

Digital Health Etiquette Checklist

The Digital Health Checklist can help a health care provider deliver a professional, quality health care experience.

PATIENT ENGAGEMENT

BEFORE	
	Ensure that the patient plans to use the strongest internet connection available
	Provide the patient with forms and instructions for returning them
	Provide instruction on other information needed for the visit, i.e., medication list, etc.
	Explain digital health and a patient's rights under HIPAA
	Explain the processes for co-pays, referrals, scheduling, prescriptions, etc.
	Explain how the patient will get lab work and results, i.e., MyChart, call from clinic, etc.
	Ensure that the patient understands how to access the visit, i.e., patient will receive a text or email with a link 30 minutes prior to the scheduled appointment, etc.
	Explain the waiting room once the patient clicks the appointment link
	Provide contact information if there is an issue making the connection
	Arrange for interpreter, if needed
	Provider should review the chart and note any important aspects to help better understand the patient and his/her needs

Digital Health Etiquette Checklist

DURNG	
	Ensure that audio and visual connections are adequate on both sides of encounter
	Establish a rapport through information conversation, such as talking about items visible in the background, pictures, pets, etc.
	Acknowledge that the technology can seem a bit awkward, which is normal at first
	Ensure that the patient is in a private place that is free from distractions
	Provide an introduction that includes name, role, organization, and department (determined by new or established patient)
	Identify anyone that may be in the exam room on the provider side
	Ask patient to identify reason, expectations, and/or goals for the visit
	Explain any activities, such as looking away to take notes
	Display empathy and compassion during the assessment
	Use motivational interviewing techniques to include the patient in the healthcare plan
	Frequently ask patient if he/she has questions, comments, concerns
	Validate the patient's emotions and concerns
	Repeat questions to ensure that both provider and patient have the same understanding
	Determine if other assessments are needed (housing, abuse, food insecurity)
	Outline the healthcare plan and any needed follow up in a clear manner
	Ask the patient to explain the care plan
	Reassure patient and provide any available resources
	Discuss follow up needed, i.e., clinic nurse will contact, etc.

PROVIDERS - BEFORE A VIRTUAL VISIT

APPEARANCE	
	Wear the same professional clothing styles in a virtual visit that you would wear during an in-person visit
	Choose clothing in solid, neutral colors and avoid busy patterns
	Display your name badge and ensure that it is visible to your patient
	Wear a lab coat, if appropriate
	Wear jewelry that won't distract, i.e., small pieces that don't create sounds
WORK ENVIRONMENT	
	Select a secure room with a door that can be closed to ensure patient privacy
	Consider wall color – use neutral tones or a green screen
	Consider lighting – use natural when possible and lamps to compensate for poor lighting
	Consider the number of electrical outlets needed to manage equipment
	Determine equipment configuration, such as multiple monitors, etc.
	Avoid displaying personal items such as photos; however, consider displaying diplomas and credentials
	Limit clutter on desktop and other surfaces within the room
	Throw away food containers, wrappers, etc., prior to connecting with a patient
	Ensure that only protected health information (PHI) for the current patient is visible
	Determine where you will take notes during the visit

TECHNOLOGY	
	Verify that the internet connection is stable and there is an alternative if the connection becomes unstable
	Test the microphone and audio settings to ensure that sound capability is working correctly
	Adjust lighting to illuminate the face
	Set webcam on a stable surface to avoid movement of the projected image
	Position the webcam to ensure that you are at eye level with the patient
	Minimize the distance between you and the webcam

PROVIDERS - DURING A VIRTUAL VISIT

APPEARANCE	
	Avoid chewing gum, eating and drinking during the visit
WORK ENVIRONMENT	
	Eliminate potential distractions, such as background music or people coming into the space
	Mute cell phones
	Avoid side conversations
	Avoid texting
TECHNOLOGY	
	Look directly into the webcam when speaking
	Verify that the patient can see and hear you clearly
	Mute the microphone when not speaking
	Minimize distracting noises

PROVIDERS - AFTER A VIRTUAL VISIT

AFTER	
	Update chart with notes from the visit
	Schedule tests and follow up appointments
	Ensure that the patient is notified about additional activities
	Follow up with a patient satisfaction survey
PATIENT SATISFACTION SURVEY (Online, Phone, Email, Posted Mail)	
	Quality – How did the visit compare to an in-person visit?
	Convenience – <ul style="list-style-type: none">• Did the visit save time and/or money?• Was the visit easy to schedule?
	Satisfaction – <ul style="list-style-type: none">• Were you happy with the visit?• Would you use digital health again?
	Technology – Did you experience any difficulties trying to connect?

COMMUNICATION

VERBAL COMMUNICATION	
	Speak clearly using words and tones that are empathetic and thoughtful
	Introduce yourself
	Ask the patient to introduce him/herself
	Acknowledge and show respect to others involved in the visit
	Use motivational interviewing techniques that encourage the patient to actively discuss and participate in developing hi/her care plan
	Use lay terms when possible to clarify information
	Frequently ask the patient if he/she has questions or comments
	Repeat questions to ensure that you understand the patient
	Avoid interrupting
	Stay aware of tone and volume of voice
	Consider the lag in internet speed and allow the patient a few seconds to respond, especially if the patient suffers from a hearing loss or other medical condition that could impact the speed of their response
	Discuss the need for an interpreter to support communication prior to the visit, if needed
NON-VERBAL COMMUNICATION	
	Ensure positive engagement through eye contact, smile, nod head, lean toward webcam
	Avoid negative body language such as crossed arms, poor posture, covering mouth, scratching, locking arms behind head, fidgeting, etc.
	Limit hand gestures
	Explain topics through diagrams, drawings, and other visual aids