Providing Virtual Care
LEARNER ORIENTATION CHECKLIST

Best Practices of Virtual Care

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

☐ Have you ever done virtual care?

☐ What did your prior experience with virtual care look like?

☐ Have you been taught how to deliver virtual care?

☐ Risks and limitations of virtual care

☐ What you can appreciate about a physical exam via phone or video and the importance of documenting what can and cannot be ascertained virtually

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

Patient Encounters, Direct Supervision and Feedback

Supervising a learner provides them with the opportunity to develop and practice clinical skills with a clinical expert on a one-to-one basis. By establishing opportunities for the learner to develop skills and receive feedback the preceptor shows the learner that they are committed to helping them meet their learning goals. Please review the following with your learner:

☐ Review how to get consent from the patient

☐ Review how to explain supervision to the patient

☐ Confirm your roles as learner and preceptor when it comes to working with patients

☐ Establish whether the appointment will happen via speaker phone, conference call or video call

☐ Discuss what to do if they are concerned about the safety of a patient

☐ Establish opportunities for feedback (when and how it will be done, as well as how it will be documented)
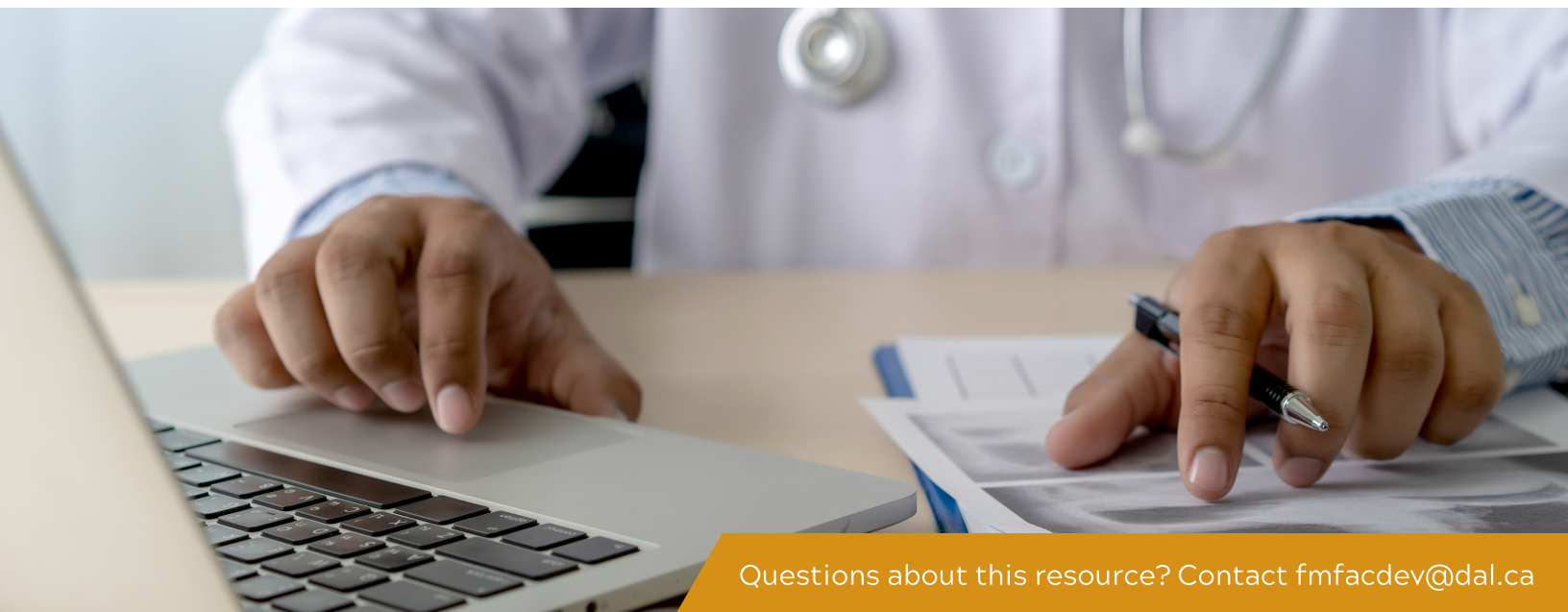
Technology

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

Documentation

It is important your learner understand the importance of documentation and how to go about it. Please review the following with your learner:

☐ Templates or macro to be used
☐ Important information you want them to include in their notes
☐ How they should dispose of any confidential notes made off-site

Communications

Frequent communication between you and your learner is important. To ensure these communications channels are established, please address the following:

☐ 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

Learning Objectives

As a preceptor, it is important to show your learner that you are committed to their learning objectives. Please ask your learner the following questions:

☐ Do you have any questions or concerns about providing virtual care?
☐ What are your learning objectives for virtual care
☐ Is there anything we have not discussed that you would like to bring up?
☐ How are you coping with your work from home requirements? (if applicable)

Ongoing Orientation

Consider doing mini-orientations or check-ins on a frequent basis (daily or before each clinical session) to review the following with your learner:

☐ Technical issues
☐ The plan for the day (and if a change in plan may need to happen)
☐ Patient list