

Post-Clinic Follow-up Checklist

We suggest that you follow the same principles as face-to-face clinic visits. Work with your team to ensure:

- Clinical documentation including a clear follow-up plan
- Communication with referring providers and appropriate care team members
- Auditing/monitoring to confirm required follow-up has been coordinated in a timely manner

You may find the checklists below helpful. We are investigating ways to automate this process for virtual clinics. At this time, please develop a manual process that works for you and your patients.

Physician Checklist

Consider follow-up for each patient and communicate to your administrative assistant and/or PFC as required:

- Return to clinic date
- Consultations to be arranged
- Prescriptions to be placed
- Laboratory tests to be ordered
- Diagnostic tests to be arranged
- Complete billing information

Administrative Assistant/ PFC Checklist

Ensure the necessary follow-up for each patient has been arranged, where relevant:

- Next scheduled clinic visit
- Required consultations
- Prescriptions have been documented and signed
- Laboratory tests have been arranged
- Diagnostic tests have been arranged
- Billing information has been completed