

# Virtual Implementation Workflow Checklist

## Determining roles and responsibilities in the clinic

This document is intended to assist healthcare providers in developing a plan to integrate virtual visits into their practice. By following these steps, you will be many strides closer to launching your telemedicine offerings.

### **Phase 1: Engage the right people**

| Step  | Assignee | Actions required |
|---|----------|------------------|
| <b>Engage the team</b><br><br>Conduct internal meetings to discuss the changes, workflow, and responsibilities (eg, who will do what?)                          |          |                  |
| <b>Train the staff</b><br><br>Train your staff on how to troubleshoot common technical issues (eg, assisting patients over the phone)                           |          |                  |
| <b>Find the right patients</b><br><br>Identify potentially suitable patients for your virtual services (eg, what types of consultations are appropriate?)       |          |                  |
| <b>Educate patients</b><br><br>Create an FAQ document for your patients (eg, how to book virtual visits, technical tips, troubleshooting, or patient etiquette) |          |                  |

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| <b>Ready the participants</b>   |  |  |
| Ensure the patient is ready for their virtual visit (eg, should the admin send a reminder email?) |  |  |

## Phase 2: Organise the logistics

| Step   | Assignee | Actions Required |
|--|----------|------------------|
| <b>Establish communication lines</b>   |          |                  |
| Set up an email address to allow patients to communicate with the clinic (eg, assign staff to keep track of it regularly)    |          |                  |
| <b>Make time</b>   |          |                  |
| Allot specific days and time slots for virtual visits (eg, how will this work with existing schedules?)                      |          |                  |
| <b>Set up the technology</b>   |          |                  |
| Create a system for patients to book their appointments (eg, consider a virtual waiting room vs individual meeting links)    |          |                  |
| <b>Streamline your process</b>   |          |                  |
| Develop a standard method for recording and charting the virtual consultation (eg, will it be the same as in-person visits?) |          |                  |
| <b>Remember the paperwork</b>  |          |                  |
| Consider how to transfer documents remotely (eg, prescriptions, lab, and imaging requisitions)                               |          |                  |

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|---|--|--|
| <b>Balance the accounts</b>   |  |  |
| Institute a system for tracking and billing telemedicine services (eg, invoicing) |  |  |

### Phase 3: Prepare Your Consultation

| Step   | Assignee | Actions Required |
|--|----------|------------------|
| <b>Virtual etiquette</b><br><br>Consider placement of EMR vs video screens (eg, is it optimal for eye contact?)                  |          |                  |
| <b>Set up the room</b><br><br>Prepare the space that the patient will view during a virtual visit (eg, is it welcoming?)         |          |                  |
| <b>Set up the technology</b><br><br>Make sure all of the equipment is functional (eg, internet connection, hardware, microphone) |          |                  |

### References:

Nova Scotia Health Authority. COVID-19 Virtual Visit Implementation Guide. March 2020. Available at: <https://files.constantcontact.com/bb5ecdfa601/5f987c11-5433-40af-9e7f-189933ae6d46.pdf>. Accessed September 2020.

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