

## A Resource for Care Teams

# Virtual Care Privacy Protection & Consent Documentation

Purpose of this resource is to support care teams with ensuring privacy protection during virtual care and documenting virtual care consent in Epic.

## 1.0 Privacy Protection during Virtual Care

Follow the tips outlined below to protect your patient's privacy during a virtual care encounter.

- **Confirm identity.** Ask for patient's name, date of birth and OHIP #.  
*Note.* If OHIP number is not readily available or patient is not comfortable to provide, instead ask the patient for name of primary care doctor, date of last visit to the hospital or clinic.
- **Be aware of your location and surroundings when providing virtual care.** Ensure that only staff necessary to support the call are present. Alternatively, identify anyone else who is present and explain why.
- **Advise the patient that personal health information will be discussed.** Recommend the patient be in a quiet place for the visit.
- **Advise the patient that the visit will not be recorded** and ask that they also not record the visit.
- Ask the patient if they are comfortable having this virtual visit.

For further tips please see Privacy and Working Remotely ([Intranet > COVID-19 Updates > Remote Access & Care](#)).

## 2.0 Virtual Care Consent Documentation Requirements

Consent for virtual care must be obtained and documented in Epic before a patient participates in virtual care. Consent should be collected and stored using the *Virtual Care Consent* document type from the *Document List* in the patient's chart.

Consent is valid for one year; a patient will not be required to complete the *Virtual Care Consent* document again until the one year expiry has been exceeded

### For patients with an email address on file:

- The *Virtual Care Consent* document will automatically be sent to patients with an email address on file via *eCheck In* the first time they participate in a virtual care appointment

### For patients without an email address on file or if the *Virtual Care Consent* document is not completed at the time of the appointment:

- Informed consent should be collected verbally and updated manually in the patient chart (see detailed instructions in [Section 2.1 Updating Virtual Care Consent in Epic](#))

### If the patient refuses a virtual care appointment:

- Document the refusal in the patient's chart (see detailed instructions in [Section 2.1 Updating Virtual Care Consent in Epic](#)) and that a telephone visit, in-person visit or delayed appointment was offered (as appropriate)



# Virtual Care

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## 2.1 Updating Virtual Care Consent in Epic

### 1. Navigate to the *Document List*

#### Care Providers:

- You can access the *Document List* by selecting *Jump to Document List* from your Schedule in the *Virtual Care Patient Status Preview*


The screenshot shows the Epic Virtual Care Patient Status Preview interface. At the top, there is a 'Schedule' section with a table of appointments. Below this, there are sections for 'Contact Information', 'myUHN Status', 'Hardware Test: Not Attempted', and 'Patient Connection Status: Not Connected'. At the bottom, there is a 'Virtual Care Consent' section with a yellow highlight and a link that says 'Jump to Document List to view or update filed documents.'

#### Admin / Clerical Staff:

- You can access the *Document List* from *Registration* or *Check-In*

The top screenshot shows the 'Registration' module in Epic. A 'Documents' window is open, displaying a table of documents. The table has columns for 'Type', 'Status', 'Received By', 'Received On', and 'Expires On'. A document titled 'Virtual Care Consent' is highlighted, with a status of 'Signed' and received by 'OPEN SCHEDULING, BAC.' on '03/02/2022'. The bottom screenshot shows the 'Express Check In' module. A 'Documents' window is also open, showing the same 'Virtual Care Consent' document. The 'Express Check In' status is 'Everything checks out!' with a green checkmark.

## 2. Update the *Virtual Care Consent* document

- a. Select the  (pencil icon) from the *Virtual Care Consent* document row
  - If *Virtual Care Consent* is not on the list, add the document by selecting + (plus icon)
- b. Complete the fields on the *Document Information* pop-up:

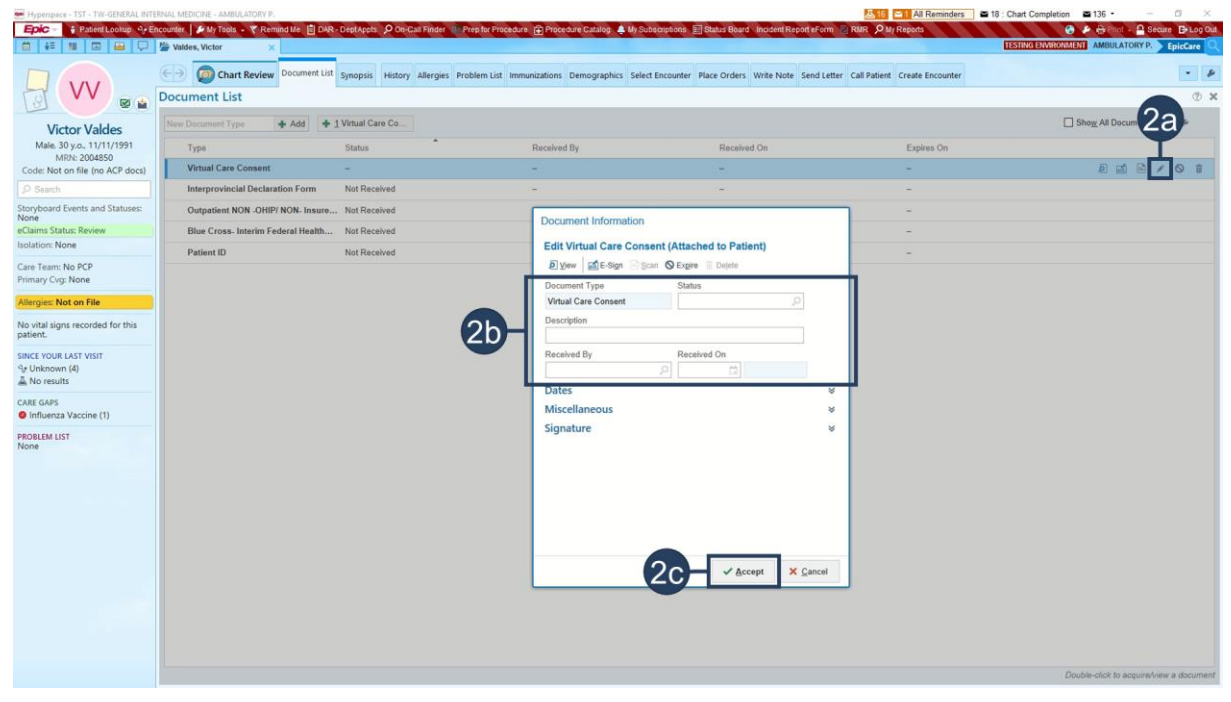
### For verbally obtained consent

- *Status*: Select *Received*
- *Description*: You may include a free text note (optional)
- *Received By*: Select your name
- *Received On*: Select the date and time that verbal consent was obtained

### For refusal to virtual care

- *Status*: Select *Patient Refused*
- *Description*: You may include a free text note (optional)
- *Received By*: Select your name
- *Received On*: Select the date and time that virtual care was refused

- c. Select  *Accept*



The screenshot shows the Epic EMR interface for a patient named Victor Valdes. The 'Document List' table is visible, with the 'Virtual Care Consent' document highlighted. A pop-up window titled 'Document Information' is open, showing the 'Edit Virtual Care Consent (Attached to Patient)' form. The form has the following fields:

- Document Type: Virtual Care Consent
- Status:
- Description:
- Received By:
- Received On:
- Dates:
- Miscellaneous:
- Signature:

At the bottom of the form, there are two buttons:  *Accept* and  *Cancel*. The 'Accept' button is highlighted with a red circle labeled '2c'. A blue circle labeled '2a' points to the 'Edit' button in the top right corner of the document list. A blue circle labeled '2b' points to the 'Description' field in the form.