



Section 4: Practice in action: Understanding your virtual visit

By the end of this section you will be able to:

- Consolidate the learnings from the first three sections.
- Reflect on and have a clear understanding for yourself on how to incorporate all this theory into your virtual visit.
- Apply compassionate communication through the use of your body to communicate presence and empathy during a virtual health visit.
- Know where to get more information and who is there to support you.

Meet the characters

Nurse Practitioner Jane



She's been in practice for 12 years and finds the most rewarding part of her days are spent making a difference with her clients. Her clinic started offering virtual health visits as an option since 2022. She has been working with John for 3 years to manage his diabetes and John has recently expressed his preference to go virtual.

The client John



John has been experiencing a change in his health. He's noticed his decline in mobility, which makes it harder for him to move around with comfort. John has become more confident with technology since his daughter has moved back home, and he's been regularly video conferencing with his friends overseas.

Daughter Amy



Amy is John's daughter and she recently moved back home to help out as her dad navigates his current health. John loves spending time with his daughter and is grateful for her support.



Is a virtual health visit the right fit?

- Determine [clinical appropriateness](#)
- Obtain consent from your client
- Verify client's email address and send the virtual health visit email invitation
 - Consider providing [patient resources from the Office of Virtual Health webpage](#) because our software setting in health care may be different.
- [Consider language access needs](#) of your client



Getting prepared

- Review the appropriate clinical information needed for the virtual health visit
- Be aware of sensitivities in building relationships online due to generational trauma
- Consider strategies that can assist you in delivering relational-caring virtually for diverse cultural or ethnic groups
- Set-up environment to maintain patient confidentiality & privacy (e.g. use headphones or book a private space)
- Optimize set-up so you are comfortable and have everything you need
- Conduct pre-visit testing to ensure quality (e.g. Internet and audio/video feed)
- If you've met the client before, think 'connection' - is there something you can ask about or mention that would have them feel remembered?
- Consider self-care: take a stretch or a drink of water

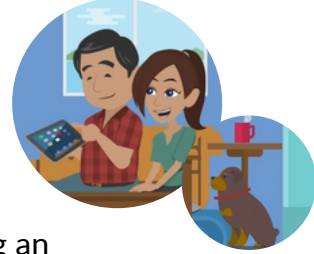


Self-reflection

What might be some preparations that are specific to your role?

What have you noticed you personally need in order to feel confident and settled when meeting with a client? If you're not already formally including them in your preparation, what might you need in order to make it a habit?





Greeting the client

- Check that you and the client can both hear and see each other ok, and if using an interpreter or captioning, ensure settings are enabled and the client can access them
- Greet the client and others who are joining for the visit
 - Consider the phrase *'Hello, thank you for inviting me into your home'*
- Introduce everyone, including anyone not seen on the screen directly, and ensure patient is comfortable with everyone who is in attendance
- Take opportunities to connect, consider your client's cultural background and needs. Ask yourself: *How else can I be kind, patient and compassionate during this online engagement?*
 - If appropriate, provide a meaningful land acknowledgement
- Verify the client's identity with [two valid identifiers](#)
- Confirm their consent for virtual health
- Offer guidance to support communication in the visit. Consider the phrases:
 - *'You may notice me look away occasionally to type a few notes about our visit'*
 - *'If at any time you have questions or technical problems, please speak up'*

Identifying needs

- Take the time to acknowledge the purpose of the VHV with your client, and ensure to ask if there's anything else they would like to address during your time together. Ask ['what matters to you?'](#)
- Set the stage for the assessment, consider the phrase: *'I'd like to ask a few questions about what's going on, then we can discuss next steps. How does that sound?'*
- Use open-ended questions, actively listen and check in with the client to fully understand their needs

Responding to the client

- Use [websiteside manner](#):
 - For example: looking into the camera to mimic eye contact, be mindful of your gestures, use prolonged pauses to allow time for clients to unmute, and positive body posture such as exaggerated smiling or nodding to support collaboration.
 - If you cannot interpret facial expressions, inquire about how the patient is feeling about the discussion
- Paraphrase and clarify meaning:
 - Summarize what the client has said in your own words to ensure you've accurately understood. Provide plenty of opportunities for your client to clarify or elaborate. Consider the phrase: *'if its okay with you, I'd like to check that I understand everything that we've discussed so far....How am I doing?'*

Responding to the client (cont'd)

- Teach-Back:
 - Offer suggestions on ways to navigate their health and get feedback on options discussed. After giving instructions, have client report back in their own words what next steps are to ensure you've communicated it clearly and they've understood it accurately

Concluding the visit

- Document your follow up action items in the appropriate places (e.g. electronic health record)
- Clients may be processing what was just discussed, take a moment to stop and ask *'Do you have any questions for me?'*
- Ask *'How did you find doing your visit virtually?'* to understand if you should continue using this platform
- Agree on next steps and confirm how the client can reach you with questions after the VHV



FOLLOWING a virtual health visit

Document and follow up

- Document the consent and care provided for the visit per professional/program standards
- Email resources as identified in your VHV
- Arrange follow up as needed
- Reflect on your experience of the visit and consider improvements for future virtual health visits

