Virtual Visits: 5 Ways to Better Engage Patients & Families

Virtual visits offer new opportunities to engage patients and families. However, they might also reinforce barriers to partnering meaningfully — barriers that disproportionately affect people of color, people with low incomes, and people with disabilities. Take steps to mitigate these risks.1

- **Clearly communicate expectations in advance.**
  - Plan for a positive patient experience that is tailored to people’s technology access, digital literacy levels, and communication preferences.
  - Proactively answer patients’ frequently asked questions, such as: Who will I meet with? How long is the visit? What technology or platform will I use?

- **Support communicating in languages other than English.**
  - People with limited English proficiency have a right to have an interpreter present and receive information in their native language, regardless of the setting.
  - Choose digital platforms that enable the participation of interpreters.
  - Find out patients’ language preferences in advance and provide materials accordingly.

- **Leverage opportunities to engage patients differently.**
  - Even though physical exams may be limited during virtual visits, they can provide a unique view of the patient’s life and new opportunities for coaching and technical assistance.
  - Watch the patient conducting part of a self-exam.
  - Observe how they complete medical tasks at home.

- **Enable and encourage inclusion of family members and other caregivers.**
  - Many patients want family and other trusted caregivers to accompany them to medical visits.
  - Ensure virtual platforms allow caregiver participation and tell patients that caregivers are welcome.
  - Invite on-site caregivers to help with using the technology.

- **Avoid surprise medical bills.**
  - Unanticipated medical bills can derail a person’s finances and undermine their trust.
  - Before a virtual visit, verify the patient’s insurance coverage and inform them what they will need to pay.

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