# Virtual Health
## TOOLKIT

Authored by Primary & Community Care, IMIT, CIS, & Professional Practice

northern health
*the northern way of caring*

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# Contents

**Please note:** This is an evolving document and will continue to be updated. This version is being released now in order to give providers the tools to move forward with providing virtual care. Please watch for new additions to this document going forward.

*-- Primary & Community Care, IMIT, CIS, & Professional Practice, May 5, 2020*

# Guiding Principles for Virtual Health

**Guiding Principles for Virtual Health During COVID-19 Pandemic**

1. Northern Health is committed to supporting clinicians and health care providers in their daily work with clients in community to maintain continuity of care and prevent unnecessary admissions to acute care.

2. The decision to implement virtual health is done in collaboration between the operational leadership, the primary care interprofessional team, the health care professional and the client.

3. Virtual health enabled services in Northern Health will use approved platforms, standardized processes and tools to direct virtual care delivery. This includes decision support/algorithms, Information Technology (IT) supports, and guidelines for practice.

4. Virtual health services within Northern Health will maintain client records and information exchange processes according to Northern Health standards, policies and procedures.

5. Northern Health is committed to ensuring professional practice standards inclusive of ethics, duty to care, and appropriate clinical documentation are maintained in the provision of virtual care delivery.

6. Northern Health is committed to ensuring safe quality care in the provision of virtual health delivery.

7. All virtual health services will adhere to the current privacy and security standards, policies and procedures within Northern Health.

## Determining Suitability for Virtual Health

Virtual Health can replace or complement some components of in-person direct healthcare services. The following is a guide to support clinical decision-making and judgement processes when determining whether a virtual health appointment can replace or complement in-person appointments or services.

Use professional judgement on a case-by-case basis to determine whether virtual health is appropriate. Many factors need to be considered and virtual health may not be appropriate for all situations. The determination should consider the client's condition and preferences, available technology, risks and benefits, and whether the goals of the appointment can be met virtually.

**Standards of Care**
Your professional responsibilities and expectations as defined in the Standards of Practice and Codes of Ethical Conduct apply regardless of whether you provide health services via virtual health or through in-person client interactions.

You should consider whether you're able to deliver substantively similar care by virtual health as you could in person, and whether hands-on assessment or treatment is required for this client to be sure you're offering competent, effective, and safe care. Overall, ensure that virtual health doesn't expose your client to greater risk than other possible service delivery methods. You should consider any risks to the privacy of the client's health information or risks to their safety depending on the physical environment.

Some factors to consider in determining appropriateness of virtual health: See chart on following page.

| Considerations For Virtual Service | Comments and Reflections |
|---|---|
| Level of physical assessment required | • Will it be possible to deliver substantively similar care in the remote visit as you could in-person?<br>• Is hands-on assessment/treatment required for competent and safe delivery of care? Or can it be done remotely in a reliable manner? |
| Level of visual assessment required | • Consider both the client's care needs, and the provider's need for visual information, when deciding which virtual option to offer. If care outcomes are improved through visual observation of the procedure, use PEXIP videoconference.<br>• For example, if a provider would benefit from seeing a client's appearance and behaviour during a mental status exam, use videoconference. If visual observation won't improve care outcomes, use telephone.<br>• Consider if a combination of virtual and in-person services may be appropriate. For example, if you see a client twice a week to assess their wound, would it be appropriate to offer alternate virtual follow-ups with in-person appointments? |
| Ability of client to participate, considering any physical or mental health impairments | • Does my client have any cognitive or behavioural impairments, which would prevent them from benefiting from virtual service?<br>• Are they able to provide full informed consent?<br>• Do they have a family member or caregiver support who is available to assist the client during a virtual visit? |
| Level of client/family/ caregiver experience with the virtual technologies | • Does my client have experience using computers, tablets, internet, or mobile phones?<br>• Do they have a family member, caregiver or health care support provider who is experienced and available to assist the client during a virtual visit? |
| Level of support available in client's home | • If an in-person visit requires the use of interpreters, the presence of family members or caregivers, or other aides, then the same level of support should be arranged for the virtual service. |
| Balance the benefits of providing virtual service with identified risks | • Will the virtual service introduce risks to client safety that cannot be mitigated? For example, would an underlying balance impairment prevent an effective falls risk assessment and invention plan?<br>• Are there risks to client safety associated with providing in-person services (such as with the COVID-19 pandemic)? |
| Client/family/care provider desire to | • Some clients/families may prefer a virtual service to an in-person meeting or appointment. For example, clients' worries |

| participate in virtual service | about going into health facilities during the COVID-19 pandemic. |
| | • Clients always have the right to decline or opt out of virtual services. Providers also can decline to use virtual services if they feel they cannot meet an appropriate standard of care for a given scenario. |
| Client/family/care provider access to the virtual technology | • Does the client have a telephone, mobile phone, computer, laptop, or tablet? Do they have reliable high-speed internet in their home? |
| | • Are there other barriers preventing the client from meeting virtually? (e.g., no email address, unable to afford internet or cellular services, living in shelter or is transient). |

# Virtual Health Quick Start Guide

Northern Health has an expedited process to set up care providers with Virtual Health to provide client care during this pandemic. Follow the link to the Virtual Health OurNH page where information on the tools and process for getting started can be found [NH Virtual Health Services](NH Virtual Health Services).

**Getting Started in Virtual Health (Pandemic Process):**

1. Email [imit.covid19.planning@northernhealth.ca](imit.covid19.planning@northernhealth.ca) with the name of a contact person, a phone number, an email address and a very brief explanation of what you are requesting (see the [How to Go Virtual](How to Go Virtual) section of NH Virtual Health Services).
2. A Northern Health IT representative will call as soon as possible (usually within 24 hours) Monday to Friday to schedule a conversation to gather information.
3. A demonstration of the tool and a training session will be scheduled.
4. The Virtual Health tool will be set up for use (usually within 24 hours)
5. Access to a 'Virtual Health DoNotReply' email account will be provided.

**Key Technical Considerations:**

- Do you have a device that has a microphone, camera, and speaker? Any modern smart phone, tablet, or Northern Health Computer likely have these. If using a personal computer be sure to check for these features.
- Is there high-speed connectivity? LTE Cellular data of minimum two bars or high speed internet? If you can Skype or Face Time on your network, Virtual Health can likely be done.
- A headset with microphone is recommended for best results - but is not necessary.
- If your clinical needs include peripherals (stethoscopes, exam cameras, goniometers, etc.),  a customized solution is required (we will consult with you in order to meet your needs).
- Northern Health Virtual Health Services supports **Pexip** as its primary tool. Other Virtual Health tools are available and we are happy to work with you ensure you have the right platform to meet your needs ([Virtual Health Tool Comparison](Virtual Health Tool Comparison)).

**Support**

- For general questions about Virtual Health or questions after you have been set up, email [Telehealth@northernhealth.ca](Telehealth@northernhealth.ca) (available and monitored Monday to Friday).
- For Northern Health hardware/devices or clinic connectivity issues call ITS service desk for support 1-888-558-4357.

**Checklist for Virtual Health consent: Getting your client set up for a virtual appointment**

| Steps to securing informed consent | √ |
|---|---|
| **1. Orientation -  Email Notification and Validation**<br>• Introduce the client/family to the video solution, how it works, what to expect, and how it can be accessed (via computer, smartphone, tablet, online or with app).<br>• Check technical eligibility of your client<br>    ☐ Computer (webcam, speaker, and microphone), tablet, or smartphone<br>    ☐ Secure and reliable internet connection<br>    ☐ Email account<br>• Obtain the client's personal email and send an initial email to validate the email address. Attach the 'Virtual Health Security Considerations for Patients' and confirm this email is received.<br>• Explain an email invitation with a link will be sent and the need to do a pre-test of the connection. | |
| **2. Confidentiality and Privacy**<br>• Assure individual and their family that no other parties can see the interaction online and that the video connection is secure.<br>• Explain that their privacy is important and the same policies apply as with an in-person visit.<br>• Remind client that they will be asked for two unique identifiers at the time of the appointment (e.g. first and last name, date of birth, PHN/BC Care Card, witnesses) | |
| **3. Recording**<br>• Assure all participants that the session takes place in 'real time' and will not be recorded.<br>• Advise client that if they or their health care provider(s) have just reason for recording a clinical event (i.e. for assessment or education purposes), informed written consent must be obtained. | |
| **4. Contingency Management and Follow Up**<br>• Explain to client that they have the right to decline care via virtual health or can refuse to participate at any time.<br>• Inform client that an in-person, telephone consultation or follow up appointment is an option should they or their provider determine that it is preferred or necessary.<br>• Establish a plan in the event of a technical issue or adverse event (e.g. ask the patient to call the office and ensure they have the right number; obtain emergency contact information).<br>• Inform the client that the next steps in their plan of care will be identified prior to concluding the virtual health appointment. | |
| **5. Opportunity for Questions or Feedback**<br>• Ask the client if they have any questions or concerns about the process.<br>• Inform them that there will be an opportunity to provide feedback about their experience. | |
| **6. Consent** | |

- Request consent to participate in the session from the patient or substitute decision maker.
- Documentation in the clinical record or EMR must reflect the client was informed as per the 'notification for the use of digital communications' and agreed to virtual health services.
- For information on using electronic communications, refer to (NH Policy Email and Text Messaging).

## Other Considerations

**How to Best be Seen and Heard During your Virtual Appointment**
- Ensure the lighting and space in the home is suitable for the purpose of the appointment.
- Explain the sound delay and suggest pausing before speaking to improve conversation flow.
- Advise the patient to use a normal speaking voice and ensure audio settings are set right.
- Explain 'self-view' modes to the client so they can monitor their position in front of the camera.
- Request that the individual review 'Virtual Health Overview' brochure for further tips.
- Remind the client to wear any hearing devices or visual aids if needed.
- Consider if there are any language or communication barriers that need to be addressed

## Virtual Health: Security Considerations for Patients

Digital communications can be a convenient way to communicate with your care team between visits, but there are risks when using these technologies to send personal information.

We'll do what we can to confirm any personal information we send is being received by you, and only you, but it's never possible to have 100% certainty about who we're communicating with outside of a face-to-face visit.

You need to be aware that we can't control what happens to information once it is stored:
1. On your device;
2. By your telecommunications providers;
3. By software or application providers; or
4. By other applications that may have access to your messages.

You're responsible for the security of your own computer/tablet, email service and smartphone.

### Security Risk Considerations

- Your personal health care information could be requested, viewed, changed or deleted if others have access to your computer, smartphone, tablet or email account.
- Information may be vulnerable if stored or accessed on a computer/device that has been compromised by viruses or malware.
- Organizations may have to disclose information where required by law or under court order.
- Electronic communications can be unencrypted or intercepted by third parties.
- Your data may be stored and/or accessed outside of Canada.

### What can you do?

Below are best practices to help you protect your information once it's in your control and on one of your personal devices. It's important to note these are general best practices. There's no guarantee your information won't be accessed by a third party.

- Protect your passwords! Someone could pose as you by sending us a request from your device or email account
- Download applications (Apps) from trusted sources (Google Play, iStore). If the information you're wanting to communicate is of a sensitive nature, you may want to seek a more secure method of communication
- Delete emails and texts you no longer require (empty your trash can regularly)
- Use your device settings to control what information your Apps have permission to access
- Avoid sending personal information while using public WiFi
- Use permission controls on your device to ensure that none of your Apps have unnecessary access to your text messages and/or emails
- Use anti-virus protection software on your computer or device, and regularly scan
- Never give your password to anyone. Northern Health will never ask you for your password.

## Patient Brochure: Preparing For Your Virtual Visit

**Please note:** A final version of the brochure below is under development and will be added to this document when available.

# Virtual Visit Overview

Northern Health is offering clients the option to have a video appointment. Video or virtual appointments allow you to use technology to meet with your health care provider from the convenience of your home.

In order to have a virtual appointment you will need the following items:

1. Computer (webcam, speaker, and microphone), tablet, or smartphone
2. Secure and reliable internet connection
3. Email account

If you do not have these items or do not want a virtual appointment, please let your health care provider know. Virtual Health is not right for everyone or a substitute for going to the Emergency Department if urgent care is needed.

### What services are provided through a virtual appointment?

A variety of health care providers are using virtual appointments to do assessments, education, and exercises. Health care providers range from doctors and nurses, to occupational therapists and speech language pathologists plus many more. Professional Practice Standards are followed similar to an in-person visits.

### Is there an additional cost for a virtual appointments?

There is no cost for BC residents who are covered by Medical Services Plan (MSP). You are responsible for any data costs or charges incurred by your internet service provider.

### Can new prescriptions or refills be given during a virtual visit?

If your visit is with a doctor or nurse practitioner, prescriptions for commonly prescribed medications may be provided to your pharmacy at the health care provider's discretion. However prescriptions for controlled medications like opiates & stimulants are not typically provided virtually.

### Are virtual appointments secure?

Your privacy is important to us. Similar to a face-to-face visit, your identity will be confirmed and your information is kept confidential. Appointments will not be recorded. We confirm your email, prior to sending you the virtual appointment invite.

We use a health care version of Pexip that is compliant with privacy laws: PIPEDA/PHIPA. Servers are located in Canada to ensure data sovereignty. Audio, video and messages are encrypted and the application is configured to ensure Security Best Practices are followed.

### How can you make a virtual appointment more secure?

Perfect security does not exist, and we cannot guarantee security on your device. Please follow safe online practices including:

- Use secure password protected Wi-Fi, not public Wi-Fi
- Use antimalware and antivirus software
- Download applications only from trusted sources
- Ensure your computer software is up-to-date

If at any time during a virtual visit you feel uncomfortable, let your health care provider know so that alternate arrangements can be made.

**NH Virtual Health Services**

# Preparing for a Virtual Appointment

## Before your virtual visit

**What you will need for technology:**

- A computer or electronic device with a camera
- A headset or a built in microphone

Choose the method you will connect by:

- Computer, iPhone or iPad or Android smartphone
  - Launch either Google Chrome or Safari
  - Enter in the search bar: video.northernhealth.ca
  - Enter you name; click **OK**
  - Allow access to your mic, speaker and camera
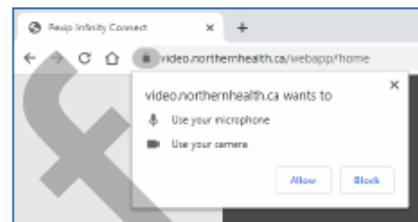
## Join your Virtual Visit

**1** Open your email invitation and check it contains:

- The date and time your **PEXIP** appointment
- A link to join your **PEXIP** meeting

**2** Arrive at your virtual visit 5 minutes early

- Click on the **PEXIP** link in your invitation
- Ensure you are using Google Chrome or Safari

**3** When the link opens
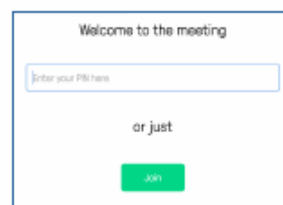
- Enter your guest pin
- Wait for the host (your care provider) to allow you into the virtual meeting room

**Example**

Occupational Therapist Sue is inviting you to a scheduled PEXIP meeting

Time: 10:00 a.m. - 11:00 a.m.
Date: Thursday April 30, 2020

To join the meeting click on this link https://video.northern-health.ca/webapp/conference/meet.OTSue

## Tips for a good virtual appointment:

- Choose a well-lit, distraction-free private location
- Have a family member or friend sit with you
- Have a pen and paper ready to take notes
- Have the health provider's phone number available
- Have your BC Care Card number available
- Have the name and address of your pharmacy

## Technical tips:

- Ensure your mobile device is fully charged
- Use a wired connection or WiFi to avoid extra data charges
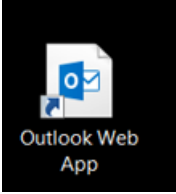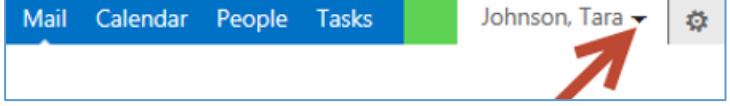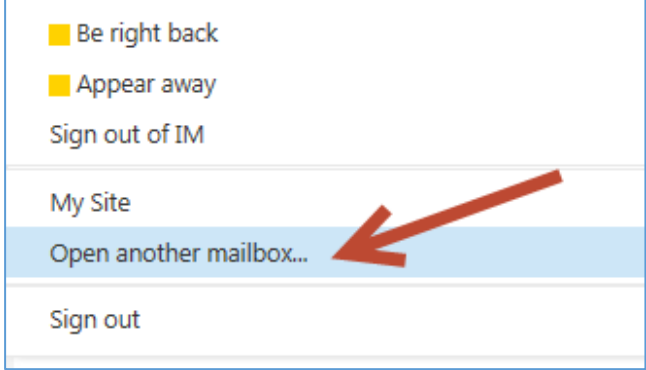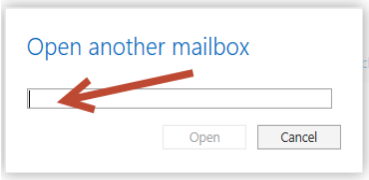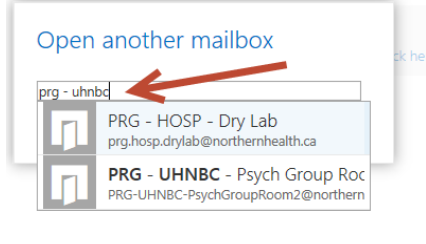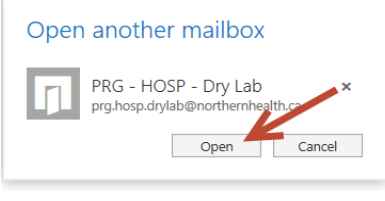- Ensure you are not using internet explorer

If at any time during a virtual visit you feel uncomfortable, let your health care provider know so that alternate arrangements can be made.

NH Virtual Health Services
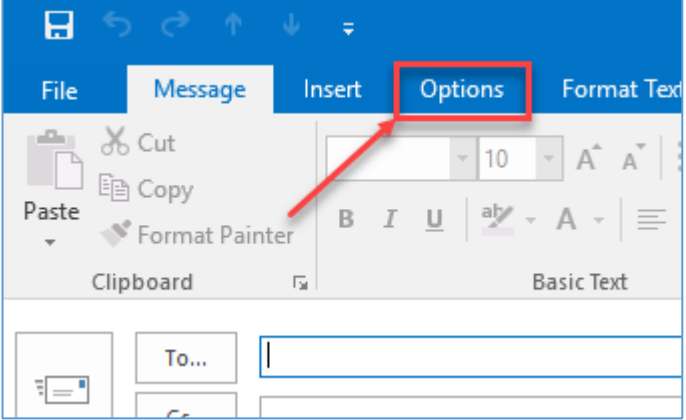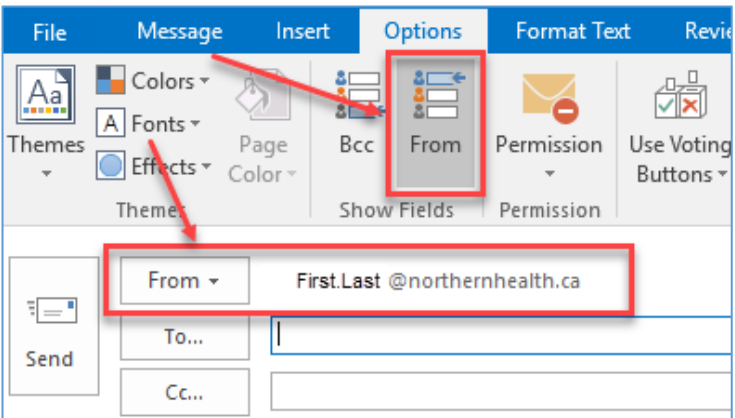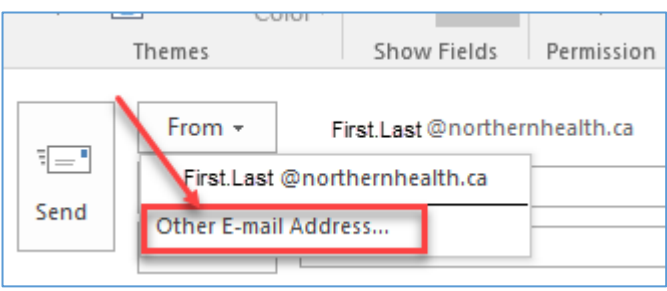
XX-XXX-XXXX (IND Rev. 04/18)

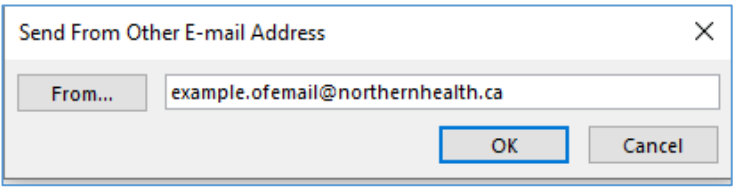## How to Open a Shared Mailbox via the Outlook Web App
Questions? Contact the Service Desk at 250-565-2784.

| | |
|---|---|
| 1. Click on the shortcut on your desktop to **Outlook Web app** |  Outlook Web App |
| 2. At the top right of your screen, click on the dropdown arrow beside your name | Mail  Calendar  People  Tasks  Johnson, Tara ▾  ⚙ |
| 3. Click on **Open another mailbox** | ▪ Be right back ▪ Appear away Sign out of IM My Site Open another mailbox... Sign out |
| 4. Type in the name of shared mailbox or shared calendar, then click on the desired name | Open another mailbox [ ] Open  Cancel |
| 5. Click on the desired name (you must have permission to the calendar/mailbox). | Open another mailbox prg - uhnbc PRG - HOSP - Dry Lab prg.hosp.drylab@northernhealth.ca PRG - UHNBC - Psych Group Roc PRG-UHNBC-PsychGroupRoom2@northern |
| 6. Click **Open**. | Open another mailbox PRG - HOSP - Dry Lab prg.hosp.drylab@northernhealth.ca ✕ Open  Cancel |
| 7. A new window opens up; you can now access your shared Mailbox or Calendar (by clicking on the "Calendar" tab) via Outlook Web App. | |

## How to Send an Email from a Shared Mailbox via Outlook 2016
Questions? Contact the Service Desk at 250-565-2784.

| | |
|---|---|
| 1. Start a new email and click on **Options**. |  |
| 2. Click **From** and a new box will appear: |  |
| 3. Click the **From** dropdown and choose **Other email address**: |  |
| 4. Type in the email you want to send from and click OK. NOTE: You must already have access through IT to send from this email. |  |
| 5. Notice the change in e-mail and complete e-mail as normal. It will be saved as a quick selection for future use. |  |