# **Magali’s Checklist for Chronic Disease Management via Telehealth**

*Without the patient*

**Prepare the workspace**

* Have a basic **checklist** to use as a rough guide/prompt
* Have **notepad and pen** handy
* Have **access to the patient file**

**Get up-to-date on care we’ve provided for this patient:**

* Go through the patient file to **check for current and past health conditions**
* Do they have a **previous or current plan already in place?**
* What **other providers** are they seeing? **Last correspondence** received? Or any **referrals we’ve made**, but don’t seem to have any follow up correspondence about
* **Last pathology results** on file and if **any routine bloods** are **due/overdue**
* Any outstanding **recalls**?
* Are they due/overdue for any **immunisations**?
* Based on their condition(s), are there any **measurements** we’d want to track?

*With the patient*

**Start the patient consult**

* Initiate the **video** or phone consult
* Check they can **see and hear me** clearly
* Do **3 points of identity check**
* Are they **comfortable**, in a **private**, **quiet** area where they can have this conversation
* Set expectations of **consult length**
* Any foreseeable **interruptions** that will be happening in that timeframe?
* **Cover aim/purpose of this plan/review** (consent to proceed)

**Main discussion/assessment**

* If I haven’t already… **break the ice!**
* Check on **how they’re going today**
* Check **“How are you coping generally with it all?”**
* **How do you feel your health has been affected by what’s going on?**
* **Any changes to your sleep?** **amount or quality**
* **Energy levels?**
* **Do you feel safe at home?**
* Any other **health professionals you’re currently** in contact with or **due/overdue for?**
* **Mood:** Over the past 2 weeks have you:
  + 1. Felt down, depressed or hopeless?
    2. Felt little interest or pleasure in doing things?
* **“And when it comes to your (chronic condition) how are you managing at the moment?”**
* Access to **medication/pharmacy**
* **Physical activity**: type and how much?
* **Nutrition**: access to grocery shopping?
* **Alcohol** consumption: number of drinks and frequency
* **Smoking**
* **Any new symptoms or anything that’s worried or concerned you** (or those around you?
* **Measurements:** Anything overdue or that they can self-check at home?
* Any **condition-specific tasks to perform/arrange/check** (based on pre-consult file review discoveries)
* If appropriate to do **goal setting:**
  1. “What is **one thing you feel you could start doing** from today or tomorrow **that would help your health during this time**?”
  2. **Self-efficacy:** “**How confident are you** that if I ring you this time next week (or in x Days) you will have started doing that regularly?” Self-rate from 1 to 10, where 1 is not at all confident and 10 is extremely confident
* Discuss **next steps** (arrange pathology, scripts, referrals, etc.)

**Wrapping up:**

* Arrange or confirm **session with the GP** to finalise and claim relevant items
* Confirm **follow up date/time** for nurse support
* Explain what **documentation to expect** electronically/via post (e.g. Copy of the plan, referrals, pathology slips, scripts, etc)
* **Thank** **you** **and** **don’t hesitate to reach out** if you have any questions.