



TELEMEDICINE CONSULTATION CHECKLIST*

PREPARING FOR THE VIRTUAL VISIT

Step	Comments
Confirm process for working with your supervisor <i>(consider contacting your supervisor in advance of the clinic)</i>	Confirm supervisor expectations <ul style="list-style-type: none"> Will your supervisor directly or indirectly observe the visit? How will you contact your supervisor for key issues during the visit? Confirm components of the virtual visit (e.g., history, physical exam, diagnosis, management plan, follow up) and which aspects require check in with your supervisor How will case review your supervisor work? How will counseling and recommendations be communicated to your patient afterwards? Do you have the resources you need (for example, do you need home EPR access?)
Review chart	<ul style="list-style-type: none"> Ensure suitability for phone/video visit Consider whether you will need an interpreter or family member present
Familiarize yourself with video conference technology	<ul style="list-style-type: none"> Clarify the choice of application which will depend on your hospital policy and must be PIPEDA/ HIPAA compliant. Some application examples: OTN, Doxy.me, and Zoom for Healthcare. Familiarize yourself with the software features.
Contingency planning	<ul style="list-style-type: none"> Be prepared for technical difficulties. <i>If the video application fails, you may have to resort to using the phone.</i> Make sure you have a phone number.
Set up your space	<ul style="list-style-type: none"> Ensure adequate lighting and professional background Test microphone/webcam Angle webcam so that you will be looking at patient directly Minimize interruptions; consider putting a sign on the door Ensure privacy
Pre-intake forms and/or orientation (if applicable)	<ul style="list-style-type: none"> If applicable in your clinic, have patients complete pre-intake forms and/or watch orientation video for software to be used, such as for OTN Patients may be directed to other resources such as FAQ by the CPSO

DURING VISIT

Step	Comments
Introduction	<ul style="list-style-type: none"> Introduce yourself and anyone else joining, state your role, and who your supervisor is Confirm patient number in case connection fails Confirm if any family members or others are present to assist with the encounter
Patient ID	<ul style="list-style-type: none"> Confirm the patient ID in at least two ways. In a video visit they can show you a piece of ID (ideally health card), and in a telephone visit ask for date of birth and address
Location and privacy	<ul style="list-style-type: none"> Make sure both parties are in a private and quiet place and in Ontario Ensure your background and camera field of view does not show any confidential information or breach privacy for you or your patient Communicate to patient that you are calling from a private space without others listening and that they have the right to end the call at anytime

Communication	<ul style="list-style-type: none"> • Speak clearly, but not too loudly • Ensure patient has heard you, check for comprehension during interview and at end • When listening, mute your microphone • Try to maintain eye contact as much as possible; when looking down, explain what you are doing (“I am looking down to review the notes in front of me and make notes”) • Remember to ask about social history which may help to build rapport with your patients
Clinical stability	<ul style="list-style-type: none"> • Attend to signs that patient is unwell and needs an in-person assessment • If immediate safety concerns arise, do not hang up, immediately involve your supervisor and consider calling 911
Documenting physical exam findings	<p>There are some components that can be reasonably documented in virtual assessments.</p> <p>Examples:</p> <ul style="list-style-type: none"> • Patient reports height and weight • Patient is speaking in 2-3 word sentences and sounds breathless • Patient does not appear cyanotic

CONCLUDING A VISIT

Step	Comments
Confirm pharmacy and/or lab details	<ul style="list-style-type: none"> • To ensure you can send prescriptions and lab requisitions to appropriate places
Concluding	<ul style="list-style-type: none"> • Summarize investigations, management, counseling, and follow up plan • Determine follow up plan and whether and when need to be seen in person, documenting rationale (If unsure, can wait for supervisor review) • Clarify how patient will receive further communication (phone, email, mail)
Communicate plan for review	<ul style="list-style-type: none"> • Let your patient know if you will call them back with your supervisor present

FOLLOWING A VISIT

Step	Comments
Reviewing	<ul style="list-style-type: none"> • Review case and management plan with supervisor • Call your patient back with your supervisor to update them on the plan (unless you have agreed on an alternate arrangement)
Debrief and Feedback	<ul style="list-style-type: none"> • Discuss key learning points and obtain coaching and feedback • Consider documenting discussion on an EPA assessment form

For the most up to date version and for other virtual care resources, please visit:

<https://virtualcarehelp.com/>