

Virtual Health Visit Checklist

For Clinicians

Use this checklist to help ensure a respectful and culturally safe virtual health visit.

In our commitment to address historical systemic racism in our organizations, PVH encourages staff to apply trauma awareness, cultural humility and harm reduction in virtual health practice. For more information, please see the [PVH Virtual Health Competency Framework](#), particularly competencies 3a and 4b.

BEFORE

- ☐ Determine patient and clinical [appropriateness](#).
- ☐ [Check with the patient if they need language access for the virtual health visit](#).
- ☐ Consider strategies that can assist you in delivering relational-caring virtually for diverse cultural or ethnic groups.
- ☐ [Inform risks](#) and obtain consent.
- ☐ Verify patient's e-mail address and send the virtual health visit email invitation.
- ☐ Review the appropriate clinical information needed for the virtual health visit.
- ☐ Set-up environment to maintain patient confidentiality & privacy (e.g. use headphones or book a private space).
- ☐ Conduct pre-visit testing to ensure quality (e.g. Internet and audio/video feed).



DURING

- ☐ If using interpreter and captioning, ensure settings are enabled.
- ☐ Introduce everyone (i.e. including anyone not seen on the screen directly), and ensure patient is comfortable with all in attendance.
- ☐ If appropriate, provide a meaningful land acknowledgement.
- ☐ Verify patient identity against [two valid identifiers](#).
- ☐ Confirm [consent](#) to use vhw for service delivery.
- ☐ Review the purpose for the appointment. Ask '[what matters to you?](#)'
- ☐ Use [webside manner](#).
- ☐ 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 using [Zoom recording](#), obtain informed consent.
- ☐ Communicate next steps before closing the session.
- ☐ Check in with the patient. Did the virtual health visit work well for them?

FOLLOWING

- ☐ Document the following per professional /program standards:
 - Consent for virtual health visit
 - All care provided by virtual health (e.g. phone, video, other).
- ☐ Arrange follow up as needed.
- ☐ Email resources as required.
- ☐ If using Zoom recording, document consent for recording within the patient's health record and share out the recording link as appropriate.
- ☐ Reflect on virtual health visit, considering improvements for future virtual health visits.

