

Strategies for Effective Patient-Assisted Telehealth Assessments

Sue Boisvert, BSN, MHSA, Patient Safety Risk Manager II, The Doctors Company

Physicians who practice telemedicine must carefully consider the components required to complete an effective remote assessment and plan ahead based on their specialty area and the patient's presenting complaint.

The important role that assessment plays in the diagnostic process and the prevention of diagnostic error cannot be understated as illustrated in our recent analysis. The Doctors Company studied 286 primary care malpractice claims that closed between 2014 and 2018. Analysts found that 51 percent of the claims involved assessment failures. The top two contributing factors were failure to establish a differential diagnosis (16.7 percent) and failure to assess and address continued symptoms (14 percent). The standard of care remains the same whether the visit is in person or remote. It is the provider's responsibility to ensure that information gleaned during a remote assessment is sufficient to determine the patient's diagnosis and treatment.

Use the following strategies to prepare your patients to assist effectively with remote assessment:

1. **Plan Ahead**

Ensure that the patient telehealth pre-visit process includes instructions for obtaining the equipment necessary to measure vital signs. Based on diagnosis and provider specialty, the instruction can be patient specific—such as a blood pressure and oxygen saturation monitor—or general, such as a thermometer and scale. Advise the patient to practice using the equipment before the telehealth visit and to collect measurements the morning of the visit.

2. **During the Visit**

Ask the patient to report their vital signs and document as “patient self-reported.”

Assessment during a virtual visit is a collaborative effort. Collaborate with the patient to conduct the physical assessment. Patients can be directed to position themselves to facilitate visual inspection of head and neck structures.

Cooperative patients may be able to palpate for enlarged lymph nodes. Patients can be asked to palpate pulses, provide a heart rate, and describe what they are feeling. Respiratory function can be assessed by having the patient sit quietly and take deep breaths while the provider and patient listen for any wheezing or coughing. Abdominal pain, balance and gait can be assessed by asking the patient to stand, walk and jump. Remember to document the portions of the assessment that were “patient assisted.” For example, “the patient assisted with lymph node assessment.”

When used appropriately, a patient-assisted assessment during a telehealth visit is a wonderful opportunity to increase patient engagement in their own healthcare and further enhance the provider-patient relationship.

Reference

1. Benziger CP, Huffman MD, Sweis RN, Stone NJ. The telehealth ten: a guide for a patient-assisted virtual physical examination. *Am J Med.* 2021 Jan;134(1)48-51.
doi: [1016/j.amjmed.2020.06.015](https://doi.org/10.1016/j.amjmed.2020.06.015)
-

The guidelines suggested here are not rules, do not constitute legal advice, and do not ensure a successful outcome. The ultimate decision regarding the appropriateness of any treatment must be made by each healthcare provider considering the circumstances of the individual situation and in accordance with the laws of the jurisdiction in which the care is rendered.