

Video Visit Best Practices

Before the visit

- We recommend using Zoom on your phone while using Epic on your computer (rather than running both programs on your computer).
- Experiment with your setup: position a light source in front of you, place your phone at eye level, try a headset or ear buds, and prep your background (see slides below for images).
- Before your first time using Zoom with a patient, try it with a colleague. Open Zoom and tap “New Meeting.” Your colleague will open Zoom on their phone, tap “Join” and then enter your Zoom ID#. You can get valuable feedback on your visual and audio setup from them.
- Dress professionally +/- white coat. Patterns and stripes can be distracting on video, so you may want to go simple. Avoid green because it can cause a “green screen effect” – it looks like you’re disappearing!
- Avoid multitasking and distractions. Silence your phone and turn off any automated alerts on your computer.
- Give your colleagues or family a heads up that you’re doing video visits to minimize disruptions.

Starting the visit

- Aim to call patient within 15 minutes of their scheduled appointment whenever possible.
- Makes sure you can each see and hear each other.
- Introduce yourself slowly and show your ID badge. Ask the patient to confirm their name and date of birth.
- Acknowledge the difficulty of this situation: “Thank you for your flexibility. We are finding that phone and video visits are a very effective way to provide care. Our primary goal is to keep you safe.”

During the visit

- Make “eye contact” by looking into the camera as much possible.
- Use your excellent communication skills as usual, for example: listen generously, use your body language (e.g. nodding, leaning forward, avoid crossing your arms), paraphrase what the patient says, use empathetic statements, verbalize what you are thinking, speak slowly, and be mindful of your tone.
- If you need to look up something or type, let the patient know what you are doing. If the patient doesn’t know what you’re looking at, they may think you are disengaged or distracted.
- See “Telehealth Visit Workflow” tipsheet for info on required documentation:
<https://contracostahsd.sharepoint.com/sites/Telehealth>

Wrap up

- Summarize: “Ok, let’s review. We think that what’s going on is... and our plan is... and let’s talk again in...to follow up. How does that sound to you?” You can ask the patient “what questions do you have?” or “did we cover all your questions today?”
- Since video visits are new for our system, you can ask the patient how the video visit went for them and if they have any feedback on how to make it better.
- If the patient asks for feedback, you can share video visit tips such as lighting, camera position, and keeping the phone steady.

Slides Adapted from California Primary Care Association

Audio Setup

- We recommend using a headset or earbuds with microphone to protect patient privacy and to improve your sound quality for the patient.
- If you are unable to use a headset, keep the microphone on your device as close to you as possible.
- Consider ways to diffuse sound e.g. rugs, carpets, drapes, furniture, etc.

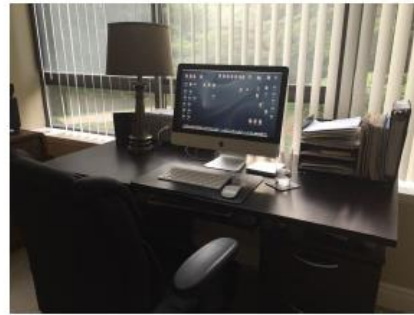
Room Layout

- You may not have many options. But maximize what you have.
- Things to keep in mind.
 - Face into the light. Minimize or avoid windows behind you. Even good blinds are going to leak light.
 - Keep backgrounds simple. Be aware of what the background says about you.
 - Add depth behind the speaker.



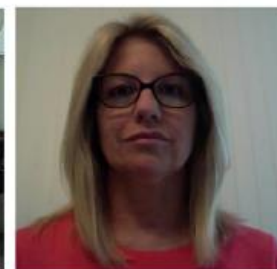
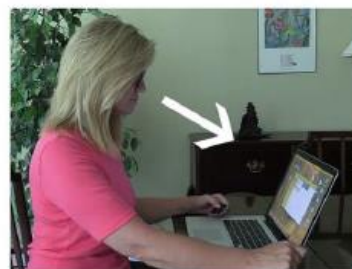
Lighting

- Lighting is the single most important thing you can do to optimize your equipment and your video scene.
- Keep it bright and defuse
 - Use lamps and overhead light to make the light as even as possible, especially on you.
- Use daylight type bulbs rather than incandescent bulbs

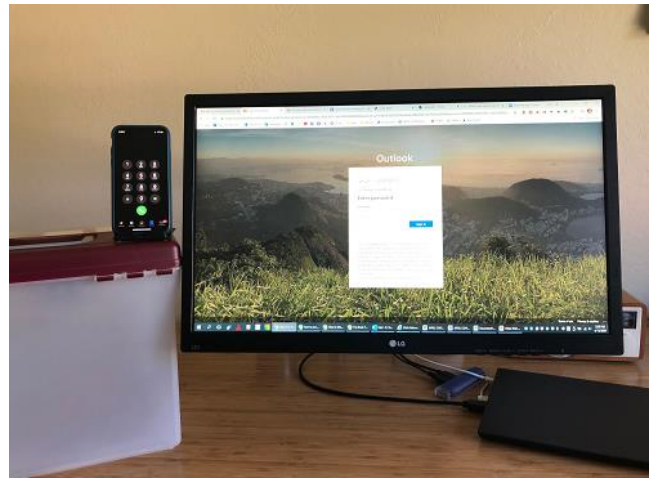
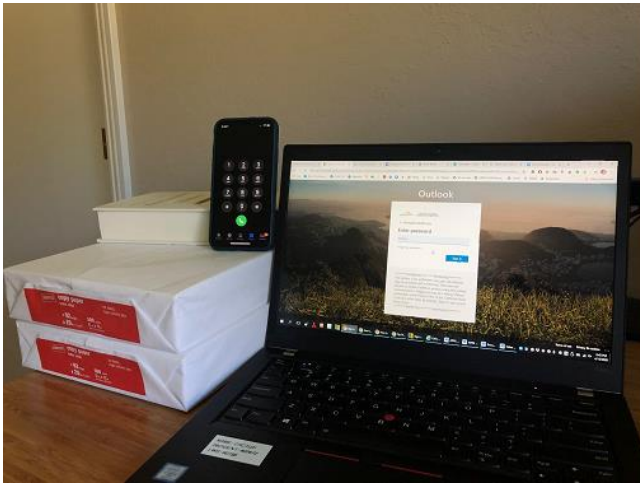


Camera Angles

- Situate camera as close to the top of the monitor as possible. Top of the monitor as close to top of your head as possible.



Position your phone at eye level by setting it on an elevated surface and/or use a stand. See various stands below: gooseneck, kickstand, & monitor mounted.





Frequently Asked Questions?

Check out the Issues / FAQs and additional tipsheets on the Telehealth sharepoint

<https://contracostahsd.sharepoint.com/sites/Telehealth>

Source material:

California Primary Care Association

American Telemedicine Association

Chiron Health

Kaiser Permanente

Compiled by B. Yoshi Laing, April 2020