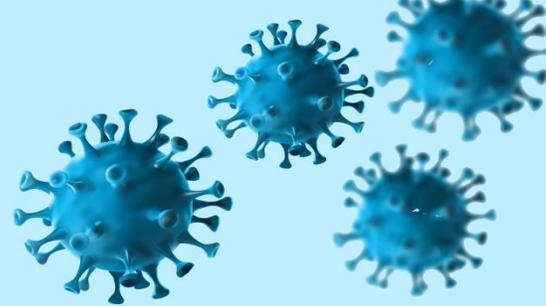


Tips for Scheduling and Conducting Virtual Visits



Booking and Scheduling Workflow

Ensure the following are worked into your booking and scheduling process, whether through reception staff or an online booking service:



- Obtain patient contact info. For phone visits confirm the phone number the patient should be reached at, and for video obtain an email address and mobile phone number.
- Provide a screening process to determine patient suitability for a virtual visit.
- Supply a script to inform patients of risks and potential need for in-person follow up visit.
- For video visits, [obtain patient consent](#) and document in patient record
- For video visits, send confirmation email with instructions for video call and fact sheet for patients. Ensure confirmation messages do not include confidential patient information. (See [sample email confirmation](#) message)

Conducting a Virtual Visit

If you call the patient for a phone visit from a personal or direct line, consider having your number blocked so it cannot be seen on caller ID. Use the following checklist to guide your virtual visit:



- Introduce yourself and, if appropriate on video visits, display your ID badge
- Confirm patient's identity
- Confirm patient's location, to ensure they are in a private area and to ensure you know their location should they need emergency assistance during the virtual visit
- Confirm patient consent for video visit
- A patient may want to include a family member or caregiver during the virtual visit. If so, be aware of who participating with the patient. Establish patient's level of comfort about sharing personal health information and follow the same principles as with in-person visits.
- Conduct the virtual visit in the same way you would in-person, obtaining relevant history, medications, allergies, current symptoms.
- If the patient has cold/flu symptoms, use the [current COVID-19 screening protocol](#) or direct the patient to use the [online screening tool or phone screening](#) system.
- Document your virtual visit following the same approach as in-person visits, including history, diagnosis treatment, and start and stop times. For video visits, note patient consent.
- Consider how you will transmit any prescriptions or lab/DI requisitions and share this with the patient. Ensure your approach complies with CPSM standards
- End the call and ensure both sides have disconnected.