Process Observations for Video Care Visits

Purpose: To understand each team members role in the video visit process and potential areas for improvement

Process: For each health center site, the leadership team should observe the steps of the process and talk with all staff about their experience with video visits—what works well, what is challenging or an obstacle, and what are their ideas for remedying the identified challenges/obstacles. Staff to observe: (1) front desk (2) medical assistants (3) clinicians

Process Tips:

* Safety first
* Respect patient privacy (when appropriate, ask patient about their experience)
* Explain our purpose to the host or the staff person you are following: “We’re here to see how we do things now so we can make improvements for patients and staff.”
* Quiet observation – avoid interrupting staff (ask questions later)
* Show appreciation

Payoff: The information you are gathering will be invaluable to guiding improvements to the video care process for patients and staff.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Process | Person Responsible   * FD = front desk * MA = medical assistant * RN = nurse * Prov = Clinician * SS = Site Specialist | What are the specific steps of the process? | What works well? | What is challenging or an obstacle? | What are ideas to remedy the challenge, obstacle? |
|  | Scheduling a video visit  Areas of particular interest: |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |