COVID-19 Virtual Visit Implementation Guide

o   *Adapted from Doctors of BC Toolkit*

This document is intended to:

- Assist providers in developing a plan to integrate virtual visits into their practice;
- Advise on the types of services where virtual visits should be considered under the current circumstances.

Specific how-to guides, privacy guidelines, communication templates, and other materials related to virtual care will be released shortly.

When to Consider a Virtual Visit

- When triaging patients prior to an office encounter to avoid unnecessary trips to the office
- Managing acute illnesses that may not require a physical exam (remembering that they can always be asked to come in for an exam, if it is deemed necessary)
- Managing patients with chronic disease

Implementation Plan

Step	Clinic Notes (who does what, when and how?)
Team engagement – Staff / Admins are key to success Consider internal meetings to discuss the changes, workflow, and responsibilities.	
Patient FAQs Consider creating an FAQ document for your patients specific to your practice. E.g. This could include how to book virtual visits, technical tips, troubleshooting, patient etiquette, etc.	

Step	Clinic Notes (who does what, when and how?)
Allowing patients to email back to the clinic Consider setting up a new email address to allow patients to send emails to the clinic.	
Patient suitability Consider which patients (primary care physicians can leverage their patient panel) or visit types are suitable for virtual visits. Reviewing your schedule over the last week could help with identifying potential patients and visit types.	
Schedule planning Consider specific days and time slots for virtual visits. How will this work with existing schedules? Consider creating an appointment type for virtual visits.	
Booking virtual visits Consider how patients can book virtual visits. Consider staff triaging the booking of patients for in person or virtual visits. Consider a virtual waiting room or sending out individual meeting links.	
Setting up the room Consider placement of EMR screen vs. placement of video screen. Can both be displayed on the same screen, or are two screens needed?	
Virtual visit etiquette Consider the space that the patient will view during a virtual visit. Consider clarifying your actions to the patient if you are not looking at them. E.g. typing up notes on the EMR.	

Step	Clinic Notes (who does what, when and how?)
Starting a virtual visit Consider how to ensure the patient is ready for their virtual visit. ▪ Consider the role of the Admin. Will they contact the patient ahead of time? Will they set up the visit for the physician on the computer? ▪ Does the tool have a virtual waiting room? ▪ Does the patient need to call and 'check in'?	
Visit notes Consider having a standard method for recording that the visit was conducted over video. Charting the patient encounter for video consults is the same as for an in-person visit.	
Sending documents If working away from the clinic office, consider how to transfer documents E.g. prescriptions, lab and imaging requisitions. Could an Admin send this from the clinic? Consider testing the EMR from home to see what is possible. Does the patient need access to a printer?	
Billing **Available service codes can be found** here	
Follow-up visit Consider the workflow for arranging a follow-up visit for the patient. What are the instructions for the patient?	

Patient Communication

With the popularity of smart phones and video chat, many of your patients may be familiar with the basic functions needed to enable virtual care visits. Still, it is important to clearly communicate with them so they know what to expect, what the benefits are and how they can get started with virtual care.

Promoting Virtual Care in Your Clinic

1) Choose a date to start using virtual care in your clinic.
2) Let patients know that the service will be available by providing information on your website, via email, via posters in your clinic and by telling them in person.
3) Consider outlining the process of signing up for virtual care on your website, along with a list of the conditions that are eligible and excluded.
4) Train your staff on how to troubleshoot the most common technical issues related to virtual care so they can assist patients over the phone.