

# ZOOM FOR HEALTHCARE CHECKLIST

Use this checklist to help guide you in **hosting your virtual appointment**.

## SET UP THE ENVIRONMENT

- Designate a secure area– quiet, well-lit and private.
- Limit chances of distractions and interruptions.
- Use a professional and neutral backdrop.
- Be mindful of your attire.
- Position your web camera on the computer monitor directly above the patient video image so you are looking directly at them.
- Collect/create relevant patient education texts and web links to share with the patient after the encounter.



## BEGINNING THE APPOINTMENT

**Note:** Support staff may assist in these tasks if they have the appropriate permissions. However, consent must be documented.

- Admit the patient from the virtual Waiting Room
- Authenticate the patient's identity with **two** sources:
  - Name
  - Date of birth
  - Provincial Health Card number
- Troubleshoot any audio or visual issues with the patient, if needed.
- Receive (and document) verbal consent for video conference use. They may remove this consent at any time during the appointment.
- Confirm the patient is in the province where you hold your licence.
- Discuss options if technology fails and make a plan (revert to a phone call, patient will call, provider will call the patient, reschedule, etc.).
- Ask if they are in an appropriate and private location.
- Ask them to identify if else is present for the appointment.

## ENDING THE APPOINTMENT

- Ask the patient how they felt about doing the appointment virtually.
- If another appointment is required, ask the patient if they want to attend their next appointment virtually.
  - If the patient is interested, advise them that they will receive an email invitation for their next virtual appointment.
- Ensure all necessary items are documented on the patient's health record:
  - This was a virtual appointment using Zoom for Healthcare
  - The patient's location (home, workplace, etc)
  - Verbal informed consent obtained
  - All participants in attendance
  - Any incidents that impact the delivery of care
- Distribute copies of the documentation (as appropriate).

