

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

<p><b>Ready the participants</b></p> <p>Ensure the patient is ready for their virtual visit (eg, should the admin send a reminder email?)</p>		
<p><b>Foster continuity of care</b></p> <p>Consider the workflow for arranging a follow-up visit for the patient (eg, what are the instructions for the patient?)</p>		

## Phase 2: Organise the logistics

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

**Balance the accounts**

Institute a system for tracking and billing telemedicine services (eg, invoicing)

**Phase 3: Prepare Your Consultation**

Step	Assignee	Actions Required
<b>Virtual etiquette</b> Consider placement of EMR vs video screens (eg, is it optimal for eye contact?)		
<b>Set up the room</b> Prepare the space that the patient will view during a virtual visit (eg, is it welcoming?)		
<b>Set up the technology</b> 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/bb5ecd6a601/5f987c11-5433-40af-9e7f-189933ae6d46.pdf>. Accessed September 2020.

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