Consider multiple processes that include paper and online options that are available from multiple sources at the hub and spoke sites.
- Think through the questions below to establish the referral processes for individuals to the spoke site.

- How will the process work for self-referral, school staff referrals (admin, support, health services, instructional, coaches, etc.), family referral, and referral from other clinic settings such as hub?
 - Who do they contact, how, when? What processes need to be in place for minor consent considerations and self-referral?
 - How will you follow up when a referral is made? What is an acceptable timeframe for doing so? Will this vary by service type?
- Create a scheduling process for spoke-site services using the guiding questions below.
 - Does scheduling happen through the hub or spoke location (or both)?
 - What staff from the spoke site operator and/or the school are involved in scheduling and how? What considerations for minor consent services are in place?
 - How is this information shared with students, families, and school staff?
- Outline process for students to leave and return to class when attending telehealth appointments (consider HIPAA/FERPA needs and minor consent needs)
- Include processes for parent engagement in telehealth appointments (phone in, three-way virtual visit capabilities, pre-post call with provider)
- Articulate the processes for patients seen at the spoke site to access services in person at the hub site when desired/needed with a focus on timely access and continuity of care
- Establish emergency/crisis response protocols for spoke site visits
 - Ensure responses cover all serve types provided
 - Coordinate and share with spoke school and district staff
- Create and implement spoke site utilization and promotion plan (school and district level, SBHC hub/healthcare organization promotion, community)
- Establish a formal agreement for hub-and-spoke telehealth delivery of healthcare services with the school district (update or create new MOA as appropriate)

Create a staffing structure and schedule for spoke site services

- Identify needed staff types who will deliver services from the hub location
 - Look for ways to complement provider/staff schedules (fill gaps)
 - Create process to ensure spoke-site users can access in-person care at hub centered on continuity of care
- Define role(s) needed to facilitate visits at the spoke site location
 - Having in-person staff employed by the operating healthcare organization at the spoke site is highly recommended
 - Consider what this role will look like and staff accordingly
 - Will it perform billable services? Provide vaccines or injectable medication? Dispense medication? Provide patient education? Use telehealth equipment? Take vitals?
 - Identify how this staff could spend time when telehealth visits are not scheduled (promotion, health education, scheduling, enrollment)
 - If school staff are to directly support telehealth visits, how will HIPAA/FERPA work? Will they be compensated for time spent on telehealth visits, if so, by

whom? How does this fit into their school workload? Ensure any school staff assigned to this work is involved in the planning and training process.

- If school staff support telehealth visits indirectly, such as helping students get to and from class, set-up on a telehealth platform, etc., how will this work be defined, HIPAA/FERPA compliant, and compensated?
- Identify hours of operation for spoke site
 - Consider if services will be by appointment only, walk-ins are permitted, initiated by school-nurse triage, etc.
 - Include back-up/on call coverage for providers responding to the spoke site if scheduling occurs on as needed basis and define what the accepted response time to requested services will be.
 - If providing set hours for telehealth services, consider how hours will be determined, communicated, and scheduled. Will there be non-clinical staff available at the spoke site (in-person or virtually) outside of clinical appointment hours?

Set-up the spoke site

- Install and secure telehealth equipment
 - Make sure the designated spoke site space has necessary power and internet connections
- Hold trainings for all staff (operating organization and school) who need to be trained on telehealth equipment *and* workflows
- Include quick-reference sheets for telehealth equipment/platforms that also IT support contact information for school, operating organization, and equipment vendor
- Furnish room with seating/exam equipment and storage needs and other clinic equipment such as refrigerators and lab equipment, hazardous materials disposal such as sharps bins, etc.
 - If vaccines will be kept on site, ensure proper storage protocols
 - Consider security needs for medications and technology that needs to be kept locked. Who will have access? How? When?
- Pay attention to lighting options and needs as well as when setting up spaces to support telehealth video quality.
- Add window coverings and consider a white noise machine outside of the door to the space as needed to create confidential spaces.
- Stock supplies (paperwork, worksheets, pens/pencils, fidgets, handouts, therapy materials, medical supplies, cleaning supplies)
- Set-up the space using inclusive, accessible, [trauma-informed designs](#) and include youth voice in the room layout and design
- Display appropriate signage to indicate the presence of the spoke site

Promote new telehealth hub-and-spoke school-based clinic

- Ask the spoke site school and district to include information about how to access the clinic in their student and parent communications
- Hold an open house and offer demonstrations using telehealth equipment

- Hold these in conjunction with school-events such as back-to-school events and parent-teacher conferences
- Organize a vaccine clinic, back to school-well visit offerings, or oral health screening and cleaning and provide in-person services at the spoke site location for a day.
- Include information about the spoke site and its connection to the hub in your organization's newsletters and other PR efforts
- Talk to established patients and their families about the spoke-site and how it can be accessed
- Be a presence at the spoke-site's host school. Engage with teachers, support staff, school administrators, school health professionals, coaches, and the athletic director
 - Offer to present on health topics in classrooms
 - Support CNA classes with getting immunizations
 - Eat lunch in the teachers' lounge
 - Ask how you can help them support students and families

Additional resources for getting started

- [Opening a School-Based Clinic in Colorado, A How-To Manual](#) (Youth Healthcare Alliance)
- [American Medical Association Telehealth Implementation Playbook](#)
- [American Medical Association Selecting a Vendor Guide](#)
- [School-Based Health Alliance \(SBHA\) School-Based Telehealth Playbook](#)
- [National Consortium of Telehealth Resource Centers](#)
- [Telehealth Technology Needs and Readiness Assessment](#)
- National Organization of State Offices of Rural Health: [Telehealth Big Picture Fact Sheet](#)
- [Human and Health Services \(HHS\) Telehealth Resources for Health Care Providers](#)
- [Maryland Health Care Commission Telehealth Readiness Assessment Tool](#)
- [The CTRC Program Developer Kit: A Roadmap For Successful Telehealth Program Development](#)
- [National Telehealth Technology Assessment Resource Center \(TTAC\)](#)