

# Preparing for a Successful Telehealth Visit

*This guide will help you prepare before your visit with your service provider.*

Provider's Name: \_\_\_\_\_



## BEFORE THE VISIT

Select as applicable and briefly explain in the notes:

- Since your last visit, is there any information you want to share with your provider?
  - Celebrations  Concerns  Challenges  Other
- Any new changes, observations or updates to share about:
  - Doctors  Behaviors  Symptoms
  - Medicines  Treatment  Labs  Imaging  Other
  - School  Therapies  Socialization
- Plan of Care:
  - Any updates from other providers/specialist or changes to the plan of care



**NOTES:**



## DURING THE VISIT Who, How and What?

- Who will participate in the visit- either joining virtually or in person?
  - Child
  - Parent, family member, or other caregiver
  - Home health aide
  - Others
- How do you want the visit to flow or proceed? What will be discussed:
  - How comfortable are you helping with the physical exam?
  - Do you want to demonstrate or share information about any home routines, supplies, or equipment?
  - Would your child like to share any information during the visit?
- Did you notice anything during the exam that your provider did not notice that you want to share?  
Describe in the notes:



**NOTES:**



## NEXT STEPS

Before the visit is over, you and your provider can:

- Discuss the plan of care. **PAUSE** *Are you comfortable and confident with the care plan?*
- Discuss if you will need or will be provided:
  - Referrals
  - Prescriptions
  - Orders for supplies, therapies or medical care
- **Clarify:** Who is responsible for key parts of care plan, communication and care coordination?
- Discuss next appointment: will an in person or virtual visit work best for your child?  
Consider the follow in this discussion:
  - Preference for the day and time that works best for your child and family
  - Discuss the safety and risks of each of the options (face-to-face and virtual)
  - Share your child's and your family's needs
- Any other needs or concerns that were not discussed?



**NOTES:**

List additional **acheivements, concerns, or challenges** you want to discuss:

**FOLLOW-UP NOTES:**

