

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

<p>Ready the participants</p> <p>Ensure the patient is ready for their virtual visit (eg, should the admin send a reminder email?)</p>		
<p>Foster continuity of care</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>Establish communication lines</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>Make time</p> <p>Allot specific days and time slots for virtual visits (eg, how will this work with existing schedules?)</p>		
<p>Set up the technology</p> <p>Create a system for patients to book their appointments (eg, consider a virtual waiting room vs individual meeting links)</p>		
<p>Streamline your process</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>Remember the paperwork</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
Virtual etiquette Consider placement of EMR vs video screens (eg, is it optimal for eye contact?)		
Set up the room Prepare the space that the patient will view during a virtual visit (eg, is it welcoming?)		
Set up the technology 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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