

## PROVIDER TELEHEALTH VISIT TIPS

### Preparing for the Telehealth Visit

The following guidelines comply with patient privacy and security laws, regulations and related NM policies.

#### ✓ **Location**

- Place your device in a separate and private distraction free location away from other household members to avoid them seeing patient information, or patients seeing others
- Use a privacy screen, if available, to prevent others from being able to view your screen.
- Minimize background noise.
- Declutter and remove personal objects, such as family photos, from your background.
- Do not eat or drink while conducting the visit.

#### ✓ **Appearance**

- Dress in professional attire. Wear solid colors and professional attire: complex patterns and stripes are distracting.
- Wear your NM badge and lab coat, if possible.
- How to look good on camera:
  - Put the computer on a stack of books so the camera is slightly higher than the top of your head, then point the camera down into your eyes.
  - Place the camera close to you, but far enough to see your head and torso. Being too close gives the appearance of a “floating head.” Being too far may make the patient feel distant.
  - Lighting: The computer should not be facing a window. You can take a tall lamp and set it next to the computer. The lamp should be in line with and slightly behind the computer so the light falls nicely on your face.
  - Make sure hand gestures are visible within the frame of the camera.
  - Use earbuds or headphones, if possible.
- Eye Contact
  - Occasionally look directly at the camera to simulate eye-to-eye contact. Remember they can see your facial expressions.
  - If you will be looking at a second screen for labs, imaging or documentation, explain this to the patients, so they know you are paying attention to them.

#### ✓ **Test your own NM approved technology**

- Make sure you start the visit with the video enabled and sound on.
- Have a contingency plan if the video technology fails (telephone call).
- Phone Number Privacy.
  - Call patients from your mobile phone and display your office number on their Caller ID by using the free Doximity Dialer app. Below are the instructions to use the calling feature in Doximity.
    - [Download and install the free Doximity app](#)
    - Sign into the Doximity app with the same e-mail and password you used to log in to the Doximity Dialer app. If you cannot find your email submit a request to Doximity support.
    - Open the Doximity app and tap Dialer on the bottom of the screen.
    - Place your test call to complete the transition and access the Doximity Dialer calling feature.

✓ **Review the patient's chart** (medical history, recent results and reason for the visit).

✓ **Inform your clinic if the visit does not occur within 1 hour of the scheduled visit time.**

## Beginning the Visit

- ✓ **Create rapport**
  - Start with a warm greeting. Smile and make sure you are looking at the camera.
    - “Hello, thank you for inviting me into your home so we can have a conversation.”
  - Introductions:
    - State your name and role.
    - Confirm patient name and date of birth.
    - Ask the patient to identify everyone in the room with him/her. Confirm that the patient is comfortable with you discussing their health information with everyone in the room.
- ✓ **Acknowledge the virtual nature of the visit**
  - Minimize barriers. Ask if they can see you and hear you ok. Make adjustments and troubleshoot as needed.
  - Orient the patient to the benefits of a virtual visit as well as the difference between an in-person visit to set realistic expectations. Ask them if they have any questions about this type of visit.
- ✓ **Set the time frame for the visit**
  - Let the patient know how much time you have for the visit.
- ✓ **Collaboratively set the agenda**
  - Ask the patient for a list of items they want to address.
  - Provide your agenda items.
  - Determine a mutually beneficial agenda.

## Facilitating the Medical Discussion

- ✓ **Elicit the patient narrative of the history of the present illness**
  - Ask open ended clarifying questions.
  - Engage in reflective listening.
- ✓ **Demonstrate empathy**
  - Let the patient know you care. Explore and name emotions.
- ✓ **Share diagnosis and information in the context of the patient’s perspective**
  - Use patient friendly terms when explaining medical conditions and treatment options. Ask the patient to repeat back what you said so you know they understand.
  - Identify what is most important to the patient, such as the biggest concerns or goals.
  - Then identify how the diagnosis or information and treatment planning might impact what matters most to the patient.
- ✓ **Collaboratively develop a treatment plan**
  - Provide information and invite them to share ideas and preferences.
  - Treatment plan checklist
    - Summarize the plan,
    - Reinforce your actions, such as calling in a prescription, labs, etc.,
    - Reinforce actions the patient will do such as change diet, comply with medication, etc.,
    - Provide guidance on what to watch for should a problem worsen.

## Ending the Visit

- ✓ **Have the patient repeat back what they understand. Teach back.**
  - Ask the patient to restate what they understand and what they are going to do next.
- ✓ **Provide closure for the visit.**
  - Give a clear signal that the visit is coming to a close.
  - Offer instructions for follow-up or concerns.
- ✓ **Complete the After Visit Summary (AVS) within 48 hours of the visit.**