# Virtual Care Risk Checklist

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## Licensing and Credentialing
☐ Am I licensed where the patient is located?
☐ Are there local prescribing rules?
☐ Am I using nursing staff, PAs, NPs, etc. who also need to be licensed?
☐ Is there a credentialing process in place?

## Physician/Patient Relationship
☐ Am I creating a physician/patient relationship?
☐ If not, is that clear to the patient?

## Standard of Care – Patient/Condition Selection
☐ Am I providing the same standard of care as I would in person?
☐ Is this patient suitable for virtual care?
☐ Is this condition appropriate for virtual care?
☐ Do I have a plan for an emergency?

## Physical Environment
☐ Can I communicate and understand as if this patient were in front of me?
☐ Is the lighting adequate on both sides?
☐ Is the video and sound quality adequate?
☐ Can I ensure there will be no interruptions?

## Webside Manner
☐ Am I showing empathy and compassion?
☐ Am I introducing myself?
☐ Am I making eye contact?
☐ Am I presenting myself professionally?

## Privacy and Security
☐ Am I confident I am compliant with HIPAA?
☐ Am I protecting the confidentiality, integrity, and security of ePHI?
☐ Do I have contractual assurances and/or BAAs with vendors?
☐ Do I have adequate encryption, passwords, and anti-virus and security software?
☐ Where are my records stored?
☐ Who owns my records if there is a breach?

## Patient Safety
☐ Is my patient in a safe, private place to talk?
☐ Could I be missing abuse situations?
☐ Is this examination too intimate for virtual care over video?

## Medical Records
☐ Does my e-visit get into the medical record?
☐ Am I documenting as much as I would in person?
☐ Am I documenting any technical problems?
☐ How do my patients request access to records?

## Billing
☐ Have I verified that I can bill for this service?
☐ Has my patient verified insurance coverage?

## Professional Liability Coverage
☐ Does my professional liability policy cover virtual care?
☐ Does it matter where my patient is located?
☐ Do I need additional cyber liability coverage?

## Informed Consent
☐ Am I talking with patients about the risks and limitations of virtual care?
☐ Am I sharing contingency plans for outages?
☐ Am I managing expectations about what can be accomplished remotely?

## Administrative Considerations
☐ Do we have policies and procedures covering virtual care?
☐ Are we tracking licensure in each state?
☐ Do we have protocols for patient/condition selection and escalation of care?
☐ Are we tracking orders and follow-up plans?
☐ Do we have protocols for record-keeping?
☐ Do we have a plan for quality tracking?
☐ Are we assessing patient and provider satisfaction with virtual care?
☐ Are we comfortable with provider competence to use virtual care?