

Video and Telephone Visit Etiquette

1. Set your webcam at eye level.

Making direct eye contact will help your virtual interaction feel more personal and professional. Remember to maintain eye contact with your patient by looking straight into the webcam rather than at their face onscreen. This can be challenging at first but will help you come across as being more present.

2. Establish a professional space to conduct your virtual visits.

Ensure a quiet, private, distraction-free space for your visit. If you are worried about potential interruptions, consider hanging signs outside the door to notify others that a patient interaction is occurring. Also, turn off notifications from other devices whenever possible.

3. Be punctual.

Just as in-person patients appreciate not languishing in a waiting room, so will your virtual ones. And if you are running behind, consider asking your support staff to notify or reschedule the patient so they aren't left sitting waiting for the phone to ring or staring at a blank screen waiting for you to "pop" up.

4. Dress for success.

Remember: Your patients can see you! Dress as you would for an in-person evaluation. Your patients are expecting the same professionalism you have always provided.

5. Remember the human touch.

Especially during these difficult times, take a few moments to ask your patient how they are doing. Reiterate why a video/telephone visit was recommended if they were initially scheduled to be seen in person.

6. Engage with your patient.

Video: Smile when you see your patient, and have a warm, welcoming tone. Also, simple body movements (such as nodding, gesturing with your hands, displaying appropriate emotions such as concern with facial expressions) all help your patient feel you are present. And don't forget, your patient is watching when you are not talking. Your behavior will affect how they feel about the encounter.

Telephone: Studies have shown people can tell if you are smiling by the tone of your voice, so smile even if you can't be seen. As you cannot see your patient, elicit reactions by asking questions, like "What do you think about that?" Finally, as patients are missing out on your facial expressions of care, make empathic statements, such as "I'm sorry you're going through this difficult time" or "that sounds really tough," so you can convey these feelings with your voice.

7. Set expectations.

Make it a point to let your patient know how much time they have for their appointment, and ask them to prioritize what they would like to discuss. You likely already do this for in-person visits, but patients may not know what to expect when being evaluated remotely. It's also a good idea to let your patient know that you may experience some technical difficulties; and if those happen, you or your support staff will reach out to them as soon as possible to get things back on track.

8. Communicate when you look away from the screen.

Let your patient know if you need to review old records, order tests, document, or perform other activities that cause you to look away from the screen so that you don't come across as distracted.

9. Be clear with post-appointment instructions.

Make sure patients know about prescriptions, future labs, and follow-up recommendations. You may want to educate in small chunks and repeat your recommendations a few times. It's important to not only share your plan verbally but also ensure instructions are clearly stated in the patient's after-visit summary.