

THE PREPARED PATIENT

BEFORE, DURING & AFTER A VIRTUAL VISIT

Before the Virtual Visit

- Download a copy of these templates and fill in before each doctor's visit. Send to your doctor in advance, if time permits.
- Call the doctor's office to confirm any preparation needed and the length of the appointment.
- Ask to test the technology in advance of the appointment to ensure that audio and video quality is good and to familiarize yourself with any new technology that may be used.
- Confirm whether the doctor will perform a virtual physical exam, what that may entail, and if you need to acquire any technology such as a blood pressure cuff, pulse oximeter, thermometer, etc.
- Follow-up with your insurance company to confirm coverage, costs and/or obtain any necessary approvals. Ask what type of technology is covered under your telehealth plan.
- Be prepared to share your medical history and any test results. You can use our **My Medical Timeline** templates and/or other relevant trackers as a guide for documenting and sharing your story.
- Keep a record of health complaints, symptoms, allergies, and medications to share with your doctor/nurse. You can use our **Medicine and Symptom Tracker** and/or other relevant trackers to record this information.
- Write down your questions/concerns in order of priority and discuss the most important items first. Make a copy for your doctor/nurse and send in advance. Ask a family member or friend to join the visit virtually to help you take notes. Refer to the **Questions to Ask My Health Care Team** for frequently asked questions to guide you.
- Pick a quiet location where you will have privacy without any distractions. Your background will be seen by the doctor so be aware that this may be part of an assessment of your living conditions.
- Prepare a location that is well-lit and where there is enough space, in case your doctor asks you to move around as part of a virtual physical exam.

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During the Virtual Visit

- Position your camera on a firm surface that's far enough so that your doctor can see your torso and arms. Set the view so that you can see your doctor only, rather than also seeing yourself on screen, which can be distracting.
- Don't forget to take notes during the visit as you ask questions!
- Make sure you understand your options so that you can make informed decisions. Ask for clarification if you don't understand any words used or instructions.
- Don't leave your virtual visit until you are clear on next steps. It's a good idea to repeat next steps to your doctor/nurse to avoid any miscommunication.

After the Virtual Visit

- Ask for an after visit summary that recaps your virtual visit and potential next steps.
- Take a look at the medical report through your patient portal to confirm all information documented is accurate.
- Make a follow-up appointment and/or schedule recommended tests.
- Don't forget to fill your prescriptions.
- Coordinate with other members of your health care team, as needed.