

## Tip #28: Effective Telehealth Patient Engagement

**The Risk:** Telehealth has emerged as an essential component of healthcare during the COVID-19 crisis. Changes in permissible formats, adjustments to reimbursement, and the need for social distancing have contributed to the widespread acceptance of this technology, leading to a significant increase in telehealth visits.

The proliferation of telehealth highlights the need to implement effective strategies for patient engagement. While for many segments of the population the move to “virtual visits” with their healthcare providers was seamless, this may not be the case for all patient populations. There are numerous factors to consider when determining whether a telehealth encounter is the right choice for an individual patient:

### Recommendations:

1. **Appropriateness:** The presenting condition or health concern must be amenable to visit type. Practices may consider identifying diagnoses and symptoms or conditions that require in-person visits to use as guide for patients and staff when scheduling virtual visits.
2. **Patient disabilities and impairments:** Healthcare professionals have a legal obligation to provide care equally to all their patients, including when telehealth is being utilized as an alternative to in-person treatment. Communication with a disabled person via telehealth must be as effective as with any other patient, and healthcare providers should consider using platforms that provide closed captioning for deaf or hearing-impaired patients. When language barriers are presented, providers should have access to an interpreter and consider using telehealth platforms that allow for three-way communication. Lastly, the patient’s cognitive abilities and the availability of a support system, including family members or significant others, should be considered as part of the patient selection process.
3. **Access and compatibility:** The patient must have internet access and the appropriate equipment required to participate in the visit. An assessment of the location of the visit should be completed, and patient consent obtained, to ensure that HIPAA protections are in place.
4. **Commitment:** The patient must be personally invested and willing to actively participate in this mode of care delivery. In order to achieve a meaningful and successful healthcare encounter, both the provider and the patient must be fully engaged and committed to this format.

5. **Use with Seniors:** When evaluating the appropriateness of telemedicine visits for senior patients, consider the patient's hearing ability, as it is common for seniors to have some degree of hearing loss in conjunction with the aging process. They may also have some reduced vision from cataracts, macular degeneration and/or other ocular issues. The following recommendations can help address these barriers and enhance the quality of the telemedicine visit:
- To begin the visit, ask the senior patient if they can see and hear you clearly.
  - Assess your location prior to initiating a telehealth visit:
    - Evaluate the lighting.
      - Avoid lights that cast shadows on your face so that facial expressions will be clearly seen and communicated.
  - Remember to use non-verbal gestures to augment the spoken word.
  - Consider having the patient use headphones that allow for volume adjustment.
    - Minimize background noises and visual distraction when possible.
  - If indicated, use a platform that includes closed captioning.
  - Consider performing a "dry run" with your staff to identify any issues that might impact the experience for your patients.

Even though these visits are conducted remotely, be cognizant that the patient will also be able to visualize the encounter. When considering telehealth encounters, please see our [Risk Management Tip #21](#) on the effective use of computers in the examination room.