Understanding a Video Visit at the Health System Level

Video telehealth visits are an effective way for patients to access health care providers, and patients increasingly like the option of video visits.[1] These visits can be a seamless and efficient way for patients to access high-quality health care services — if health systems invest significant resources in technology, training, and infrastructure. Preparing for successful video visits requires substantial effort, a fact that can easily be overlooked.

Video visits require infrastructure and support, including both health care and technical staff, just as successful in-person visits do. Recognizing all the components that go into a successful video visit can help ensure high-quality telehealth services.

These components should be in place before video visits are offered:

- A video platform that is HIPAA compliant, accessible, user-friendly, and compatible with patient-owned devices and that integrates with EMR scheduling and enables multiple concurrent participants (e.g., learners, patients' family members).
- Sufficient internet access and bandwidth for providers and patients.
- Devices for providers and patients (e.g., webcams, headsets, smartphones).
- Established workflows and staffing in place to ensure effective appointment scheduling, notifications, reminders for providers and staff, and learner supervision, as necessary.
- Protocols and infrastructure in place for managing patients' emergencies.
- Effective technology training for providers and staff, including real-time technical support for providers and patients, with contingency plans in place for when failures occur.
- Private locations where others cannot hear or see the patient during the video visit.

The following key steps are critical components of a successful video visit.

Pre-Visit
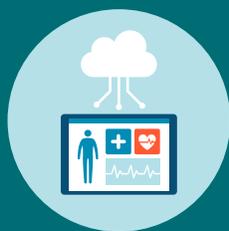
Determine whether the patient will be in a clinic or using a personal device remotely.

- If in a clinic, coordinate resources needed for the visit (e.g., a room, equipment, a telepresenter, assistant, or facilitator).
- If using a personal device, ensure the adequacy of the device, bandwidth, and the patient's video-visit skills. Provide test-call services and troubleshooting, as needed.

Provide patient education
(e.g., set expectations, determine comfort level with technology, offer training, as appropriate).
Prepare the patient for the video visit
(e.g., confirm consent to participate, confirm the camera and microphone are working, review the process and what other personnel might be present).

Create and follow a standard, user-friendly process
for confirming patients' identity, sending patients to a virtual waiting room, and notifying the care provider that the patient is waiting, ready for the visit.

1. Ramaswamy A, Yu M, Drangsholt S, et al. Patient satisfaction with telemedicine during the COVID-19 pandemic: retrospective cohort study. *J Med Internet Res*. 2020;22(9):e20786. doi:10.2t96/20786.

Visit

Reconfirm the patient's identity, location, privacy, emergency numbers, and consent.

Complete clinical triage, as needed, for the visit (e.g., obtain vital signs, complete screening questionnaires).

Guide the telepresenter, assistant, or facilitator in a physical exam, when appropriate.

Facilitate the involvement of caregivers, family members, and learners, as needed.

Maintain professional standards,[2] including ensuring privacy and conducting the visit using appropriate webside etiquette (e.g., be aware of eye contact, body language, and other nonverbal cues, tone of voice).

Allow for sharing and uploading images, as needed (e.g., photos, ID, lab results).

Coordinate electronically with other staff who may help complete the visit, as needed.

Post-Visit

Complete follow-up actions and next steps (e.g., prescribe medications, order and schedule labs and tests).

Arrange the next appointment, and clarify whether it will be virtual or in person.

It is important for payers to recognize and reimburse for the infrastructure and staffing costs for telehealth care, beyond the clinicians' time and clinical expertise. Providers need to employ nurses, medical assistants, and other staff to engage patients before, during, and after telehealth visits to coordinate care pre- and post-visit and ensure a seamless experience. For telehealth to effectively enable access to care for patients and the timely and effective management of their needs, reimbursement for services must be commensurate with the costs of providing care through video visits. As telehealth options continue to increase, recognizing the core components and necessary steps of a successful video visit will help providers, patients, health systems, and payers assess cost, appropriately assign resources, and be better prepared for the future of health care.

Additional telehealth resources: aamc.org/telehealth

2. AAMC. *Telehealth Competencies Across the Learning Continuum*. AAMC New and Emerging Areas in Medicine Series. Washington, DC: AAMC; 2021.