

# Virtual Care Guidelines

## North York General Hospital

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**VIRTUAL CARE**

North York General supports and encourages activities that promote safe patient care. The provision of high-quality care and service to patients/clients in ambulatory settings may involve virtual care. This model of health care delivery is of particular value during situations where directives advise against direct patient contact for non-urgent situations. Benefits of virtual care include enhanced access to health care and more efficient delivery of care for the patient/client. Virtual care may be considered a high-risk activity due to the lack of face-to-face contact and hands-on physical assessment of the patient. Risk can be reduced when the client is known to the Health Care Provider (HCP) and when the HCP has the knowledge, skills and judgement to provide tele-practice advice and care.

Virtual Visits at North York General Hospital include three different modalities:

- Use of OTN (Ontario Telemedicine Network) (audio and video)
- Use of Microsoft Teams (audio and video)
- Use of Telephone (audio only)

North York General Hospital will continue to support existing clinics using OTN, but is encouraging new clinics to onboard to virtual care using Microsoft Teams. Unlike OTN, Microsoft Teams does not require a ONE ID to operate, it has been deployed to all staff computers, and is supported locally by [NYGH's Help Desk](#). Microsoft Teams is also approved by our Privacy Office as a secure tool to perform virtual care visits.

**SUMMARY OF VIRTUAL CARE STAGES****Prior to the Virtual Care Visit**

1. Clinic staff receive a request from a provider to set up a virtual visit. The request will include the identity of the patient, preferred date/time, as well as preferred modality of communication (OTN, Teams, or telephone)
2. Clinic staff contact the patient and obtain consent from the patient to conduct a virtual visit. This includes explaining the privacy requirements of virtual visits, which must be understood by the health care provider and patient
3. Clinic staff schedule the patient appointment, documenting the patient's email address (if applicable)
4. Clinic staff email an Outlook invite to the patient
  - The patient will be able to join the virtual meeting via a computer, or a smartphone device
5. Clinic staff create/modify the patient registration to reflect virtual visit, and check in the scheduled visit
  - Appointment check-in and Registration for a virtual visit must be completed simultaneously on the day of the appointment, so that the visit will be available in the electronic health record for physicians/clinical staff to document their notes electronically
6. Clinic staff help the patient to understand functionalities of the software/hardware (Telephone/OTN/Microsoft Teams)

**During the Virtual Care Visit**

1. At the start of the visit, the provider verifies the identity of the patient
2. The provider advises the patient that the call is being made in a privacy-protective setting. The provider also identifies anyone else on the hospital side of the call, and explains why they are present

**3. Documentation Requirements:**

Notes should be documented within the electronic health record, using tools made available for each provider role:

- Physician or Nurse Practitioner – choice of telephone dictation, or electronic documentation (DynDoc)
- Allied Health – Ad Hoc - PowerForm
- Nurse/Nurse Specialists – Ad Hoc - PowerForm

**After the Virtual Care Visit**

1. It is assumed that all virtual visits take place. If a visit does not take place (e.g. due to patient no-show or refusal), the provider advises the clinic staff, at which point the visit is rescheduled by the booking clerk. (It is recommended that the provider create a document on the scheduled visit, to indicate that an attempt was made at a visit, etc.)

## SECTION 1: CONSENT TO A VIRTUAL VISIT

## INSTRUCTIONS FOR CLINIC STAFF:

**Receive consent from the patient to conduct a virtual visit**

- Means of communication for each virtual visit needs to be determined (e.g. telephone, video conference), based on the appointment booking request from the involved provider(s).
- Additional information for virtual care visits that can be accessed by clinic staff, clinicians and patient/families by [clicking here](#)
- Obtain verbal consent from the patient, as required (refer to Hospital Consent to Treatment policy # II-50)

## SECTION 1.1: OBTAINING CONSENT VIA TELEPHONE

**CONSENT FOR TELEPHONE VISIT**

Hi, may I speak with [patient name]. This is (name) calling from the (name of clinic) at North York General Hospital. To protect your privacy, we want to make sure that we are speaking with the right person. Could you please tell me your name, date of birth and OHIP#. *[If OHIP number is not readily available, instead ask the patient for name of primary care doctor, date of last visit to the hospital or clinic]* Thank you.

The clinic is now offering telephone visits to reduce physical contact and protect our patients against COVID-19 and other respiratory illnesses. I am calling to offer a telephone visit to you.

Some health concerns can be appropriately responded to through a telephone visit alone. However, during a telephone visit, the doctor may decide that an in-person appointment is required for a clinical examination or may direct you to visit your nearest hospital for urgent care. If at any time, your health status changes and you need immediate or urgent care, please go to the nearest Emergency Department.

Privacy is one of our top priorities, so we want to assure you that telephone visits are made in a privacy protective setting.

- Do you have any questions?
- Is there anyone else who will be joining the call?
- Do you consent to sharing your personal health information with this individual during the call?
- Do I have your consent for me to make an appointment for you for a telephone visit?

*If the patient does not consent to a telephone visit, offer to make an in-person appointment or to delay their next appointment, if clinician is accepting in office visits*

- Informed refusal to a telephone visit, including alternatives provided and chosen by the patient (if applicable)

**TELEPHONE CONSENT FOR VIRTUAL PLATFORMS (OTN & MICROSOFT TEAMS VISIT)**

Hi, may I speak with [patient name]? This is (name) calling from the (name of clinic) at North York General Hospital. To protect your privacy, we want to make sure that we are speaking with the right person. Could you please tell me your name, date of birth and OHIP #. *[If OHIP number is not readily available, instead ask the patient for name of primary care doctor, date of last visit to the hospital or clinic]* Thank you.

The clinic is now offering virtual visits to reduce physical contact and protect our patients against COVID-19 and other respiratory illnesses. A virtual visit is one where you and your doctor communicate using audio and visual technology. The hospital uses an application called Microsoft Teams that is easy to use, secure and privacy protective.

Microsoft Teams is a trusted tool, and all reasonable efforts have been made to protect the privacy and security of virtual visits, but they are not free of risks. If you consent to participate in a virtual visit, we will need your email address. It will be used to send you information on participating in a virtual visit.

Email is convenient, but there is also a risk that information exchanged can be disclosed to a third party. It can be intercepted, forwarded, stored, even changed, or accessed by third party or email providers without anyone's knowledge or consent.

Before your appointment, we will email you a Microsoft Teams invite that will include the link to connect you to your Microsoft Teams virtual visit. No information about your health, care or treatment will be included in the email to you, just the date and time.

- Do you have any questions?
- Do you consent to providing your email address? Do I have your consent for making an appointment for you for a virtual visit?
- Is there anyone else you will be having in the same room during the virtual visit?
- Do you consent to sharing your personal health information with this individual during the virtual visit?

*If the patient does not consent to a virtual visit, offer to make a telephone or in-person appointment or to delay their next appointment, providing the clinician is accepting in-office appointments.*

*The **Terms of Use** below should be sent to the patient upon obtaining consent for a Teams visit, to the email address the patient has provided. The information should be sent together with any necessary details on who to contact to cancel a meeting, change an email address, and [how to download the Microsoft Teams App](#).*

**Terms of Use - Microsoft Teams Virtual Visit**

At North York General Hospital, privacy is one of our top priorities, so we want to assure you that virtual visits are made in a privacy-protective setting. Please note that some health concerns can be appropriately responded to through a virtual visit alone. However, during the visit, the doctor may decide that an in-person appointment is required for a clinical examination or may direct you to visit your nearest hospital for urgent care. If at any time, your health status changes and you need immediate or urgent care, please go to the nearest Emergency Department.

To enhance security and confidentiality, we recommend that you use a personal device for your visit and not a cell phone/computer/laptop owned by an employer or third party. A private connection at home or somewhere you trust should be used rather than, for instance, a coffee shop.

Microsoft Teams is a secure and privacy protective tool but, because of the nature of cybersecurity including use of email, it is not entirely without risk. Please review the following measures to protect your privacy, and support a positive virtual visit.

I understand and agree that:

- Email will be used only for the purpose of sending you a link to participate in a virtual visit
- Information about my health will be collected and used during a virtual visit to provide care, and may be disclosed as necessary to provide continuity of care (for example, to my primary care physician)
- I will not have anyone present at the visit whom I do not wish to have present
- In accordance with NYGH privacy policies, no audio or video recording of the visit will be made by me or by NYGH
- I will contact NYGH by telephone to change or cancel a meeting or if my contact email is changed; [*Contact details must be included*]]
- I may withdraw my consent for using email to send a link to participate in a virtual meeting at any time
- NYGH may withdraw the virtual care visit opportunity at any time

### Consent

I understand and agree that by participating in a virtual visit that I am accepting the risks and agreeing to the above noted terms.

## SECTION 1.2: PRIVACY AND CONSENT PROCEDURES DURING/AFTER VISIT

### **PRIVACY PROTECTION DURING THE MICROSOFT TEAMS VISIT/OTN (FOR HEALTH PROFESSIONALS):**

- The same clinical standards apply as they would for in-person care
- Advise the patient that the visit is in a privacy-protective setting
- Identify anyone else who is present and explain why
- Ask the patient if they can confirm they consent to having this visit and that no one is with them whom they don't wish to be present during the visit
- Confirm the patient's identity at the start of the session with government ID and OHIP card
- OTN consent to participate in a telemedicine consultation checklist, to access [click here](#)

## SECTION 2: SCHEDULE AND CAPTURING CONSENT FOR A VIRTUAL VISIT

### ADMINISTRATIVE STAFF:

#### To Schedule a Virtual Care Visit:

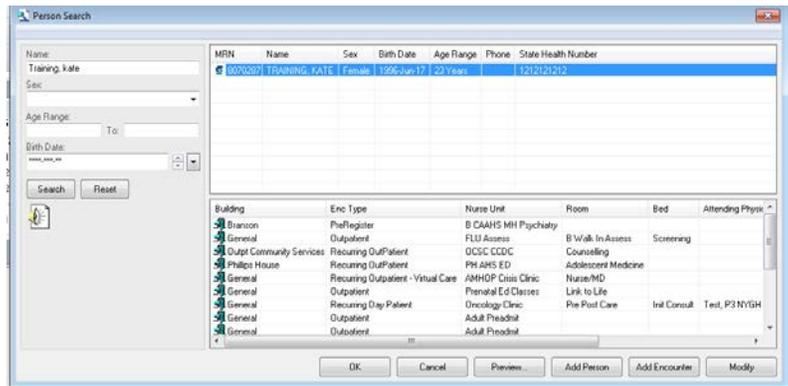
- From Scheduling, click on the **Appointment** tab
- Click on the **Ellipsis** at the end of the Person name field



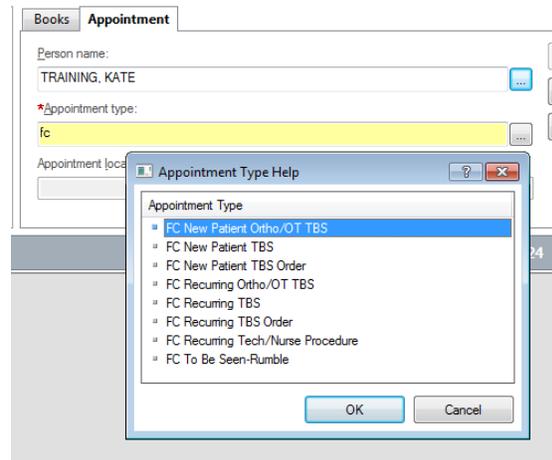
- Search for your patient by **MRN** or **name**

**Tip:** To display the Name field, click on Cancel

- Ensure the correct patient displays at the top of the screen
- Click on **OK**



- In the Appointment type field, type in the prefix of the appointment you are searching for then press Enter on your keyboard
- Once a list of appointments display, select the appropriate appointment type

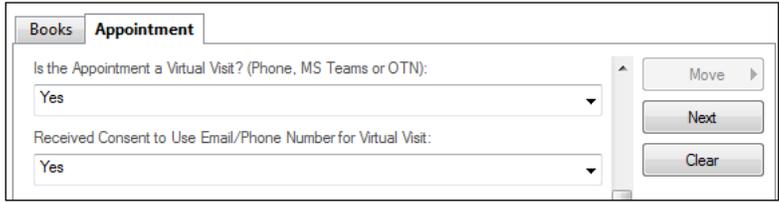


In the **Reason for Visit** or **Reason for Exam** field, indicate the reason for the visit and type of visit e.g. Follow up - MS Teams



The screenshot shows the 'Appointment' form with the 'Reason for Visit' field populated with 'Follow up - MS Teams'. The 'Is the Appointment a Virtual Visit?' field is empty. The 'Received Consent to Use Email/Phone Number for Virtual Visit:' field is also empty. Navigation buttons 'Move', 'Next', and 'Clear' are visible on the right.

In the **Is the Appointment a Virtual Visit? (Phone, MS Teams or OTN)**, click on **Yes**



The screenshot shows the 'Appointment' form where the 'Is the Appointment a Virtual Visit? (Phone, MS Teams or OTN):' dropdown menu is set to 'Yes'. The 'Received Consent to Use Email/Phone Number for Virtual Visit:' dropdown menu is also set to 'Yes'. Navigation buttons 'Move', 'Next', and 'Clear' are visible on the right.

In the **Received Consent to Use Email/Phone Number for Virtual Visit** field, select the appropriate response

**If applicable,**

- In the **Email for Virtual Visit** field, type in the patient's email address



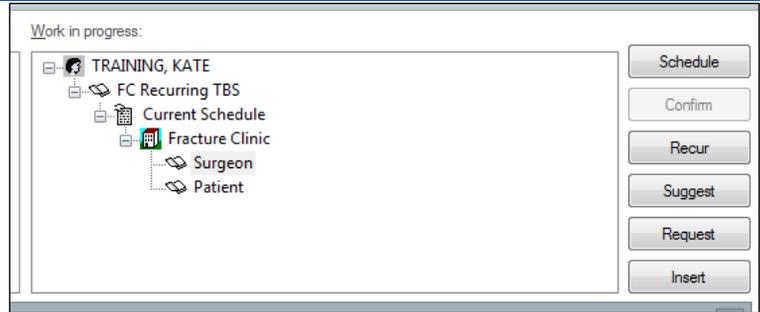
The screenshot shows the 'Appointment' form with 'Is the Appointment a Virtual Visit?' set to 'Yes' and 'Received Consent to Use Email/Phone Number for Virtual Visit:' set to 'Yes'. The 'Email for Virtual Visit:' field is populated with 'jypeinemailaddyhere@gmail.com'. Navigation buttons 'Move', 'Next', and 'Clear' are visible on the right.

- Once all the pertinent appointment details are filled out, click on **Move**

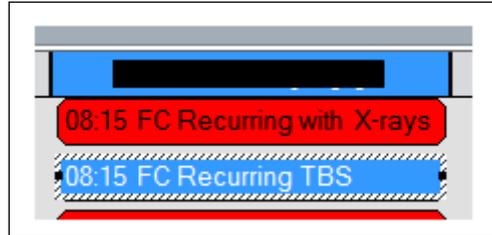


The screenshot shows the 'Appointment' form with all fields filled out. The 'Move' button on the right side of the form is highlighted with a red rectangular box, indicating the final step in the process.

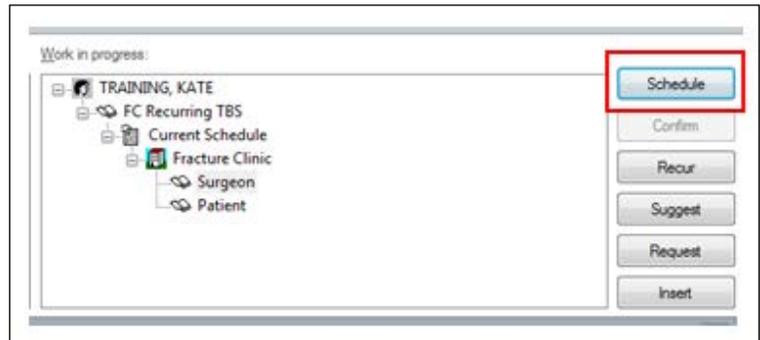
- The appointment now displays in the Work in Progress (WIP) box.



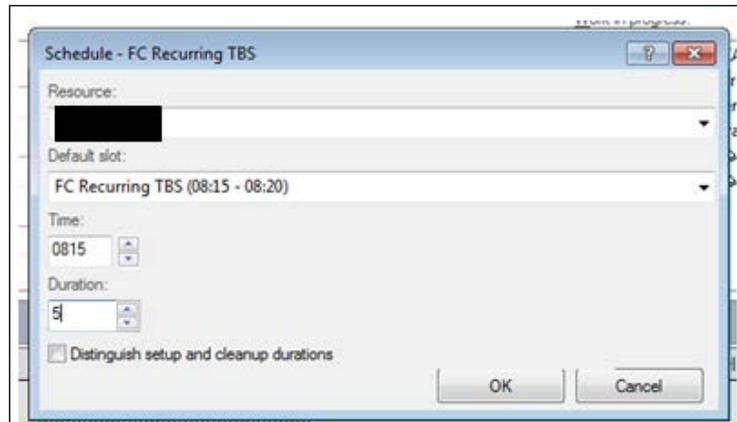
- Select the resource and time you would like the appointment to be scheduled for



- Click on **Schedule**



- A Schedule screen will display. Ensure all information is correct (Resource, Default slot, Time and Duration)



**Note:** You may change the duration of the appointment if needed.

- Click on **OK**

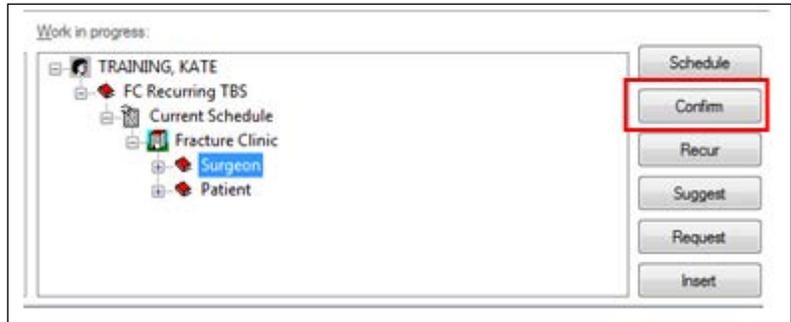
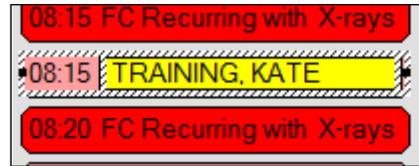
- The appointment will display in the slot selected with a status of Pending (appointment slot turns yellow)

**Note:** You may lose the slot if you don't confirm.

- Click on **Confirm**
- The Confirmation window displays with a summary of the appointment. Print out the appointment summary if needed
- Click on **OK**

**Note:** If the appointment is a pre reg appointment, you would then continue creating the pre reg encounter (visit)

- The appointment is now confirmed. (Appointment will display in white with a green border around it)



## SECTION 2.1: REGISTRATION (CHECK-IN) A VIRTUAL CARE VISIT

**Note:** Due to patient virtual visits, changes on how to register encounters (visits) have been improved. Moving forward, when selecting 'patient types (...)', administrative staff will be required to select a 'type of visit' which was not mandatory in the past.

**To Check In a Virtual Care Visit:**

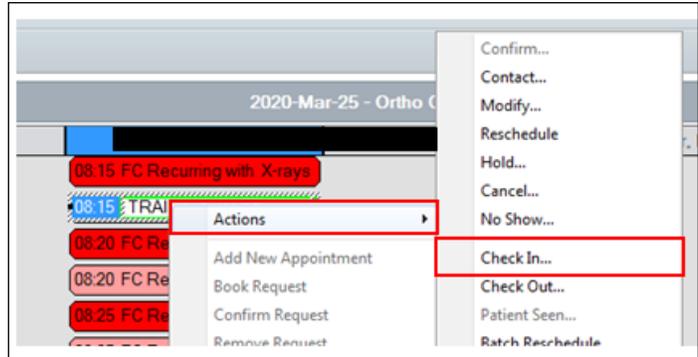
- From Scheduling, right click on the appointment
- From the drop down menu, click on **Actions**
- Click on **Check In...**
  
- Once the Check In screen displays, click on **Set Enc**

**Note:** If the appointment is a Pre Reg encounter (visit), you would click on Modify on the Check In screen

Depending on your clinic, you would either...

**For Outpatient Clinics - Click on Add Enc**

**For Recurring Outpatient or Recurring Day Patient Clinics – If this is the first encounter (visit) to the clinic, you would click on Add Enc. For all subsequent visits, highlight the previous encounter (visit) then click on Modify**



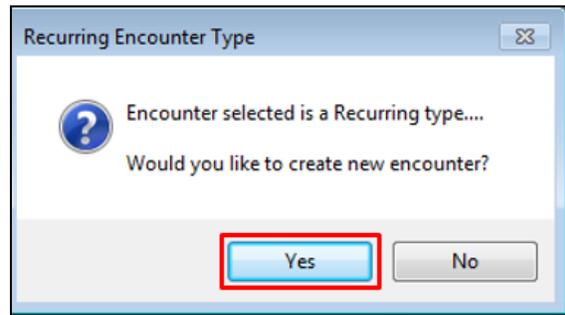
FIN NBR	Enc Type	Nurse Unit	Room	Admit Type	Facility	Reg Date	Disch Date
0008175032	Recurring OutPatient	Fracture Clinic		Clinic	NYGH	2020-Mar-18 - 08:04	2020-Mar-18 - 08:06
0008174911	Outpatient	FLU Assess	B Walk In Assess	Outpatient	NYGH	2020-Mar-13 - 11:34	2020-Mar-13 - 23:59
0008174802	Recurring OutPatient	OCSC CCDC	Counselling	Clinic	NYGH	2020-Mar-03 - 15:26	2020-Mar-03 - 23:59
0008174349	Recurring OutPatient	PH AHS ED	Adolescent Medicine	Clinic	NYGH	2019-Dec-05 - 09:03	2019-Dec-05 - 23:59
0008174237	Recurring Outpatient - Virtual Care	AMHOP Crisis Clinic	Nurse/MD	Clinic	NYGH	2019-Nov-21 - 15:14	2019-Nov-21 - 23:59
0008173972	Outpatient	Prenatal Ed Classes	Link to Life	Outpatient	NYGH	2019-Sep-20 - 14:58	2019-Sep-20 - 23:59
0008173577	Recurring Day Patient	Oncology Clinic	Pre Post Care	Visit	NYGH	2019-Jul-02 - 10:51	2019-Jul-02 - 23:59
0008173458	Outpatient	Adult Preadmit		Outpatient	NYGH	2019-Jun-18 - 09:31	2019-Jun-18 - 23:59
0008173457	Outpatient	Adult Preadmit		Outpatient	NYGH	2019-Jun-18 - 09:29	2019-Jun-18 - 23:59
0008173366	Outpatient	Gynaecology Clinic	Clinic	Outpatient	NYGH	2019-May-14 - 13:40	2019-May-14 - 23:59
0008172873	Outpatient	DI Out Patient		Outpatient	NYGH	2019-Mar-04 - 09:28	2019-Mar-04 - 23:59
0008172028	Outpatient	B CAAHS MH Psychiatry		Outpatient	NYGH	2018-Oct-05 - 09:00	2018-Oct-05 - 23:59
0008172027	Outpatient	B CAAHS MH Psychiatry		Outpatient	NYGH	2018-Oct-04 - 09:00	2018-Oct-04 - 23:59
0008170744	Recurring OutPatient	B Bst. Strategic In	Clinic	Clinic	NYGH	2018-Aug-07 - 07:26	2018-Aug-07 - 23:59
0008170417	Inpatient	2 West	215	Elective	NYGH	2018-Jun-20 - 10:42	2018-Oct-29 - 21:55
0008172030	PreRegister	B CAAHS MH Psychiatry		Visit	NYGH		

- From the Available Conversations screen, you would select the appropriate conversation
- Click on **OK**



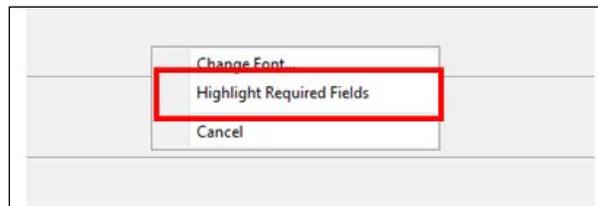
**For Recurring clinics:**

- When the Recurring Encounter Type displays, click on **Yes**



The Conversation screen will display. Review and fill out information i.e. Required fields (yellow fields).

**Tip:** To display required fields, right click anywhere in the grey area at the top right hand side of the screen then click in **Highlight Required Fields**



**From the Visit tab**

**Patient Type** - you would change it to the appropriate one for your clinic

- Outpatient = Outpatient – Virtual Care
- Recurring Day Patient = Recurring Day Patient – Virtual Care
- Recurring Outpatient = Recurring Outpatient – Virtual Care

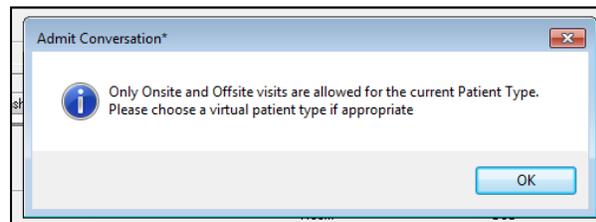
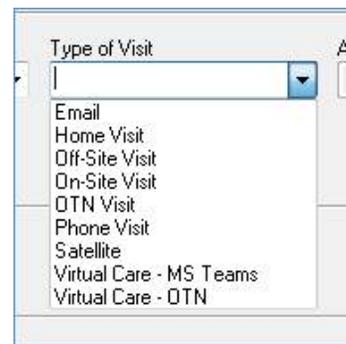
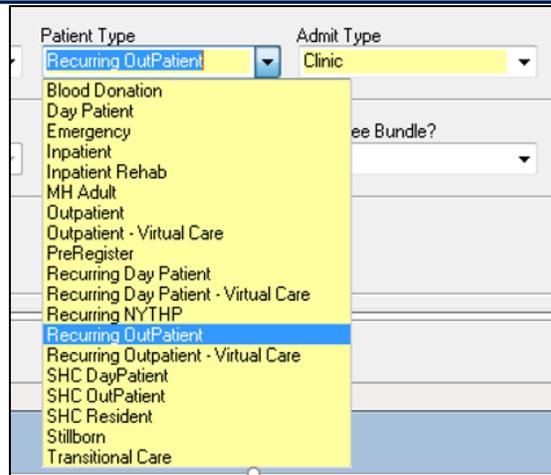
**Admit Type** – you would select the appropriate one for your clinic

- Outpatient
- Clinic
- Visit

**Type of Visit** – you would select the appropriate one

**Note:** If you forget to change the Patient Type and try to select eg Phone Visit, a pop will display prompting you to choose a virtual patient type.

Once all information is filled out, click on **OK**



**SECTION 3: DOCUMENTATION**

**Notes should be documented within the electronic health record, using the tools made available for each provider role:**

- Physician or Nurse Practitioner – Telephone dictation or electronic documentation in Cerner using DynDoc
- Allied Health – PowerForm
- Nurse/Nurse Specialist– PowerForm

**DOCUMENTATION REQUIREMENTS:**

Consistently document:

- Informed consent discussion(s) and patient agreement to a Microsoft Teams/OTN/Telephone visit  
Below is some standard text, approved by the Ontario Medical Association, that can be added to clinical notes documenting a virtual visit:

*Informed verbal consent was obtained from this patient to communicate and provide care using virtual and other telecommunications tools. This patient has been explained the risks related to unauthorized disclosure or interception of personal health information and steps they can take to help protect their information. We have discussed that care provided through video or audio communication cannot replace the need for physical examination or an in person visit for some disorders or urgent problems and patient understands the need to seek urgent care in an Emergency Department as necessary.*

- Care provided during a virtual care visit, including management plan and any follow-up plans

**SECTION 4: SOFTWARE/HARDWARE FOR VIRTUAL VISITS****Microsoft Teams****How does Microsoft Teams work? Who can use it?**

Microsoft Teams can be used by individuals who have the Microsoft Teams App, as well as through the web. Video conferencing has a 200 person limit to who join the call. Microsoft Teams is fully supported by Google Chrome and Microsoft Edge. It is not supported by Internet Explorer 11, Firefox or Safari 11.1+

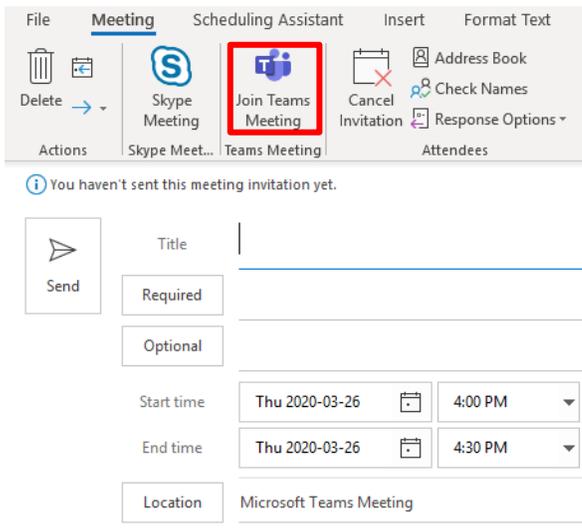
**How to set up a Microsoft Teams Meeting?**

In Microsoft Outlook, when you open a new meeting invite, it will allow you to select “Join Teams Meeting” on the menu item. Once clicked, it will add a link into the body of your email. This will be the link that patients and clinicians will click to join the meeting.

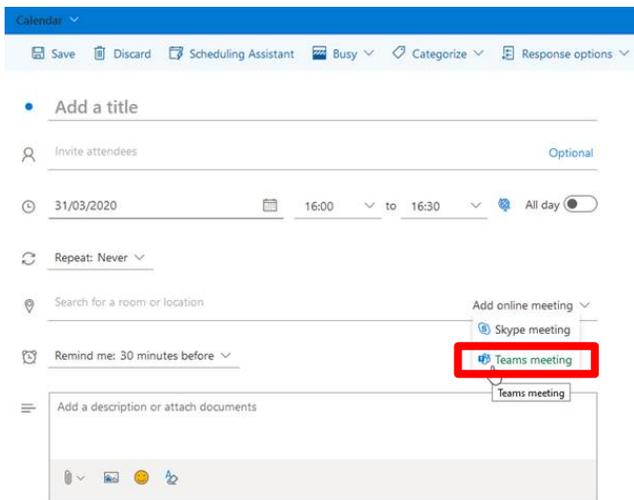
For additional Microsoft Teams resources, [click here](#)

**How to send an Outlook invite to the patient:**

- To access a guide for sending an invite to a patient [clicking here](#)
- Additional documentation about virtual care can be sent to the patient as an electronic document or a website link, if needed (see [Appendix 1](#), or [NYGH's patient virtual care website](#))
- Inform the patient to test their internet connection before the virtual visit
- They can use their smartphone or computer for the virtual visit



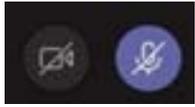
Click **'Join Teams Meeting'** will turn the meeting into a virtual MS teams meeting and will add the link into the body of your invite



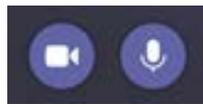
If you are using office.com to send out the meeting invite, be sure to select **'Teams Meeting'** in the drop down

### Microphone, Camera and Volume - All three will ensure a meaningful virtual visit for your patient

When you join your Microsoft Teams meeting, ensure that both your microphone and camera are turned on for patients to see/hear you. Also, ensure your volume is increased sufficiently to hear the patient.



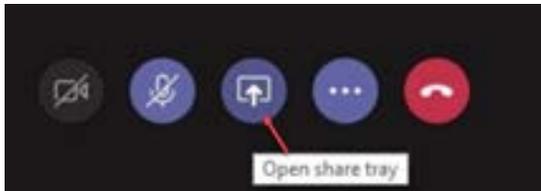
If your microphone and camera have a line through it, they are **turned off**



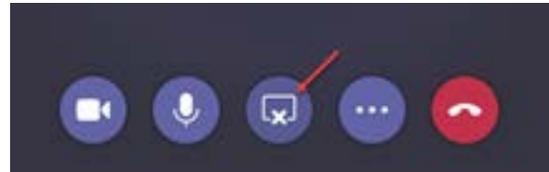
If your camera and microphone have no line through it, they are **turned on**

### Sharing your screen in Microsoft Teams

Select the **Sharing Icon** from your screen



Select the **Sharing Icon** again to stop presenting



### Sending a file/document to your patient on a Microsoft Teams call

Click **Attach**  under the box where you type your message. Select from these options:

- Recent
- Browse Teams and Channels
- OneDrive
- Upload from my computer

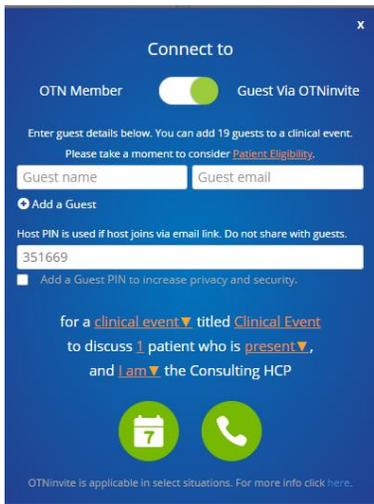
Select a file > **Share a link**. If you're uploading a file from your computer, select a file, click **Open**, and then **Send** 

## Ontario Telemedicine Network (OTN)

Once the consult is booked, the administrator logs onto OTN and then fills out patient name and email address and physician’s information

- Once the booking clerks completes this process on OTN’s website an e-mail will be triggered to the patient that provides instructions on the virtual visit
- Patient will click the link to initiate the virtual visit
- Any issues with OTN, please contact customer care number: 1-855-654-0888

The provider will be able to use the [OTN Hub](#) (screenshot below), which has resources about how the application functions:



This screenshot shows the virtual visit booking tool which the OTN provider can use to send invites.

**The following supplementary information about virtual care can be sent to patients and families, if desired. The information is also available for reference on [NYGH's website](#).**

### **Information for Patient for Virtual Care**

COVID-19 is placing stress on Canada's healthcare system. Our clinic is now offering virtual care options to make sure that we can continue to care for our patients safely and effectively. This means that we will be using video and audio technologies for most patient visits, rather than asking all patients to come in person to our clinics. Some of these technologies are provided by the Province. Others have been provided by vendors like Microsoft to help make discussions with your care provider as easy as possible.

Some health concerns can be addressed with virtual care alone, but in some cases your doctor may ask you to visit a hospital or other health care facility if necessary, for a physical examination.

We do our best to make sure that any information you give to us during virtual care visits is private and secure, but no video or audio tools are ever completely secure. There is an increased security risk that your health information may be intercepted or disclosed to third parties when using video or audio communication tools. To help us keep your information safe and secure, you can:

- Understand that this method of communication is not secure in the same way as a private appointment in an exam room.
- Use a private computer/device (i.e., not an employer's or third party's computer/device) and a secure internet connection. For example, using a personal computer or tablet is more secure than at a library, and your access to the Internet on your home network will generally be more secure than an open guest Wi-Fi connection.
- You should also understand that virtual care is not a substitute for in-person communication or clinical examinations, where appropriate, or for attending the Emergency Department when needed (including for any urgent care that may be required).
- If you are concerned about using video or audio tools for virtual care, you can ask our office to arrange for you to visit in person, see a different healthcare provider, or visit other health care facility. However, please note that visiting a health care provider in person comes with a higher risk of coming into contact with COVID-19 and the possibility of spreading the virus.
- By providing your information, you agree to let us collect, use, or disclose your personal health information through video or audio communications (while following applicable privacy laws) in order to provide you with care. In particular, the following means of electronic communication may be used: email, telephone, and/or videoconferencing (including Ontario Telemedicine Network, and/or Microsoft Teams)

ADDITIONAL QUESTIONS? PLEASE CONTACT:

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