TELEMEDICINE VISIT CHECKLIST

Telehealth has been brought into sharper focus by the COVID-19 pandemic. Use these simple pearls to make your telemedicine appointments a success.

PROFESSIONAL SETTING

• Video background should be clean and uncluttered and reflect your status as a physician - you are building the cultural space for a medical encounter.
  • Note: Digital backgrounds do not reassure the patient that you are working in a private setting.
• Maintain privacy.
  • Windows and glass office walls are a privacy concern; do not conduct a visit in a location where someone could see your screen.
• Conduct the visit in a quiet location.
• Mute your phone (or explain clearly if you must take a work call).
• Avoid distractions in the background, especially moving objects such as a ceiling fan.
• Remember your setting imparts non-verbal communication - use it to enhance your credibility, not detract (for example, don’t display a bowl of candy if you are counseling on diabetes).

PERSONAL APPEARANCE

• Dress like a doctor.
• Make sure your ID badge is visible to the patient.
• Make sure your face is well-lit and clearly visible.  
  • If your eyes can be easily seen you have it about right.

LEGAL CONCERNS

• Clearly introduce yourself, including your credentials and employer.
• Ask the patient to state their name, date of birth, and specific current geographic location.
  • As a general rule, you must be licensed to practice medicine in the state where the patient is located during the appointment.
• Ask if there is anyone else in the room with the patient; if you don’t ask you won’t know.
  • If the patient is not alone, make sure they are comfortable discussing private health information in front of the person present with them.
  • Tell them to let you know if the situation changes by anyone else entering the room.

TELEMEDICINE DISCHARGE

• Ask the patient to summarize their understanding of your instructions.
• Reiterate key points and clarify as needed.
• Ask the patient to end the visit to ensure you don’t cut them off.
• Know how you will escalate care if medically necessary, including how you will call 911
  • Pro tip: You need to know where the patient is!