

10 Tips to Consider When Meeting with Your Patients Virtually with a Learner Present

1. **REVIEW** the virtual platform/telephone system you will be using and ensure multiple people can be online at once.
2. **INFORM** your patient about the virtual appointment, ask permission and prepare them for a learner being involved.
3. **IDENTIFY ALTERNATE CONTACT INFORMATION** should the call/ video be cut off, or to have patients rejoin if they sign off during the review period.
4. **PLAN** your patient encounter process and expectations with your learner prior to the visit.
5. **ENSURE THERE IS A QUIET AND PRIVATE** location for the learner and the patient.
6. **INTRODUCE** your learner to the patient once in the virtual space and ensure the volume is adequate for everyone.
7. **DECIDE** whether you will keep your camera on if you are observing the learner taking the history and explain this in advance.
8. **CREATE** space in the schedule for review after the learner takes the history, just as you would when face to face with learners.
9. **DECIDE** the disposition of your patient when reviewing the case with the learner. This could include having them sign off and back on when you are ready or placing them in a waiting room for example.
10. **LOOK AT THE CAMERA** as often as possible when speaking to your learner and patient.