DALHOUSIE UNIVERSITY | **Family Medicine**

Providing Virtual Care
LEARNER CHECKLIST

Getting Started

Virtual care is now a common practice that can be used in many circumstances in place of in-person assessment. To ensure your learner is ready to provide virtual care, the following questions must be addressed:

☐ Have you been taught how to deliver virtual care?
☐ Have you delivered virtual care?
☐ What is your experience delivering virtual care

From there, provide handout about virtual care and resources on virtual care etiquette.

The Virtual Office

It is important that patients feel comfortable and secure in the space they are receiving care. Office space is as important in virtual care as it is in-person. The learner must have a private space, free of distraction, that allows confidential conversations to take place. Just as in the physical office, the space used for video visits must be professional. The same goes for physical appearance and dress.

☐ Review technology requirements and explain the virtual care platform
☐ Confirm the learner has an adequate cell phone plan with data and that their number is blocked
☐ Confirm the learner has access to headphones for calls
☐ Confirm the learner has bandwidth that supports video conferencing
☐ Discuss how the learner accesses the patient's chart

Best Practices of Virtual Care

Virtual care is any interaction between a patient and health care provider that does not involve direct contact. It can include video visits, telephone calls and secure messaging. Please review the following with your learner:

☐ Risks and limitations
☐ The importance of documenting what can and cannot be determined about a virtual physical exam
☐ How visits are to be documented (provide a template if available)

☐ All relevant points you expect covered in notes

☐ Details on how to safely destroy confidential notes made in their virtual care setting

Virtual Visits and Supervision

Supervising a learner provides them with the opportunity to develop and practice clinical skills with a clinical expert on a one-to-one basis, which leads to increased confidence. By providing effective feedback, the preceptor shows the learner that they are committed to helping them meet their learning goals. Please review the following with your learner:

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Best Practices of Virtual Care

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Patient Encounters

☐ The process of obtaining patient consent for the virtual visit

☐ How the learner will be supervised (how and when the preceptor will be involved)

☐ If the preceptor is co-located in a clinic room during virtual visit, explain expectations for utilizing speaker phone and having preceptor observe and how to explain to patient

☐ Format for preceptor attended visits (i.e. conference calls, shared video call)

☐ Protocol preferences to learner (i.e. should learner take patient history before preceptor joins call; for senior learners does preceptor prefer the visit be completed and then reviewed at the end of the clinic?)

☐ Procedures for addressing patient safety concerns

Preceptor/Learner Communication

☐ Best method of communication for reviews

☐ Frequency of communication (establish timelines)

☐ Backup plan in the event either of you is unable to contact the other

Ongoing Support

☐ Review virtual care protocols frequently (i.e. technical challenges, daily plans, patient lists to determine suitability for virtual care and if a change in plan, visit, flow or supervision is required

Ready to Learn

You have provided your learner with a lot of information to prepare them for providing virtual care, please review these final points:

☐ Are there any concerns about providing virtual care?

☐ What are the learner's own learning objectives for virtual care?

☐ If applicable, how is the learner coping with recent work from home requirements?

☐ Does the learner have any final questions about what has been covered on virtual care?