

# Guidelines for Virtual Visits

Site Applicability: All PHC Sites

Practice Level: All PHC Staff: basic skill

## Requirements

These Virtual Visit (VV) guidelines must be used by Providence Health Care (PHC) staff and physicians when communicating by video conference with clients, patients or residents; family members or representatives; other care providers; and/or staff members; and in conjunction with the [PHC Emailing Policy](#) and [Province of BC Health Authorities Telehealth Clinical Guidelines](#).

**NOTE:** For the purposes of these guidelines, “clients, patients, or residents” include their family members or representative.

## Need to Know

VV should only be used for appropriate clinical scenarios, such as when the interaction does not require physical examination, when it is not feasible for patients to present at a PHC or VCH site, or when a VV would offer a richer experience than a telephone call. Appropriate scenarios will be defined by each clinical program area. The [Virtual Health Visit Decision Tree](#) can be used for guidance when considering the appropriateness of a VV.

Assess the appropriateness for a VV at the first inpatient visit, or during the initial patient connection prior to the initial visit.

## Equipment and Supplies

- ✓ Access to internet
- ✓ Access to email
- ✓ Tablet, smartphone or computer
- ✓ A quiet, private space for conversation
- ✓ Adequate lighting for video call

## Guideline

### Prior to Communicating via VV:

- Discuss the specific clinical purposes for the VV(s) with all parties.
- Gather the necessary information (email address and secondary communication method) to connect with the individual.
- Authenticate the owner of the email address. This may be accomplished by one of the following methods:
  - Sending an initial email to confirm the right person is being contacted prior to sending a virtual visit invitation or any personal information

- In-person, by text or by phone, asking the client, patient or resident to verify a piece of information that only they would know (e.g. date of birth, date of last appointment, middle name, etc.)
  - Confirming the email address against another current document
- Provide client(s), patient(s), and resident(s) with the [Patient Notice](#) via email. (Note: While PHC's Zoom for Healthcare accounts use Canadian data centres, data from other platforms - like FaceTime and doxy.me – may be accessed or stored outside of Canada.)
- Inform the client, patient or resident when the VV will occur or how a session will be scheduled.
- Schedule and send the meeting invitation to the client, patient or resident confirming the date and time of the VV.
- During scheduling, ensure that the client, patient or resident email address, which is required to initiate a VV, is collected and stored in a secure fashion, ideally within the client, patient or resident's health care record.
- Limit communications to information necessary for the effective provision of care within a VV
- For clients, patients or residents with a preferred language other than English, consider contacting the [PHSA Provincial Language Service](#) to access interpretation and translation services.
  - Please log in to the [online booking platform](#) to access step-by-step instructions.
  - [Click here](#) for additional options for interpretation.

### Communicating during the VV

- Confirm with the client, patient or resident that they have read the Patient Notice and would like to proceed with the VV.
- When you connect with the client, patient or resident, introduce all members of the care team and any other participant on the call.
- Ensure your camera is at eye level, your environment is confidential, your badges are visible to the patient, there are no visual distractions behind you, and you are as punctual for your appointments as possible.
- Verify the patient's identity by asking for two types of identification, such as a name, birthdate, address, and/or health card number.
- Do not record the VV.

### Documentation

- Document consent for the VV in the client, patient or resident's chart; e.g., "This visit is being done via a virtual visit. The Patient Notice was provided and informed verbal consent was obtained from this patient to communicate and provide care using a virtual health tool."
- Document any clinically significant information in the client, patient or resident's chart, as you would in a face-to-face or other Telehealth consultation.
- Report any actual or potential privacy breaches associated with VVs to the PHC Information Access and Privacy Office, as per [PHC's Managing Privacy Breaches Policy](#).

### Patient and Family Education

Provide the client, patient or resident with the Patient Notice: [Using Video appointment to Communicate with your Health Care Provider.](#)

Inform the client, patient or resident of the [Patient Virtual Health Tech Support desk](#). The Support desk can offer telephone support for patients using Zoom for Healthcare or BC Virtual Visits for VV.

## Platform-Specific Virtual Visit Guidelines

### Zoom

#### To Mitigate the Risk of Zoom Bombing:

Zoom Bombing occurs when unauthorized users invade video calls with racist, pornographic, or vulgar content with the intention of either humour or logistical disruption. To mitigate the risk:

- Ensure the VV is scheduled using a Zoom for Healthcare account. (If needed, request an account here: <https://bcvh-zoom.phsa.ca/>)
- Do not share meeting links on public-facing platforms.

If you experience Zoom Bombing, please notify [virtualvisits@providencehealth.bc.ca](mailto:virtualvisits@providencehealth.bc.ca)

#### Principles in using Zoom for communication:

- Screen sharing is a function of Zoom. Ensure all other programs such as Microsoft Outlook email/calendar and other documents that may contain personal or confidential information are closed before initiating screen sharing.
- Ensure that the meeting invite, which contains the email address, is deleted out of the Staff member's Outlook calendar after the meeting has taken place.

### FaceTime

#### Principles in using FaceTime for communication:

- Ensure Apple smartphones and iPads have the most current iOS version installed, and are password protected
- Explain the purpose of the FaceTime session to the client, patient or resident and ensure they are comfortable using FaceTime before using this modality to provide Patient care
- View the complete [User Guide – FaceTime for Clinical Use](#)

### Skype for Business

#### Principles for Using Skype for Business for communication:

- Send the patient/client device-specific instructions on how to connect in with Skype for Business. These instructions can be found under 'Online Meetings' under the heading 'External Participants' at <http://imitsinfocentre.healthbc.org/services/web-conferencing/online-meetings>
- View the [User Guide – Planning to Offer Virtual Visits via Skype for Business](#)
- Provide the [Skype for Business Questions and Answers for Patients](#) to the patient, client or resident prior to the VV
- Screen sharing is a function of Skype for Business. Ensure all other programs such as Microsoft

Outlook email/calendar and other documents that may contain personal or confidential information are closed before initiating screen sharing.

- Ensure that the meeting invite, which contains the email address, is deleted out of the Staff member's Outlook calendar after the meeting has taken place.

## Doxy.me

### **Principles in using Doxy.me for communication**

- Disable the screen share and file transfer extensions of Doxy.me before beginning the VV
- Avoid sharing personal health information through the Doxy.me text chat functionality