

# VIRTUAL VISITS

*A Complete How-To Guide for Performing Virtual Visits*

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ENHANCE PATIENT  
EXPERIENCE &  
ENGAGEMENT

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IMPROVE CLINICAL  
WORKFLOW

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RESPOND IMMEDIATELY  
TO HIGH-RISK PATIENTS

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REDUCE TRAVEL FOR  
CLINICIANS & PATIENTS

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REINFORCE PATIENT  
CARE WITH SPECIALIST  
CONSULTATIONS

Through real-time video conferencing, clinicians, patients, and caregivers can communicate and interact. These virtual visits can be built into the care plan to augment in-person visits, or performed as needed when a patient's health is exacerbated.

## Virtual Visit Goals

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The overarching goal of virtual visits should be to augment in-person visits, broadening access to care and increasing communication between clinicians, patients, and caregivers.

Other goals of the virtual visits and metrics to measure success include:

- Increase patient engagement and satisfaction
- Improve clinician satisfaction and efficiency
- Enhance communication
- Resolve medication discrepancies
- Improve care quality and reduce hospitalizations
- Reduce patient anxiety and feelings of loneliness

## Clinician Prep

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Prior to meeting with your patient be sure to review:

- Clinical notes
- Medical history
- Patient messages
- Vital signs and symptom survey responses

## Patient Prep

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It is essential that patients know what to expect from each virtual visit. Patients, as well as caregivers, should receive introductory training and be made aware of any information - symptoms, medication regimen, and more - that is typically discussed during a virtual visit.

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### Best Practices for a Virtual Visit

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#### **Maintain Eye Contact**

Eye contact is a critical element of virtual and in-person patient interactions. Adjust the webcam to be eye level to help comfort patients and contribute to a patient-clinician relationship.

#### **Ensure the Patient Can Hear You**

Throughout the exam, particularly in regions where cellular service can lag or when visiting with elderly patients, check periodically that patients can hear you clearly. A headset with a microphone with enhance clinicians' ability to hear and interact with patients.

#### **Be Mindful of Time**

Reduced travel and time savings are key benefits of virtual visits. Establish a process to alert patients if you are running behind schedule, and to call or text message patients the day before their exam to reduce missed visits and delays.

#### **Examine Patient Surroundings**

Social determinants of health have become a critical element in patient care. When performing a visits, examine patient surrounding to understand better the impact their environment and living conditions will have on their health status.

#### **Clarify Your Actions**

Properly documenting a visit can require extensive note-taking, interrupting eye contact with patients. This action may be more obvious in-person than during a virtual visit. Build trust through transparency by communicating to patients what you are noting.

#### **Creating a Virtual Care Space, Right in Your Office**

Creating a designated virtual call room may not be a feasible option for all agencies and programs. However, it need not be a deterrent to incorporating video visits into patient care. There are two setup strategies: a *Centralized Station* or *Self-Serve Setup*.

With a *Centralized Station*, set up a call space or desk that has a soundproof headset and webcam available for the clinical staff's use. For a *Self-Serve* setup, integrate a headset and webcam into the monitoring staff's day-to-day equipment, so they can conduct virtual visits from their desk or an appropriate space available.

#### **Follow-up & Feedback**

As with an in-person visit, virtual visits should end by outlining next steps to the patient. Communicate when the next visit will occur, treatment instructions, or medication adjustments. Finally, encourage patients to provide feedback to ensure virtual visits are providing the same high-quality care as in-person visits.