



# 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.<sup>1</sup>

**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.**

<sup>1</sup> <https://www.nationalpartnership.org/our-work/resources/health-care/effective-equitable-patient-engagemenet.pdf>