Orienting Learners to Virtual Care – Checklist

In addition to student registration through UMLearns and orientation per usual clinical student processes, consider the following to foster a good virtual care teaching and learning experience.

Orient the learner to the processes and procedures for providing virtual care including:

☐ Format to be used for providing virtual care (e.g., phone, OTN and/or MS Teams)

☐ Privacy when providing virtual care. Review the Privacy & Learning Remotely During COVID-19

☐ Obtaining consent and the differences for virtual care, including any scripts to be used

☐ Documentation and any changes in how information should be recorded or stored

☐ Patient scheduling and the amount of time required before, during and after sessions

☐ Getting ready for the session (e.g., test all technology prior to client appointments, obtain technical support contact information, establish an alternate number to call the client if a call gets dropped or in emergencies)

☐ Virtual care etiquette and professionalism (e.g. mute if not speaking; eliminate all distractions from your surroundings; turn off all visible and audible computer notifications; if you are not looking at the patient then explain what you are doing)

Discuss providing virtual care and the learner's experience with virtual care including:

☐ Determining if a patient is appropriate for virtual care

☐ Differences in the assessment and intervention for virtual care

☐ The learner's familiarity with using virtual care technology and accessibility to the required technology, as well as access to a private space for providing virtual care

☐ The learner's previous experience to determine appropriate level of supervision and support

Make a plan for supervision including:

☐ The role of the teacher and learner, and how the teacher may intervene during the virtual session

☐ How the learner will signal if they need help during the session (e.g., chat message; speaking to you directly: "Do you have anything to add?")

☐ Your presence during the session (e.g., will you be on mute, video on/off)

☐ Frequency of checking-in which may be more frequent if you are not on-site together

☐ Communication methods if the learner is independently providing care and needs to contact you

Discuss expectations including:

☐ Whether more time or an altered caseload is needed to adapt to providing virtual care

☐ Developing a virtual care plan for each patient including what may need to be done differently (e.g. camera setup to see the client, modifications for assessments and treatments)

☐ Synched calendars (if appropriate) between the learner and supervisor(s) to ensure clarity of scheduling.

☐ A plan for the learner to escalate concerns to their supervisor during virtual care or other virtual learning experiences

☐ A plan for self-directed learning for non-patient care times

Most of all enjoy this unique learning experience together!