

Getting the most out of virtual appointments

This past year, many aspects of our daily lives have changed, including physicians visits. The OBRI asked a rheumatologist, OBRI investigator Dr. Jane Purvis, and a patient, Patient Advisory Committee member Erinn McQueen, for their perspectives on making the most of virtual appointments.

The checklist below highlights special considerations for rheumatologists and patients for both video and telephone assessments. Dr. Purvis points out that, as a rheumatologist, it is important for both the physician and the patient to prepare for virtual calls and to keep in mind that this process is slightly different than for in person appointments.

PRIOR TO THE APPOINTMENT

FOR THE PHYSICIAN:

- Review the chart to plan the appointment
- Review the medication list and the available investigations (labs, x-rays, etc.).
- Before the call starts, get set to administer questionnaires such as Bath Ankylosing Spondylitis Disease Activity Index (BASDAI) or Health Assessment Questionnaire (HAQ). In an ideal world, the questionnaires would be available before the appointment starts.

FOR THE PATIENT

- For telephone appointments**, ensure that the physician's office has the **correct telephone number** to call, whether home, cell or work. Ensure the area is quiet. Calls should not be made while driving, as it makes the call unsafe. The rheumatologist will confirm that the correct individual is on the line, as there are no visual cues.
- Set aside time to prepare for the appointment.** Often when having an in-person appointment, there is some travel/wait time involved which allows for brainstorming before the discussion. Have minimal distractions, if any, in the space in which you have decided to set up for the appointment. (Remember to put the dog out 😊)
- Write out what you would like to have accomplished by the end of the appointment**, i.e., mention symptoms out of the ordinary, prescription renewal, etc. Take note of how you feel emotionally over the past while, that day before the call and how you would like to be feeling after the appointment. For example, if you're heading in to the discussion feeling anxious or frustrated, figure out what needs to be addressed to end the appointment feeling settled and content with the plan moving forward.
- Write down any questions** you may have. Review your daily activities and note any struggles that you may be having. This helps to give a picture of how the disease activity is affecting everyday life. If possible, and if agreed upon with your rheumatologist, send in photos or videos that could be helpful in the disease activity discussion.
- Have all **medications** and **supplements** at hand to review during the appointment.
- Assessing swollen joints, if applicable.** Be prepared to indicate how many swollen joints you may have. This will be done verbally for telephone appointments. During video appointments, you can show your joints by holding your hands up close to your face or aiming the camera down to show feet and knees, if possible.
- Ask someone to attend the appointment with you.** Sometimes it's helpful to have a second set of ears to take in the discussion. That individual could help take notes, keep distractions to a minimal, and reviewing everything together at the end of the appointment is helpful.

Special considerations for video appointments:

- For video appointments, make sure the area is quiet and the lighting is appropriate. Having the camera on and the microphone nearby are also keys steps. Always have a telephone nearby in case the video call fails.

- If possible, test the video/technology in advance of the call. First time users of some platforms may have to set up an account.
- If the patient does not have access to good high-speed internet, the video call may only have audio available. For usual follow-up appointments, only 15 minutes have been scheduled and it is not useful to spend 5 minutes on the technology. If the video does not work, be ready to switch to the telephone instead.
- Connecting through the video usually leads you directly to the person you are having the appointment with, which is different than telephone calls.
- Once the video starts, delve into the reason for the appointment and share any visual things promptly, as the video could fail during the call.

DURING THE APPOINTMENT

- Clear communication.** Without visuals, it is important that both the both the rheumatologist and the patient are clear on what they are saying, as this is critical for success.
- Revisit the goals and outcomes.** Throughout the discussion, revisit the goals and outcomes that you had set out prior to the call to ensure you've covered off everything as best as possible. Look over any requests that you may have for your rheumatologist and remember to ask at the appropriate time.
- Be completely honest.** It is different than being face to face, and sometimes emotions may be over looked. Check in with your feelings throughout the call.

WRAPPING UP THE APPOINTMENT

- All questions answered.** Ensure that there are no unanswered questions at the end of the visit. Rheumatologists should remind patients that the office remains open and that patients can call in to ask questions, move their appointments to in person or change visit date.
- Next steps.** Once the issues have been identified and addressed, the patient and the rheumatologist must make sure that the plan is mutually agreed to. It is important that the next steps are as clear as possible for the patient, be it explaining how lab requisitions and other forms are going to be dealt with or reviewing any follow-up that will be arranged. If follow up tests are suggested, the appointment(s) should be booked as soon as possible, while it is top of mind.
- In-person assessments.** It is sometimes clear that an in-person visit is going to be required. This might be to do a joint injection or because the clinical issues may not be clearly sorted out virtually.
- Set aside time to review the call once you have finished.** With face to face interaction there is again, often that travel time to be thoughtful. Give yourself that time and make additional notes where helpful. When dealing with a chronic illness, a plan is one of the most helpful tools to have.

Self-care has become front and center while living in a pandemic. Now, more than ever, it is important to advocate for yourself and know that the support is there if needed.

Remember that rheumatologists, and all healthcare workers, are all doing their best to maintain safety during this difficult time while continuing to provide the best possible care for patients!