A STEP-BY-STEP APPROACH   
TO VIRTUAL CARE

| I WANT TO START VIRTUAL CARE | NOTES | PRIORITY & TIMELINE |
| --- | --- | --- |
| Keep patient contact info current Assess your active patient panel to verify patient contact information.  Identify a method and workflow. You may need to export patients demographics from your EMR.  Establish and document the process for keeping records current. |  |  |
| Establish communication channels Discuss the type of messages you would like to send and if you will allow patients to email the clinic back.  Consider setting up a clinic-specific email address.  Investigate the benefits of various communication channels such as Pathways, clinic website, broadcasting platforms. |  |  |
| Obtain and record patient consent Review requirements and select the format for capturing patient consent.  Develop a process for collecting & documenting consent and keeping track of who has or has not provided consent. |  |  |
| Share documents when working remotely Discuss how to transfer/e-fax documents (e.g. prescriptions, requisitions, forms, notes, and images). Decide how to add signatures to documents within or outside of the EMR.  Decide how to receive and provide electronic documents to patients and how to save them in the patient chart.  Ensure that privacy is protected when sharing documents. |  |  |
| Review your schedule to include virtual care Identify opportunities for virtual care including video visits.  Consider working from the home office or the clinic.  Consider selecting specific days and time slots. |  |  |

## 

Review each step of the virtual care workflow to identify possible improvements.

| I WANT TO Add video visits | NOTES | PRIORITY & TIMELINE |
| --- | --- | --- |
| Choose video platform Investigate what video visit tool is the best fit for your clinic. Consider virtual waiting room, screen sharing, chat option etc.  Consider the cost and what support and resources are available.  Conduct tests for video visits and consider how to evaluate the experience. |  |  |
| Add video visits to your booking process Define booking criterial for phone and video visits. Establish how staff can triage the booking of video visits.  Decide how patients can book video visits in addition to in-person visits.  Decide how you invite patients to the video visit (e.g. create templates).  Discuss with your MOA how to prepare patients for their first video visit. |  |  |
| Set up your workstation Review technology at the home office or the clinic. Essentials include: webcam, microphone, speakers, internet with adequate speed.  Arrange physical space for privacy protection, easy access to patient chart during a video visit, and proper ergonomics |  |  |
| Establish a workflow for video visits Discuss MOA support during the visit.  Review virtual care etiquette to ensure positive experience.  Ensure patients are waiting for the visit and have a way to communicate with them if needed.  Consider creating a note template for video visits.  Have a back-up plan for the team and patients in case of issues with a video visit.  Discuss the workflow for arranging a follow-up visit and for providing the instructions to the patient.  Evaluate and improve a virtual care experience. Ask for patient feedback. |  |  |
| Inform patients about virtual care Consider broadcasting to large groups of patients.  Create message templates to streamline communication.  Ensure staff are prepared to effectively promote virtual visits.  Assemble patient handouts and resources. |  |  |