

## Optimizing Clinic Telehealth Visits with Student Learners

**Purpose:** To optimize use of the virtual clinic platform for medical education in the outpatient clinical setting

**Application:** Teaching settings where patient encounters previously performed in an ambulatory care model have transformed to include telehealth visits, telephone visits

### Student Learning Objectives

(Adapted from AAMC Draft Competencies for Medical School Graduation, 2020)

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#### 1. Preparing for Telehealth Visits

Student objectives	Faculty Guide
<p>Demonstrate skill with navigation of EMR, Tele-visit platform and secure team and preceptor communications</p> <p>*Student with secure access and training on EMR, Telehealth Platform, Telehealth flow plan, back-up alternate communication systems, communication w/care team including preceptor</p>	<p>Role model how to set up and use telehealth for clinic visits; mitigate risks of providing care from a distance; assess methods for improvement</p>
<p>Establish a therapeutic patient relationship and environment</p> <ul style="list-style-type: none"> <li>• Minimized disruptions ( noise abatement, technical set-up, internet reliability)</li> <li>• Professional attire/presentation (introductions, permission, appreciation, focus)</li> <li>• Professional workspace (lighting, audio, background, camera placement, seating, reliable internet/phone)</li> <li>• Reliable technical resources (charged laptop/phone, secure reliable log-on)</li> <li>• Acknowledgement of student role and responsibilities (consent, collaboration)</li> </ul>	<p>Role model appropriate professional set up for telehealth visits; identify students' presence to patients, obtain consent.</p> <p>Role models and teaches effective rapport-building with patients/care-givers via video visits</p>
<p>Understand the roles and responsibilities of team members in telehealth encounters, regardless of modality</p>	<p>Assist the student in understanding how to coordinate, implement, and evaluate the effectiveness of the telehealth visits, regardless of modality</p>

#### 2. Obtain a History During a Telehealth Encounter, Including Major Physical and Social Environment Factors that May Impact Health

<p>Obtains a history during a telehealth encounter, including major physical and social environment factors that may impact health</p>	<p>Role models and teaches skills required to obtain a history (from patient, caregiver, family) during a</p>
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	telehealth encounter and incorporate the information into a management plan
<p>Work with diverse patients and caregivers to determine patient/caregiver access to technology to incorporate telehealth into care</p> <ul style="list-style-type: none"> <li>- Demonstrate ability to appropriately employ translator, ASL interpreter, if needed</li> <li>- Demonstrate ability to trouble shoot technology access issues that may arise</li> </ul>	Role model and teach students how to partner with and work with diverse patients and caregivers in the use of telehealth including use of translational services, if needed.
Identify and describe when patient safety is at risk, including when and how to escalate care (convert to in-person visit or emergency response) during a telehealth encounter	Roles model and teach students how to assess patient safety during a telehealth encounter, including preparing for and escalating care when patient safety or health is at risk

### 3. Perform a Focused Physical Exam Via Telehealth Encounter

<b>Student objectives</b>	<b>Faculty Guide</b>
<p>Modifies Physical exam to the Telehealth Platform</p> <ul style="list-style-type: none"> <li>• Patient-Reported Vital Signs, home self-monitoring</li> <li>• Assessment of Demeanor, Cognition, Mood, Level of Distress, Insight</li> <li>• Assessment of gait, posture, use of assistive devices</li> <li>• Assess for CV and Respiratory distress: diaphoresis, dyspnea, weakness</li> <li>• Patient-assisted HEENT,MSK and SKIN exam</li> <li>• Photo for improved visual clarity and inclusion in medical record</li> </ul>	Role models and teaches the skills required to perform a physical exam during a telehealth encounter, including guiding the patient and/or telehealth presenter
Explains the importance of patient-generated data in the clinical assessment and treatment plan during a telehealth encounter	Role models and teaches how to incorporate patient-generated data into clinical assessment and treatment plan, while understanding data limitations and adapting accordingly

### 4. Formulate and Present an Assessment and Plan

<b>Student objectives</b>	<b>Faculty Guide</b>
<p>Presentation to Preceptor</p> <ul style="list-style-type: none"> <li>• W/wo Patient present for clarification and comment</li> </ul>	<p>Perform assessment, verification of findings and discuss 1-2 key teaching points</p> <p>Preceptor repeats-exam for documentation</p>

<ul style="list-style-type: none"> <li>• Time-planned vs. invitation of preceptor to join vs. silent observation logged-in</li> </ul>	
<p>Visit Wrap-Up and After-Visit Care</p> <ul style="list-style-type: none"> <li>• Scheduling: Specialist Referral, Lab/Imaging</li> <li>• Follow-Up Visit timing</li> <li>• Next-step Instructions</li> <li>• Portal/Printed Care Handouts</li> <li>• Follow up phone call</li> <li>• Identify high-risk patients who need closer follow up</li> </ul>	<p>Review after-visit plan with student, ensure appropriate follow up plan in place. Ensure student has access to portal to provide patient/caregiver with supplemental handouts</p>
<p>Preventive Care Summary</p> <ul style="list-style-type: none"> <li>• Motivational Interview Goals Statement</li> <li>• Portal/Printed Resource Guides</li> <li>• Vaccination Recommendations</li> <li>• Future Screening schedule</li> </ul>	<p>Review after-visit plan with student, ensure appropriate follow up plan in place; ensure student has access to portal to provide patient/caregiver with supplemental handouts</p>

5. Complete appropriate telehealth documentation requirements based on modality, health institution, payer and practice

<b>Student objectives</b>	<b>Faculty Guide</b>
<p>Understand the legal and privacy applications to telehealth</p> <ul style="list-style-type: none"> <li>• HIPPA, Sign-on to EMR Platform, Secure chat with Preceptor</li> <li>• Institution, Payor, and Practice Requirements</li> </ul>	<p>Role model and comply with legal and privacy regulations for telehealth; Review CMS guidelines for telehealth visits with students</p> <p>Review billing requirements for telehealth visits with students</p>
<p>Understand Ethical/Best-Practice Applications of Tele-Health</p> <ul style="list-style-type: none"> <li>• Role, limitations and opportunities for Patient-Generated Data</li> <li>• Role as a Care Team Member</li> <li>• Security, Confidentiality, and Information Management</li> </ul>	

## 6. Access and Equity in Telehealth

<b>Student objectives</b>	<b>Faculty Guide</b>
Describe one's own implicit and explicit biases and their implications when considering telehealth	Role models and teaches how to recognize and mitigate biases during telehealth encounters
Defines how telehealth can affect health equity and mitigate or amplify gaps in access to care	Promote and advocate the use of telehealth equity and access to care as well as to advocate for policy change in telehealth to reduce disparities.
Assess the patient's needs, preferences, access to, and potential cultural, social, physical, cognitive, and linguistic/communication barriers to technology use when considering telehealth.	Accommodates and role models how to advocate for improved access to accommodate the patient's needs, preferences, and potential cultural, social, physical, cognitive, and linguistic/communication barriers to technology use when considering telehealth