

# How to Prepare for a Virtual Appointment



Virtual appointments are a little different from in-person appointments. Learning about and preparing for these differences can help you make the most of your appointment. Based on the [June 2020 Canadian Medical Association \(CMA\) Virtual Care Guide for Patients](#), you can take the following steps to set-up and prepare for your appointment.

## Setting up an Appointment



### Book a virtual appointment

There are two ways to book a virtual appointment:

1. **Directly with a practitioner with whom you already have a relationship (e.g., family physician, general practitioner).** In most cases you can call your practitioner's office to book the appointment or use their online booking system.
2. **Through an online virtual health platform with a new practitioner.** Learn more about virtual health platforms covered under your health plan [here](#). Please note that coverage for these services might change based on factors such as legislation changes.

There are additional virtual health platforms that you can access but are not covered by provincial or territorial health plans. You will need to pay for these services out-of-pocket or check with your private insurance (e.g., via employer) for coverage.



### Complete and submit required forms

You may be asked to fill out forms (e.g., consent for virtual visit, health assessments) in advance of the meeting. Completing and submitting these forms before the appointment can prevent delays during the appointment.



### Confirm questions with the practitioner's office or the virtual health platform helpline

You should connect with the practitioner's office or the virtual health platform helpline to confirm any questions (e.g., how to share any helpful documents, log-in best practices) in advance of the appointment.



# Getting Ready for the Appointment



## Set up your technology

1. Choose your preferred device (e.g., phone, tablet, computer) and ensure that it is fully charged or plugged in.
2. Video visits require high-speed and stable internet connection. Check that the internet connection to your device is stable in the room that you plan to use for the appointment. Have a backup plan in case internet does not work during the meeting (e.g., using cellular data instead of WiFi).
3. Practitioners may use a secure video/teleconference platform for virtual visits. They will share details about the platform before the appointment, and you must follow the applicable instructions (e.g., downloading the required software). It is recommended that you test the software in advance of the call to minimize potential disruptions.
4. If possible, use earphones or headphones because they provide a better microphone and sound, as well as greater privacy.



## Find an appropriate location

Choosing a location that is private and free of distractions can enhance the quality of your appointment. Try to find a location where:

1. You can have a comfortable seat.
2. There is adequate lighting so that the practitioner can see you (if the appointment is over video).
3. Other people can't see or hear the conversation.
4. Background noise can be minimized.



## Gather important items

As with in-person appointments, there are items you must have readily available for the virtual visit. These include:

1. Health insurance card. If your health card doesn't include a photo, you must have a supporting photo ID.
2. A list of symptoms, including when they started and how severe they are.
3. Any recorded health data such as weight, temperature, blood pressure and pulse reading.
4. If the appointment is your first interaction with the practitioner, you should have your relevant health history readily available, including:
  - Existing health conditions or illnesses
  - Medications (prescription containers with the pharmacy labels)
  - Allergies
  - Immunizations
  - Past surgeries and hospitalizations
  - Family health history (e.g., parents and siblings)





## Arrange for family/other members to join the appointment

If there is someone you would like to have at your appointment, you should provide them with your appointment details and ensure they can be available during the meeting time. Note that for video visits for children, the child must be on camera for at least part of the appointment.

## What to expect during the appointment

While seeing a health care provider virtually is very similar to seeing them in person, there are a few differences that you should be aware of:



If a secure video/teleconference platform is used for the appointment, you may have to wait “on the line” before the practitioner joins or admits you into the virtual meeting room.



If the practitioner is calling you on your phone, the call may come from an unknown or blocked phone number.



The practitioner may ask you to confirm your location and health card information.



If the visit is over video, you should remain in front of the camera and speak clearly.



If there is anyone else (e.g., caregiver, family member) joining the appointment, you should introduce them to the practitioner.



If there is background noise, you should mute your microphone, if possible, when not speaking to enhance sound quality.

## After the Appointment

After the appointment, the practitioner might share a summary of the appointment via secure messaging. You should review the summary and ask the practitioner if anything is unclear or incorrect.

