

Tips for a Successful Virtual Visit

Courtesy

1. Be mindful of background noise. Silence all devices and computer notifications.
2. Mute your microphone when you are not speaking.
3. If you are an observer, mute your microphone and turn off your video.
4. Let the speaker finish their thought before jumping in to ask a question or interject a comment. Keep in mind there is a lag in call time.
5. Use the hand raising function in Zoom to indicate you would like to speak.

Physical Space

1. Ensure you are in a quiet, private space with good lighting and acoustics for videoconferencing.
2. Do not have more than one computer in a room to avoid feedback.
3. Each participant should be in their own physical workspace while on Zoom for the Review Meeting portion of the agenda. We ask that you do not have large groups in a conference room because it is difficult to hear and identify all participants.
4. For Level III site visits, when reviewers are in two separate virtual rooms on Zoom during chart review, make sure the physical rooms that the TMD and TPM/TPC are close to one another so they can easily move between rooms if reviewers have questions for them.

Tour

1. Video should be provided by tablet/phone/laptop signed into the Zoom platform.
 - a. The tablet/phone/laptop can be put on a stationary object that will not be moved up and down or have individual tablets strategically located at each of the areas that will be toured.
 - b. A small Bluetooth speaker/microphone could be paired to the tablet/phone and used as microphone for all interviewees. It should be handed to each person interviewed.
 - c. Have someone go ahead of the person conducting the tour to ensure the next room is quiet and no patient information is visible.

Equipment

1. Ensure reliable connectivity (stationary and mobile).
2. Computers ready for Zoom, EMR, and file transfer application.
3. Headsets (integrated microphones) that work with computer and Zoom platform.
4. Cameras (integrated or separate) that work with Zoom platform.
5. Mobile devices for tour and Bluetooth speaker or headset/microphone. Gimbals (handheld mechanical stabilizers) not required but may be helpful.

Video Conferencing Platform

1. If you are having problems with Zoom connectivity, dial in by phone and link the phone audio to your video.
2. Ensure that your full name is displayed on Zoom so that reviewers can easily identify attendees.