

## Appendix 5 – Orientation Checklist for Learner Providing Virtual Care

### Background

- Have they ever done virtual care before?
- What did their prior experience with virtual care look like?
- Have they had teaching with how to deliver virtual care?

### Technical Issues

- What platform are you going to use? Does the learner have familiarity with it?
- If using their own cell phones, do they have an adequate data plan?
- Is their phone number blocked?
- Do they have internet bandwidth to support video?
- How do they access the patient chart?
- Can they work somewhere private where they can have confidential conversations?
- Do they have a set of headphones they can wear?
- If using video, check what is visible in their background and ensure their own appearance is professional as it would be in the office.

### Communication plan with preceptor

- How will you communicate when ready to review?
- When does the supervisor want to be contacted?
- What to do if you can't contact each other? (Backup plan)

### Flow of patient encounters and direct supervision

- How to get consent for encounter and how to explain to patient what will happen with supervision.
- When will preceptor be involved?
- How will preceptor be involved?
- Will the learner have their phone on speaker in the clinic room if co-located so the preceptor can listen?
- Will it be a conference call?
- Will they all be on video together?
- Will the learner take the history and then call the preceptor or if a senior learner, complete the visit and review with the preceptor at the end of the clinic?
- What to do if learner is concerned about the safety of a patient?

**Best Practices of Virtual Care**

- Ensure they have had an orientation/teaching or given handout about virtual care
- Review risks and limitations of virtual care
- Review what you can appreciate about physical exam via phone or video, the importance of documenting what can and what cannot be ascertained virtually

**Documentation**

- Is there a template or macro to use?
- Are there certain points of information you want the learner to include in the note?
- How will the learner dispose of any confidential notes that they make off site?

**Feedback**

- When will it be done?
- How will it be done?
- How will it be documented?

**Learning Objectives**

- Does the learner have any concerns or questions about providing virtual care?
- What are the learner's own learning objectives for virtual care?
- Is there anything we have not discussed that the learner would like to bring up?
- How is the learner coping with the new work from home requirements? (if applicable)

**Handouts and Teaching Materials**

- Consider giving your learner copies of resources to help with virtual care etiquette

**Ongoing Orientation**

Consider doing mini-orientations or check-ins on a frequent (daily or before each clinical session) to review any technical issues, the plan for the day and also to review the patient list for appropriateness and if a change in plan visit flow or supervision may need to happen.