

Telephone Visits for Virtual Care

Purpose

Clinicians regularly utilize the telephone to provide patient care. Becoming aware of a few best practices can help clinicians improve the effectiveness of these virtual visits.

Best Use

A telephone visit is most suitable for established clinical relationships when an in-person visit is not required, video is not needed, and a verbal discussion can meet the patient's needs. Telephone care is a well-recognized approach to support patient consultation, assessment, diagnosis and treatment, follow-up including test results, education and counselling¹, where appropriate.

Consultations between clinicians, including multidisciplinary case conferences (where the patient and/or family may or may not be involved), are also easily supported using the telephone.

Benefits	Limitations
<ul style="list-style-type: none"> • Most people have access to a telephone and it is simple to use. • A phone call can support many aspects of care delivery, throughout the spectrum of care. • Offers an alternative to a video visit if the patient prefers using the telephone to access care. 	<ul style="list-style-type: none"> • Participants cannot see each other, limiting the type of information that can be obtained. • Cellular fees or long-distance charges may be incurred. • Patients may not have a telephone landline or may have unreliable cellular service. • There may be privacy considerations (e.g., if cell phone calls are routed outside Canada).

Best Practices

Before the Call

- Obtain the patient's verbal permission to participate in the virtual telephone visit.
- Confirm the patient's preferred telephone number for the visit.
- Schedule and register patients for all telephone visits within existing department scheduling systems.
- Use an Alberta Health Services cell phone, landline or Skype for Business to call the patient. If using your personal phone, ensure the call display function is turned off.
- If the patient is unavailable, leave a concise message requesting they return your call.

During the Call

- Include [Interpretation & Translation services](#) to support communication, if required.
- Introduce yourself using **Name**, **Occupation** and **Duty (NOD)** and the reason for calling.
- Verify the patient's identity with two identifiers ([AHS Patient Identification Policy #PS-06](#)).
- Confirm that the patient wishes to proceed with the virtual telephone visit.
- Ensure they are available to talk, are in a private space where their health information will not be overheard, and confirm whether anyone else is joining the call.
- Obtain the address of their current location, in the event of a medical emergency.
- Complete the patient consult, assessment or treatment and provide next steps.

After the Call

- Complete documentation in the patient's record of care.

¹ The information in this document has been modified from the Provincial Health Services Authority of British Columbia's website <http://www.phsa.ca/health-professionals/professional-resources/office-of-virtual-health/covid-19-virtual-health-toolkit/telephone-consults>