

Following Up With the Patient

by Capella Healthcare



WHAT'S COVERED

In this lesson, you will learn about different ways to follow up with your patient. Specifically, this lesson will cover:

1. Reminding the Patient About the Appointment
2. Keeping the Patient Engaged
3. Collecting Customer Feedback
4. Reflect: Introducing a Telehealth Program

1. Reminding the Patient About the Appointment

Reminder messages are essential in telehealth. Ideally, reminder messages should be delivered a day prior to and 15 minutes before the scheduled appointment time. Email and text are both useful. The medical record should contain the patient's preferred method of communication. Keep in mind many people have text and usage limits on their phone plans. In addition, the reminder should include detailed information about the check-in process and provide a link to the meeting.

Sample Telehealth Appointment Confirmation [Send to Patient via Secure Communication]

Thank you for scheduling a telehealth visit with Dr._____. Your telehealth visit has been scheduled for [DAY], [DATE], from [HOUR RANGE].

NOTE: As the patient, you must be located in [STATE] at the time of the visit. Below are important details related to your upcoming telehealth visit:

- [Link/Attachment] Patient consent form, notice of privacy practices/HIPAA
- [Link/Attachment] Telehealth education materials and instructions
- [Link/Attachment] **If a new patient:** New patient forms and patient questionnaires: On the day of your appointment, please review and complete the enclosed forms and questionnaires and have them ready to review with your provider during your telehealth appointment.
- [Link] to the telehealth appointment: Please click on the link above/below and wait in the Zoom meeting until your health care provider joins the appointment.

If you encounter problems, please call the clinic at _____.

Sample Telehealth Appointment Confirmation

Source: American Academy of Family Physicians. (2020). *Telehealth Toolkit*. Retrieved from https://www.aafp.org/dam/AAFP/documents/practice_management/telehealth/2020-AAFP-Telehealth-Toolkit.pdf

2. Keeping the Patient Engaged

According to Wetter (2020), “when patients are more involved and engaged with their care management and understand how to take cautious and preventative measures, they are more likely to participate in actionable solutions and interventions.” He extends this to telehealth. Use the tips within this course to keep patients interested and engaged in using telehealth. Frequently communicate with them, provide updates on telehealth features, and make it simple and easy for them to make telehealth appointments.

3. Collecting Customer Feedback

The voice of the customer is essential to improving the patient’s experience with your telehealth services. Collect feedback in real-time if possible on the entire telehealth experience, ideally at the conclusion of the visit so you can fix any major issues quickly and then track and trend the others for performance improvement. Include the scheduling process, pre-and post-visit support, and any secure messaging or non-visit check-ins. Make sure you have a diverse group of patients in the survey, including marginal groups and those with disabilities.

Questions		Patient Satisfaction Survey ⁴⁶			
How did you hear about our telehealth offerings?	Drop-down choices: email, social media, office staff, office flyer				
How satisfied were you with:	Poor	Fair	Good	Excellent	Comments
Scheduling Process					
Length of time required to get a telehealth appointment scheduled?					
Pre-visit Support					
Pre-visit setup process and technology check?					
How well your questions about the equipment were answered?					
Courtesy, respect, sensitivity, and friendliness of the practice staff person conducting the pre-visit check?					
Telehealth Visit					
Audio quality of the visit? (if applicable)					
Visual quality of the visit? (if applicable)					
Length of time spent with your doctor during the visit?					
Overall treatment experience using telehealth?					
<p>Patient Satisfaction Survey</p> <p>Source: American Academy of Family Physicians. (2020). <i>Telehealth Toolkit</i>. Retrieved from https://www.aafp.org/dam/AAFP/documents/practice_management/telehealth/2020-AAFP-Telehealth-Toolkit.pdf</p>					



HINT

If you want your survey to be even simpler, you could ask patients the Net Promoter Score question at the conclusion of each encounter: “How likely would you be to refer this service to a friend?”

4. Reflect: Introducing a Telehealth Program

Reflect on the previous sections, specifically the printed resource examples. Focus on how to introduce and discuss telehealth with patients and educate them on its use.



REFLECT

1. Identify the steps you would provide for patients to access the platform. What else would you include beyond what was mentioned in this course? Are there any additional questions that may be important for your patient population, specifically?
2. Think about a resource you may provide to introduce telehealth to your patients. How would you disperse this? Would you use social media or your website to help promote this resource? What additional modes can you think of that would work well for your patients?

3. What challenges can you identify for introducing telehealth to patients? What would you put in place in the above to help minimize this?

Authored by Cindy Ebner, MSN, RN, CPHRM, FASHRM and Melissa A. Singer Pressman, PhD, MLIS

Support

If you are struggling with a concept or terminology in the course, you may contact **TelehealthSupport@capella.edu** for assistance.

If you are having technical issues, please contact **learningcoach@sophia.org**.