

Telehealth Tip Sheet: Phone and Video Visits (Developed by Kelly Skelly and Marcy Rosenbaum, University of Iowa Hospitals and Clinics)

BEFORE THE VISIT: PREPARATION

• Scheduling	For scheduling, if possible best with a provider known to patient
• Documentation	<ul style="list-style-type: none"> • Start the clinic note or add to the template started by the nursing staff who made initial contact with the key interim history . Create a mental agenda, if not written outline, in your HPI prior to calling
• Self-preparation	<ul style="list-style-type: none"> • Take a breath to ready yourself for the call • Make sure you are comfortably seated before you call the patient. Consider having a kid-friendly toy/book/prop to use during call. • Check that the background in your video is not distracting • If possible be away from noisy areas – such as others talking or on camera

KEY COMMUNICATION TIPS FOR PHONE AND VIDEO VISITS

• Maintain full attention	<ul style="list-style-type: none"> • Remove all distractions, and avoid multitasking (checking emails, etc) as patients can pick up on this
• Convey attention and interest	<ul style="list-style-type: none"> • Use warm tone of voice throughout • Use verbal listening acknowledgments such as uh-huhs, okay, etc <p>For video, use explicit non-verbal listening such as eye contact and nodding</p> <ul style="list-style-type: none"> • Summarize periodically
• Pacing and language	<ul style="list-style-type: none"> • Speak slowly and clearly • Avoid jargon unless necessary • Pause after asking questions • Pause for patient questions and elaborations more frequently
• Explicit empathy	<ul style="list-style-type: none"> • Listen/watch carefully for patient and parent emotional cues – including pauses or hesitation • Increase explicit empathic statements especially on phone since patient/parent won't see nonverbal empathy "<i>Gosh, this sounds really tough.</i>"

BEGINNING THE CALL

• Introductions	<p>Identify patient "<i>I just need to confirm your full name and birth date</i>" and (re) introduce yourself;</p> <ul style="list-style-type: none"> • Check that this is a good time for patient and/or parent to talk • Make certain that they are in a safe place and conversation can be confidential • Warm greeting: Smile (will come through in tone of voice) and indicate you are happy to talk
• Initial check in	<ul style="list-style-type: none"> • Check that patient/parent can hear/see you • Indicate how you will re-connect with patient/parent if disconnected • Rapport building: Especially during Covid19 ask how family is coping. Connect on a personal level
• Orientation	<ul style="list-style-type: none"> • Describe your understanding of visit purpose (from MA, MyChart, etc). If relevant, describe visit duration

GATHERING INFORMATION: HPI etc

• Agenda setting	<ul style="list-style-type: none"> • Elicit list of problems/concerns patient and parent wants to talk about up front, add what you want to talk about, Negotiate what can and cannot be covered in this visit
• Asking questions	<ul style="list-style-type: none"> • Speak slowly, clearly and pause after asking questions • Avoid jargon • Listen attentively • Clarify what patient and parent says using clarifying questions, repetition and summary
• Signposting	<ul style="list-style-type: none"> • Explicitly identify when moving from one topic to another • Tell patient and parent when you are looking at or writing in the chart

SHARING INFORMATION: PATIENT EDUCATION

• Structure the conversations	<ul style="list-style-type: none"> • Signpost the number and types of issues you will be talking about for easier tracking. <i>I want to talk about 3 things: your test results, your medications and where we go from here</i> • Summarize frequently
• Minimize information density	<ul style="list-style-type: none"> • Speak slowly and clearly • Shorten your educational spiels. Break up your explanations into short chunks. Repeat them if necessary.
• Elicit patient input frequently	<ul style="list-style-type: none"> • Assess patient/parent knowledge before new topic "<i>What do you know about diabetes</i>" • Periodically check patient and parent understanding and concerns about information • Check for patient and parent questions frequently "<i>What questions do you have so far?</i>"

CLOSING THE VISIT

• Orientation	<ul style="list-style-type: none"> • Orient the patient/parent to the end of the encounter, "<i>We have just a few minutes left and I want to summarize and plan next steps.</i>"
• Review	<ul style="list-style-type: none"> • Be clear about the plan. Review what you discussed during the call • Establish what will happen after you hang up (follow-up, next steps, etc). • Identify who to contact with additional concerns and elicit any additional questions
• Teach back	<ul style="list-style-type: none"> • Teach back: Have patient and/or parent summarize specific, important things such as next steps, management options, etc