

# Virtual Office Initiative

**Virtual care** is any non-face-to-face communication with patients

- ✦ Telephone is the easiest virtual care option (please see the [resources](#) for details on how to protect your cell number), but video calls have been shown to improve the therapeutic alliance when compared to audio-only communication
- ✦ Video may aid in the assessment, diagnosis, and management of complex medical concerns
- ✦ Email and SMS are insecure and vulnerable to breaches in privacy

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This document was created to aid in the decision and rapid implementation of virtual care into your clinic. **Please do not hesitate to contact us** regarding your questions or troubleshooting needs.



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## Step 1: Essentials to getting started



### Collect Patient Information

Obtain patient email addresses and mobile numbers → can be delegated to your MOA

- Email is the easiest way to send appointment links and information to your patient.



### Consent

Though the CMPA *recommends* **written consent** from patients regarding use of telemedicine, **verbal consent** has been endorsed by Doctors of BC after consultation with the Deputy Minister of Health.

- **Recommendation:** *Document verbal consent in every telemedicine visit note.*
- In the future, we can help you set-up a written consent option that fits with your workflow.
- Interested in more details? → Check out our [resources](#)



### Equipment

- You will need access to a computer, tablet, or smartphone with a camera and microphone
- Web-based Virtual Care platforms run best using the internet browser Google Chrome
- It is important to visualize both your clinic EMR and the patient video call at the same time. This can be done by:
  - a. shrinking both windows and organizing them side-by-side on a single screen, OR
  - b. by setting up 2 separate computer screens side-by-side, OR
  - c. the video call can be done on a tablet, while the EMR is open on a computer
- Consider making a new email address from which you and your staff will send documents and appointment links to patients



### Etiquette

- Consider what your patient will see during the virtual visit. Is there personal information in your background? If you use the “share screen” function, is information from other patients open on your screen?
- Be aware of who is in the room with the patient.
- To avoid appearing distracted, explain to your patient what you are doing when you are not looking at the camera (e.g. making notes in the EMR, reviewing labs)
- To promote effective eye-contact look at the camera and NOT at your image on the screen
- Be mindful of your movements as they can make the video choppy.






### Resources

1. Vernon ICC Medical Students (Taryn, Emily, Hamish) - contact information on [page 1](#)
2. See the end of the document for additional details, links, and a review of [other virtual care options](#).



## Step 2: Choose your Virtual Care Platform

|                             |    |   |   |
|-----------------------------|---|---|--|
| <b>Cost</b>                 | *Free via IH or DoBC x 12 months  | Free (Basic version)<br>\$35/month (Pro version)  | *Free x 6 months<br>\$99/month thereafter<br>\$74 if using Accuro EMR  |
| <b>Setup Time</b>           | 24-48 hours   | 10 minutes  | ~7 days  |
| <b>Security and Privacy</b> | <ul style="list-style-type: none"> <li>- HIPAA/PIPEDA and PIPA compliant</li> <li>- Servers in Canada</li> <li>- Recording and storing of info is disabled in healthcare version</li> </ul>   | <ul style="list-style-type: none"> <li>- HIPAA/PIPEDA compliant.</li> <li>- Servers in USA</li> <li>- Does not store info</li> </ul>  | <ul style="list-style-type: none"> <li>- HIPAA/PIPEDA and PIPA compliant.</li> <li>- Servers in Canada</li> </ul>  |
| <b>Pros</b>                 | <ul style="list-style-type: none"> <li>- Chosen platform by IHA</li> <li>- Audio, video, and messaging</li> <li>- Waiting room</li> <li>- Share and annotate your screen</li> <li>- Patient does not need an account</li> <li>- Patients enter via an emailed appointment link</li> </ul> | <ul style="list-style-type: none"> <li>- Audio, video, and messaging</li> <li>- Waiting room</li> <li>- Quickest setup</li> <li>- Easiest patient access</li> <li>- Patient does not need an account</li> <li>- No app needed</li> <li>- Screen sharing, File transfer, and customized waiting room (paid version)</li> </ul> | <ul style="list-style-type: none"> <li>- Audio, video, and messaging</li> <li>- Integrates with Accuro EMR</li> <li>- Online booking</li> <li>- Secure file-sharing</li> </ul> |
| <b>Cons</b>                 | <ul style="list-style-type: none"> <li>- No file sharing</li> <li>- More complicated interface</li> <li>- Patients may be hesitant to use given privacy and security breaches</li> </ul>  | <ul style="list-style-type: none"> <li>- Servers located in USA</li> <li>- No file sharing on free version</li> </ul>   | <ul style="list-style-type: none"> <li>- Patient creates an account +/- downloads app</li> </ul>   |
| <b>Ideal for...</b>         | Doctor looking for QUICK, SHORT-TERM option for video visits and who may be using Zoom for other types of meetings.   | Doctor looking for QUICK, EASY, SHORT-TERM option for video visits.   | Doctor with Accuro EMR looking for an integrated LONGER TERM solution.   |

Though Medeo is a great solution for those with Accuro EMR, it is currently very backlogged so they are not integrating the Medeo platform with the Accuro EMR until a later date. Therefore we are not recommending it at this time.



Zoom was chosen by the writers as the number one telemedicine platform due to its reliability, widespread use and because it was chosen by IHA for funding.

→ Request FREE access via Interior Health (healthcare version)

Email [zoom@interiorhealth.ca](mailto:zoom@interiorhealth.ca) with the following info:

- Full name, title, specialty, and contact number
- IH email address (or call the Service Desk 1-855-242-1300 to get an IH email)
- Email address of MOA doing bookings for clinician - Interior Health email is preferred.

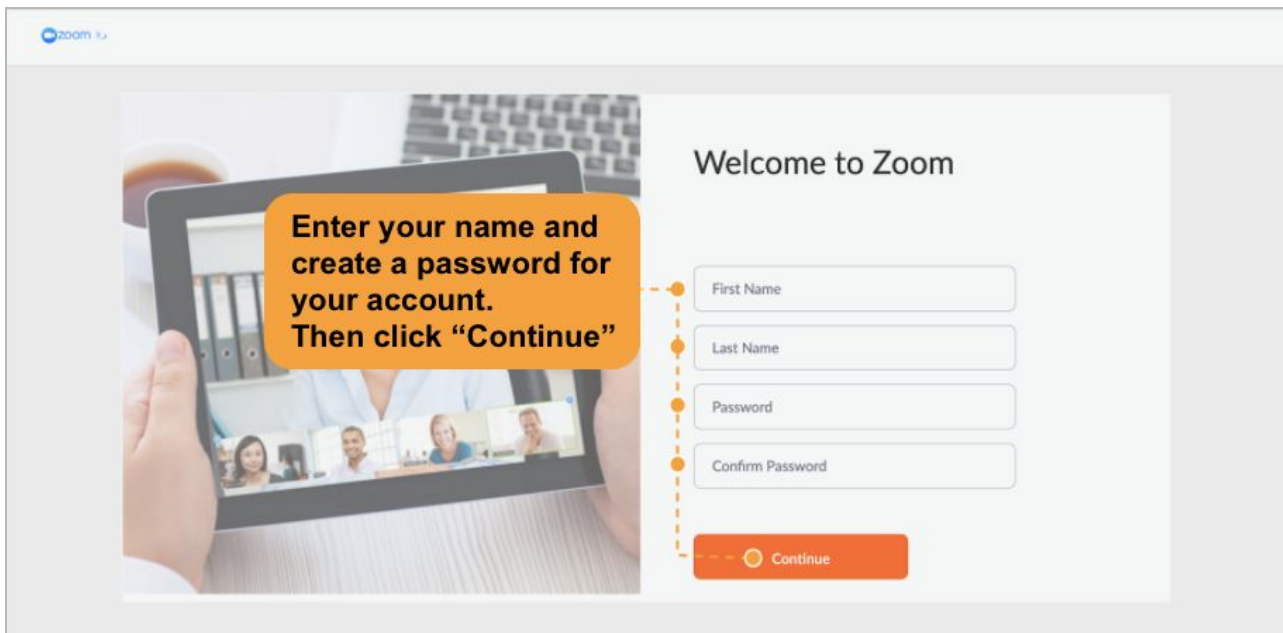
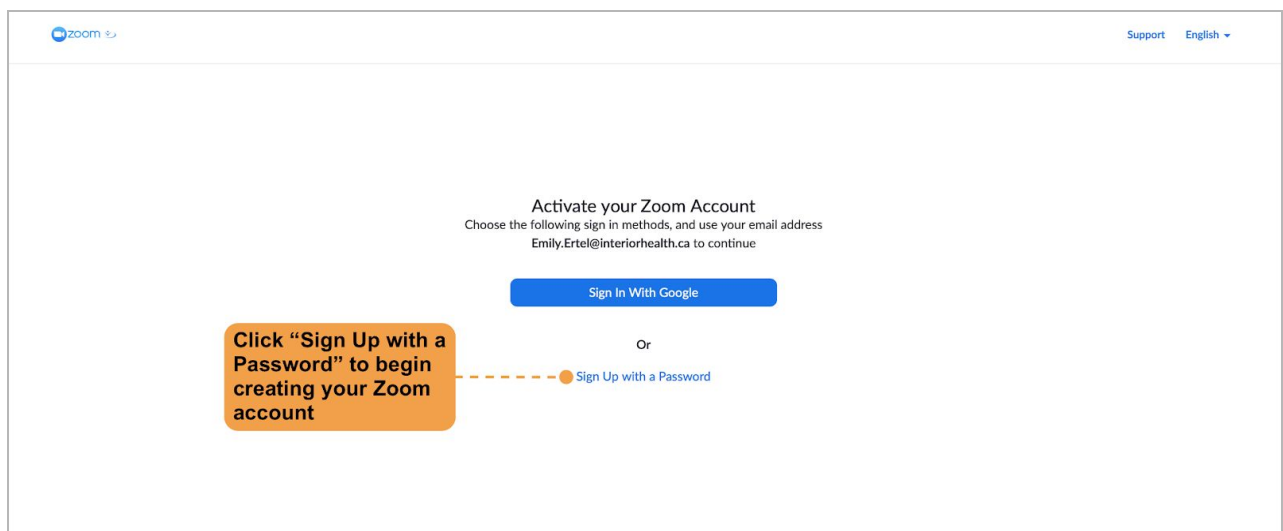
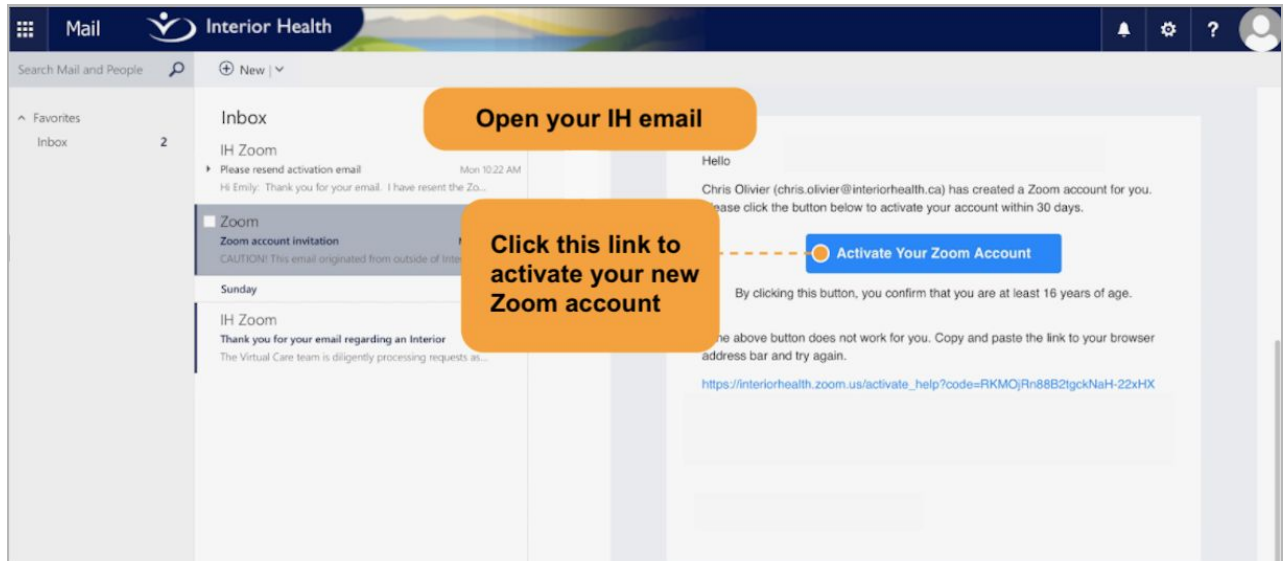
**You will receive two emails :**

1. Email from IH Zoom team with educational resources
2. Email from Zoom with link to activate account


**\*\*Common issue of not receiving an activation email---** Email [zoom@interiorhealth.ca](mailto:zoom@interiorhealth.ca) and ask them to resend the activation email.

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## Step-by-Step: Zoom setup



zoom



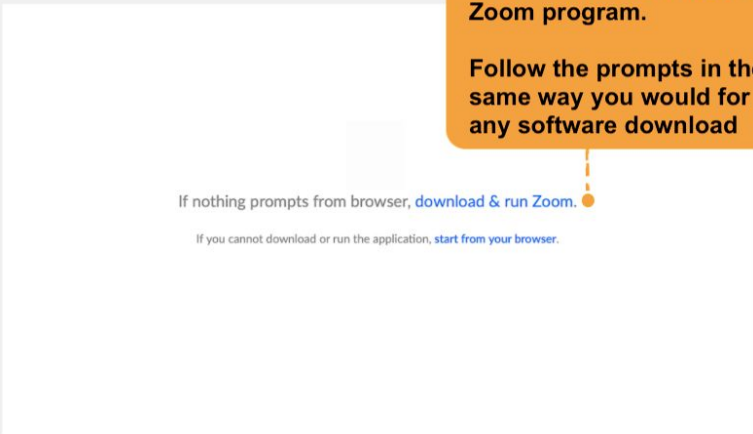
**Start your test meeting.**

Your personal meeting url:  
<https://interiorhealth.zoom.us/j/5970983438?>

**Click "Start Meeting Now" to open the Zoom app and begin a test meeting**

**Start Meeting Now** Go to My Account

zoom



**Click here to download the Zoom program.**

**Follow the prompts in the same way you would for any software download**

If nothing prompts from browser, [download & run Zoom.](#)

If you cannot download or run the application, [start from your browser.](#)

Choose ONE of the audio conference options

Phone Call **Computer Audio** Call Me

**Once downloaded, the app will open automatically. Click here to allow audio**

**Join With Computer Audio**  
Test Speaker and Microphone

**Check this box to save your audio settings**

☐ Automatically join audio by computer when joining a meeting

zoom

**Join a Meeting**

Sign In

**You are ready to use Zoom!**

**Now close the app. Use your web browser to schedule meetings. Meetings will automatically open in the Zoom app**

## Schedule an appointment (or check out our [2 min demo video](#))

zoom

Profile

Meetings

Webinars

Recordings

Settings

Account Profile

Reports

Upcoming Meetings

Previous Meetings

Personal Meeting Room

Meeting Templates

Schedule a New Meeting

| Start Time             | Topic                    | Meeting ID  |              |
|------------------------|--------------------------|-------------|--------------|
| Thu, Apr 9<br>10:30 AM | Jill Jones - Rash        | 643-087-367 | Start Delete |
| Thu, Apr 9<br>01:00 PM | Post-op Wound assessment | 829-568-828 | Start Delete |

Click on "Meetings" on the left, then select "Schedule a New Meeting"

zoom

Profile

Meetings

Webinars

Recordings

Settings

Account Profile

Reports

My Meetings > Schedule a Meeting

Schedule a Meeting

Topic

Description (Optional)

Use a template

When

Duration

Time Zone

Recurring meeting

Input patient name, chief complaint, date and time of appointment, and appointment length

Audio

Telephone

Computer Audio

Both

Dial from Canada

Meeting Options

Enable join before host

Mute participants upon entry

Enable waiting room

Only authenticated users can join

Alternative Hosts

Example: mary@company.com, peter@school.edu

Save

Cancel

Ignore the rest of the screenshots for now. Scroll to bottom of page. Click "Save" to generate the appointment.



**2. Click “Copy Meeting Invitation” and then paste into an email to your patient from your office email program. Then click the small “x” in the right corner.**

**1. Click “Copy the invitation”**

Meeting ID

Meeting Password

Invite Attendees

Video

Copy Meeting Invitation

Cancel

Start this Meeting

Copy the invitation

**Click on “Meetings” on the left sidebar to see all your scheduled appointments.**

Profile

**Meetings**

Webinars

Recordings

Settings

**Upcoming Meetings**

Previous Meetings

Personal Meeting Room

Meeting Templates

Schedule a New Meeting

| Start Time        | Topic                    | Meeting ID  | Start | Delete |
|-------------------|--------------------------|-------------|-------|--------|
| Tomorrow 12:30 AM | Jeff's Red Eye           | 713-747-536 | Start | Delete |
| Tomorrow 09:00 AM | Jill Jones - Rash        | 917-394-848 | Start | Delete |
| Tomorrow 01:00 PM | Post-op Wound assessment | 829-568-828 | Start | Delete |
| Tomorrow 02:00 PM | Jeniffer's bump          | 764-061-322 | Start | Delete |

## Start appointment

**Click on “Meetings” on the left sidebar to see all your appointments**

**When you're ready, click “Start” to begin video call**

Profile

**Meetings**

Webinars

Recordings

Settings

**Upcoming Meetings**

Previous Meetings

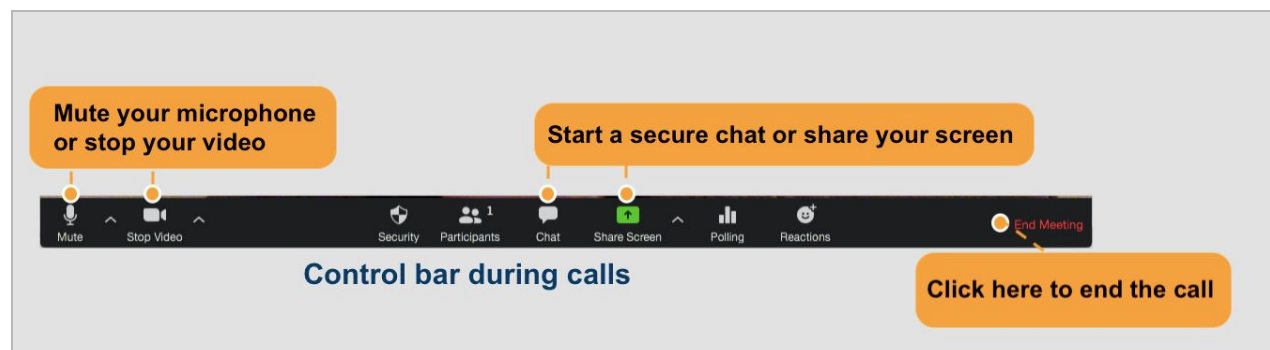
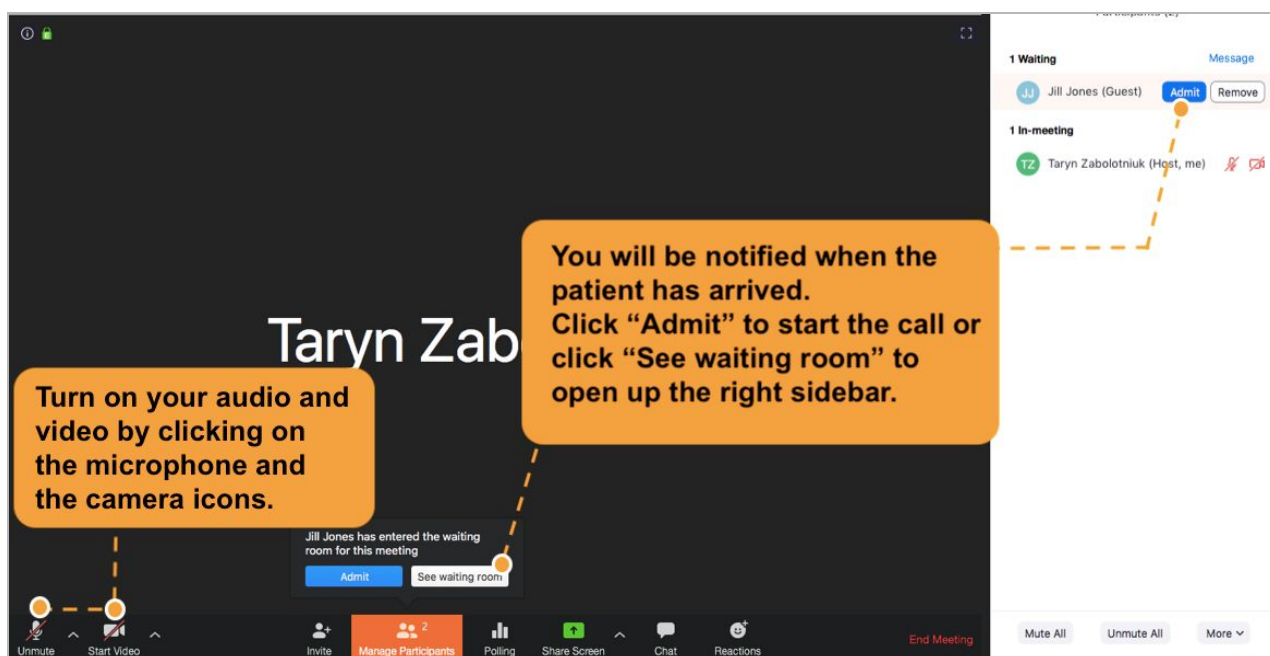
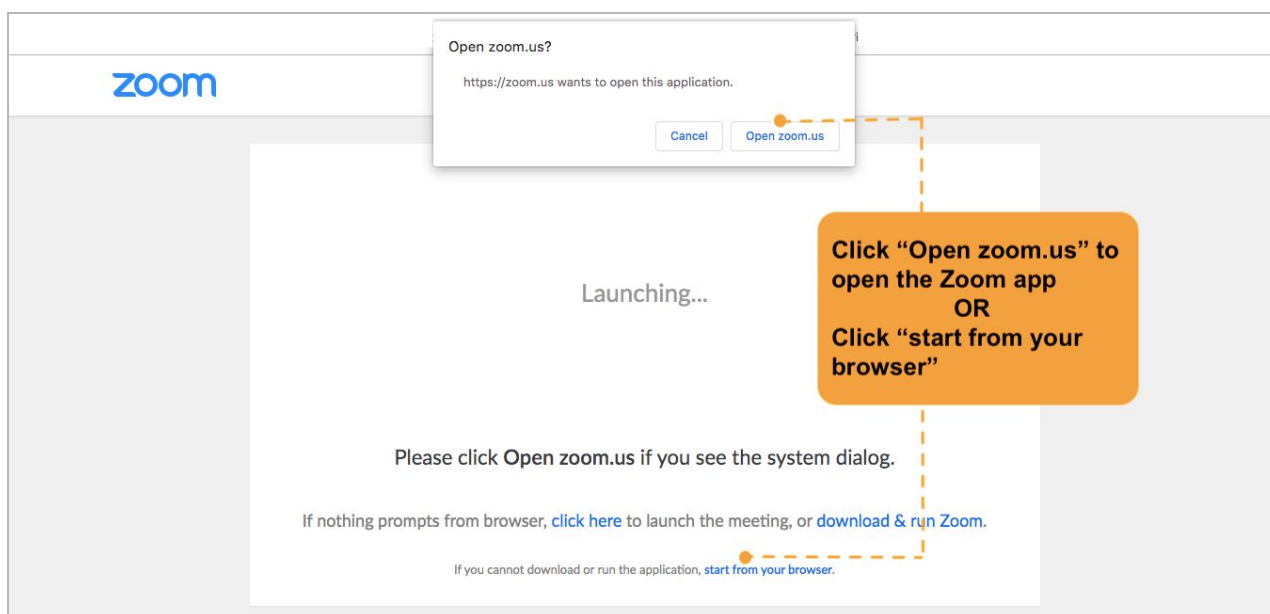
Personal Meeting Room

Meeting Templates

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| Tomorrow 01:00 PM | Post-op Wound assessment | 829-568-828 | Start | Delete |
| Tomorrow 02:00 PM | Jeniffer's bump          | 764-061-322 | Start | Delete |



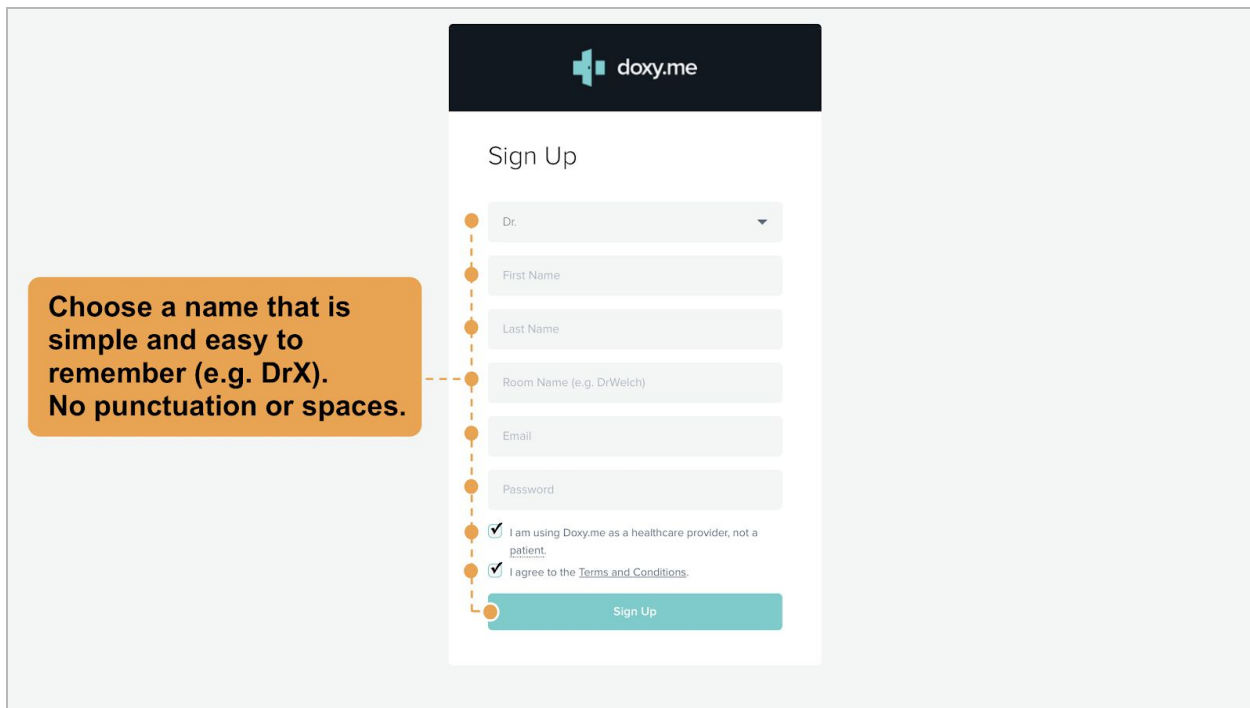
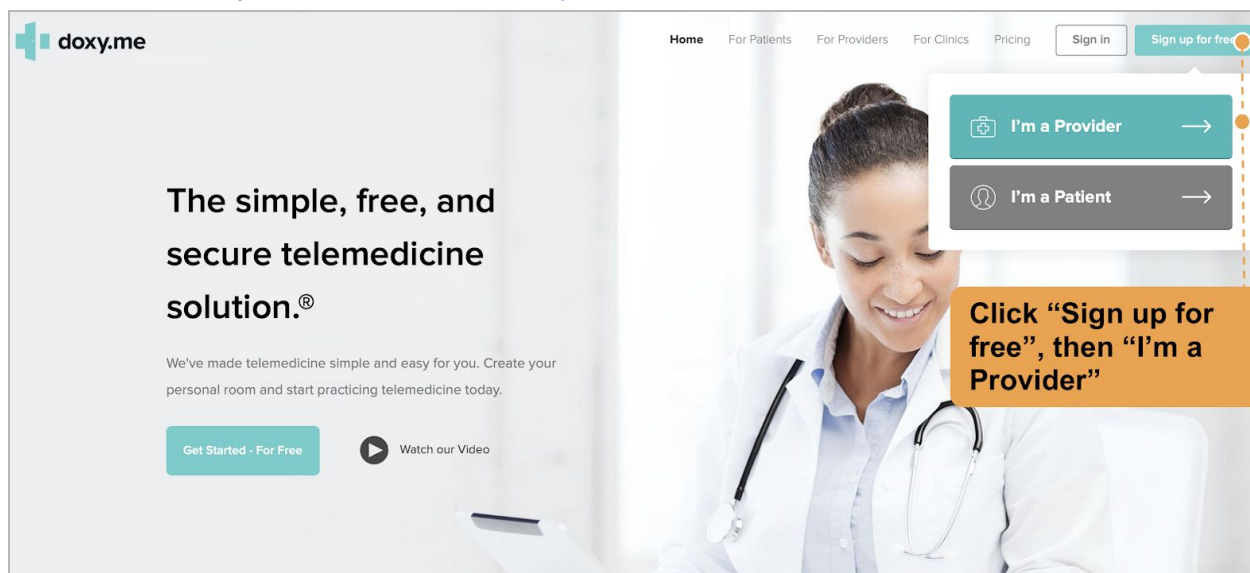




doxy.me also offers paid subscriptions with added features: customize your waiting room, transfer files (i.e. Rx's, lab reqs), share your screen, and send emails/texts from the program. You can easily upgrade your subscription after you sign up for the free version.

## Step-by-Step: doxy.me setup (free version)

1) Start at the doxy.me website: <https://doxy.me>.



**This is your Dashboard**

Welcome, Ms. Ertel!

To invite someone to your waiting room, share this link:

<https://doxy.me/eertel> Copy Invite via ▾

**Click "Turn on webcam"**

A pop up will ask for access to your microphone and camera

**Invite patients via sharing your Waiting Room Link**

- by clicking "Copy" and emailing it
- by putting the link on your website
- by MOA saying the URL over the phone

**Patients waiting for their appointment will appear here under "PATIENT QUEUE"**

**Turn on webcam**

**HELP**

Send Tom Smith a message.

**Start Call**

Welcome, Ms. Ertel!

To invite someone to your waiting room, share this link:

<https://doxy.me/eertel> Copy Invite via ▾

**Start call by hovering mouse over patient's name in the patient queue.**

**Click "Start Call"**

**HELP**

Send Tom Smith a message.

**PAUSE:** Temporarily stop the video and put patient back in waiting room

**Control bar during calls**

**HANG-UP:** Ends the call, patient does not go back into waiting room.

**SETTINGS:** Change audio and video inputs and video quality

**HELP**

Send Jill Jones a message.

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## Step 3: Determine Office Workflow

Unfortunately, **there is no perfect workflow that works for everyone** as it will depend on your EMR, location (office or home), access to admin staff, patient population, etc.

- Here are some things to consider:
  - When booking patients, ask for their email address OR provide them with your unique Waiting Room URL for doxy.me.
  - Consider sending out a generic email to all patients with information about your chosen platform ([doxy.me flyer](#) or [Zoom pt setup](#) or [DoBC editable document](#))
- Please reach out to the medical students (contact information on the first page) to discuss any roadblocks you are facing in your workflow and we will find you the answers you need!

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### Other things we can help you with:

- EMR templates and specific workflow issues
- Setting up an email account that can broadcast information to all your patients
- Remote faxing options
- Phone forwarding options
- Secure texting options
- Finding the best telemedicine platform for you



## Resources

### How to hide your cell phone number



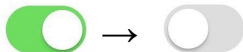
\*This will allow your number to come up as “NO CALLER ID” when calling patients from your personal cell. Tip: some patients won’t answer a call with no caller ID, so try leaving a message and letting them know you will try them again in 5-10min. They will usually answer the second call.

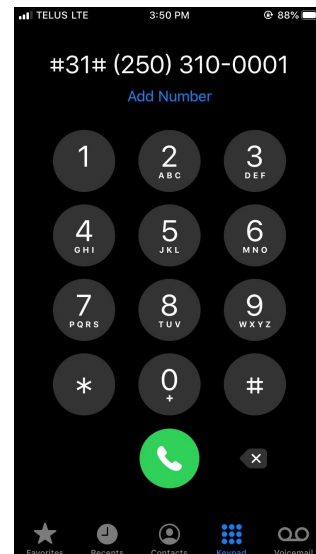
#### Single Call

- Dial **#31#** followed by the number you want to dial



#### ALL Calls

##### iPhone :

1. Tap  on “Settings” icon
2. Tap on  “Phone”
3. Tap “Show My Caller ID”
4. Toggle 



##### Android:

1. Tap  on “Settings” icon or by pulling down notification bar at the top of screen
  2. Scroll down and tap  “Call” under “Device” header
  3. Tap “Voice call”
  4. Tap “Additional settings”
  5. Tap “Caller ID”. A pop-up will appear
  6. Tap “Hide number”
-

## Other Virtual Care Options Review

| Other Software Options |   |  |   |
|------------------------|---|--|---|
| <b>OnCall Health</b>   | <b>\$99</b>                                     | OnCall Health is a Canadian platform that incorporates secure video, text, file sharing, and screen sharing. Once a patient's email address is entered into the program and an appointment is scheduled, OnCall Health takes care of the rest - helping patients get setup, sending appointment reminders, and troubleshooting any issues with the patient. Like Zoom it operates through a video client download. The current estimated wait-time for setup is 2-3 days.<br>PIPEDA compliant. Prompts patients to fill in forms prior to visit - consent, PHQ9, etc.  | Demo:<br><a href="https://www.youtube.com/watch?v=E61Pd19TCyk&amp;feature=youtu.be">https://www.youtube.com/watch?v=E61Pd19TCyk&amp;feature=youtu.be</a><br><br>Contact: Ross Dixon<br>416-854-4451 |
| <b>Synaptek</b>        | <b>\$50</b><br><br>Negotiable for larger groups | Synaptek is a virtual office assistant software based out of Victoria, BC. Its features include a sophisticated video telemedicine platform with an online waiting room, file sharing and secure patient messaging. It can also perform numerous other functions to improve office productivity such as patient reminders, online booking, mass patient messaging, and more. The current estimated wait-time for setup is 1-2 days.<br><br>Synaptek may be best for providers hoping to utilize the benefits of a virtual office assistant in addition to its telemedicine platform.<br>Notes: Patient must make an account.   | Contact:<br>Dr. Govender<br><a href="mailto:sundren@synaptek.ca">sundren@synaptek.ca</a><br><br>Website:<br><a href="https://www.synaptek.ca/">https://www.synaptek.ca/</a>                         |
| <b>Signal</b>          | <b>Free</b>                                     | Signal is an open-source software that emphasizes its secure and encrypted messaging service. It is an app that can be downloaded onto any iOS or Android device linked to a phone number. Once registered with a phone number it can be used on a desktop. The app provides secure video, messaging, and file/photo sharing between users. Physicians can use it to communicate and video-conference securely with their patients.<br><br>Notes: If physicians do not wish to share their phone number with patients they must use an alternate number, or a "burner" number for \$5/mo.  | Website:<br><a href="https://signal.org/">https://signal.org/</a><br><br>Burner number:<br><a href="https://www.burnerapp.com/">https://www.burnerapp.com/</a>                                      |
| <b>VSee</b>            | <b>\$49</b>                                     | VSee is a telehealth platform that offers many features. This is suited for providers who are looking for a long-term telehealth option and a "virtual clinic". Here, you are able to meet with 1 or more patient(s) at a time, share/annotate your screen and send pictures via the secure text chat feature. It also offers a live stream of otoscopes and dermatoscopes. E-prescriptions are possible, and patients can easily book follow-up appointments.<br><br>Notes: VSee can be accessed by providers via the web or app. Patients join the waiting room by email or web. Unknown how long it would take to set up this platform.<br>VSee has a free clinic option that allows you to do basic video conferencing by emailing a patient the link to your virtual clinic. This option is comparable to doxy.me or zoom, but in our experience has lower quality video. | <a href="https://vsee.com/clinic/">https://vsee.com/clinic/</a>   |
| <b>VirtualCare</b>     | <b>Paid</b>                                     | VirtualCare is a video telemedicine platform created by Think Research and based out of Ontario. The platform includes features such as secure video, messaging, file sharing, and analytics which enable reporting and data visualization. Physicians are able to send prescriptions, lab and imaging requests, and to document visit notes through the software. It can also be used on iOS or Android devices.<br>Notes: VirtualCare is a popular option in Ontario.  | <a href="https://www.thinkresearch.com/ca/products/virtualcare/">https://www.thinkresearch.com/ca/products/virtualcare/</a>   |
| <b>Webex</b>           | <b>Free</b>                                     | Webex is a free, secure video-based platform. Its website offers clear instructions on the program's functions. Providers and patients may access Webex via the web or app. Screen sharing is possible, as well as the ability to annotate your shared screen. Note: Patients must create an account. There is no patient waiting room so the patient can only enter the meeting once the provider has started the call.   | <a href="https://www.webex.com/webexremotehealth.html">https://www.webex.com/webexremotehealth.html</a>   |
| <b>WelTel</b>          | <b>Free</b>                                     | WelTel is a Canadian text based program that is in partnership with UBC and DoBC. Its main purpose is to send weekly text messages to check in on patients, but also has video conferencing capabilities. This may be helpful for providers looking to quickly connect with patients for check ins, and is particularly useful for patients in quarantine or in more rural/remote areas with poor wifi service.<br>WelTel is secure and encrypted.   | <a href="https://covid.welTelhealth.com/covid19#Contact%20Me">https://covid.welTelhealth.com/covid19#Contact%20Me</a>   |

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## Doctors Technology Office Resources

[Doctors Technology Office](#) has resources for Virtual Care that are important to read before getting started. Please click the following links to learn more:

- [Virtual Care Quick Start Guide](#)
- [Virtual Care Toolkit](#)
- [Videoconferencing Guide: Privacy and Security Considerations](#)
- [GP Billings and Incentives](#) + [Specialists' Telehealth Billing Codes](#)
- [Doctors of BC Temporary Billing Changes - Covid-19](#)
- [Patient FAQs](#)

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## Zoom PHSA *How-To* Documents

- Physician
  - [How to start an instant/impromptu appointment](#)
  - [How to start an appointment on smartphone app](#)
- MOA
  - [How to book an appointment on behalf of doctor](#)
- Patient
  - [Patient Notification info re: privacy, security, and risks](#)
  - [Join a Virtual Health Visit from a computer](#)
  - [Join a Virtual Health Visit from a smartphone or tablet](#)

(For the most up-to date versions please click [here](#))

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[IH COVID-19 information update from March 23, 2020](#)





## More on Consent

### Key Points:

Based on information from various teleconference sessions, **implied consent** is adequate at this juncture. However, verbal and/or written consent from patients, when possible, is preferred.

Carol Rimmer, Director of Technology & Operations at DoBC, said the following in a DTO teleconference on March 26th (quote confirmed by Rimmer):

*“Under normal circumstances we want written consent - but in this time of emergency please don’t worry as much about it. Just make sure you are documenting verbal consent in the chart.”*

In a follow-up email with her, she added:

*“At a minimum, physicians should chart that they have received verbal consent. As we slowly move back to a new normal, I would recommend that physicians build a written consent into their administrative practices to get patients to acknowledge that they consent to communicating electronically with their physicians (and associated care team) including checkboxes for all approved methods: videoconferencing, email, telephone, text.”*

| Written Consent   | Verbal Consent   |
|---|--|
| <p>Paper Form</p> <ul style="list-style-type: none"><li>- <a href="#">CMPA Example</a> can be emailed to patients, signed and emailed back</li></ul> <p>Online Form</p> <ul style="list-style-type: none"><li>- <a href="#">Google Form Template</a> adapted from the CMPA example can be set up for your practice and responses emailed to your office email.</li><li>- Contact one of the medical students (contact information on first page) to set it up for you</li></ul> <p><u>Document in chart:</u></p> <p>Upload the signed form to EMR</p> <p><b>OR</b></p> <p>Write in Visit Note:</p> <p>“Informed written consent was obtained from this patient to communicate and provide care using virtual and other telecommunications tools. This patient has read the risks related to 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 the patient understands the need to seek urgent care in an Emergency Department as necessary.”</p> <p><b>OR</b></p> <p>“After a reading about the risks, benefits, and alternatives, the patient provided written consent to proceed with telemedicine.”</p> <p><b>OR</b></p> <p>“Informed written consent obtained”</p> | <p>Verbal consent phrases developed by CMPA (<a href="#">see DTO Virtual Care Toolkit page 2-3</a>)</p> <ul style="list-style-type: none"><li>- Can be delegated to MOA when booking</li></ul> <p>“Just like online shopping or email, Virtual Care has some inherent privacy and security risks that your health information may be intercepted or unintentionally disclosed. We want to make sure you understand this before we proceed. In order to improve privacy and confidentiality, you should also take steps to participate in this virtual care encounter in a private setting and use your own devices for further protection. If it is determined you require a physical exam you may still need to be assessed in person. You should also understand that virtual care is not a substitute for attending the Emergency Department if urgent care is needed. Are you ok to continue?”</p> <p><u>Document in chart:</u></p> <p>“Informed verbal consent was obtained from this patient to communicate and provide care using virtual and other telecommunications tools. The risks associated have been explained and how they can protect their information. We discussed that care provided via telemedicine cannot replace the need for physical examination or an in person visit for some concerns and the patient understands the need to seek urgent care in an Emergency Department as necessary.”</p> <p><b>OR</b></p> <p>“After a discussion of risks, benefits, and alternatives, the patient provided verbal consent to proceed with telemedicine.”</p> <p><b>OR</b></p> <p>“Informed verbal consent obtained”</p> |

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Last updated: May 22, 2020