

## Supporting your Practice Excellence

### 20 Tips for New Virtual Care Providers

**Collated and shared by Julie Clyde, OSOT Director. Julie's experience is based on moving hospital out-patient services to virtual practices, but her tips & insight give good direction and points to consider for any occupational therapist considering a move to virtual practice.**

1. Engage your IT department or consultant early on to test all required equipment and systems, facilitate training, and assist in development of onboarding education materials for patients and yourself or staff.
2. Ensure your patient has access to technical support services during business hours.
3. Consult with your Privacy department, COTO guidance or Privacy Commissioner early to ensure processes are aligned with required legislation and corporate recommendations.
4. Read *COTO Guideline for Telepractice* and *OSOT's Engaging Telepractice in your Occupational Therapy Practice* document prior to commencing telepractice to help understand your professional and legal obligations.
5. Develop process maps for onboarding and clarifying all team members' roles in the process.
6. Develop scripts/checklists for staff to follow when booking appointments and to structure the virtual visit.
7. Reflect on contingency management plans to prepare for any adverse incidents during virtual visits. Have IT and emergency contact numbers at your fingertips during virtual visits.
8. Obtain specific consent to use and collect patient email addresses.
9. Double....triple check your patient's email address to protect your patient's personal health information.
10. If you send your patient education resources, ensure they are in PDF format.
11. Try to book in time buffers between appointments during the pilot phase to allow for any technical or unanticipated issues that cause delay.

12. Instruct your patients to call the office/clinic if they do not receive an email invitation within 1 hour of booking the appointment to allow for rapid identification of system/connection errors.
13. Provide your patients Brochures or Virtual Care Help Guides to assist accessing virtual care appointments prior to their first visit (email documents in PDF form or link to guides on an external website).
14. If there are multiple clinicians sharing devices, consider creating a device booking schedule to reduce double booking of a device.
15. Consider creating a shared electronic location to house all updated virtual care training materials.
16. Consider creating patient and provider satisfaction surveys to obtain feedback to enhance future virtual experiences. Obtain consent to email surveys prior to sending them out.
17. Identify power users early on that can assist with trouble shooting.
18. Consult your IPAC department regarding appropriate cleaning practices for shared equipment/devices.
19. Ask for help and don't be afraid to reach out to colleagues for support.
20. Don't rush through the decision process! Take time to reflect on the risks and benefits of each type of visit interaction with your patient and generate a shared decision that is the most appropriate.

***Do you have tips to share from your experience integrating virtual care strategies into your practice? OSOT members are each others' best resource – please consider sharing your experience and advice. Forward input to [osot@osot.on.ca](mailto:osot@osot.on.ca).***