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|  | Virtual Care – toolkit  *Thank you to Doctors of BC for Developing this valuable TooLkit and permitting us to adapt to meet our needs in Alberta* |

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# Workflow: A Step by Step Approach

|  | Clinic Notes |
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| Team engagement – Staff / MOAs are key to success  Consider internal meetings to discuss the changes, workflow, and responsibilities. |  |
| Patient FAQs  Consider creating an FAQ document for your patients. E.g. This could include how to book virtual visits, technical tips, troubleshooting, patient etiquette, etc. See the Patient Communication section in this Toolkit. |  |
| Allowing patients to send secure messages to the clinic  Consider subscribing to a simple secure messaging service that enables patients to directly message the clinic. |  |
| Patient and visit type suitability  Consider which patients (primary care physicians can leverage their patient panel) or visit types are suitable for virtual visits. Reviewing your schedule over the last week could help with identifying potential patients and visit types. |  |
| Schedule planning  Consider specific days and time slots for virtual visits. Blocking off consistent daily time slots for virtual visits may ease the transition to offering virtual care services.  Consider creating an appointment type for virtual visits. |  |
| Booking virtual visits  Consider how patients can book virtual visits.  Consider staff triaging the booking of patients for in person or virtual visits, and include clear instructions for the virtual visit in the appointment confirmation message  Depending on the tool chosen, consider a virtual waiting room or sending out individual meeting links. |  |
| Setting up the room  Consider placement of EMR screen vs. placement of video screen. Can both be displayed on the same screen, or are two screens needed?  Essential items include: webcam, microphone and speaker. |  |
| Virtual visit etiquette  Consider the space that the patient will view during a virtual visit.  Consider clarifying your actions to the patient if you are not looking at them. E.g. typing up notes on the EMR. |  |
| Starting a virtual visit  Consider how to ensure the patient is ready for their virtual visit.   * Consider the role of the MOA. Will they contact the patient ahead of time? Will they set up the visit for the physician on the computer? * Does the tool have a virtual waiting room? * Does the patient need to call and ‘check in’? |  |
| Visit notes  Consider having a standard method for recording that the visit was conducted over the video or secure messaging channel. Charting the virtual patient encounter is the same as for an in-person visit. |  |
| Sending documents  In order to enable working away from the clinic office, consider virtual care solutions that support location-agnostic document transfer E.g. prescriptions, lab and imaging requisitions. Could an MOA send this from the clinic? Consider testing the EMR from home to see what is possible.  Does the patient need access to a printer? |  |
| Billing  Available service codes can be found on <https://www.albertadoctors.org/leaders-partners/ehealth/virtual-care> |  |

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| Follow-up visit  Consider the workflow for arranging a follow-up visit for the patient. What are the instructions for the patient? |  |

# Equipment Essentials and Testing

## Equipment essentials

For a video-based virtual visit the computer, laptop, tablet, or smart phone both you and your patient are using need to have:

* An internet connection that supports at least 15Mbps download and 5Mbps upload
* Webcam
* Microphone
* Speaker

For a secure messaging based virtual visit, your clinic needs to have an internet connection and an email address

## Testing your equipment

It is important to test the hardware to ensure your webcam, microphone and speaker are all working and it also helps to be familiar with how to adjust the settings as well.

## Testing the speed of your internet connection

Run an online speed test from the room you would use for video consults to find out the internet speed. Use the equipment you are planning to use for the most accurate test. You can use the site (<https://www.speedtest.net/>).

**Virtual Care Tools**

The following information was consolidated for convenience with the best available information. Although we try to keep it current, the list may not reflect current state and all available solutions.

We strongly encourage physicians and clinics to use this as a starting point and perform the required investigation before choosing a solution.

| **Virtual Care Tools** | **Cost\*** | **Video** | **Video**  **Multiple Attendees** | **Secure Messaging** | **Online Booking** | **Patient Portal** | **EMR Integration** | **Servers in CAN** | **Encryption** | **Alberta**  **PIA**  **Submitted** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| [Advancare](https://www.advancare.ca/) |  | ✓ | ✓ | ✓ |  | ✓ |  | ✓ | ✓ |  |
| [Alevia Virtual](https://www.aleviavirtual.com/) |  | ✓ | ✓ | ✓ | ✓ | ✓ |  | ✓ | ✓ |  |
| [Brightsquid Secure-mail](https://brightsquid.com/) |  |  |  | ✓ |  | ✓ | TELUS | ✓ | ✓ | ✓ |
| [Doxy.me (Free)](https://doxy.me/) |  | ✓ |  |  |  |  |  |  | ✓ |  |
| [Doxy.me (Paid)](https://doxy.me/) |  | ✓ | ✓ | ✓ |  |  |  |  | ✓ | ✓ |
| Facebook Messenger |  | ✓ | ✓ |  |  |  |  |  |  |  |
| Facebook WhatsApp |  | ✓ | ✓ |  |  |  |  |  |  |  |
| Google Hangouts |  |  |  |  |  |  |  |  |  |  |
| [Healthquest dr2dr](https://www.microquest.ca/) |  | ✓ | Coming Soon | ✓ | ✓ | ✓ | Healthquest | ✓ | ✓ | ✓ |
| [iCareHub](https://www.achssite.com/icarehub/) |  |  | ✓ | ✓ | ✓ | ✓ |  |  | ✓ |  |
| [LiveCare](https://www.livecare.ca/healthcare-providers) |  |  | ✓ | ✓ | ✓ | ✓ | Oscar | ✓ | ✓ | ✓ |
| [Medeo](https://medeohealth.com/) |  | ✓ | Coming Soon | ✓ | ✓ | ✓ | Accuro | ✓ | ✓ | ✓ |
| [PurposeMed](https://purposemed.com/) |  | ✓ | Coming Soon | Coming Soon | ✓ | ✓ |  | ✓ | ✓ | ✓ |
| Regular Email |  |  |  |  |  |  |  |  |  |  |
| [Skype for Business / Microsoft Teams](https://products.office.com/en-CA/microsoft-teams/group-chat-software) | $ | ✓ | ✓ | ✓ |  |  |  | ✓ | ✓ |  |
| [Sphygmo Telemonitioring](https://sphygmobp.com/) |  |  |  | ✓ |  |  |  | ✓ | ✓ |  |
| [TELUS Health EMR Virtual Visits](https://www.telus.com/en/health/covid19-physicians) |  | ✓ | ✓ | ✓ |  |  | MedAccess  PS Suite  Wolf | ✓ | ✓ | In progress |
| [TELUS Health with Health Myself patient portal](https://www.telus.com/en/health/covid19-physicians) |  | ✓ |  | ✓ | ✓ | ✓ | MedAccess  PS Suite | ✓ | ✓ | In progress |
| [TELUS Health Wolf Patient Portal](https://www.telus.com/en/health/covid19-physicians) |  | ✓ | ✓ | ✓ | ✓ | ✓ | Wolf | ✓ | ✓ | ✓ |
| [TELUS Health with Cognisant MD](https://www.telus.com/en/health/covid19-physicians) |  |  |  |  | ✓ |  | PS Suite | ✓ | ✓ | ✓ |
| [TELUS Health with Chronometriq](https://www.telus.com/en/health/covid19-physicians) |  |  |  |  | ✓ |  | MedAccess  PS Suite | ✓ | ✓ | ✓ |
| Text Messaging |  |  |  |  |  |  |  |  |  |  |
| [Vidyo](https://www.vidyo.com/video-conferencing-solutions/industry/telehealth) | $ | ✓ | ✓ | ✓ |  |  | Epic | ✓ | ✓ |  |
| [Zoom](https://zoom.us/) (Free) |  | ✓ | ✓ |  |  |  |  |  |  |  |
| [Zoom Enterprise (AHS)](https://zoom.us/healthcare) |  | ✓ | ✓ |  |  |  |  | ✓ | ✓ |  |

## \*During the pandemic many vendors are offering their solution free for a limited a time. Please check with each vendor for further details.

# Patient Communication

With the popularity of smart phones and video chat, many of your patients may be familiar with the basic functions needed to enable virtual care visits. Still, it is important to clearly communicate with them so they know what to expect, what the benefits are and how they can get started with virtual care.

This guide provides useful templates and tools that will help patients learn how to connect with you using virtual care on their smart phone or laptop.

## Promoting Virtual Care in Your Clinic

1. Choose a date to start using virtual care in your clinic.
2. Let patients know that the service will be available by providing information on your website, via email, via posters in your clinic and by telling them in person.
3. Consider outlining the process of signing up for virtual care on your website, along with a list of the conditions that are eligible and excluded.
4. Train your staff on how to troubleshoot the most common technical issues related to virtual care so they can assist patients over the phone. The [Quick Start Guide for Patients PDF](https://mfiles.doctorsofbc.ca/SharedLinks.aspx?accesskey=733653570bacbfcd21859a6439cca447c44cd4b32f683dd28a39ff193006c6e0&VaultGUID=D43316D7-A660-4C25-A7F3-285FB47DAEC5) also provides tips and tricks.

## Email Template example: Virtual Care - Introduction for Patients

In order to expand our services and availability to patients, our clinic will be introducing virtual care visits as of [Date]. Patients will now be able to connect with their family doctor from the location of their choosing, using their smartphone or computer.

Check out the Virtual Care - Quick Start Guide for Patients PDF attached to this email for more information about how to access this new service.

To request a virtual care visit, refer to our [Website] for appointment availability and clinic hours. For questions or assistance with troubleshooting, please contact the clinic at [Clinic Phone] or [Email].

## Email Signature Disclaimer example: when sending unsecure emails to patients

**DISCLAIMER:** *Please note, we cannot guarantee the confidentiality of information transmitted through e-mail. Please be aware of this limitation when contacting us.*

## Email Template example: Virtual Care - Visit Email Invitation

Note: Depending on the platform, clinics may opt to utilize a virtual waiting room model or to send set up scheduled virtual care sessions. The following template can be used as an email invitation for scheduled virtual care appointments.

This is a courtesy reminder of your virtual care appointment at [Name of Clinic]:  
  
[Date & Time]

[Virtual Care Meeting Link]  
[Teleconference Phone # and Meeting ID]  
[Application help link or clinic contact info]

Please ensure you read Doctors of BC’s **Virtual Care - Quick Start Guide for Patients PDF** and any attachment accompanying this email, as they contain important information regarding your appointment(s).  
  
**Need to cancel or change your appointment date?**

Please respond to this message or contact the clinic at [phone number] with at least 24 business hours advance notice to avoid missed appointment fees.

## Email Signature Disclaimer example: Virtual Care - Visit Email Invitation

Consider including the following disclaimer in your virtual care invite emails or website pages:

**DISCLAIMER:** *This virtual care visit, email invite and any attachment(s) is/are for authorized use by the intended recipient(s) only and must not be read, distributed, disclosed, used or copied by anyone else. If you are not the intended recipient, please notify the sender immediately, disconnect and delete any attachment(s). Patients may be redirected to the clinic for an in person visit at any time if the concern is deemed not appropriate for virtual care. Thank you.*

# Privacy and Security Safeguards

## Session Safeguards

* Always **ensure the patient is ready** to have a confidential conversation. When appropriate, start the virtual care session with clear introductions and confirming the patient’s identity.
* When conducting a video session, do so in a **private space in both yours and the patient’s location**. Using a phone or other mobile device in public could compromise the patient’s confidentiality. During the session, check if the volume is set to an appropriate but discreet level.
* A patient may want to include a family member or caregiver during a video or secure messaging consult. If so, **be aware of who is in the room with the patient, or included on the secure message thread.** Establish the level of patient comfort and follow the same principles as with in-person visits.
* **Do not leave the video connection unattended** and/or set on automatic call answering. Once the session is over, all participants are expected to disconnect from the call immediately.

## Technology Safeguards

* Refrain from using any unsecured public networks. When setting up **a wireless connection** in your clinic, use an adequate password that is shared only with authorized users.
* All systems, applications, and devices should be **behind the firewall** with anti-malware and anti-virus software installed.
* Updates and security patches should be applied as they are made available by the software vendor. Ensure the **device used for virtual consults is not obsolete** and software is current so the **most recent updates can be applied.**
* All devices used for virtual consults, and the sessions themselves, should be **password protected** to prevent accidental configuration changes or hacking attempts. Do not use default settings and be sure to create adequate passwords.
* **Avoid recording videoconference sessions** containing personal or clinical information unless it is absolutely necessary. If a recording must be made, the best is to retain it as part of the clinical record. Implement security measures such as secure storage behind a firewall. When using personal, mobile and desktop devices, the best practice is to encrypt a device and use two-factor authentication for access.
* **Disable cameras and microphones when not in use**, either by disconnecting power, connection cables, and/or using lens coverage.

## Tool Selection

See section on Virtual Care Tools for guidance on assessing the appropriateness of virtual care tools.

# Frequently Asked Questions (FAQs)

## **Does the virtual care tool need to be integrated into EMR?**

**Not every EMR vendor offers virtual care tools at this time (although some are in progress). Some EMR vendors may also have the ability to integrate with third-party vendors. If your EMR does offer virtual care capabilities, you should consider the difference in workflow compared to using a tool that is outside of your EMR.**

## **Which virtual care tool should I choose?**

There are many different virtual care platforms on the market that will vary with respect to cost, functionality, privacy and security, workflow and user interface. There are also differences in the device requirements to run a tool (e.g. Windows operating system only) and whether any downloads are required (web-based vs. app-based), which can impact workflows and accessibility. In the Tools section of this Toolkit you will find a high-level overview of some of the tools available.

## Do you have any information on the approximate costs for the various virtual care solutions?

Virtual Care pricing varies depending on a number of factors including number of licenses, usage (e.g. number of participants or duration of services allowed), service model, customization, etc. Some of the tools are free of charge – refer to the section on Tools in this Toolkit for a list of options. For tools that are not free, you will need to contact the vendor directly for a personalized quote. Be sure to also ask about other services that the vendor may charge for, such as IT support and training, custom reporting, and data analytics, as these costs can also vary among vendors.

## How do I ensure that the device I am using for virtual care is secure?

All systems, applications, and devices used for virtual care should be supported by a Privacy Impact Assessment, accepted by the Office of the Information and Privacy Commissioner. You should ensure the device used for videoconferencing is not obsolete and software is current so the most recent updates can be applied. Furthermore, all devices should be password protected using a complex password.

## Will this Toolkit be updated?

Yes, this Toolkit will continue to be updated over time, please check back [here](https://www.albertadoctors.org/leaders-partners/ehealth/virtual-care) for the most recent version.

Whenever possible, it is still recommended to take a structured, methodical approach to implementing any change into practice in order to minimize as much disruption as possible.