A telehealth implementation is only successful when patients are aware of the option, are empowered to use it, and appropriately interact with the platform.

Below is a five-step outline of how to educate patients about telehealth and keep them engaged.

1. **Announce Telehealth Launch and Availability**
   - **Timing:** Go-live date; Quarterly, Before/after visits; New patient; Plan to message the same patient about three times about telehealth before engagement
   - **Messaging:** Showcase benefits including increased convenience; increased access to specialized care not locally available; decreased time and money spent getting to care; use cases; evidence; appropriate uses; where to sign up
   - **Channels:** In-person; Office collateral; Email newsletter; Patient portal; Website; Social media

2. **Educate Patient about Using Telehealth**
   - **Timing:** Once visit is scheduled
   - **Messaging:** How to download the app or platform; learn more about the telehealth process; what to expect; payment/billing practices; FAQs
   - **Channels:** Email; Phone

3. **Telehealth Visit Reminder**
   - **Timing:** Day of visit; 15 minutes before visit
   - **Messaging:** Walk through check-in process; provide link to meeting
   - **Channels:** Email; Text

4. **Follow-up Care**
   - **Timing:** After visit
   - **Messaging:** Collect patient satisfaction feedback; schedule any necessary follow-up care
   - **Channels:** In telehealth platform; Email; Text

5. **Scaling Announcements**
   - **Timing:** Quarterly
   - **Messaging:** New use cases and/or capabilities of telehealth solution
   - **Channels:** Website; Social media; Patient portal; Email; Text