



# How to Help a Family Member or Friend with Their First Telehealth Visit

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Seemingly overnight, the COVID-19 pandemic has shifted the way that providers deliver and patients receive care. Avoiding exposure to the virus has been a huge driver for this change, particularly for individuals considered at high risk such as those over the age of 75 and/or who have co-morbidities such as hypertension and diabetes. Favorable policy changes in

response to the pandemic have helped to facilitate the transition from in-person office care to care using telehealth technologies.

Even as progress is made in controlling the pandemic, many providers and patients remain hesitant about resuming office visits. On top of that, providers and patients have gotten a taste of the convenience, speed, quality and

safety associated with providing and receiving care using telehealth technologies. In other words, the proverbial genie has been let out of the bottle, and there may be no going back. For those caregivers who have not yet experienced their first telehealth visit, here are some helpful things to know.

### **WHAT IS TELEHEALTH?**

Telehealth is a way to receive care from a health care provider while remaining at home. By using technology, a health care provider can do many of the same things that he/she would do to assess a patient or client's health and wellbeing that would have been done during an in-person office visit. For simplicity, we will be using the term patient in this article, acknowledging that for behavioral health and other visits, patients are more frequently referred to as clients.

### **WHAT EQUIPMENT IS NEEDED?**

In the best possible scenario, the patient will be able to have his/her visit using both an audio and video connection. To have a video visit, the patient will need a stable internet connection and either a computer, tablet or smartphone. While a video visit would be the preferred mode of providing care, if that is not possible because the patient does not have an internet connection or does not have access to a device with a video camera, the health care provider may be able to conduct some or all of the visit by telephone. While not absolutely required, sometimes your health care provider might ask whether the patient has access to devices such as a thermometer, scale, blood pressure monitor or pulse oximeter.

### **CAN ALL CARE BE DONE USING TELEHEALTH?**

Think of telehealth as a pretty versatile multi-purpose tool. Like all tools, there will always be some limitations to what it can do. Some things will require the patient to have an in-person visit, such as having certain procedures or lab tests done.

Some, but not all, clinical practices started their journey into telehealth long before the current pandemic. These practices have had plenty of lead time to prepare their practice for telehealth visits. This preparation time has allowed them to research, test, procure and deploy digital devices, such as stethoscopes, thermometers, blood pressure monitors, glucometers and pulse oximeters to their patients. This extends the scope of what type of care can be done by telehealth and will become more and more common over time. However, this has not yet become the norm.

### **HOW DO YOU SCHEDULE A TELEHEALTH VISIT?**

Most providers will schedule a telehealth visit in the same way you would schedule an in-office visit. The most common ways are: 1) contacting the provider's office by phone; or 2) scheduling the appointment online by either going through a patient portal or using a scheduling application found on the provider's website.

### **I'VE SCHEDULED THE TELEHEALTH VISIT. NOW WHAT?**

Taking a little time to prepare will result in a more successful and satisfying visit. Here are a few things to consider:

- **LOCATION, LOCATION, LOCATION!** Find a location in the patient's home where there is a fast and reliable internet connection or strong phone signal. The location should also be well-lit, comfortable, distraction-free and private, so the patient can discuss health matters. If the patient is able to use a video-enabled device, try to avoid having them sit with a very bright light source, such as a window, directly behind them because this could make their image look washed out to the provider. Do not try to conduct a telehealth visit while you or the patient is driving, sitting in a moving vehicle, or sitting in a public place like a coffee shop.



- **TECHNOLOGY.** Telehealth visits will be most effective if the health care provider is able to see and hear the patient clearly, so:
  - If the patient has access to several types of devices (a computer, a tablet and/or a smartphone), select the one that will provide the best picture and sound. If a phone will be used for the visit, consider putting it on speaker so that the patient does not have to hold it in his/her hands.
  - Make sure the device that will be used is either plugged in or fully charged before the telehealth visit.
  - If using video, whenever possible, find a way to place the camera at or near eye level, so that he/she can easily make eye contact with the health care provider.
  - Assist the patient with testing out the device by doing a video call with another friend or family member. Make sure

all parties can hear and see each other clearly. Adjust the lighting and camera angle as needed.

- **PREPARING THE PATIENT.** Here are a few things to consider doing prior to the scheduled telehealth visit:
  - Assist the patient with creating a list of questions or concerns that he/she would like to discuss with their health care provider.
  - If you, as the caretaker, will want some time to discuss concerns with the health care provider in private, you may want to schedule a separate time to speak with the provider by telephone.
  - If this is a new health care provider (or at least someone who might not recognize the patient by sight), the patient may be asked to verify their identity. You should make sure that the patient has some form of picture ID readily available (e.g., a driver's license or passport).

- If this is a new health care provider who does not have access to the patient's medical records, he/she will mostly likely ask about the patient's health/medical history, allergies and/or medications (both prescription and over the counter). You may be asked to submit this information for the patient online before the visit. If not, make sure you have this information available before the start of the visit.

- **DURING THE TELEHEALTH VISIT:**

- Make sure you know how to connect with the health care provider, either by video or by phone. If using video, connect a few minutes early in case you run into any technical difficulties.
- Have the patient wear comfortable, loose-fitting clothes, especially if he/she has an area of concern where the clinician might want to take a closer look. For example, if the patient has fallen and injured his/her knee, you may want to have them wear shorts or loose-fitting pants that would allow the health care provider to see the area of concern without the patient having to get undressed.
- At the start of the visit, let the provider know that you are the caretaker and will be joining the patient during the visit. If there is anyone else in the room, you should also let the health care provider know that at the start of the visit.
- Encourage the patient to act as they would during an in-person visit. They should share their health concerns and answer questions while looking into

the camera so that their health care provider can see them. As a caregiver, you may want to have a piece of paper and pen available to take notes.

- If the audio or video quality is poor and you or the patient are unable to see or hear the health care provider clearly, make sure you say something. You or your health care provider may want to try disconnecting from the visit and reconnecting again to see if the sound or video quality improves.
- The health care provider may sometimes ask you to be his/her hands. For example, he/she may show you an area on the patient's body to feel for swelling, or may instruct you to apply pressure to certain areas to see if there is tenderness or pain. If you don't understand the instructions, don't be afraid to ask questions!
- Before you end the telehealth visit, make sure you are clear on any instructions for what to do next. If this visit is not with the patient's regular primary care provider, you should request that a summary of the visit be sent to the primary care provider.

If you have helped to facilitate a successful telehealth visit, congratulations! In case things didn't go super smoothly, remember that both you, the patient and the provider may be pretty new at this. Don't be afraid to try again. Like everything new, it will improve with a little practice.

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