



VIRTUAL NURSING PLAYBOOK

A guide to building a successful virtual nursing program

Introduction



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How to begin your

INTRODUCTION

The path to virtual nursing

What is this playbook?

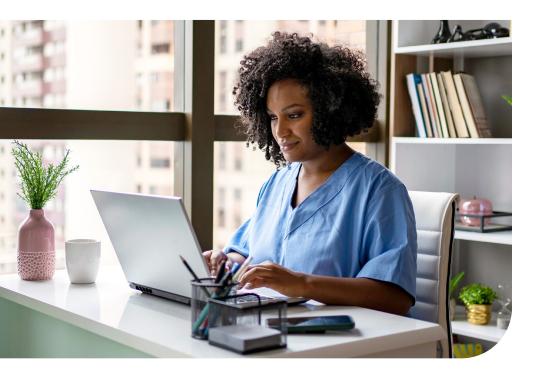
This is a hands-on, interactive planning guide that outlines the key considerations for hospitals and health systems thinking about implementing a virtual nursing solution. **Take the first steps towards transforming patient care delivery.**

Why should my organization use this playbook?

Launching a virtual nursing program can be a complex process. Learning from others can pave the way for a more effective, efficient and impactful implementation. This playbook, created by Teladoc Health innovation experts in conjunction with health system nursing leaders from around the U.S., is a compilation of lessons, insights and best practices on building a successful virtual nursing program.

How should my organization use this playbook?

Work through the playbook independently or with your transformation team. Each stage contains worksheets or process development exercises to help you in your journey to implementation — some may benefit from input from other stakeholders. Print out key worksheets to guide your planning meetings or share the entire playbook with key stakeholders as needed.





BENEFITS OF VIRTUAL NURSING

Virtual nursing programs deliver exceptional value

Virtual nursing is becoming the standard as hospitals and health systems across the U.S. work to find solutions to today's most pressing nursing challenges. When implemented effectively, a virtual nursing program can serve as a flexible, innovative solution to a broad range of challenges — while also delivering powerful benefits across your organization.

Virtual nursing is often the strategic first step hospitals and health systems take on the path to establishing an enterprise-level virtual care solution that addresses all use cases.

WORKFORCE CHALLENGES

400K Estimated gap of RN FTEs in hospitals by 2027¹

Teladoc

95 Days

Average time for a hospital to hire experienced RNs, regardless of specialty²

50%

of nurses stated they intended to or might leave their position in the next six months³



We're going to see a nursing shortage in our pipelines for many years to come, so we have to continue to think about how we can do our work differently. The virtual nursing program helps us do that."

- Theresa Trivette, DNP, RN, CENP, Chief Nursing Executive, Valley Health



KEY TAKEAWAYS



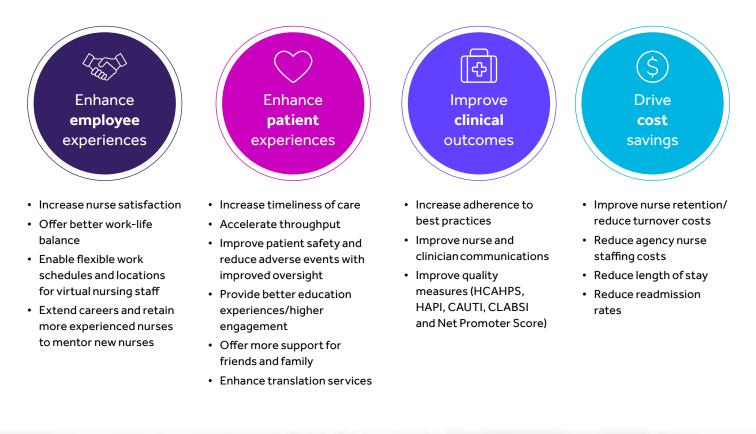
Virtual nursing is a flexible, innovative solution that can help solve for current and projected workforce challenges



improve retention and recruitment by offering nurses seeking to leave the bedside an alternative career path within your organization

Virtual nursing can

Hospital-Reported Benefits⁴







WORKSHEET: ASSESS YOUR ORGANIZATIONAL NEEDS

Customize your virtual nursing program

This list of use cases was developed in our roundtable discussion with senior nursing leaders. Identify the use cases your organization would benefit from the most.

- Which use cases matter most to you? To your nursing staff? To your executive leadership team?
- Which use cases would you prioritize to implement first?



Identify which of these use cases can be leveraged to drive quick wins during implementation. Showing results with a proof of concept with quick wins can help your program build momentum and gain buy-in.

Consider all approvals, workflows and process needs, technical support and training requirements.

USE CASES PRIORITY?	
Admissions	Y N
Discharges	Y N
Patient education	Y N
Dual medication sign off	Y N
Mentoring	Y N
Consults	Y N
Rounding	Y N
Report/bedside shift report	Y N
Patient communication	Y N
Care coordination	Y N
Social work	Y N
Translation	Y N

USE CASES	PRIORITY?	
Dietary/Dietitian rounds	Y N	
Patient registration	Y N	
Pastoral care	Y N	
Chart audits	Y N	
Preop checklist	Y N	
Pharmacy	Y N	
Fall prevention	Y N	
Recorder for codes/ rapid response	Y N	
Safety rounds/plans	Y N	
Triage	Y N	
Palliative care/hospice	Y N	
LPN oversight	Y N	

Use Cases



What are your organization's most pressing needs?

Each health system and hospital faces a unique set of challenges that virtual nursing can help address. **It's important to think about your organization's needs from multiple perspectives and roles to help you identify top priorities** — as well as other areas where virtual nursing can help elevate your organization.

Nursing leaders across the U.S. ranked the following as their greatest challenges. Think about the multiple perspectives and roles involved in mitigating these challenges and what is a priority to you. Fill out the chart below to gain a clear view of your organization's most pressing needs, adding in additional challenges as needed.

CHALLENGES	TOP PRIORITIES	SECONDARY PRIORITIES	MOST PRESSING NEED*
1 Staffburnout			
2 Staff workload burden			
3 Staffing agency costs			
4 Skill gaps			
5 Safety concerns			
6 Evolving patient expectations			
7 Lack of long-term return from point solutions			
8 Shrinking budget, skyrocketing costs			
9 Staff turnover			
10 Physical limitations			

*Review your top priorities and document which issue you think should be prioritized first.



WORKSHEET: DEFINING YOUR GOALS

How to create and communicate your vision

To gain buy-in from fellow leaders across your organization, **you need to be able to share your vision for virtual nursing quickly and clearly.**

To create your vision, fill out the chart below, adding in additional roles as needed. Think about what each department considers to be the most relevant to their team and their strategic goals.



What is most important to your stakeholders? How do priorities differ/align between departments and their leaders? **Understanding** each stakeholders' priorities can help you articulate your vision more clearly and look for organizational synergies for broader value alignment.

DEPARTMENT	LEADER	THEIR CHALLENGES/ PAIN POINTS	THEIR OBJECTIVES/ WHAT MATTERS	NECESSITIES FOR ALIGNMENT	OTHER CONSIDERATIONS
Operations					
Finance and Accounting					
Technology/ Infrastructure					
Telehealth					
Patient Experience					
Compliance					
Quality					

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Every organization is different. Each organization has their own unique needs of what they're trying to accomplish. Know your audience well, know your stakeholders well."

- Theresa Trivette, Chief Nursing Executive, Valley Health



Conclusion

SOLUTION SELECTION GUIDELINES

The value of enterprise virtual nursing solutions

Healthcare is fragmented and overly complex, impacting patients and care teams. **Your organization is being challenged to do more with less, and finding the right virtual care solution is no easy task.** To date, across the healthcare industry, efforts to address these challenges have largely been reactive, resulting in heavy investment in short-term solutions. Solving for individual challenges with different point solutions has resulted in disparate technologies and fragmented workflows.

An enterprise virtual nursing solution can help you provide connected, whole-person care that meets your organization, your staff and your patients where they are today.

Implementing a virtual nursing program through an experienced virtual care partner can help you ensure that care experiences are secure, standardized and scalable.

PREVENTING BURNOUT

Caring for your caregivers

Teladoc Health's virtual nursing solution includes digital mental health programs at no extra cost to partners. Addressing emotional burden, burnout and stress through a whole-person care approach frees up your nurses so they can focus on delivering quality patient care, while helping improve staff satisfaction that may increase care delivery efficiency.⁵

Providing whole-person care for your nursing staff

Nursing is both physically and psychologically demanding. Nurses face countless sources of stress in a given shift, all of which can impact their mental health. Providing whole-person care and support for your organization can help empower your nurses with the tools they need to support their mental health, manage workforce challenges more effectively and reduce stress-induced burnout.



The right strategic partner can help you



Virtualize patient care delivery workflows



Leverage data for actionable insights



Retain and grow your nursing workforce



Maximize your existing investments



Evaluation questions

Work through the following lists as you evaluate potential virtual nursing partners.

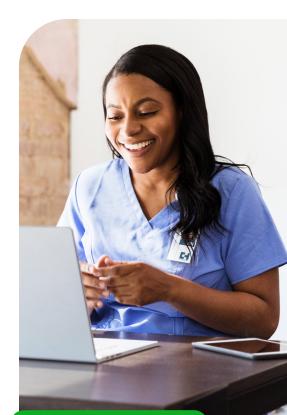
Strategic questions

- What customization capabilities are available to help meet my organization's unique needs?
- How does this potential partner contribute to the future of healthcare?
- How well does this partner's solution fit in with our existing workflows? How much would we have to change?

Tactical considerations

- Ability of virtual nurse to zoom in closely to observe patient and equipment/ medication information
- Ability of virtual nurse to see most of the patient room
- Ability of solution to be used without reliance on bedside team
- Multiparty (friends, family, interpretive services) capabilities
- Provider-to-provider consult capabilities

- How is this partner's solution expandable beyond nursing? Additional technology requirements?
- What data will this partner collect from our organization? How is that data protected?
- What level of support is available during and after implementation?
- Configuration with EMR
- 24/7 troubleshooting and proactive monitoring technical support
- Implementation support
- Support across the care continuum
- Experience and current client base
- Security and privacy considerations
- Ease of use
- Ability to scale



KEY TAKEAWAYS

Your virtual nursing solution should provide:



A connected care experience with the customizability and support you need to ensure easy adoption across a range of workflows and care teams



Ease-of-use for both nursing staff and patients



The ability to expand virtual care beyond nursing — to support all caregivers and providers



WORKSHEET: BUILDING YOUR TRANSFORMATION TEAM

Finding your champions

Implementing a virtual nursing solution will require support from all levels of your organization. You will need to find champions in bedside nursing teams, IT, HR, Finance, Facilities, Marketing and more.

Fill out the stakeholder chart below with these questions in mind:

- Who are your key stakeholders? (Add additional teams as needed)
- Whose day-to-day work will be impacted by implementation and ongoing operation of the virtual nursing program?
- Which leaders (formal and informal) will you need at each step of implementation?

ТЕАМ	RESPONSIBLE IN MY ORGANIZATION
Nurses (bedside and virtual)	
Pharmacy	
Nurse informatics	
IT	
Biomed	
Providers	
Care partner	
Case management	
Transfer center	
Health information management	
Marketing/communications	
Admissions/registration	
Quality	
Compliance	
House supervisor/ bed planner	
Risk management	

ТЕАМ	RESPONSIBLE IN MY ORGANIZATION
Infection prevention	
Home health	
Population health	
Durable medical equipment providers	
External vendors	
Purchasing	
Value analytics	
Patients	
Family members	
Behavioral health	
Hospice	
Rehab	
Patient experience	



Engage with the people on this list early on. **Involving key perspectives up front** helps build trust and helps you identify potential obstacles, challenges, and pain points. WORKSHEET: BUILDING YOUR TRANSFORMATION TEAM

Build your implementation leadership team

Now that you've identified your key stakeholders, you can **select the leaders (formal and informal) that you would like to nominate to your implementation leadership team.** (Add additional teams as needed.)

LEADERSHIP TEAM	NAME
Executive sponsor	
Chief implementation lead	
Workflow development	
Bedside nurse lead	
Virtual nurse lead	
Infrastructure	
Change management	
Technology	
Training lead	
Technology partner	
Sustainment lead	



CHECKLIST: PLANNING FOR SUCCESS

Leading indicators of success

Top considerations from established virtual nursing leaders:

Change management across your entire Explaining the who, the why and the how: organization is vital - invest in it! Be sure to introduce your virtual nurse and explain their role to all members of the care team who Full executive leadership support and buy-in. would interact with a patient. Start small: Initially, most organizations started Understand that change is hard: The shift from with one nursing unit. Many are now starting with primary nursing to a collaborative, integrated team two or more. This will allow you to iterate easily approach is complicated and will likely be met with to identify what works and what needs to change. hesitation by your staff. Change can be hard, but Capture feedback, fine tune your program, then with a change in management strategy, you can scale efficiently. achieve the value of this transformative initiative. Communicate early and often with other Delineate tasks: Be specific about what the virtual teams to help ensure understanding of broader nurse will be responsible for. This will help decrease goals, allow for dialogue and drive excitement, confusion for staff and patients. engagement and extended support across Early IT involvement is crucial: They will need your organization. to weigh in on technology, network infrastructure, Involve staff in all parts of the process: Ask, security and support needs. "What can we take off your plate to make your job easier or more enjoyable?" Accommodate the patient population: Be

Accommodate the patient population: Be prepared to modify your program to meet the needs of different patients in different units.

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One nurse leader shared the following insight after their implementation:

The top 3 use cases we started with were admissions, discharges and education. It's really easy – once people get the notion of what the virtual nurse can do, you keep adding on all these other tasks."

- Senior nursing leader and Teladoc Health virtual nursing roundtable participant



CHANGE MANAGEMENT

Addressing challenges and overcoming doubts

A robust change management plan is essential to building a strong, high-functioning nursing team. Change can be scary, and change on a large scale — with a new virtual component to factor in — can lead to resistance. To achieve success, you must deliberately build a culture focused on positive change.

Here are some of the challenges and fears nursing leaders shared with us that they heard from bedside staff during their implementations:

"This will never work."

"They're just doing this to save money."

"I have a concern, but no one listens — it won't do any good to say anything."

"It's just a pilot; it's just the next thing; it won't last."

"I didn't know; it's not my problem; I just work here."



KEY TAKEAWAYS

If these concerns go unaddressed, they can create real challenges that can derail the success of an implementation.



Here are some of the most innovative ways these nursing leaders combated the concerns they heard from their bedside teams:

"We created a QR code that allowed care teams to provide real-time feedback at the end of their shift. We made adjustments as needed to align our model to that feedback. Going into it, we thought we were going in one direction. **Now we're six months into our pilot, and we have shifted our model to focus strictly on patient experience and quality — the things that the nurses placed the most value on in their feedback.** They really want the virtual nursing team to be part of delivering that positive patient experience."

"What I experienced in a small community hospital was a little bit of pushback — but more than anything I saw fear, because patients thought we were getting rid of nurses. We developed a flyer that we hand out to every patient that says, **'The virtual nurses are here to enhance your care, and the virtual nurse is a part of your care.'"**

"I attended staff meetings to show that I wanted to be the cheerleader because I believe in the program. We created a 'myth busters' deck to help us address the most prevalent concerns. We even went so far as to change the narrative and strategic positioning to call it a 'co-caring model' — because it is about so much more than adding a virtual nurse. Additionally, we also worked with frontline staff and unit managers before we started talking about implementing and changing the bedside ratios. This way, the bedside nurse had the ability to first add a nursing assistant, so they can adjust to the ratios changing and learn to work together as a team. Then, we layered the virtual staff on top of that."

"We've been building our program using insights from within the bedside team itself. We asked our teams, 'What would be most beneficial to you?' **Our biggest buy-in has been with admissions and discharge – this is where** we've had the most success and been able to notch those quick early wins that enable us to drive positive cultural change and program growth."

One nurse leader developed a direct-toconsumer (DTC) campaign centered around the message "Elevating your care" to introduce the virtual care model to potential patients well before their first in-room visit with a virtual nurse.



CHANGE MANAGEMENT

Best practices for working with internal teams

The best practices shared here offer insight into the processes you'll need to assess and the wide range of solutions you can adopt to drive successful organization-wide change.

IT

- Define processes that help deliver the right information to your nursing teams at the right time
- Perform an ecosystem assessment (room inventory, hardware and connectivity testing)
- Find ways to flatten the technology infrastructure (replace point systems with enterprise solutions) to deliver a better care team experience
- Assess current telehealth support technologies and satisfaction levels with the program in its current state
- Understand IT's requirements from a technical perspective including certifications, integration capabilities, reliability, support and compliance

Finance

- Help Finance teams understand the full scope of the problem that virtual nursing is designed to help solve. Discuss the potential to expand virtual care to other disciplines beyond nursing.
- Discuss the Finance team's business needs and how virtualizing key parts of your workflow can solve for some of their greatest pain points, such as cost of operations, leveraging existing investments, competition and profitability
- Determine how a virtual nursing solution will bring clear, measurable and timely financial benefits – and define what tangible measurements success will be based upon

- Determine the change management support capacity of IT teams
- Evaluate implementation timelines
- Seek an understanding of the burden on IT resources, as well as the root causes
- Evaluate current dashboards and systems that measure digital disparities, identify potential areas of improvement for these systems
- Identify communication and record-keeping gaps that negatively influence nurses and increase costs
- Seek to understand the key levers that impact satisfaction and financial outcomes
- Provide specific examples for evaluating quality improvements and cost-savings that virtual nursing can impact
- Discover the total cost of care to use as a baseline assessment for measuring the effectiveness and success of your virtual nursing solution
- Seek to establish the guardrails around indicators of the need to scale virtual nursing models up or down as needs evolve – and define what scaling up and down means to your organization's unique model and workflow



Stage 2: Preparation

HR

- Collaborate to ensure full understanding of the nuances of incorporating remote employees into a space that has historically been in-person only
- Outline a strategy for recruitment:
 - What changes when "new" remote positions become available?
 Will they be open to internal/external applicants only? Both?
 - What requirements will the virtual nurses have to meet? Will there be tenure requirements?
 - Will there be hybrid opportunities for nurses that want to work both virtually and at the bedside?
- Define innovative metrics that allow HR to measure insights and success such as employee satisfaction, retention and attraction
- Seek to understand HR's policies and considerations for virtual nurse work locations

OPERATIONS ADVISORY SERVICE

Teladoc Health offers an Operations Advisory Service for clients. This allows hospitals and health systems to make the most out of their investment and simplify the management process by having a named contact for all technical and operational needs; expansion planning to streamline growth strategy, processes and business needs; and a clear process for tracking, resolving and escalating any client issues.



Teladoc Health's solution includes analytics



Comprehensive, customizable **dashboards** both at the program and detail level



Three channels

(email, automated delivery or analytics portal) to receive analytics on your care delivery, including trend and data identification



MEASUREMENTS FOR SUCCESS

Key metrics to track virtual nursing impact

Identifying and tracking measurable metrics of a virtual program are crucial to reflect program performance and success. Use this example list below and on the following page to begin tracking these metrics (and any additional metrics unique to your organization) now to establish baselines before you implement your virtual nursing solution. Use the chart to track baselines and set targets for improvement. You can then compare against actual results at the end of the pilot phase.

	METRIC	BASELINE	TARGET	ACTUAL*
	Length of stay			
	Readmissions			
	Admissions			
	Agency nurse staffing costs			
CIAL	Cost of hiring and training			
FINANCIAL	Productivity			
	Total cost of care			
	Time from order to actual discharge			

*Pilot phase



Conclusion

MEASUREMENTS FOR SUCCESS

(Key metrics to track virtual nursing impact continued)

METRIC	BASELINE	TARGET	ACTUAL*
Falls			
Environmental impact (noise pollution, call lights, alarm fatigue)			
Hospital-acquired pressure injury			
Improved time to procedures (MRI/surgery, etc.)			
Medical errors			
Patient satisfaction			
Throughput			
Net Promoter Score			
Mortality rate			
Track completion of follow-up visits			
Medication second checks			
Medication reconciliation			
Camera time/time given back to bedside			
Completion of rounding			
Hours per patient day			
Number of patients per nurse			
Nursing skill mix			
Nursing retention			
Nursing satisfaction			
Nursing turnover			
Nursing vacancy			
Physician satisfaction			
Rounding report			
	FallsEnvironmental impact (noise pollution, call lights, alarm fatigue)Hospital-acquired pressure injuryImproved time to procedures (MRI/surgery, etc.)Medical errorsPatient satisfactionThroughputNet Promoter ScoreMortality rateTrack completion of follow-up visitsMedication second checksMedication reconciliationCamera time/time given back to bedsideCompletion of roundingHours per patient dayNumber of patients per nurseNursing skill mixNursing satisfactionNursing turnoverNursing vacancyPhysician satisfaction	FailsEnvironmental impact (noise pollution, call lights, alarm fatigue)Hospital-acquired pressure injuryImproved time to procedures (MRI/surgery, etc.)Medical errorsPatient satisfactionThroughputNet Promoter ScoreMortality rateTrack completion of follow-up visitsMedication second checksMedication reconciliationCamera time/time given back to bedsideCompletion of roundingHours per patient dayNursing skill mixNursing stisfactionNursing stisfactionNursing turnoverNursing vacancyPhysician satisfaction	FailsImage (noise pollution, callights, alarm fatigue)Image (noise pollution, callights, alarm fatigue)Hospital-acquired pressure injuryImproved time to procedures (millights, alarm fatigue)Improved time to procedures (millights, alarm fatigue)Medical errorsImproved time to procedures (millights, alarm fatigue)Improved time to procedures (millights, alarm fatigue)Medical errorsImproved time to procedures (millights, alarm fatigue)Improved time to procedures (millights, alarm fatigue)Medical errorsImproved time to procedures (millights, alarm fatigue)Improved time to procedures (millights, alarm fatigue)Medication second checksImproved time to procedures (millights)Improved time to procedures (millights)Medication reconciliationImproved time to procedures (millights)Improved time to procedures (millights)Medication reconciliationImproved time to procedures (millights)Improved time to procedures (millights)Medication reconciliationImproved time to procedures (millights)Improved (millights)Musing protention of roundingImproved (millights)Improved (millights)Musing satisfactionImproved (millights)Improved (millights)Nursing satisfactionImproved (millights)Improved (millights)Nursing vacancyImproved (millights)Improved (millights)Physician satisfactionImproved (millights)Improved (millights)

*Pilot phase



SAMPLE WORKFLOWS

What components make up a customized workflow?

Questions to ask as you explore developing customized workflows:

- What components do I need to have ready for the implementation team to customize my workflow?
- What roles touch this workflow regularly?
- What roles may touch this workflow occasionally? (Nutrition, Palliative Care, etc.)

Infrastructure questions to ask as you develop workflows:

- How would a virtual nursing/inpatient solution change the room ecosystem?
 - Considerations of "always there" (device, TV, remote, speaker), "entertainment" (cable, streaming) and "other systems" (PES, educational videos and flyers, etc.)
 - Who do I work with to approve and modify rooms as needed?

Review the sample customized admission workflow on the next page. Then fill in your workflow on the blank workflow chart on the following page.



KEY TAKEAWAYS

Building a shared understanding of scope to get executive buy-in early on can help your organization prepare for, identify and remove barriers to change much more quickly.



Look for potential barriers (lack of information, permission, bandwidth, feedback, etc.) as you build your workflows

Q

Identify leadership support needed to eliminate barriers



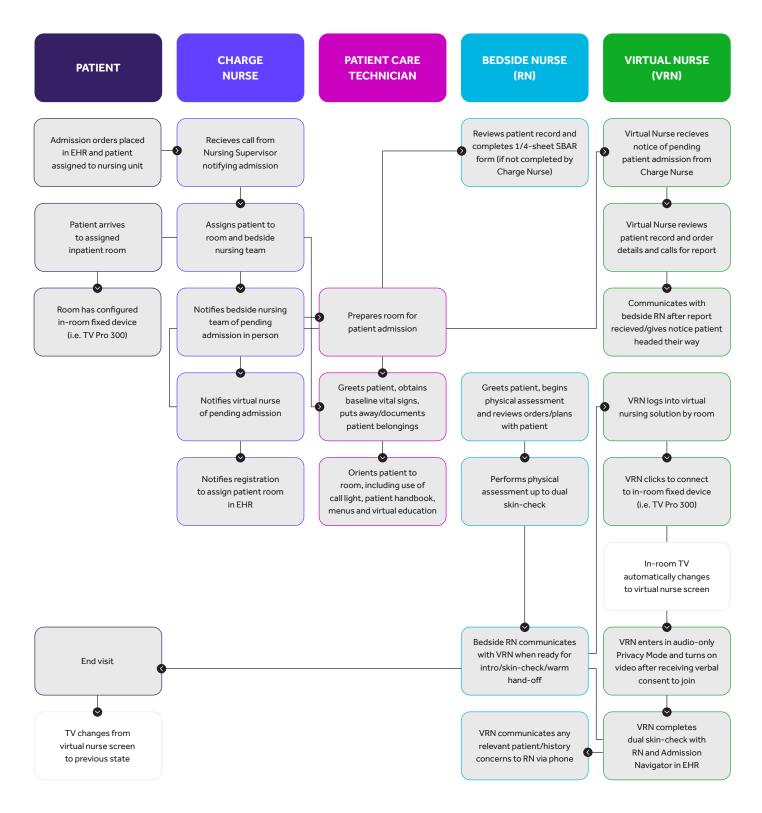
Teladoc Health's Implementation team provides expert consultancy to our partners, bringing best practices to help accelerate your transformation. **Fleshing out use cases and workflows early on** can help executive teams grasp the necessary scope of change required for implementation.

Not every task expected of a virtual nurse needs to have its own workflow. For example, purposeful rounding requires its own workflow, but pain assessment (a task within rounding) does not require its own workflow.



Sample: Customized admissions workflow

This sample workflow defines the actions needed to complete a patient admission. The chart outlines the roles for each individual, the order in which each action should be completed and which actions trigger handoffs to another team member.





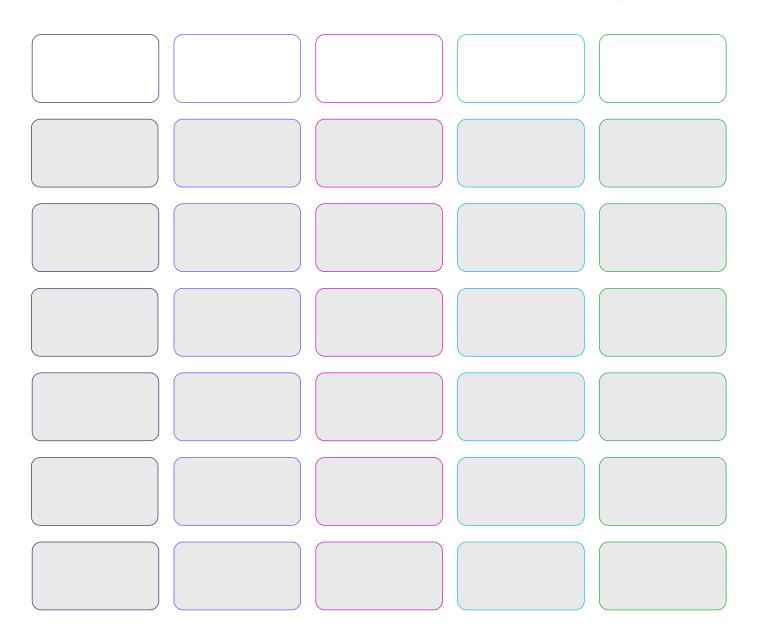
Workflow worksheet

Share this worksheet with implementation leaders as needed to develop new workflows or collect insights and feedback that can be used to adjust those that have already gone live in your pilot phase.



Don't know where to start? Remember, it all starts with the patient.

Look at your bedside workflows from the perspective of "How can we improve the patient experience?" and you'll quickly start to see where virtual care can fill in the gaps.





REITERATE Adapt as needed to the unique needs of different teams and patient populations

ANCHORING CHANGE TO YOUR CULTURE

Building on your virtual nursing foundation

When you reach this point in your implementation journey, be prepared to follow these steps to anchor your process to your organization's culture:

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Transformation is a process, not an event."

- John P. Kotter, Leading Change⁶

REFINE

Continue to solicit and incorporate feedback to improve your foundational processes

REPEAT AT SCALE

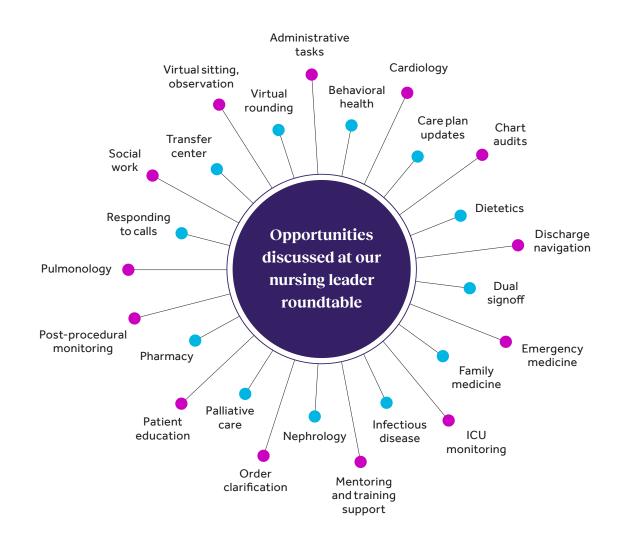
Grow your virtual nursing program into an enterprise-wide transformational change for your organization



VIRTUALIZING WORKFLOWS BEYOND NURSING

Discover additional use cases for virtual inpatient care

Adding a virtual layer to your inpatient care delivery offers an extended range of versatility. Many additional use cases will be easy to identify, but working with a trusted strategic virtual care partner can help you maximize the benefits of your virtual program. A proven virtual partner can leverage vast operational experience to help you discover and develop previously unimagined use cases across your organization.



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We're starting with a nursing discipline, but there's other disciplines that are quickly right behind wanting to do this work as well and focusing in on what problem we are solving in terms of our purpose."

- Executive nursing leader and Teladoc Health virtual nursing roundtable participant











Ready to learn more?

A virtual nursing program can help you tackle the nursing shortage, improve nurse and patient experiences, drive better clinical outcomes and grow revenue. Contact Teladoc Health to schedule a demo and learn how the transformational power of virtualization at scale can help your organization achieve its unique clinical and operational goals.

ENGAGE@TELADOCHEALTH.COM

 National Council of State Boards of Nursing and the National Forum of State Nursing Workforce Centers 2022 National Nursing Workforce Survey 2. Nursing Solutions Inc., "2023 NSI National Health Care Retention & RN Staffing Report." March 2023. 3. American Nurses Foundation, "Mental Health and Wellness Survey 3."
 Client reported data. 5. myStrength Book of Business. 6. Kotter's eight-step process for managing change (shared in his book, Leading Change) informed many of the steps in this playbook.

* The testimonials and opinions presented are applicable to the client. Each client's exact results and experience will be unique and individual. The testimonials are voluntarily provided and are not paid.

About Teladoc Health: Teladoc Health is transforming the healthcare experience and empowering people everywhere to live healthier lives. Recognized as the world leader in whole-person virtual care, Teladoc Health leverages more than a decade of expertise and data-driven insights to meet the growing virtual care needs of consumers and healthcare professionals.

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