

Summary of Sal's Virtual Visit Overview

<https://youtu.be/J7IS0FeMskc>

1. Log in to Epic and select Department called “Urg Care Distance Health”
2. Log in to American Well Express Care platform with the username and password provided to you
3. Test your computer – it will guide you through a check of video, audio, and internet connection optimization. Proceed once “passed”.
4. To see patients in “on demand” setting, make yourself available by checking the availability button. This will cause patients to appear in your waiting room. Please note: If you make yourself unavailable while a patient is in your waiting room, you can continue to see that patient without disruption and without others entering your waiting room.
5. Once in waiting room, you can see a patient’s name, age, and wait time. Click “review” to see additional patient-entered information such as their chief concern, pharmacy information, etc.
6. Decision point: If you do not treat specific medical conditions or populations (e.g., pediatric patients), you may decline a patient. If you do this, be sure to decline and transfer the patient to another provider so that they may still be seen.
7. If okay to proceed, switch over to Epic to access patient’s chart (this should be integrated into epic, but it may take a minute).
8. Then in AmWell platform, click on “Connect Now” and launch visit with patient.
9. Be sure to incorporate relationship-centered communication throughout your visit as you would in an in-person office visit. (See R.E.D.E. tip sheet for reminders)
10. Examples of how to guide a patient through the physical exam include:
 - Gently pull down on your ears and let me know if you feel any pain or pressure
 - Gently massage down your face/neck to see if anything feels a little larger than normal or hurts you
 - Tap on your sinuses – 1) Tap above your eyebrows; does that cause any tenderness or pain? 2) Below your eyes and adjacent to your nose, push in; does that cause any tenderness or pain?
 - Next take 3-4 really big deep breaths in and out. Be sure to tell them what you hear to confirm.
 - Get close to the camera and open your mouth, say ah. Again, tell them what you see.
 - Be sure to summarize physical exam
11. Summarize your findings and recommendations much like you would in a regular office visit
12. After the visit has ended:
 - Document in epic as you normally would. 2 additional questions specific to virtual visits include:
 - What platform you’re using (e.g., Express Care Online, Am Well, Live health online, or Ask an expert, etc)
 - Location of patient – the state that the patient is being treated in
 - Change over to Am Well platform: It is essential that you use the same diagnostic code in epic as you enter in American Well platform before Am Well “wrap up”

- Note: you do have option to waive all visit charges using a check box on the Am Well platform if something goes wrong with the virtual visit technology
- You can also give a “sick slip” that will automatically go to patient once you submit.
- Once you submit wrap up on AmWell side, you can’t go back, so be sure to finish everything (i.e., diagnosis) beforehand.

Summary of Sal’s Tips & Best Practices for Virtual Visits

<https://www.youtube.com/watch?v=8QkNWA7o8I&t=4s>

- Wear your lab coat and name badge
- Use a private space that limits noise and does not risk compromising HIPAA; notify others in household when you are working and not to be disturbed
- Mute your electronics and phone to avoid other distractions and disruptions
- Look at the camera vs. screen or patient when speaking to demonstrate “direct eye contact” and for optimizing audibility
- Ask patient if they can see and hear you okay; be sure you can see and hear the patient effectively; avoid speaking too loud and if patients can’t hear you, make sure you’re sound isn’t muted
- Reaffirm patients regularly by letting them know you see, hear and understand them. This can be done via head nodding, reflecting back what patient says, summarizing what you hear, and asking for clarification
- Don’t chart while speaking to avoid reducing your audibility and conveying negative nonverbal communication
- When conducting the physical exam:
 - Think outside the box
 - Show patients exactly what to do – e.g., Show them where their sinuses are when you ask them to “tap on your sinuses”
 - Don’t be afraid to stand up and walk around if helpful to demonstrate aspects of the physical exam
- When taking a history:
 - Be thorough since you are relying primarily on your history taking
 - Ask open-ended questions to get the whole story
 - Avoid making assumptions
- Avoid rushing through a virtual visit – use all of your time to get to know the patient as a person and observe how they are different in their home environment. E.g., Are they more relaxed or stressed, etc.?
- Allow patients to disconnect from the visit first to avoid accidentally cutting them off.
- Alert patients that the visit is ending and then if they are satisfied with the visit, allow them to disconnect first.