Hamilton Health Sciences

Virtual Group Visits

Guideline V1.2

Hamiltonhealthsciences.ca/VirtualCare

Virtual **Group** Visit – Guideline V1.2
Virtual Care Operations Team
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Version Control

Version	Date	Approved by	Intent
1.0	Aug 19, 2021	Virtual Care Operations Team	Initial proposal
1.1	Nov 25, 2021	Virtual Care Operations Team	Included reviewer feedback
1.2	Dec 2, 2021	Virtual Care Advisory Group	Included member feedback

Introduction

Purpose

This guideline provides steps for facilitating virtual visits to a group of participants at HHS. **Virtual Group Visits** are where a provider(s)/research team sees **multiple participants** (this includes patients, families, caregivers, research participants) using a secure video on a smartphone, computer, or other personal device with a microphone and camera. The audience for the virtual group visit guideline includes all staff, physicians, and learners at HHS.

There are **three types of virtual group visits**:

- **Clinical**, which can involve an assessment, evaluation, or treatment component (e.g., group cognitive behavioral therapy, group therapy, group counselling, medical device teaching, family meetings)
- **Educational**, which includes information/knowledge sharing, education sessions, and providing access to resources (e.g., orientation sessions, education classes, exercise classes, nutrition classes)
- **Research**, which involves research teams connecting with HHS patients and/or research study participants (e.g., conducting focus groups, interviews)

Example workflows can be found in Appendix A & B. **Email virtualcare@hhsc.ca with any questions.**

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Virtual Group Visit Guideline

Determine team plan for virtual group visits

Purpose: organizing group virtual visits is a **team decision** that involves leadership staff, administrative staff, and providers. The first step is to determine your team plan with the key planning steps and items to consider below:

Planning step	Information
☐ Decide the **type** of group virtual visit you aim to provide at your clinic.	• Clinical, Educational or Research • Consider scheduling at least two staff per virtual group visit. See Appendix C for roles and responsibilities of Providers.
☐ Determine **participant population** for virtual group visits	• Consider the participant population who would be included in the virtual group visit. • Follow clinic specific guidelines or mandates when considering who to include in virtual group visits. • For more information, participants can access the Virtual Care Patient Guidebook. • Review the Unexpected Events Guideline for considerations when providing virtual care.
☐ Ensure the **group visit is booked as an appointment** in the appropriate scheduling system	• It is recommended to have a mnemonic specifically for virtual group visits in the appropriate scheduling system. • This is to ensure that all appointments are correctly captured in the patient record. A specific mnemonic can also be used to print the participant list for a group session. • Consider putting a 'cap' for the maximum number of people that can be registered for a virtual group visit.
☐ Decide the **platform** for virtual group visit facilitators and participant population	• The two approved platforms at HHS are Ontario Telehealth Network (OTN) and Zoom Healthcare. • To help guide decision making please see the Virtual Care Platform Features Chart or email the Virtual Care Operations Team.
☐ Plan the **registration process** for participants to join virtual group visit	• Upcoming virtual group visits are shared with appropriate patient population verbally, online, using posters, etc. • Clinic staff invites interested participants to virtual group visits via OTN invitation or by sending the Zoom Healthcare link via email. • Just like a 1:1 visit it important that no PHI is shared when sending out e-mails for the group session.

Planning step	Information
☐ **Create materials** for virtual group visit	• Ensure you have all materials (PowerPoints, PDFs, Videos) ready for your group virtual visit (See HHS templates) • Include code of conduct and housekeeping in materials for virtual group visits. See Appendix D for example PowerPoint slides.

☐ **Practice** your virtual group visit with colleague.
 	
TIP: Rehearsal is key to getting comfortable leading virtual group visits as a provider.
	• Ensure you are practicing in the same environment that you will be conducting the virtual group visit with participants. This includes the device, the space, and the providers.
	• **Environment**
	  o Choose a private workspace with minimal distractions and with a light source (either natural (e.g. window) or artificial (e.g. lamp)) positioned in front of you.
	  o Select a simple backdrop (e.g. a blank wall), and ensure minimal technological distraction (computer screen, email, and cell phone is silenced). Avoid having windows behind you.
	  o Do not use public computers/devices, public spaces or public/unsecure internet connections.
	• **Technology**
	  o Ensure that correct technology is in place to host the virtual group visit (laptop/desktop & internet access).
	  o Test the platform in advance of the visit to ensure that the webcam, microphone and speaker features are functional.
	  o Check that your voice is clear and that there are no audio delays/lags. Contact HITS if there are any technical issues with your HHS devices.
	  o Make sure the camera is positioned at eye level, you are centered on the screen, and that your head and upper body are included in the frame.
	  o Create a 'back up plan' in the case that technical issues arise (e.g. telephone call, reschedule virtual visit, schedule in-person visit)

Prior to the Visit

Note: For more details, refer to the HHS Virtual Visit Playbook

Step	Information
1. Provider invites participant to virtual group visit	• The provider should consider participant access, comfort and preference prior to indicating whether the group visit should be in-person or virtual. • The provider should partner with the patient to determine the best option for the patient's care pathway. Please see the Criteria for in-person vs. virtual visit guide for more information. • If a virtual group visit does not work for the participant, an alternative visit type should be considered.
2. Obtain verbal consent and document email address	• Check the scheduling system or patient appointment notes for verbal consent and email address**.** o Email address is typically saved in the demographics section. • If not previously obtained, use the Obtain Virtual Consent Checklist (includes key conversation elements to ensure the patient understands the risks and limitations of a virtual visit prior to giving consent.).

3. Book visit in virtual visit platform and scheduling system
 	
TIP: See info on Booking and Registering virtual visit in CWS
	• Book virtual visit in the appropriate scheduling system using correct appointment booking code.
	• Schedule the visit in OTN or Zoom.
	  o Copy Zoom meeting details to prepare email invites to participants.
	  o OTN e-visit invites are sent automatically via email.

4. Email virtual group visit details to participant	• The details of the virtual group visit are communicated to the participant including appointment date, time and modality, using clinic-specific processes. See Appendix E for sample email. • If an exchange of personal health information is required prior to the virtual visit (e.g. patient medical information), the ***PHI** method should be used to encrypt the email. Exchanging Personal Health Information (PHI) Electronically Guide

During Virtual Group Visit

Step	Information
5. Set up for a quality virtual group visit *See Tips for Webside Manner* *TIP: review unexpected events in virtual visits guideline*	• Ensure your location, technology, and materials are set up. • Ensure you have a printed list of all registered patients to take attendance. • Adjust platform settings as desired (features, volumes etc.). o 'Chat': consider disabling private chat feature in Zoom to prevent participants from chatting with each other directly. Keep group chat feature enabled for questions. • Close email or documents with PHI if you will be sharing screen • Initiate the virtual group visit approximately 10 minutes before the scheduled start time of the session.

6. Conduct virtual group visit
 	
TIP: review ideas on how to take attendance in virtual group sessions
 	
TIP: review ideas on how to encourage group discussion in virtual group sessions
	• Take attendance using the participant list.
	• Admit each participant to the virtual group visit (Zoom only).
	• Introduce yourself to the group and thank everyone for coming.
	• Review code of conduct, housekeeping or safety items with the group See Appendix D for example PowerPoint slides.
	• Consider providing the HHS Land Acknowledgement (Example slide in Appendix F; C&PA; 1-pager).
	• Provide an overview of the session and ask if the participants if they have any questions or concerns.
	• Set up view/share screen as needed.
	  o Zoom Virtual Group Visit Tips
	    ▪ Gallery View in Zoom: Ideal for participant discussions – all participants are visible.
	  o OTN Virtual Group Visit Tips
	    ▪ Names are not displayed on participant videos, only in the participant list. If relevant, you may have to ask participants to identify themselves when speaking.
	• If desired, 'Lock' the virtual session (available in Zoom and OTN) after all participants have entered. This prevents further participants from joining (session can also be 'unlocked').
	• Tell participants how to ask questions e.g. during question breaks, using 'hand up' feature, chat box etc. depending on the features available in the platform you are using.

7. End virtual group visit	• Provide details on next session. • Give clinic contact information for participants to follow up after session, if necessary • Close session for all ("End Meeting")

Following the Visit

Step	Information
8. Complete Follow-up activities	- Update the virtual appointment status in scheduling system (attended/no show) for all scheduled participants - Action a follow up visit, if applicable - Send participants communication and/or education information - Document encounter in patient records, if applicable

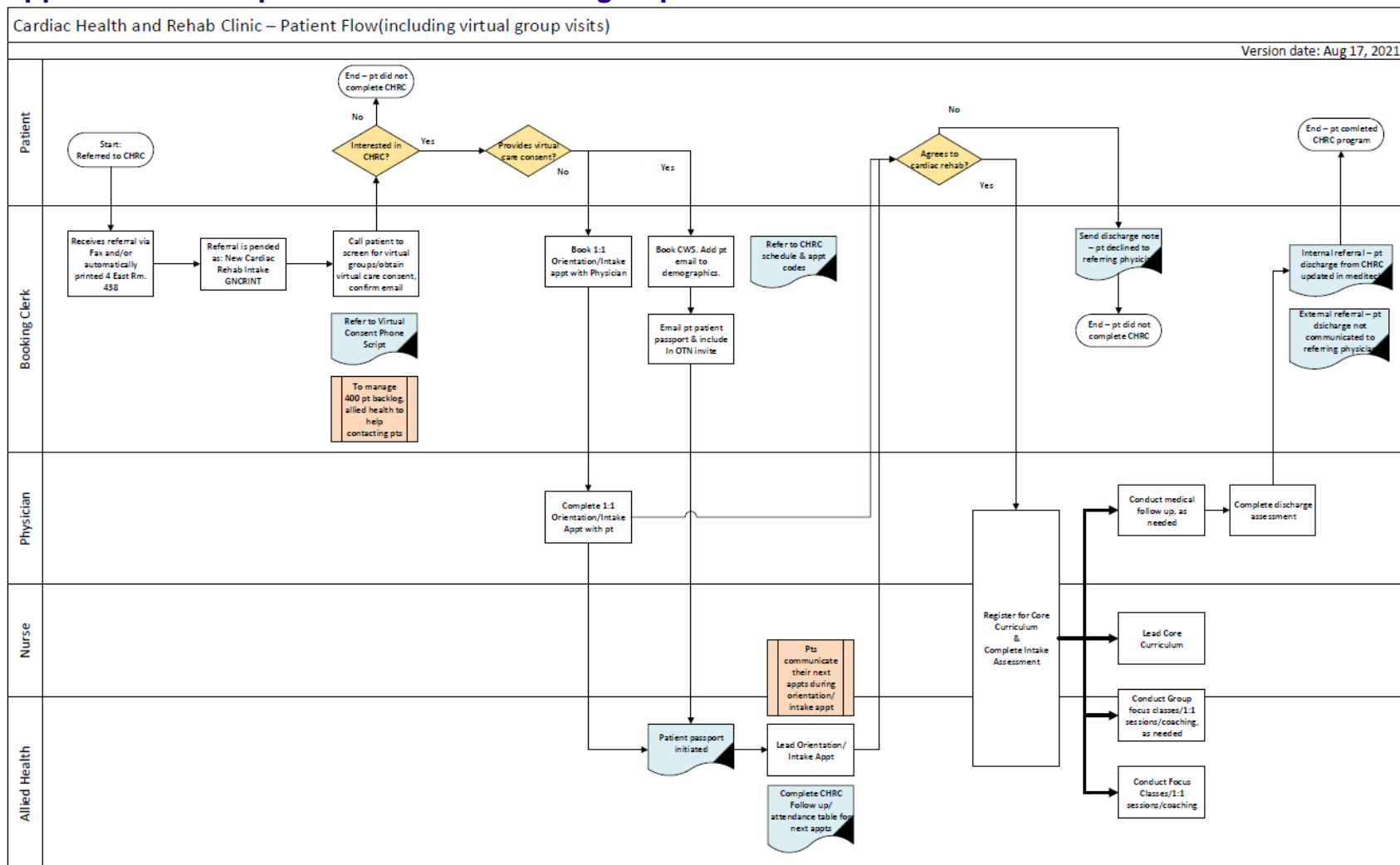## Tips for Encouraging Group Discussion

Tip	Example
Greet + Welcome the group	• "Hi my name is _____ and I am a _____. • Discuss the topic/purpose of group.
Housekeeping	• "Can everyone hear and see me- give a thumbs up?"
Icebreaker (As appropriate depending on type or size of group)	• "Let's introduce ourselves with our first name and our favourite ice cream flavour" • Ask participants to share what they hope to get from attending this group. • Utilize online games such as Jeopardy.
Build rapport by getting to know each other	• Provider can self-disclose some information about themselves, where appropriate. • Ask about the participants interests, likes, dislikes. • For long-term groups, this is something that can be built over time.
Ask open ended questions	• Allows for conversation flow. • "what are some successes you've experienced in your care". • "what are some challenges you've experienced". • "Who wants to share some quick wins they've experienced lately". • "how does this image on the screen make you feel?".
Ask survey type questions	• Allows for everyone to participate easily with short answers. • "how are you feeling today, respond with emoji".
Use Breakout Rooms	• For smaller, targeted group discussion. • Example; show video and use breakout rooms and have specific questions that each group must complete.
Take advantage of activities that work better online	• Polls, chat feature, annotate (Zoom) • Use reaction emoji's (Zoom)

Appendices

Appendix A: Example clinic flow for virtual group visits

Cardiac Health and Rehab Clinic – Patient Flow (including virtual group visits)

Version date: Aug 17, 2021
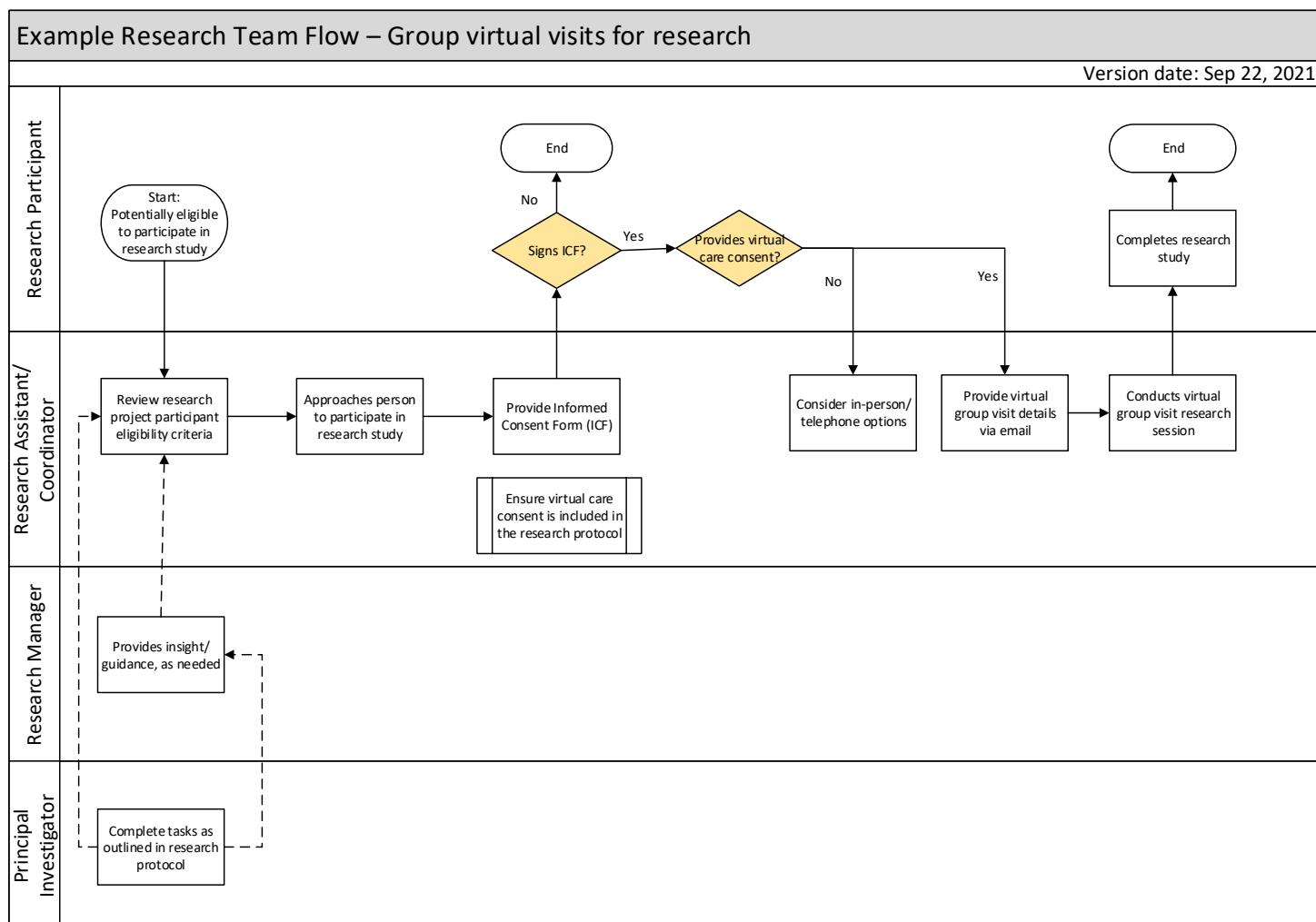
Appendix B: Example research team flow

Kindly note that research roles/team members in example flow below will differ across research areas depending on the principal investigator's environment, infrastructure support available, and the team they lead.

Example Research Team Flow – Group virtual visits for research
Version date: Sep 22, 2021

Appendix C: Provider roles during your virtual group visit

Single Provider: Single Provider presents content and also manages the technical aspects of the presentation. This is best suited for short sessions with few participants in attendance.

Two Providers: Providers divide tasks of the session considering the size, structure, content etc. This allows providers with different strengths to support each other in the session delivery. Providers should divide up tasks <u>prior to the session</u>.

Tasks to consider during the Virtual Group Sessions

Presenter tasks (Provider 1)	Support tasks (Provider 2)

• Greets participants as they enter the virtual visit to build rapport	• Confirms participant identity and cross-references with participant list in scheduling system. This may look different depending in the type of virtual group visit you are facilitating. Some examples are:
	   ○ Asking participants to change display name in Zoom to First Name, Last initial
	   ○ Messaging attendees in private chat and ask for 2 patient identifiers (name, phone # etc.)
	   ○ Asking for last four digits in phone #
	   ○ In parent groups- ask parents/guardians to share child's name
	   ○ Use 'breakout room' in zoom to confirm participant's name
	• Notes any 'no shows'

• Shares the agenda, group rules/code of conduct and housekeeping items for session	• Assists participant with audio/video issues. • Suggest to look to OTN or Zoom support.
• Explains the session activities, encourages participation from group	• Provides support to participants via chat/ email, as needed
• Delivers learning content, provides recommendations as appropriate.	• Monitors the chat feature for comments and questions
• Shares screen with PowerPoint/materials	• Helps to prepare materials in advance
• Asks the group to participate in a poll	• Opens, closes and shares poll
• Answers questions posed verbally or in the chat	• Interacts with the facilitator (e.g. brings relevant issues to the facilitator's attention)
• Solicits feedback from participants on session content	• Documents responses and actions; Assist with 'parking lot' for issues that come up that aren't directly on topic (e.g., keep a list of questions to go back to at the end)
• Closes session, shares information on next sessions and any follow up activities	• Provides suggestions and a second opinion on the group event
• Documents session in health record.	• Sends 'no show' list to admin as needed to adjust in scheduling system.

Appendix D: Example code of conduct PowerPoint slide

Virtual Group Visit - Housekeeping

- **Mute microphones** when not speaking.
- Raise your hands to speak and ask questions. Everyone gets to speak uninterrupted.
- In case of technical issues, the "**back up plan**" is to...[insert back up plan]
- Take **breaks** when you need it. On a short break, you can stop your video. On a long break, the we will resume group session on an agreed upon time.
- Facilitators might not be able to see you, please be aware of your physical limitations [if applicable]
- Questions are welcome.

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Virtual Group Visit –Respect & Privacy

▶ CODE OF CONDUCT:

- Expectation of **respect for all attendees** with a goal of understanding one another.
- This group is **confidential,** completed in a privacy-protected setting, and is not recorded. General information used for teaching and evaluation may be used anonymously.

▶ PRIVACY:

- As a participant in a virtual group session, it is important to be **mindful of the privacy** of other group members as everyone can be seen and heard by others in the virtual group.
- Participate in the session from a private spot where others cannot see/hear the session.
- Using headphones is recommended.
- Documentation: where necessary, information about this session will be included in your heath record (i.e., your attendance or no-show of this session).

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Appendix E: Example email to invite patients to virtual group visits

Steps to send Zoom email invite	1. Print out/ Open list of registered patients for the session 2. Create a New Email in Outlook 3. Change the 'From' to: XXXXX@hhsc.ca 4. Add one patient email in the 'To' section 5. Update the email subject and copy and paste the body of the email. 6. Update the highlighted sections. a. Ensure new Zoom link is used for each session on our Zoom Healthcare account 7. Email all registered participants individually X days before the session
Email Subject	[name of clinic] Education Session on [add date of session]
Body of email:	Hi there, You are invited to attend the **[name of session] virtual group visit** with the [name of clinic]. Your facilitators will be two clinic staff members. **Date:** [insert date] **Time:** [insert time in EST] **Zoom link:** [insert Zoom info] To learn about virtual care at Hamilton Health Sciences, check out the Patient Guidebook. During the group virtual visit, we will ask for your first name and last 4-digits of your phone number to take attendance. Feel free to review information related to protecting your privacy during the virtual visit. If needed, learn about joining a Zoom meeting, depending on which device you will be using (smartphone, tablet, computer). Please refer to the Zoom technical support for any technical inquires. If you have any questions, please call the [name of clinic] at 905-521-2100 ext XXXXX. Thank you, **Hamilton Health Sciences** **[Name of clinic] Clinic** Phone: 905-521-2100 ext **XXXXX** Email: XXXXX@hhsc.ca www.hamiltonhealthsciences.ca
Attachment	[Add any attachments if needed]

Create an email message template- Compose and save an e-mail as a template to be used when sending out e-mails to participants. New information can be added before the template is sent as an email message.

1. On the Home menu, click New E-mail.
2. In the message body, enter the content that you want.
3. In the message window, click File > Save As.
4. In the Save As dialog box, in the Save as type list (drop down), click Outlook Template.
5. In the File name box, type a name for your template, set desired location to save template
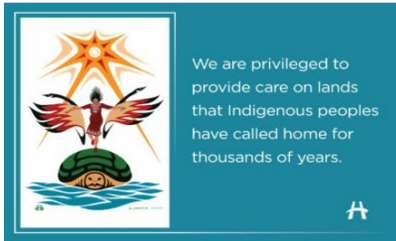6. Click Save
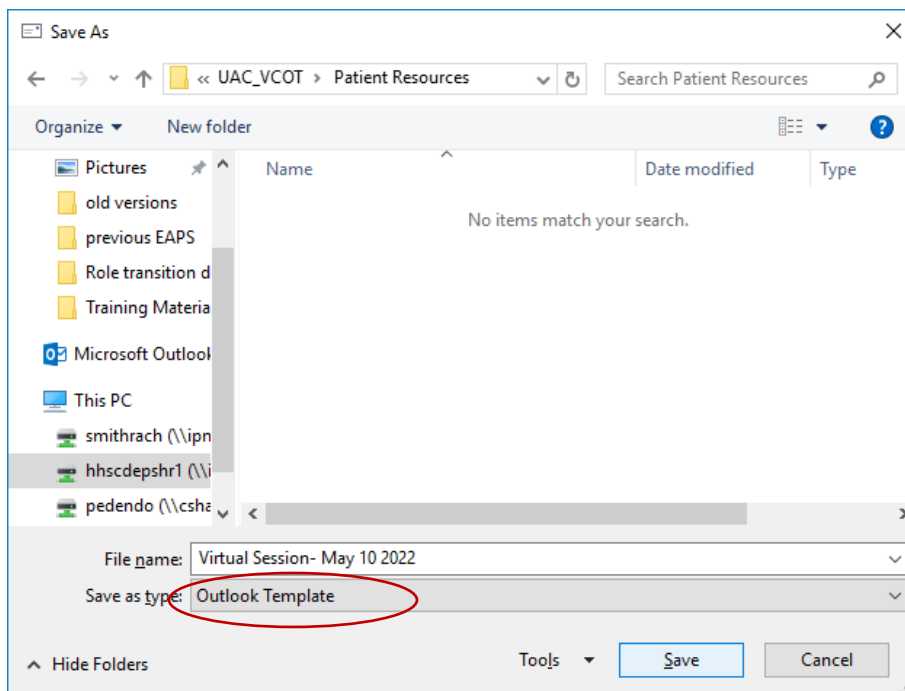
Appendix F: Example land acknowledgement PowerPoint slide

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