

Completing a Successful Video Visit

This tip sheet will help you better connect with patients and their families during a video visit.

Is your patient a good fit for a video visit?

It's up to each clinician to gather enough information to make appropriate medical decisions. If you do not believe you can provide the quality of care required for a given situation, please do not use telemedicine.

Here are some things to remember:

- You do not have to duplicate your usual in-person exam. Be creative – it's OK!
- Do not provide telehealth when a patient/parent is driving or in a public location.
- Do you have a medical license for the state in which the patient lives? Restrictions are currently waived but this may change.

Important factors to consider when determining the appropriateness for a home video visit:

- Does the patient/family have access to the internet and a computer or mobile device?
- Is there a need for in-person vital signs, physical exam and testing?
- Can the patient/family obtain necessary vital sign data?
 - Thermometer
 - Scale
 - Skill in taking an accurate pulse
 - You can count respirations
- Can the patient/family provide any physical exam needs?
- What is the patient/family dynamic?
 - While it is more difficult to control the patient's home environment, this may actually allow a better understanding of the social determinants you may need to address.
- Are there any privacy concerns?

Tips for a great video visit experience

- Assure an uncluttered view from where you are positioned:
 - Check your self-view.
 - Post a sign that your video session is in progress.
- Be aware of the position of your devices:
 - If using two screens, ensure they are positioned optimally to be able to look back to the patient frequently when documenting.
 - To better engage the patient/family, look at the camera –not your computer.



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- Be aware of lighting in your location. You may need to adjust lighting to ensure your face can be clearly seen. Assure there are no disruptions on your side during the visit:
 - If there is background noise or activity on the patient/family end, let them know it's keeping you from fully focusing on their care.
 - Consider activating the virtual background.
- Provide suggestions on what can enhance visibility or sound. Be aware of typing noise if you are charting in the EMR:
 - Typing can be loud if the microphone is close to the keyboard.
 - It is OK to advise the family that they may hear you typing but you want to accurately document the visit.
- Verify you are with the correct patient/family by using two patient identifiers at the beginning of the visit:
 - Full name
 - DOB
- Obtain consent for the telehealth visit from the patient/parent.
- Ensure the patient is comfortable and privacy is respected, particularly if clothing will need to be removed during the exam:
 - Ask non-essential staff/family members to leave the respective rooms, when appropriate.
- Assure the best possible video experience:
 - Ask for window blinds to be closed before beginning the visit.
 - Check lighting for optimal visualization of the patient.
- Explain that the video visit is not recorded, meets HIPAA requirements and cannot be posted or forwarded.
- Introduce everyone in your location who is in range of the microphone:
 - This is especially important for off-camera attendees.
 - This is also important for Team Center Care Meetings.
- Ask the patient/family to introduce everyone in their room:
 - This is especially important if anyone is off camera at their location.
 - Pediatric patients must be with the parent to be able to appropriately bill for the visit.
- Stay attentive – do not cover your camera or mute your microphone:
 - This makes the patient/family feel you're not giving them your full attention.
 - Avoid reading or responding to emails or doing other work during the visit.
- Make eye contact with your camera, not the patient's eyes.
- Keep a HIPAA-compliant workspace.