

Checklist: Preparing for a Telemedicine Visit

ORIGINATING SITE-----clinical setting where the patient is

1. SCHEDULE APPOINTMENT

- Schedule telemedicine consult with healthcare provider and coordinate with patient.
- Provide necessary medical records to healthcare provider prior to appointment.

2. PREPARE CLINICAL ENVIRONMENT FOR VIRTUAL VISIT

- Set-up a dedicated, private space with the necessary equipment, free from distractions.
- Test equipment or software. (If you are using software (such as Cisco Meeting) be sure to use the correct browser (Chrome/Firefox).
- Test out the lighting. Try turning on overhead lights and blocking light from windows, which can lead to too much background light in the video.
- Set-up the camera at eye-level to make it easier to make eye contact with the patient.
- Check microphone and volume.
- Clinicians: dress appropriately. Ensure clothing is camera-friendly or wear a blue coat.
- Prepare clinical assessment tools as needed.

3. PREPARE PATIENT

- Explain how the telemedicine consult works and answer questions.
- Obtain video consult consent.
- Obtain required vital signs or other information.

4. CONNECT VIDEO CALL

- Prepare to receive or place call at scheduled time.
- Place patient in front of camera/monitor screen.

5. TELEMEDICINE CONSULTATION

- Ensure that patient (at originating site) and provider (at distant site) can see and hear each other.
- Adjust camera and audio, as needed.
- Check self-view and mute mic until consult begins.
- Make introductions with provider.
- Maintain eye contact by looking into the camera (not the image on the screen).
- Present the patient.
- Provide vital signs and other information.
- Assist provider with exam of patient (as needed) with and without clinical assessment tools.
- Adjust camera or view to facilitate exam
- Assist with reasonable body position and movement.
- Discuss any follow-up procedures and/or issues.
- Facilitate adequate closure/sign-off with provider.
- Turn off equipment

DISTANT SITE-----where the healthcare professional is

1. PREPARE CLINICAL ENVIRONMENT FOR VIRTUAL VISIT

- Set-up a dedicated, private space with the necessary equipment, free from distractions.
- Test equipment or software. (If you are using software (such as Cisco Meeting) be sure to use the correct browser (Chrome/Firefox).
- Test out the lighting. Try turning on overhead lights and blocking light from windows, which can lead to too much background light in the video.
- Set-up the camera at eye-level to make it easier to make eye contact with the patient.
- Check microphone and volume.
- Clinicians: dress appropriately. Ensure clothing is camera-friendly or wear a blue coat.

2. PREPARE FOR CONSULTATION

- Review patient chart/information prior to session

3. INITIATE VIDEO CALL

- Ensure that patient and provider can see and hear you.
- Check self-view
- Mute mic until consultation begins

4. TELEMEDICINE CONSULTATION

- Make introductions to patient
- Maintain good eye contact (by looking at the camera---not the video screen)
- Introduce everyone in the room
- Inform patient about telemedicine consult protocol, limitations, etc.
- Review history with patient
- Direct tele-presenter at distant site in exam if patient (as needed)
- Verify patient' understanding of material reviewed and recommendations
- Discuss any follow-up procedures and/or issues
- Facilitate adequate closure/sign-off with patient
- Turn off equipment

Things to Remember!

1. 911 in case of an EMERGENCY

Have the phone number of the local hospital accessible in case you need to refer patient for further treatment.

2. HAVE TELEPHONE NUMBERS OF:

- a. Originating site (where the patient is)**
- b. Distant site (where the Health Care Provider is)**
- c. Patient**
- d. Video support person**

3. HAVE AN ALTERNATE PLAN!

- a. Sometimes, video connections fail**
- b. Inform patient of alternate plan to be seen if unable to make video connection**