



Virtual Care Playbook for Clinical Areas

Version 1.3



Table of Contents

Version Control	2
Flow Chart for Video Virtual Care Appointments (VCAs).....	3
What is Virtual Care?	4
Why offer Virtual Care?	4
New Terminology.....	5
Getting Ready for Virtual Care	6
Who is Appropriate for Virtual Care?	6
Virtual Care Appropriateness Decision-Making Tool.....	7
Consent in Virtual Care	8
Best Practice Recommendations when Obtaining Consent for Virtual Care.....	8
How to Promote “Webside” Manner in our Virtual Environment.....	10
Virtual Care Platforms.....	11
Equity/Accessibility Considerations in the Delivery of Virtual Care	13
Contact Information.....	17
Sources and References.....	18
Appendix A: Equity Decision Tree for Virtual Care	19
Appendix B: Webex Preparation Instructions for Webex Virtual Care Appointments.....	20
Appendix C: Preparation Instructions for OneChart Video Webex Appointments	22
Appendix D: OTN instructions sent to patient.....	24

The purpose of this document is to provide a “how-to” for corporately endorsed technology solutions in the delivery of virtual care. The best practice guidelines and appropriateness factors presented in this document have been compiled from a review of similar recommendations and expectations provided in [telemedicine standards and guidelines](#) from a number of professional colleges, governing bodies, and provincial and national health quality and safety organizations.

Version Control

Version	Date	Approved By	Intent
1.0	August 31, 2021	Virtual Care Project Team	Initial Content finalized
1.1	November 5, 2021	Privacy & Risk, LHSC and St. Joseph’s	Privacy & Risk approval
1.2	July 12, 2022	Virtual Care Project Team	Update links, remove outdated information
1.3	April 5, 2023	Virtual Care Project Team	Update to closed captioning information

Flow Chart for Video Virtual Care Appointments (VCAs)

Starting VCA with a patient/family

Understand [Virtual Care Guidelines](#) at London Health Sciences Centre & St. Joseph's Health Care London
(Definition, vision, considerations, privacy and security)

Determine [clinical appropriateness for virtual care](#) + [patient ability and motivation](#) for video appointment

Choose a platform
Decide which corporately approved video service best suits the patient/family needs, situation and clinical care context

- OTN – [Requirements & clinician tools](#)
- Webex – [Requirements & clinician tools](#)

Explain Virtual Care and obtain patient/substitute decision maker informed consent prior to appointment using [consent guide](#) and document accordingly

Before VCA

OTN
Patient/family [instructions](#) sent automatically to email once scheduled in OTN

Webex
Patient/family instructions sent automatically to e-mail once scheduled on [Webex](#) website or in [OneChart](#) or in [Outlook](#)

[Register patient](#) for virtual care appointment **on the morning of the appointment** (so notes/orders can be entered without delay)

OneChart Scheduling
[Schedule VCA in OneChart](#) to reflect virtual care appointment under your appointment type

Review [Equity/Accessibility Considerations](#) if patient requires support or accommodation for VCA (interpreter, support person, tech support).

During VCA

Verify the identity of the patient (2 patient identifiers)

Review the [consent](#) considerations with the patient (for setting expectations and providing orientation to platform)

Adhere to practice recommendations for [Environmental Set-up and Webisode Manner](#) while conducting your virtual care appointment

After VCA

Include the following in your documentation:

- Informed consent discussion(s) for virtual care
- Care provided during virtual care appointment, including management plan and any follow-up plans

What is Virtual Care?



VIRTUAL CARE IS CARE

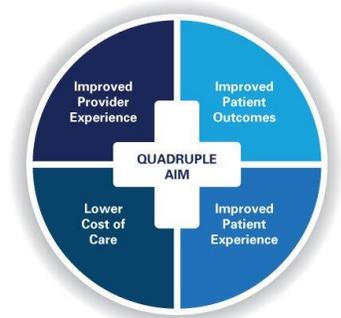
Virtual Care is defined as **any interaction between patients and/or members of their circle of care, occurring remotely using any form of communication or information technology** (including email, phone calls, video conferencing via computer or smartphone) with the **aim of facilitating or maximizing the quality and effectiveness of patient care.**¹

Virtual Care is NOT about a particular technology, particular people, or particular pieces of data. Instead, Virtual care can involve the exchange of all types of information from laboratory information to advice and ideas, and can involve people that include the patients themselves, their caregivers and clinicians, and even the broader systemic players involved in their care, including their health care institutions and the government.

Why offer Virtual Care?

***Our Future:** WHO projects a global shortage of 18 million health workers by 2030² due to ageing population. To mitigate this pressure, existing workforce will need to boost productivity by 20%.*

***Our Standard of Care:** Virtual Care has the potential to reduce healthcare costs, create health system capacity, increase patient engagement and convenience, and reduce infection risk³.*



Virtual Care will be leveraged to improve patient satisfaction, engagement and outcomes by:



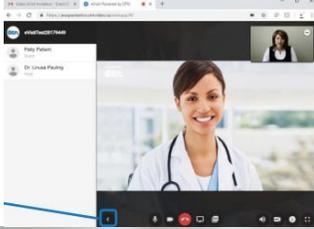
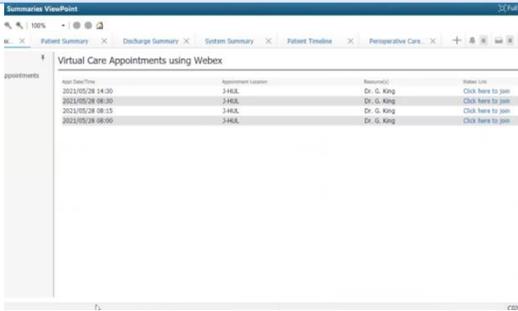
¹ Source: Shaw J, Jamieson T, Agarwal P, et al. Virtual care policy recommendations for patient-centred primary care: findings of a consensus policy dialogue using a nominal group technique. J Telemed Telecare 2018;24(9):608–15.

² Source: <https://human-resources-health.biomedcentral.com/articles/10.1186/s12960-017-0187-2>

³ Source: https://www.cdhowe.org/sites/default/files/attachments/research_papers/mixed/Commentary_586.pdf

New Terminology

No doubt you have heard some different new terms with virtual care appointments! Here are some commonly used terms within the virtual care space:

Term	Example	What does this mean?
Asynchronous	Patient care where transfer of information is not taking place simultaneously. For example, e-mail messaging or recorded education sessions.	<ul style="list-style-type: none"> Useful for education sessions and general information / inquiries Useful for quick questions/follow-ups
Group Virtual Care Appointments		<ul style="list-style-type: none"> Scheduled virtual care appointments with more than one patient at the same time Useful for group therapy, education sessions and information sessions Also useful for patient rounds, family conferences
Hybrid	A term used in virtual care to signify both in-person and virtual care conducted with the same person. An example might be calling the patient for triage, then having them come in for an assessment, then follow-up completed via video.	<ul style="list-style-type: none"> Likely to be a standard model of care for various clinical situations
Ontario Telemedicine Network (OTN)		<ul style="list-style-type: none"> One of the corporately approved and supported virtual care platforms Can be used for connecting with patients and providing virtual care Sign-in using your ONEID (consult your admin staff if you do not have this)
Remote Patient Monitoring (RPM)		<ul style="list-style-type: none"> Using digital technologies to collect medical and other forms of health data from individuals in one location and electronically transmit that information securely to health care clinicians in a different location for assessment and recommendations. Additional health monitoring tools such as blood pressure cuffs, glucose monitoring may also be used
Synchronous	This means that the virtual care takes place “live” as in the clinician is on the appointment with the patient.	<ul style="list-style-type: none"> Useful for virtual care one-on-one and group virtual care appointments
Telemedicine (Telehealth)	Telemedicine is the remote diagnosis, treatment and management of patients using telecommunications technologies.	<ul style="list-style-type: none"> Examples may include telephone, Webex, OTN, Remote Patient Monitoring, e-mail
OneChart Video Webex Appointments		<ul style="list-style-type: none"> This solution enables seamless scheduling of virtual care appointments within our Electronic Patient Record You can join the appointment right from the patient’s chart Efficient and easy to use integrated solution for administrative staff, clinicians, and patients. Currently piloting in select areas, with plans for expansion in future

Webex



- One of the corporately approved and supported virtual care platforms
- Can be used for connecting with patients and providing virtual care
- Sign-in using your Single Sign-on credentials
- Also known as Webex Virtual Care or Cisco Webex Meetings

Getting Ready for Virtual Care

Just getting started with Virtual Care? See these resource links for further information.

Technology and Set-up Requirements for Virtual Care

See the [LHSC Quick Start Guide](#) or the [St. Joseph's Quick Start Guide](#) for information on how to get your area set-up and equipment requirements for clinical areas.

Scheduling the Virtual Care Appointment in Electronic Health Record (EHR)

In the LearnNow Library, go to [Virtual Care Appointments](#)

Rescheduling the Virtual Care Appointment in EHR

LearnNow Library Links

- [Cancel a registered virtual care appointment](#)
- [No-show a registered virtual care appointment](#)
- [Reschedule a registered virtual care appointment](#)

More information about Virtual care Appointments and Resources

- On the St. Joseph's intranet, go to the [Virtual Care page](#) under Clinical & Professional Practice
- On the LHSC intranet, go to the [Virtual Care page](#) under Programs & Services

Training Resources for Webex

Training and information about WebEx for Virtual Care can be found on the [ITS Intranet site](#)

Who is Appropriate for Virtual Care?

Best Practice in Preparing for Virtual Care

- Determine whether virtual care is appropriate in consultation with the patient (refer to the "Virtual Care Appropriateness Decision-Making Tool" on next page)
- Ensure patient is aware of option to include care partner/family member in appointment and provide necessary instructions in advance
- Ensure collection of patient preferred email (refer to document on Policy Manager on Electronic (email) Use)

Virtual Care Appropriateness Decision-Making Tool

The tool is designed to bring objectivity and critical thinking to patient scenarios where virtual care may be considered. Individual programs should consider specific inclusion/exclusion criteria and virtual care appropriateness factors related to their unique patient populations and clinical conditions. [Source](#)

START: Is care necessary?



CLINICAL: Is Virtual Care clinically appropriate?

Appropriateness	Urgency
<ul style="list-style-type: none"> ✓ Is there an established relationship with the patient and family? ✓ Can quality of care be maintained? ✓ Can College Standards be upheld virtually? ✓ Can clinical needs be addressed virtually? ✓ Are there safety concerns or risks of adverse effects with a virtual appointment that cannot be mitigated? ✓ Are the patient and/or caregiver experiencing distress that would interfere with virtual communication? ✓ Is communication of sensitive or complex information best delivered in person or virtually? 	<ul style="list-style-type: none"> ✓ What is the patient's acuity/health status? (Ex: recent hospitalizations, social isolation, suicidal, etc.) ✓ Will offering virtual care reduce wait time, enhance access, reduce need for future hospital admission, or impact adherence to medical plan? ✓ Will offering virtual care impact need for sedation/general anesthesia? (pediatrics) ✓ How do the patient's social determinants of health, culture, or access to healthcare in their community impact urgency?



PATIENT-CENTRED: Is Virtual Care feasible?

Access	Motivation
<ol style="list-style-type: none"> 1. Would virtual care potentially mitigate challenges related to mobility, transportation, or travel? 2. Is there hearing, visual, or language barriers best accommodated by a particular mode? 3. Does the patient have the necessary digital literacy skills, device access, email access, internet access and/or quality internet connection? 4. Does the patient have the necessary developmental or cognitive capacity? 5. Does the patient have access to space with the level of privacy needed for the care being provided? 	<ul style="list-style-type: none"> ✓ Has a strong preference for a face-to-face or virtual mode of visit been indicated? ✓ How does caregiver/family member involvement influence access or preference? ✓ Are there factors influencing motivation that can be addressed or mitigated?



MODE: What is the best match for care?

Videoconference*	✓ Consider for: follow-ups, individuals with mobility, travel, or financial limitations, established relationships, consultations, patient preference
Telephone	✓ Consider for: gathering collateral information, brief interactions, patient preference
Hybrid	✓ Consider for: gathering information in advance of in-person appointment
In-person	✓ Consider for: certain clinical care requiring in-person appointment, sensitive information, where hands on assessment required, privacy concerns, suspected abuse, patient preference

*Videoconference is the richest virtual communication method and should be considered first where possible.

Consent in Virtual Care

Consent is a dialogue between the person proposing the service and the person giving the consent for that service or plan. Obtaining informed consent for virtual care from our patients or substitute decision makers and documenting it in the patient’s health record is an important part of care. In addition, professional need to continue to refer to your professional college standards regarding consent.

Please note, obtaining consent for virtual care does not replace obtaining informed consent to treatment related to your clinical practice. Consent for virtual care should be one part of the consent discussion.

Types of Consent

A. Consent to Clinical Care

Refers to all aspects of care that you would be completing with a patient and/or caregiver. The [Health Care Consent Act](#) and [Personal Health Information Protection \(PHI\) Act](#) emphasizes principles of transparent communication with patients and the requirement to obtain consent before providing services, collecting, and using PHI. Under the umbrella of clinical care, specific consents that are required include:

- **Consent for Treatment:** Refers to the specific interventions or service you are recommending to a patient and/or caregiver. There is information specific to virtual care in section 5 of this policy. You can find the policy on the Policy Manager here for [LHSC](#) and [St. Joseph’s](#)
 - i. **Virtual groups for clinical care:** Agreement to participate in a virtual group must includes conversations around as use of technology, confidentiality limitations, and disclosure of personal health information. See the “Guide for Group Virtual care appointments” in the [LHSC intranet](#) and [St. Joseph’s intranet](#) for details.

B. Consent to Method of Communication

- **Consent to Electronic (email) Use** – Link to Policy for [LHSC](#) and [St. Joseph’s](#).
 - Visit this [LearnNow](#) for more information on adding e-mail addresses to the Electronic Health Record.
 - For information about sending virtual care appointments to additional care partners, please see the resource here for [LHSC](#) and [St Joseph’s](#).

C. Other Relevant Policies Relating to Consent

- **Acceptable Use of Information Technology Resources** – Link to Policy for [LHSC](#) and [St. Joseph’s](#).
- **Policy for Access and Disclosure of Personal Health Information** – Link to Policy for [LHSC](#) and [St. Joseph’s](#).
- **Photography, Video, and Audio Recording** - Link to Policy for [LHSC](#) and [St. Joseph’s](#).

Best Practice Recommendations when Obtaining Consent for Virtual Care

Depending on the needs of each clinical area, the elements of consent below and scripting could look differently.

Elements of Consent	What is different in Virtual Care?	Example Script
Orient patient to self, location, technology and others present	✓ If in a video appointment, make sure your identification is visible, show your badge to the patient	“My name is.... I am.... (role) ... (show badge), meeting you today with (others in the appointment), from (location).”
Verify patient identity (refer to policies) LHSC St. Joseph’s	✓ No change to process	

Explain privacy, confidentiality and security setting	<ul style="list-style-type: none"> ✓ Describe potential limitations, risks and benefits, specific to the platform being used ✓ Privacy, confidentiality, security of technology ✓ Technological limitations 	<p>“We use secure tools and platforms for our phone and video appointments.” “OTN/Webex is a solution corporately approved to be safe and secure.”</p> <p>“There may be privacy concerns due to your own web security or lack of privacy in your own setting. If you are in public, there is a chance that your confidentiality could be breached.”</p>
Risks/Benefits and Potential Limitations	<ul style="list-style-type: none"> ✓ Explain virtual care appropriateness and benefits/risks ✓ Describe clinical limitations of using virtual care, and need to come in-person for urgent/emergent needs 	<p>“A phone or video appointment may have some limitations. If at any point it appears that you need to receive an in-person appointment, arrangements will be made”</p>
Risk Management Plan	<ul style="list-style-type: none"> ✓ Discuss the plan in the event of an emergency or technical failures ✓ Inquire if patient is in a location of preference for the context (privacy, comfort and safety) ✓ Enter Virtual care location in Reporting System (AEMS or PSRS) 	<p>“In case of an emergency, is anyone else there with you? Can you provide a contact number and address for where you currently are?”</p> <p>“In case of an emergency, do not end the call. Stay on the line, I will also stay on the line with you and (choose person) will call 911.”</p> <p>“In case of technical failures, I will call you.”</p> <p>“Are you in a place where you are comfortable discussing ... today?”</p>
Opportunity for Questions	<ul style="list-style-type: none"> ✓ No change to process 	
Documentation	<ul style="list-style-type: none"> ✓ Consent for virtual care may be obtained verbally ✓ Document consent for virtual care in medical chart or add printed form to medical chart 	<p>“Informed verbal consent was obtained from this patient to communicate and provide care using virtual and other telecommunication tools. The patient has been explained the risks related to the 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. The patient has been offered the opportunity to ask questions and seek clarification and can withdraw consent at any time.” <i>(Provided by the Canadian Medical Association)</i></p>

How to Promote “Webside” Manner in our Virtual Environment

There **will** certainly be differences between in-person appointments and virtual appointments. While in-person we call professionalism “bedside” manner, in the virtual care world we call it “webside” manner. When offering virtual care appointments, we want to optimize care, minimize risk and ensure professional standards are followed (some of these suggestions come from [Canadian Medical Association’s Key Recommendations](#)). The Healthcare Professional (HP) using virtual care must take reasonable measures to maintain confidentiality and protect personal health information.

Before the Virtual Care Appointment – Prepare the Physical and Virtual Environment

Physical Environment

- ✓ Place your workstation in a location that protects the patient exchange from being seen, overheard or interrupted by others; includes ensuring that there is no visibility of your screen(s) through a window
- ✓ Consider the sensitivity or nature of the clinical care required, to ensure privacy during the appointment (e.g. place “do not disturb sign” on the door)
- ✓ Ensure there are no patient information visible on camera (e.g. appointment schedule boards, pictures of patients, other computer screens)

Virtual Environment

- ✓ Eliminate all distractions from your computer and surroundings. In particular, turn off all visible and audible computer and telephone notifications, which create noticeable distraction
- ✓ Consider a privacy screen if other staff could potentially be present during the virtual care appointment
- ✓ Ensure you have a process in place for when you are unable to make the appointment time or need to cancel an appointment
- ✓ Ensure the patient is aware of how to cancel the appointment if needed

During the Virtual Care Appointment

- ✓ Ensure you attend the appointment within a reasonable timeframe
- ✓ Make sure your identification badge is visible to patient
- ✓ Use a professional/neutral backdrop and good lighting and wear professional attire.
- ✓ Position the camera at eye level, directly above the computer screen with the patient’s video. This allows you to look directly at the patient
- ✓ Use headsets where available for added privacy and clarity.
- ✓ Inform the patient/caregiver of the limits to [privacy and confidentiality](#) and be transparent about the risk for inadvertent disclosure during virtual care appointment
- ✓ Be sure the patient is aware of everyone who is in the room through introductions; that they have permission to be there; and that their presence is appropriate
- ✓ Ensure you do not share other patient’s personal health information during the virtual care appointment; be aware of applications that are on in the background (Jabber, emails, MS TEAMS)
- ✓ Close all other application while hosting and sharing your screen to reduce risk
- ✓ Make extra effort to engage with the patient at all times and assure them that they have your full attention; this includes eye contact, body language and attentiveness.

Ending the Virtual Care Appointment

- ✓ Provide a specific follow-up appointment date and time when appropriate
- ✓ Collect/create patient education documents and weblinks to share via email after the encounter ie. specific instruction & pamphlets as appropriate

Virtual Care Platforms

Aside from telephone and e-mail, Webex Virtual Care and Ontario Telemedicine Network (OTN) are the only approved and supported video conferencing tools for patient care at this time. Any other virtual care applications available by third parties opens up privacy and legal risks and require further consultation, review and assessment. Consult the Acceptable Use of Information Technology Resources in the Policy Manager for further information.



[Virtualcare.webex.com support information](#) on the ITS intranet

[OneChart Video Webex Appointment support information](#) on LearnNow



[OTN support information](#) on the ITS intranet

Troubleshooting Webex/OTN

Consult these external links/resources for help on basic troubleshooting for your Webex or OTN virtual care appointments.

Getting Started	Webex Virtual Care (virtualcare.webex.com)	OTN	OneChart Video Webex Appointments – Troubleshooting Guide
Audio Troubleshooting	Webex Virtual Care (virtualcare.webex.com)	OTN	
Video Troubleshooting	Webex Virtual Care (virtualcare.webex.com)	OTN	
Sharing Screen	Webex Virtual Care (virtualcare.webex.com)	OTN	

You can also consult these resources:

Internal Websites	External Websites	Telephone Support
LearnNow Virtual Care Appointments Integrated Technology Solutions (ITS) Intranet	Webex Website Support Webex Virtual Care Support OTN Website Support	<p>Helpdesk Virtual Care Phonenumber: 1-519-685-8390 (Monday-Friday 8 AM-5 PM) *Patients can also call this number for Webex support*</p> <p>OTN Technical Support: 1-855-654-0888</p>

Which Webex to Use?

At LHSC and St. Joseph's there are two different types of Webex virtual care appointments available: Webex Virtual Care Appointments, and OneChart Video Webex Appointments.

	Webex Virtual Care Appointments	OneChart Video Webex Appointments
How to:		
Login	Webex Virtual Care Appointments: https://virtualcare.webex.com	Not applicable
Schedule	Use Outlook* or log into website	Use Scheduling Appointment Book in OneChart
Reschedule/ cancel	Outlook Calendar or website	Use Scheduling Appointment Book in OneChart
Share invite	<ul style="list-style-type: none"> ✓ Forward invite in Outlook ✓ Use Website ✓ Patient can forward invite 	<ul style="list-style-type: none"> ✓ Patient can forward invite ✓ Send url link to others – see LHSC and St. Joseph's Guides for how to do this ✓ Other clinicians can join from link in OneChart
Join	Outlook, login to website or use Webex App	Click link on " Virtual Care Appointments using Webex " tab in OneChart

Functionality:		
Waiting Room*	✓	* (High priority future enhancement)
Group VCAs**	✓	x
Appointment Reminders	Must be manually sent	Automatically sent to patient 24 hours before the appointment
Annotate	✓	x
Breakout Rooms	✓	x
Chat	✓	✓

** Use the [Lobby](#) to move patients in and out of appointment space

*** VCA = Virtual Care Appointments. Book from Webex Website to send out separate invitations. See the Guide for Group Virtual Care Appointments available on the [LHSC](#) and [St. Joseph's](#) Intranet Sites for more information.

Advantages of OneChart Video Webex Appointments

There are many advantages to using the OneChart Video Webex Appointments! For more information on how to get set-up for VCAs using this tool, please consult [LearnNow](#). This site features a quick tutorial for administrative support and clinical staff. [Contact the Virtual Care Team](#) if you are interested in getting set up with this tool.

Value for Clinician and Administrative Staff	Value for Patients
<ul style="list-style-type: none"> ✓ Streamlines process of booking, rescheduling and cancelling video appointments – all within OneChart ✓ Link to Webex accessible in OneChart = no need to open Outlook for appointment links ✓ Appointments open 60 minutes in advance and up to 3 hours after scheduled time 	<ul style="list-style-type: none"> ✓ Web-based tool = no longer need to download software ✓ All information is received in an email, including tips for a successful virtual care appointment ✓ Automated reminder emails sent to patients 24 hours ahead of time ✓ Patients have a waiting room ✓ Patients can join appointments 60 minutes ahead of time and up to 3 hours after scheduled time

Equity/Accessibility Considerations in the Delivery of Virtual Care

Virtual care can improve access to healthcare services, particularly for those in remote locations or with health conditions that make receiving care in person difficult or unsafe. However, virtual care requires access to the requisite technology and an ability to use that technology, which certain patient populations may struggle with. Some patients with language, cognitive, vision and hearing impairments may benefit from optimizations during virtual care appointments in order to ensure that they have access to the best care possible. In this section, the effectiveness, acceptability, feasibility, resource use for delivering virtual health care and special consideration for equity, gender and human rights are discussed. Most of these principles will apply to in-person appointments as well.

Considerations for Equity, Gender and Human Rights

- Pay special attention to the needs, preferences and circumstances of particularly underserved or hard-to-reach groups, including people with low literacy or few digital literacy skills, people with limited control over or access to devices, people who are limited English speakers, migrant populations in new settings, and people with disabilities such as sight or hearing impairment.
- Consider how services can be made available to people with disabilities such as sight or hearing impairments, with limited access to electricity or network coverage, who do not own or cannot afford devices or charges to use them, and people who have limited autonomy, for example because their access to devices is controlled by another person. Strategies to increase access to telemedicine in these cases may be provided through public kiosks or outreach through community health workers, as examples. Consider the intent of the appointment and ensure that patients are not being put at increased risk.
- Consider whether the patient is able to access virtual care from a safe and private location. A safe and private location might look different to each person. For example, some patients who live in a multigenerational household or smaller living spaces may not have much privacy indoors, and would prefer to complete the appointment outside or in a vehicle, for example.
- Consider any demographic characteristics, sexual identity or preferences that could put a targeted population at greater risk and ensure that the way the information is provided and accessed is sensitive to this.
- Consider how virtual care may require additional charges or expenses, for instance those associated with downloading apps or sending/receiving content.

General Recommendations to Improve Accessibility in Virtual Care

- 1) When scheduling an appointment with the patient, ask the patient and/or care partner about their preference to connect via phone vs video. If video, refer to the flowchart in [Appendix A](#) to complete an equity assessment.
- 2) When booking the appointment, ask the patient if they wish to have a support person participate in the virtual care appointment. If yes, ask if the support person will be joining in the same location as the patient or if the link needs to be sent to them separately.
- 3) Verify the patient is able to see and hear you clearly at the start of the appointment.
- 4) If you share your screen or a picture with the patient, verify they are able to clearly see it. You could ask: *Please tell me about what you see.*
- 5) Some patients may have their own adapted technology solutions that they are already using with their devices. **Ask the patient what is working for them.** See <https://wirelessaccessibility.ca/find-devices/> for a list of options that patients may be using already.
- 6) Use high quality microphones or headsets for better clarity for the patient.

Impairments & Accessibility Considerations

Language, visual and hearing impairments and invisible disabilities may have impact on a patient’s ability to access a virtual care appointment, complete tasks/answer questions during a virtual appointment, and retain information from a virtual care appointment. Some considerations for these populations are highlighted in the table below.

Feature	Language Impairment	Invisible Disability	Visual Impairment	Hearing Impairment
Definition	<ul style="list-style-type: none"> • Impairment of language (e.g. speaking, understanding, reading, writing) • Can be one or multiple modalities 	Cognitive, developmental, intellectual, mental or sensory condition that limits a person’s behaviours, senses or activities	<ul style="list-style-type: none"> • Impairment of visual process (structure, processing, attention) • May have total or partial vision loss 	<ul style="list-style-type: none"> • Impairment of hearing process (structure, processing) • May have total or partial hearing loss • May have difficulty with certain aspects of speech • May communicate verbally or with sign language
Area of strength	Visual information, gestures, body language	Basic conversation, simple visual information, gestures, body language	Increase the amount of auditory information & describe visual information	Increase the amount of visual information – use text to supplement your speech
Activities in Virtual Care that May Require Compensation	Intake/patient report, following commands, understanding recommendations	Intake/patient report, following commands, understanding recommendations	Seeing visual information, reading handouts/questionnaire, following gestures	Following conversation, answering questions
Technology Solutions that may help (see next page for details of these resources)	<ul style="list-style-type: none"> • Annotate • Enlarge cursor • Chat • Supported conversation • Use of visual aids 	<ul style="list-style-type: none"> • Annotate • Chat • Enlarge cursor • Use of visual aids 	<ul style="list-style-type: none"> • Annotate • Change screen contrast • Enlarge cursor • Enlarge font size • Include Alternate Text • Show patients how to zoom in on shared screen • Deaf-blind intervener 	<ul style="list-style-type: none"> • Annotate • Use blank document to record conversation • Chat • Sign Language Interpreter

Technology Solutions to Increase Accessibility

There are a number of solutions that are built in or software solutions that will help with improving accessibility with your patients. It is important to consider the benefits and risks of using a software solution based on the needs of the patient and the type of virtual care appointment.

Accessibility Checker

Some programs have an Accessibility Checker, which is a guided way to further optimize your standard images, handouts and forms. The tools in Microsoft Office all have this capability. See [Microsoft Office Support](#) for details on how to complete Accessibility Checks in Microsoft Office tools.

Annotate

Annotate is a feature in Webex that allows you and anyone else that has joined the virtual appointment to draw or enter text on top of a picture or blank document. This may allow for you to add extra emphasis and draw attention to certain items on the screen. See [Webex Support](#) for details on how to use this feature.

Closed Captioning

Closed captioning is enabled on Webex Virtual Care (virtualcare.webex.ca). This feature is available for patients and providers, and is accessible via a new **Show Captions** icon to the left of the mute button. Clinicians will **not** be notified if a patient is using closed captioning during an appointment. Clinicians are encouraged to ask patients if they will be using closed captioning so that clinicians can enable it on their device to follow along. When patients join a meeting, they will receive a pop-up disclaimer notifying them of the availability of closed captioning. The patient must click “I agree” in order to proceed with the appointment. Please consult this brief guide for more information on using the feature and guidelines on the use of closed captioning: [Closed Captions for Webex Virtual Care](#). Please note that closed captioning is not available for OneChart Video Webex Appointments at this time.

Interpretation for Virtual care appointments

Best practice guidelines recommend the use of trained interpreters for patient care. Information on booking an interpreter for virtual care appointments can be found on the [LHSC intranet page](#) and [St. Joseph's intranet page](#). When you book an interpreter for a virtual appointment, we suggest that you also request a message relay. During a message relay, the interpreter will confirm the appointment with the patient and also assess for equity-related barriers. If a barrier is identified, the interpreter will follow-up with the requestor of the interpretation appointment to advise.

Supported Conversation Techniques

Patients with language impairments will often benefit from supported communication techniques. These techniques are designed to utilize non-verbal types of communication such as written words, pictures, gestures, to help with understanding and the patient’s ability to express themselves. See this [this video](#) for an idea of what a supported conversation looks like. The Aphasia Institute has training and resources available here [Health Care Clinicians – Aphasia Institute](#).

Visual Aids

It can often be useful to use pictures to help illustrate concepts, try sharing documents with pictures, videos, or large font. Microsoft Office Support offers [some suggestions](#) on how to enlarge your cursor and change contrast on the screen so patients can more easily follow along. Show patients how to zoom in on shared screen, encourage use of larger screens. Enlarge font size/cursor and include [alternative text](#) with all visuals. Use Annotate to mark off where you are focusing on a shared screen.

Webex/OTN Accessibility

Webex and OTN have some accessibility guides for their platforms. See these links for [OTN](#) and [Webex](#).

Patient Resource Supports

In-person and telephone supports are available for patients who are having difficulties connecting to video virtual care appointments.

Helpline

The Virtual Care Helpline is a free service available for LHSC and St. Joseph's patients that will provide assistance over the phone for patients and clinicians to connect to virtual care appointments. The Helpline number is 1-519-685-8390 and is open from Monday-Friday 8 AM-5 PM.

Connected Canadians

Connected Canadians is a nonprofit organization of volunteers that helps connect older adults with technology training and support. Some clinical areas have worked collaboratively with [Connected Canadians](#) to define a workflow and partnership to help connect patients prior to their first virtual care encounters. This partnership helped reduce the demands of virtual care setup and troubleshooting and ensured health professionals and programs were able to focus their time with patients on clinical assessment and intervention rather than technology. Consider offering contacting Connected Canadians if you are interested in having them assist with patient set-up in your clinical area.

Contact Information

Team	When to Reach Out	LHSC Contact Information	St. Joseph's Contact Information
Virtual Care Team	<ul style="list-style-type: none"> Questions or inquiries related to virtual care appointments, virtual care appointment platforms, and/or contents of this Playbook 	Virtualcare@lhsc.on.ca	
Integrated Information Technology Services (ITS)	<ul style="list-style-type: none"> Webex or OTN access or inquiries Troubleshooting ITS technology 	ITS Self-Serve Website Extension 44357 (4-HELP)	
Patient Relations	<ul style="list-style-type: none"> Concerns about/from patients about the virtual care appointment experience specifically 	Patient Relations Office patientrelations@lhsc.on.ca Ext. 52036	Patient Relations, Privacy and Risk patientrelations@sjhc.london.on.ca Ext. 61234
Patient Experience/ Care Partnership	<ul style="list-style-type: none"> Wanting to engage patients related to quality improvement 	Patient Experience Office patientexperience@lhsc.on.ca Ext. 75457	Care Partnership Office
Ontario Telemedicine Network (OTN)	<ul style="list-style-type: none"> Clinician or patient technical troubleshooting with OTN Hub 	https://otn.ca/contact/ 1-855-654-0888	
Virtual Care Helpline	<ul style="list-style-type: none"> Clinician or patient technical troubleshooting with Webex or OTN 	1-519-685-8390 (Open Mon-Fri 8AM-5PM)	
Privacy & Risk	<ul style="list-style-type: none"> When your patients or you have concerns related to privacy, confidentiality, or safety/risk 	LHSC Privacy Office privacy@lhsc.on.ca Ext. 32996 LHSC Risk Management Ext. 52882	Patient Relations, Privacy and Risk privacy@sjhc.london.on.ca Ext. 65591
Health Equity Office	<ul style="list-style-type: none"> Issues related to accessibility, access to virtual interpretation services and health equity concerns 	Jill.Sangha@lhsc.on.ca Ext. 77541	Interpretation Services Kelly.Taylor@sjhc.london.on.ca Ext. 64976

Sources and References

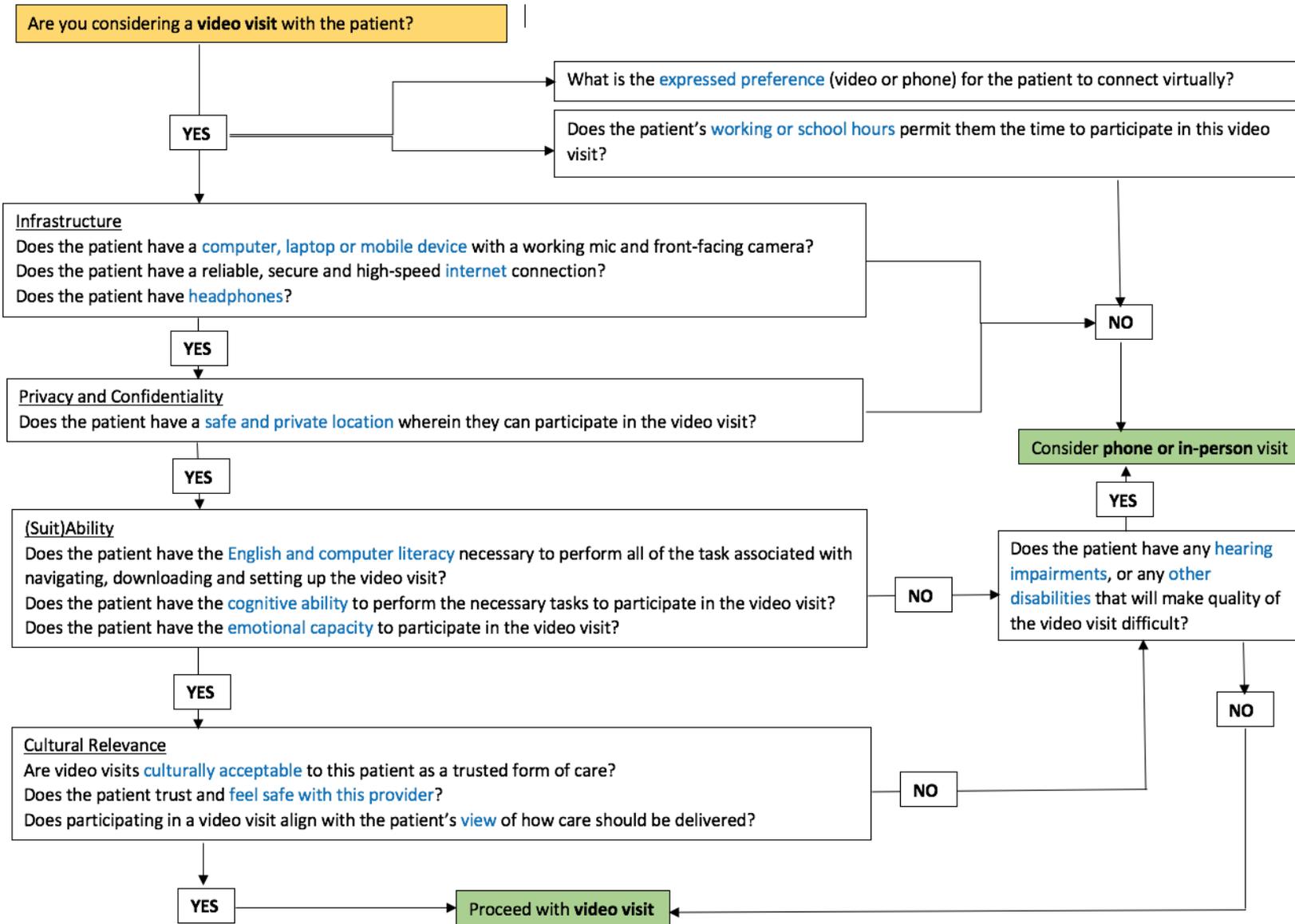
The sections, content and resources found in this playbook were developed in consultation and partnership with many teams and departments, including but not limited to:

<ul style="list-style-type: none">• Integrated Information Technology Services (ITS)• Patient Experience – LHSC• Patient Relations – St. Joseph’s• Privacy• Risk• Interprofessional Practice	<ul style="list-style-type: none">• Communications• Virtual Care Team• Virtual Care Clinical Advisors• Patient and Family Partners• Health Equity Office
---	--

Other sources and references for content include but are not limited to:

- Canadian Medical Association (CMA)
- Professional College Resources
- Canadian Patient Safety Institute
- Information and Privacy Commissioner of Ontario (IPC)
- Ontario Medical Association (OMA)
- Peer Hospitals (Hamilton Health Sciences, The Ottawa Hospital, University Health Network, Holland Bloorview Kids Rehabilitation Hospital)
- Royal College of Physicians and Surgeons of Canada
- Schulich School of Medicine and Dentistry
- Western University
- Women’s College Hospital Institute for Health Systems Solutions and Virtual Care

Appendix A: Equity Decision Tree for Virtual Care



This decision tree is intended for staff and physicians to be aware of when considering video visits with patients. It is not intended as a question checklist to be completed with patients.

Appendix B: Webex Preparation Instructions for Webex Virtual Care Appointments

(This is what is sent to the patient when a Webex Virtual Care Appointment is scheduled)

You have been scheduled for a video virtual care appointment with your health-care professional using Webex.

Privacy and Security

This platform has been reviewed and while it has met our high patient privacy standards, security cannot be guaranteed. Visit LHSC's Virtual Care website ([here](#)) or St. Joseph's Virtual Care website ([here](#)) for more information on virtual care appointments, privacy, security and risk considerations.

Join Your Appointment

If you want a family member(s) or others to participate in this appointment with you, you may forward this email to them.

Date: Wednesday, June 22, 2022

Time: 4:00 PM

Meeting Number: 2631 929 0290

Meeting Password: jqRccY8N2p7

[Click Here to Join Appointment](#)

OR

Click or call the numbers below to join by phone (audio only)

[1-226-828-9662 \(London\)](#)

[1-416-915-6530 \(Toronto\)](#)

New to video virtual care appointments?

To ensure the best possible virtual care experience, please review the following resources before your virtual care appointment:

- [Patient and caregiver guide to video virtual care appointments](#)
- [How to join Webex appointments \(video\)](#)
- [Webex online resources](#)

Click [here](#) to test your device prior to the appointment. You will be prompted to download the Webex application. After testing, you do not need to create an account or pay for Webex to join a virtual care appointment.

Need help?

- If you have questions about your appointment, contact the clinic or health-care professional directly.
- If you need help preparing for or connecting to your virtual care appointment, please call [1-519-685-8390](tel:1-519-685-8390). This line is open from 8 a.m. to 5 p.m. Monday to Friday (excluding observed holidays).

Virtual care survey

We are seeking feedback from patients and caregivers. Survey responses are anonymous and will be used to improve our services. Click [here](#) to take the Virtual Care survey now!

This email is directed in confidence solely to the person named above and may contain confidential, privileged or personal health information. Please be aware that this email may also be released to members of the public under Ontario's Freedom of Information and Protection of Privacy Act if required. Review, distribution, or disclosure of this email by anyone other than the person(s) for whom it was originally intended is strictly prohibited. If you are not an intended recipient, please notify the sender immediately via a return email and destroy all copies of the original message. Thank you for your cooperation.

Appendix C: Preparation Instructions for OneChart Video Webex Appointments

(This is what is sent to the patient when OneChart Video Webex Appointments are scheduled)

Your upcoming virtual care appointment

You have been scheduled for a video virtual care appointment with **(Name of Clinician)** of the **(Name of Clinic/Department)** at (Name of Hospital).

Date: Friday, June 17, 2022

Time: 02:45 PM

[Click here to Join Appointment](#)

Privacy and Security

Your privacy is very important to us. Your virtual care appointment is setup with a platform that has been verified by Ontario Health. While this platform has met our high patient safety standards, security cannot be guaranteed due to the nature of public e-mail accounts. For further information, contact the privacy and security office of your hospital or clinic.

Join Your Appointment

If you want a family member(s) or others to participate in this appointment with you, forward this email to them. You can join your appointment up to 60 minutes before its scheduled start time.

It is important to be patient as your healthcare provider may be running late. If for some reason you are unable to attend the appointment, please contact the (Name of Department/Clinic) at (Name of Hospital).

New to video virtual care appointments?

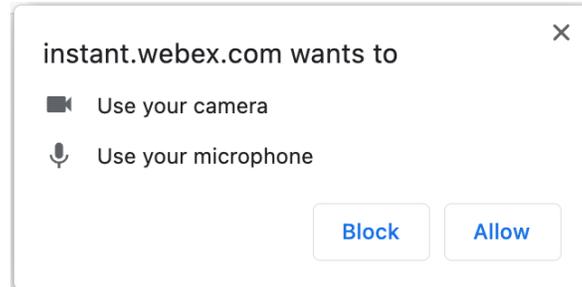
To ensure the best possible virtual care experience, please review the following resources before your virtual care appointment:

- [Patient and caregiver guide to video virtual care appointments](#)
- [Click here to test your device prior to the appointment](#)

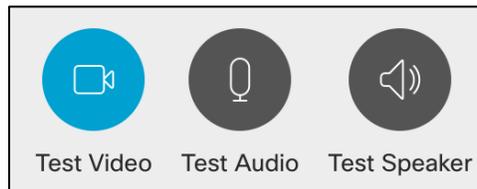
What to expect when you join your virtual care appointment

Once you click the **Join Appointment** button above:

1. Your web browser opens and your screen displays the **Patient's waiting room**.
2. A pop-up message may ask you to allow the use of your microphone and camera.



3. Click **Allow**.
4. Test your Video, Audio, and Speaker by clicking the buttons.



5. When your health-care provider is ready to see you, the appointment will begin.

Need help with joining the appointment?

If you have questions about how to prepare for, or connect to, your virtual care appointment on June 17, 2022 - 02:45 PM, please call our technology help line at **1-519-685-8390**. Service is available from 8 a.m. to 5 p.m. Monday to Friday (excluding observed holidays).

This email is directed in confidence solely to the person named above and may contain confidential, privileged or personal health information. Please be aware that this email may also be released to members of the public under Ontario's Freedom of Information and Protection of Privacy Act if required. Review, distribution, or disclosure of this email by anyone other than the person(s) for whom it was originally intended is strictly prohibited. If you are not an intended recipient, please notify the privacy office at the facility and destroy all copies of the original message. Thank you for your cooperation.

Appendix D: OTN instructions sent to patient (automatically sent when you schedule appointment on OTN's website)

Voir en Français



An eVisit to the home is a private, secure video appointment where you will see and speak with your health care clinician from your computer at home, or on-the-go via tablet or smartphone.

Appointment Details

Who	Dr. Smith - host
	Patient Testing (testpatient@gmail.com) - attendee
When	11:30 AM - 11:45 AM ET (10:30 AM - 10:45 AM CT), Friday, August 20, 2021
Where	Check your email box for "Video eVisit Invitation - Event ID: 315087213. Use the "Start eVisit" button on the day of appointment.
	<i>Note: Please monitor your email for any changes to your appointment details.</i>

Appointment Support

Technical Support	Visit otn.ca/video-evisit-help/ for step-by-step instructions, video tutorials, and frequently asked questions to help prepare you for your appointment. If this is your first eVisit appointment, this step is crucial for a successful experience.
Administrative Contact	If you have questions about your health care or appointment, contact your health care clinician using the information below:
Name	Sample Name
Phone	245-445-4343
Email	Testemail@gmail.com

Disclaimer: This document contains confidential information. By printing and/or generating this document, the OTN member/user assumes responsibility for: a) the secure and appropriate management of this document in accordance with the Personal Health Information Protection Act, 2004; and b) the secure delivery or transmission of the document to the applicable recipient. If this document is received or recovered by an individual who is not the intended recipient, please notify the OTN Privacy Office at privacy@otn.ca.

OTN is an independent, not-for-profit organization funded by the Government of Ontario. To learn more, visit otn.ca

Printed on: August 20, 2021 at 11:22 AM