

## **Virtual Care Standard Operating Procedures at Hamilton Health Sciences**

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<b>1.0</b>	April 21, 2020	Virtual Care Task Force	Initial Proposal
<b>1.3</b>	April 28, 2020	Corporate Command Centre	Updates for Command Centre Endorsement/Approval
<b>1.4</b>	May 6, 2020	Virtual Care Task Force	Updates to include addition of Zoom and Group Consent Considerations; For Corporate Communication

## VIRTUAL CARE STANDARD OPERATING PROCEDURES

During the COVID-19 pandemic emergency, Hamilton Health Sciences (HHS) is moving quickly to support clinicians in providing virtual care.

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. This document contains information to help ensure safe experience.

There are three approved modalities for virtual care visits at Hamilton Health Sciences:

- Use of OTN (Ontario Telemedicine Network) (audio and video) – see [Appendix C](#)
- Use of Zoom for Healthcare (Zoom) (audio and video) – see [Appendix D](#)
- Use of Telephone (audio only)

It is recommended that clinicians use one virtual care platform within clinical care to minimize confusion for patients.

For an overview of the HHS virtual care applications for videoconferencing, refer to [Appendix B](#).

The modalities and work flows during the COVID-19 pandemic will be reviewed at the end of the COVID-19 pandemic.

### Section 1: Planning for Virtual Care

- Obtain Access to Approved Virtual Care Solutions (*Refer to Appendices [C.1](#) - OTN and [D.1](#) - Zoom*)
- Secure Required Technology
  - Provider and patient require secure, reliable and high speed internet and a device (Smartphone, tablet or computer) with functional webcam, microphone and speaker features
  - NOTE: Ensure you are using OTN/Zoom outside of Citrix. You can request that HITS add Chrome to the desktop of the HHS computer that you will be using for video visits.
- Develop Standard Work Processes to Integrate Virtual Care into your Practice around the following:
  - Consent to Participate in Virtual Care
  - Preparing the Patient for Virtual Care Visit (*Refer to [Appendix A](#)*)
  - Booking Registration
  - Documentation
  - Collateral processes (requisitions, prescriptions, referrals, booking follow ups)
- Review Virtual Care Resources (*Refer to [Appendix C.2](#) – OTN and [D.3](#) - Zoom*)

## Section 2: Prior to the Virtual Care Visit

### Section 2.1: Obtain Consent

Obtaining and documenting consent for virtual visits is required.

#### ***Obtaining consent for the First Virtual Visit***

- Full verbal consent processes as outlined below should be carried out before the first virtual visit with a patient for any one clinic. (*Refer to SAMPLE: Verbal Consent statements*)
- If an individual is a patient of multiple clinics, each clinic is responsible for obtaining full consent as outlined below before first virtual visit with that clinic.
- If you are **hosting group sessions virtually, you must remind participants to be mindful of the privacy of other group members.** They should be guided to participate from a private spot in their home where other members of their family cannot see/hear the session. Use of headphones, if they are able is recommended, and they should avoid having other distractions (television, music, etc.) on in the background.

#### ***Obtaining consent for Subsequent Virtual Visits with a Clinic/Provider***

- For subsequent visits with a clinic/provider where full consent has been previously obtained, providers may rely on the initial consent for the duration of the COVID-19 emergency.
- At the commencement of each subsequent virtual visit, the provider is expected to check in with the patient to ensure they are still comfortable with the virtual visit and that they do not have any questions regarding virtual care.

Dependent on work flow, programs will determine the specifics related to who will obtain and document consent from patients to support their participation in virtual care visits and when that will be done (e.g., when booking or at the beginning of the visit). The following is recommended:

- If consent is **obtained by the provider** prior to or at the beginning of the visit, appropriate documentation is completed within the patient's health record.
- If consent is **obtained by administrative support staff** during their discussion with the patient, consider the work flow to determine appropriate documentation processes.

The HHS Virtual Care Team is available to support consent and documentation standard work processes specific to programs and clinics.

#### **SAMPLE: Verbal Consent to Participate in Telephone Visits**

The clinic is now offering telephone visits to reduce physical contact and protect our patients against COVID-19. 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 provider 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.

At Hamilton Health Sciences, privacy is one of our top priorities, so we want to assure you that telephone visits are made in a privacy protected setting.

- Do you have any questions?
- Do I have your consent to proceed with/schedule an appointment for you for a phone visit?

### **SAMPLE: Verbal Consent to Participate in Virtual Care Visits Using Videoconferencing**

The clinic is now offering virtual visits using videoconferencing to reduce physical contact and protect our patients against COVID-19. The hospital uses applications called the Ontario Telemedicine Network (OTN) and Zoom Healthcare that are easy to use, secure and private.

At Hamilton Health Sciences, privacy is one of our top priorities. However, electronic communication, including virtual visits and email may have risks. If you agree to participate in a virtual visit, we will need to share your name and email address with OTN/Zoom. We will schedule your virtual visit with OTN/Zoom and you will receive an email with information on how to participate in a virtual visit.

We suggest that you use your personal email and device for your visit and not one owned by an employer or third party. Use internet at home or somewhere you trust rather than a public internet connection such as a public library or coffee shop.

**(SPECIFIC TO ZOOM APPOINTMENTS)** It is important for you to understand that we are taking all reasonable steps to protect the privacy of your information, but it is still possible that your information may be routed through the U.S.A. It is not recorded, stored or otherwise retained there.

**(SPECIFIC TO VIRTUAL GROUP SESSIONS)** If you are participating in a virtual group session, it is important to be mindful of the privacy of other group members. Participate in the session from a private spot in your home where others cannot see/hear the session. The use of headphones is recommended.

If at any time, your health status changes and you need immediate or urgent care, please go to the nearest Emergency Department.

- Do you have any questions?
- Do you have the technology (mobile device, tablet or computer with a webcam, speaker/microphone) and secure internet to support a virtual visit? If not, a telephone appointment can be offered
- Do I have your consent to proceed with/schedule an appointment for a virtual visit? Do you consent to providing your email address?

Should you have further questions regarding virtual care at Hamilton Health Sciences, please refer to our website: [www.hamiltonhealthsciences.ca/virtualcare](http://www.hamiltonhealthsciences.ca/virtualcare).

### **Documentation of Verbal Consent for Participation in Virtual Care Visits for Individual Patients:**

The following is a statement approved by the Ontario Medical Association that should be included in virtual care visit documentation in accordance with existing documentation standards and practices for in-person visits (i.e., transcription, electronic documentation etc.):

*Informed verbal consent was obtained from this patient to communicate and provide care using virtual and other telecommunication 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 (and the information of others if a group*

*virtual care session). 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 the patient understands the need to seek urgent care in an Emergency Department as necessary.*

## Section 2.2: Connect with the Patient

Dependent on work flow, programs will determine the specifics related to who on the Health Care Team (provider or administrative support staff) will contact the patient.

Verification of the patient's identity by requesting two person-specific identifiers including the patient's name, date of birth and/or HIN is required at the beginning of the phone call.

The purpose of the call includes:

- Providing a brief overview of virtual care ([Refer to Appendix A](#))
- Ensuring that technology requirements and set up to complete the virtual visit can be supported by the patient
- Obtaining consent for the virtual care visit
- Obtaining the patient's email address after consent is expressed. Review the patient's email address to ensure it is correct. This will prevent inadvertent privacy breaches due to email address errors.
- Scheduling a date and time for the virtual visit
- Preparing the patient for the virtual care visit ([Refer to Appendix A](#)). It is recommended patients are directed to the HHS website ([www.hamiltonhealthsciences.ca/virtualcare](http://www.hamiltonhealthsciences.ca/virtualcare)) or send the *Virtual Visits at Hamilton Health Sciences* document.

**NOTE:** *If a message needs to be left for a patient, review the HHS [PRI – Protocol for the Use of Telephone to Leave Patient Messages](#) for guidelines for the use of the telephone to leave a message for a patient or the Substitute Decision Maker (SDM), regarding virtual care visits when the patient or SDM is not available.*

## Section 2.3: Book the Virtual Appointment

The patient's virtual appointment must be **booked** into the applicable HHS scheduling system. ([Refer to Appendix F](#))

The patient's virtual visit is **registered** on the day of the visit, prior to the appointment. The virtual visit will therefore be available in the electronic health record for the provider to complete required documentation.

The virtual care visit is also scheduled within the virtual platform. For virtual visits scheduled in:

- OTN: Patients will receive an email from OTN with instructions regarding the virtual visit.
- Zoom: An email will be sent to the patient by the provider or delegate with the Zoom meeting link.

## Section 3: During the Virtual Care Visit

### Section 3.1: Virtual Care Visit Best Practices

#### **Environment**

- Ensure that the correct technology is in place to host the virtual event. Test the platform in advance of the visit to ensure that the webcam, microphone and speaker features are functional
- Create a private remote work space to complete the virtual visit
- Do not use public computers/devices, public spaces or public/unsecure internet connections
- Minimize visual and auditory distractions (i.e., in the room, on the computer screen, mute email notifications, silence cell phone)
- To ensure a quality video image, consider lighting and the height of the camera

#### **Patient-Provider Interaction**

- Introduce yourself to the patient
- Verify the patient's identity at the start of the visit by requesting two person-specific identifiers including the patient's name, date of birth and/or HIN.
- Advise the patient that the visit is being completed in a privacy-protected setting
- Advise the patient that the virtual visit is not being recorded. **NOTE:** Screenshots of the patient are not to be taken during the virtual visit for any purpose.
- Identify others who may be present for the visit and explain why they are attending
- Confirm that the patient consents to the virtual visit and who may be joining them for the appointment (i.e., family member, caregiver etc.). Document as per guidelines referred to in [Section 2.1](#).
- Provide an overview of the virtual visit (i.e., review of goals and needs, current health care status, next steps in care plan)
- Review the "back up plan" with the patient should technical issues arise (i.e., telephone call)
- Confirm patient's email address and consent to share appropriate resources and information with the patient to promote and enable self-management by secure email.  
**NOTE: Emails to patients containing personal health information and resources must be sent through an HHS email account as per the [HHS ICT – Electronic Mail \(E-mail\) Protocol](#).**
- Answer final questions and clarify instructions before closing the virtual care session

**REMEMBER:** Clinical standards required for in-person appointments apply within virtual care visits.

### Section 3.2: Documentation

Documentation of virtual visits should be completed in accordance with in-person documentation practices (i.e., dictation, electronic documentation etc.) using approved medical records systems only.

In addition to regular documentation, the following must be documented:

- **Consent to participate in virtual care:** Informed consent discussion(s) and patient agreement to a virtual care visit must be documented as outlined in [Section 2.1](#).
- **Clinical Care** provided during a virtual care visit, including a management plan and next steps in the patient's care plan.

## Section 4: Following the Virtual Care Visit

### Section 4.1: Communication/Follow-up Documentation

Complete clinical documentation from the virtual visit.

Should a virtual visit not take place (i.e., due to a patient no-show or cancellation), the provider (or delegate) will contact the patient to follow up as to the reason (i.e., technical issues, illness etc.) and document accordingly. As appropriate, a follow up visit will be confirmed with the patient during the phone call.

Ensure that required tasks following the virtual visit are completed including:

- Investigation requisitions
- Prescriptions
- Referrals
- Patient education resources shared with the patient
- Follow-up appointments scheduled

### Section 4.2: Update Appointment Status

It is assumed that all virtual visits are completed. If a visit does not take place (e.g., due to a patient no-show or patient declines virtual visit), the provider advises the administrative support staff who will:

- Edit the appointment status in the hospital scheduling system
- Reschedule the virtual visit with the patient as per the provider's direction



# Virtual Visits at Hamilton Health Sciences

## Protecting Patients and Staff During COVID-19

**What to expect if you have been scheduled for a telephone or video visit with your care team at Hamilton Health Sciences (“HHS”).**

### **What is a virtual visit?**

A virtual visit is an appointment with your doctor or health care team that does not involve an in-person meeting.

Instead of coming to the hospital, you speak with your health care team using a regular telephone, smartphone or your computer (for video-visits). Virtual visits minimize in-person meetings, and reduce your risk of contracting COVID-19.

### **Why is Hamilton Health Sciences offering virtual visits?**

We are using virtual visits more often at HHS to reduce how many people come to the hospital. This is to protect our patients, staff and the community from the spread of COVID-19.

Virtual visits are not new. HHS and health care teams across Ontario have been using virtual visits for some time through the Ontario Telemedicine Network (OTN). However, we are offering virtual visits in more clinics now and using a new platform called Zoom Healthcare, as a result of the COVID-19 pandemic. We are doing this so that we can make sure patients have access to care during this time, without exposing patients or staff to unnecessary risk.

### **What happens during a virtual visit?**

Your health care team talks with you about your current health status, any symptoms you are experiencing and your needs. If your health care team feels that an in-person visit would be a better fit for you, they will discuss your options and next steps with you.



### **What equipment do I need?**

You will need:

- a personal device (computer, tablet, cellphone) with a web camera and microphone
- high speed internet
- an email address (for video-conferencing)
- private space
- a pen and paper to write down any questions or instructions from your health care team

If you don't have access to these things, your health care team will do everything that they can to make other arrangements for you to access care appropriate to your needs.

### **How will my virtual visit be booked?**

Your health care team may call you to discuss changing your upcoming appointment to a virtual visit.

- They will talk to you about options for virtual care. This may include offering a regular telephone call or a video call using a system called Ontario Telemedicine Network (OTN) or Zoom Healthcare, depending on your provider.
- They will give you instructions on how to prepare.
- They will also ask for your verbal consent for the upcoming appointment.
- They will let you know the day and time of your virtual visit and confirm they have your preferred contact information.

The decision on which type of virtual visit you have will be made based on your care needs and the technology you and the clinic have access to.

## What can I expect during my virtual visit?

### Telephone visit

- Your health care team will call you on the phone at the scheduled time
  - A call from HHS will appear as a “blocked” or “unknown” caller. **Please make sure that you answer if you are expecting a call from us.**
- You and your health care team will talk about how you’re feeling, your questions and next steps in your care plan.

### Videoconferencing Tools

- HHS uses two secure video conferencing tools:
  - Ontario Telemedicine Network (OTN); and,
  - Zoom Healthcare

### What to expect using OTN

- If you agree to participate in a virtual visit using OTN, HHS will need to provide your name and email address to OTN. Your health care team will schedule your virtual visit with OTN.
- Before your appointment, you will receive an email from OTN No-Reply < do-not-reply-otninvite@otn.ca>
  - Do not reply to the email or send the video conference link or appointment email to anyone.
- This email contains:
  - Your care provider’s name
  - The date and time of your virtual visit.
  - Instructions on using OTN with Help resources
  - Links to download the required application (if using a mobile device)
  - A link to test if the application works well on your device before your appointment (which we recommend trying before your first appointment)
  - A link to access your appointment at the scheduled time
- 15 minutes prior to your scheduled appointment, you click on the “Start eVisit” link in your email to join the video visit with your health care team on your smartphone or computer using the OTN video system. You will be placed in a waiting room “Waiting for the Host to Join” until your health care provider (“Host”) joins the visit.
- If you have trouble with the video system, your health care team will call your telephone number instead.
- During your appointment, you and your health care team will talk about how you’re feeling, your questions and next steps in your care plan.

Please call your care provider’s office if you have any questions regarding your OTN appointment or if you do not receive this email from OTN.

### **What to expect using Zoom**

- If you agree to participate in a virtual visit, HHS will need to provide your name and email address to Zoom Healthcare. Your health care team will schedule your virtual visit using the Zoom Healthcare system.
- Before your appointment, you will receive an email from your health care provider or their administrative support with instructions and a link to join a secure video conference with your care team on your smartphone or computer using the Zoom Healthcare video system at the scheduled date and time which is noted in the email. A password will also be included.
- 15 minutes prior to your scheduled appointment, you need to click the link (or copy and paste it into an internet browser window). The system will automatically place you in a virtual waiting room until your health care provider – the “host” – joins the meeting
- If you have trouble with the video system, your care team will call your telephone number instead.
- During your appointment, you and your health care team will talk about how you’re feeling, your questions and next steps in your care plan

Please call your health care provider’s office if you have any questions regarding your Zoom appointment or if you do not receive an email confirming the appointment time and providing you with a link.

## Is Video-Conferencing Safe And Private?

- There is some risk with any virtual care solution. Just like when using e-mail there is always a risk that your information could be intercepted/misdirected. However, the video conferencing platforms that HHS uses are used by many hospitals in Ontario and Canada. These platforms have been reviewed by our Privacy and Information Security, and we are taking appropriate precautions to make sure your information is as safe and secure as possible.
- Personal health information discussed during the virtual visit is not stored or kept by OTN or Zoom Healthcare. Calls and video are not recorded or kept by OTN or Zoom Healthcare after your appointment finishes.
- However, specific to Zoom Healthcare, it is possible that the live feed of your appointment may be routed outside of Canada, through the United States of America, before it is deleted.

WARNING: Electronic communication, including virtual visits and email, may have some risk. Third parties may take over electronic communication and introduce malware, phishing scams, or other unauthorized access.

HHS is not responsible for the security of patients' internet service providers, email domains, personal devices or personal computers.

We suggest that you use your personal email when communicating about your health and not a work email address, as your employer may have the right to inspect your work email.

Use a secure internet connection. Do not use a public internet connection such as at the airport internet café, public library or other open area. Other people may be able to use the link to listen in on your appointment without you knowing.

## Email consent and safety

- HHS may also send you appointment information and other general information by email, if you have consented to receive information in this way. Your health care team may ask you for consent to communicate using email when scheduling your virtual appointment or during the virtual appointment.
- Please do not send emails for urgent symptoms, questions or in an emergency. **If you have an urgent medical issue, please call 911 or visit an Emergency Department or Urgent Care Centre.**
- Some care areas may send you a follow-up survey after your appointment by email. This will help us improve the quality of our care. They should let you know about this during your appointment, so check with them that they have your preferred contact details.
  - If you receive a link to a survey and are not sure if it is coming from your health care team, please call them to check before clicking on any links.

## Protecting your privacy

Your privacy is very important to us at HHS. We protect your privacy during virtual visits in the same way as we do during a clinic visit.

This means:

- Only the people providing care to you will be present during your appointment – unless you are part of a group care sessions, in which case other members of the group session will also be present.
- Our discussion during the visit will be documented in your health record, just like an in-person appointment would be.

We suggest that you take similar steps to protect your own privacy. This means being aware of your surroundings and who may be able to overhear your virtual visit.

## What can I do to prepare for my virtual visit?

- Make sure that your technology is set up properly
- Find a quiet spot so that you can easily hear and be heard
- Decide if you would like a family member or caregiver to be with you during the visit
- If you are part of a group session, it is important to be mindful of the privacy of other group members. Try to find a private spot in your home where other members of your family cannot see/hear the session. Use headphones, if you can, and avoid having other distractions (television, music, etc.) on in the background.
- Have all your materials ready prior to the meeting including:
  - Health Card
  - Pen and paper to write down information and instructions
  - List of medications being taken (if applicable)
  - Notes of medical history, symptoms
  - Questions you would like to ask

## Can I decline a virtual visit or change my mind?

Yes, you can decline or withdraw your consent for virtual visits or communication using email or text, at any time by contacting your health care provider. Please know that this may lead to delays in your care during this challenging time, as only urgent in-person appointments are being offered in our clinics right NOW.

## Where can I learn more or provide feedback about virtual visits?

- **Ontario Telemedicine Network** Website: <https://otn.ca>
- **Zoom Healthcare:** <https://support.zoom.us/hc/en-us>
- **HHS Patient Experience Office:**
  - Email: [PatientExperience@hhsc.ca](mailto:PatientExperience@hhsc.ca)
  - Phone: 905.521.2100 extension 75240

## Appendix B: Overview of HHS Virtual Care Platforms for Videoconferencing

	<b>OTNHub</b>	<b>Basic Zoom Account</b>	<b>Licensed Zoom Account</b>
Secure Videoconference for Clinical Encounter (1:1)	✓	✓	✓
Secure Videoconference for Group Clinical Encounter	✓ (up to 20 participants)	✓ (up to 100 participants for a max duration of 40 minutes)	✓ (up to 500 participants)
Screen Sharing by Host	✓	✓	✓
Delegate Scheduling Access	✓	✗	✓ (both clinician and admin staff require Licensed Account)
Automated Patient Invitation	✓ (sent from OTNHub when eVisit is scheduled)	✗ (user copies link from Zoom meeting and sends email to patient)	✗ (user copies link from Zoom meeting and sends email to patient)
Automated Patient Reminder	✓ (sent from OTNHub 24 hrs before visit)	✗	✗
Tech Support for Clinicians	OTN Technical Support	HITS Helpdesk	HITS Helpdesk
Tech Support for Patients	OTN Technical Support and web based resources	Web based resources	Web based resources
Physician Billing	Ontario Virtual Care Program codes ( <a href="#">MOH Info Bulletin</a> ) Additional information for OTN and OTN approved platforms: <a href="#">Virtual Care Billing Information Manual</a>	Temporary K Codes ( <a href="#">MOH Info Bulletin</a> )	Temporary K Codes ( <a href="#">MOH Info Bulletin</a> )



## Appendix C: OTN References

### Appendix C.1: Process to Obtain Access to OTN

The provider initiates discussion regarding virtual care with program leadership (i.e., Clinical Manager, Clinical Leader etc.) to ensure that they are aware and supportive of this care model. Leadership can then support the necessary standard work processes for the program/clinic to support the integration of virtual care into clinical practice.

An overview of the different types of Virtual Care Platforms can be found in [Appendix B](#).

#### **Access for Physicians:**

- Obtain eHealth Ontario **ONE ID credentials**. This can be done through the physician's CPSO account using the instructions [here](#).
- **Activate the OTN** account by using ONE ID credentials to log into the [OTN Hub](#). Physicians provide their contact, organization as **Hamilton Health Sciences Corporation** and professional registration details.
- To **bill for virtual care services in OTN**, the physician must register by completing and submitting the [OHIP Virtual Care Physician Registration Form](#).
- Obtain **Delegate Scheduling Access** for those who will be responsible for booking OTN visits. Send the following information to Nate VandenDool ([vandendn@hpsc.ca](mailto:vandendn@hpsc.ca)): Legal First and Last Names, email address, phone number. *Please note these requests are processed through OTN.*

#### **Access for HHS Staff:**

- Send the following information to HHS HITS eHealth Team ([HITSeHealthChangeTeam@hpsc.ca](mailto:HITSeHealthChangeTeam@hpsc.ca)): Legal First and Last names, email address, phone number, role and program.
- The HITS eHealth Team will then be in contact with next steps on obtaining a ONE ID and activating your OTN Account.

## Appendix C.2: Resources for Use of OTN

### Provider Resources:

[Guide to Basic Functions in the OTN Hub](#) (this link can be accessed in Citrix on the HHS Hub)

[eVisit Simple Start Guide](#)

[Use of OTN Outside of Citrix](#)

[OTN Direct-to-Patient Video Visits Toolkit](#)

[Guide for Using a Mobile Device to Join an eVisit as a Host](#)

### Patient Resources:

[Guide for Patient Connecting to eVisit](#)

[OTN eVisit Help Centre for Patients](#)

### Technical Troubleshooting Resources:

OTN Technical Support at 1-855-654-0888

[Troubleshooting OTN Audio Issues](#)

[Troubleshooting OTN Video Issues](#)

[Trouble Shooting in Pexip Infinity Connect during an OTN eVisit](#) (sound/video issues)

## Appendix D: Zoom References

### Appendix D.1: Process to Obtain Access to Zoom

The provider initiates discussion regarding virtual care with program leadership (i.e., Clinical Manager, Clinical Leader etc.) to ensure that they are aware and supportive of this care model. Leadership can then support the necessary standard work processes for the program/clinic to support the integration of virtual care into clinical practice.

An overview of the different types of Virtual Care Platforms can be found in [Appendix B](#).

To access a **Basic Zoom Account**:

- Navigate your Internet Browser to <https://hhsc.zoom.us/signup>
- Enter your HHSC.CA email address
- Create your Zoom account password, please make sure to use a password not associated with HHS
- Download the Zoom client from <https://hhsc.zoom.us/download>
- Sign into your account

To access a **Licensed Zoom Account**:

- Email/call the HHS HITS Helpdesk requesting a Licensed Zoom Account
  - [helpd@hhsc.ca](mailto:helpd@hhsc.ca); 905-521-2100 ext. 43000
- To assist in determining eligibility for a Licensed Account and to steward these licenses, you will be asked questions about your proposed use for Zoom
- If the license request is approved, a license will be applied to your Zoom account
- You may need to log out/in for the license change to take effect
- Please note due to high license demand, all licensed accounts are monitored for inactivity

### Appendix D.2: Security Requirements for the Use of Zoom at HHS

The following security requirements are to be met when using Zoom for virtual visits with patients:

#### **Before You Meet**

- You must use a @hhsc.ca email address to register with Zoom. This ensures you have the approved Zoom with Healthcare settings.
- Always keep your personal device up to date with a supported and patched operating system.
- Keep Zoom up to date. Click your *profile* picture top right and then click *Check for Updates*
- If possible, keep your device plugged in so you don't run out of power during your meeting.
- Have a separate work area ready so you aren't disturbed during your meeting.

#### **Booking a Meeting**

- Use individual meeting ID's to prevent the wrong person from attending the meeting.
- Do not disable the waiting room. The waiting room helps you validate attendees.
- Do not use PHI in the meeting topic. The meeting topics can appear in unsecure locations like calendar events.
- Do not enable "join before host".
- Always use a meeting password to prevent Zoom Bombing. Malicious uninvited guests are joining random meetings and live steaming their mischief.

### **Managing your Meeting**

- You will be prompted as attendees enter the waiting room. Only allow expected people into the meeting from the waiting room. Select *>Manage Participants > Admit*
- Always confirm the patient identity before sharing information.
- Lock the meeting once everyone has attended and you're ready to start. Click *Security* then *Lock Meeting*.
- You can remove any unwanted participants by clicking *Security > Remove Participants > remove*

## **Appendix D.3 Resources for the Use of Zoom**

### **Provider Resources:**

[Overview of Zoom Software and Hosting First Zoom Meeting](#)

[Scheduling a Meeting on the Zoom Website](#)

[Setting Up Audio and Video Features](#)

[Additional Zoom Tutorials](#)

### **Patient Resources:**

[Join a Zoom Meeting](#)

[Setting Up Audio and Video Features](#)

### **Technical Troubleshooting Resources:**

**HHS Users:** HITS Helpdesk at [helpd@hhsc.ca](mailto:helpd@hhsc.ca) or call ext. 43000 during business hours

## Appendix E: Security Requirements for the Use of Personal Devices For Virtual Care

### General Security:

- Enable your personal device to automatically lock itself if it is idle for a period of time. 30 minutes is recommended.
- Keep your device up to date with the latest security updates each month.
- Keep your browser up to date and patched.
- Always run up to date anti-virus software.
- Keep your firewall turned on.
- Encrypt any device containing confidential information, including hard drives and USB drives.
- Do not share your device credentials with anyone, even IT.
- Use complex passwords, and change your password at least yearly.
- Do not reuse passwords you've used on other services like Gmail, Meditech or Citrix

### Mobile Device Security:

- Do not try to bypass your device security. This is known as root or jailbreaking.
- Use supported and fully patched versions of IOS/Android.
- Use biometric or passcodes to unlock your device. Minimum 6 character should be used for passcodes.
- If storing PHI on your mobile device set the device to wipe after multiple failed attempts.
- Set inactive lock timers to a maximum of 30 min.

## Appendix F: Booking a Virtual Appointment in Meditech

Virtual appointments (telephone, video, etc.) with HHS patients must be booked, registered and attended in the applicable HHS scheduling system.

This is critical to:

- Ensure the visit becomes a part of the patient record
- Enable providers to document on the visit
- Ensure that the documentation is able to be distributed appropriately
- Report, track and resource virtual visit activity

### **Set up in Advance:**

- Confirm if virtual appointment types (mnemonics) have been created for your area. If not, request that they be created through the Clinical Manager.  
*NOTE:* Appointment Types with the suffix “TELE” or “TEL” should be used for phone visits and those with the suffix “OTN” should be used for any type of video visit.  
*EXAMPLE:* MFCARD, MFCARDTELE, MFCARDOTN
- Create a process with the provider(s) to get information after the appointment including:
  - a. If the visit occurred or not;
  - b. If additional support is required (e.g., investigation requisitions, prescriptions, etc.)
  - c. If a follow-up appointment is required to be booked.

### **Process to book a virtual appointment in Meditech (Community Wide Scheduling):**

**Step 1:** Book the appointment using the appropriate appointment type (mnemonic).

**Step 2:** Add the patient’s email address in the demographics section in Meditech.

**Step 3:** Pre-register the appointment.

**Step 4:** On the day of the appointment and prior to the appointment, register the patient which will update the appointment status to “attended”.

**Step 5:** The provider should indicate after the visit if it was completed or not. If the patient did not attend, update the appointment status to “no show”.

## Appendix G: HHS Virtual Care Contacts

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