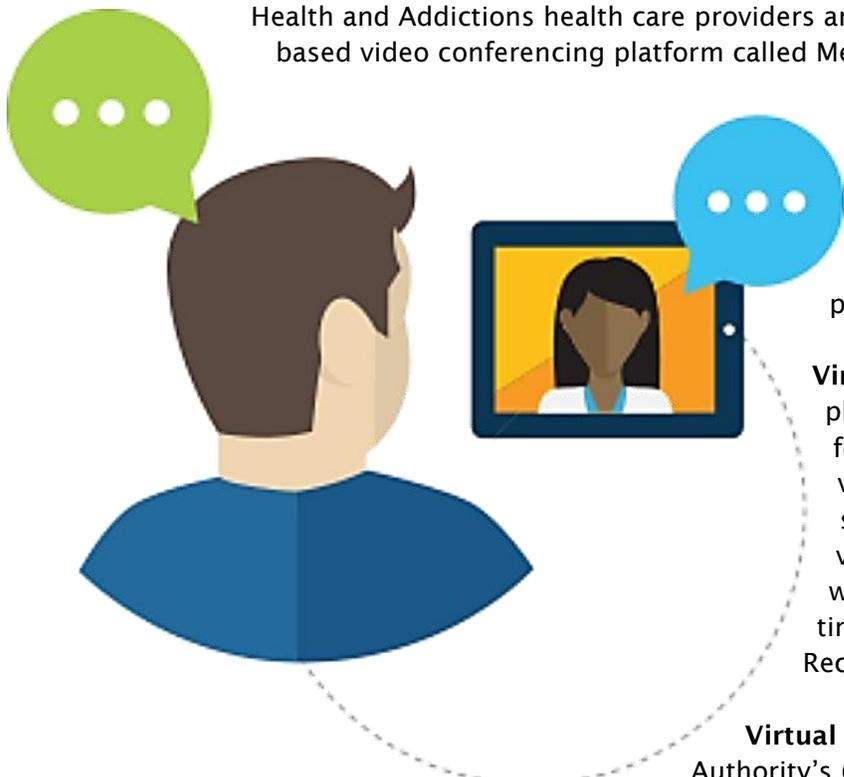


Virtual Visits

Guide for Health Care Providers (HCP)

This guide is intended to provide an outline of the steps for health care providers (HCPs) to begin offering home-based virtual visits, as well as a toolkit of resources, and will be used as part of your training provided through Virtual Care.

Virtual Visits were successfully piloted from August 2017 to January 2018 with Mental Health and Addictions health care providers and patients. The pilot employed a web-based video conferencing platform called Medeo.



Medeo is a secure, web-based virtual care video conferencing platform that **connects patients to their health care provider (HCP)**, via their mobile devices or personal computer, in their home, or personal location of their choice.

Virtual Care is now offering the Medeo platform as a short-term solution provincially, for home-based virtual appointments (virtual visits). Existing alternative virtual care solutions are available for facility-based virtual appointments. Medeo will be replaced with an enterprise solution; however, the timeline is dependent on the One Person One Record (OPOR) initiative.

Virtual Visits support Nova Scotia Health Authority's (NSHA) value of innovation and their mission: "To achieve excellence in health, healing and learning through working together," and also align with the IWK Health Centre's vision: "To passionately pursue a healthy future for women, children, youth and families".

Contents

1.0	FIRST STEPS	3
2.0	SETUP AND TRAINING PROCESS	4
3.0	TECHNICAL REQUIREMENTS	5
4.0	ROLES AND RESPONSIBILITIES	6
5.0	ADMINISTRATIVE ASSISTANTS	8
6.0	PATIENT SAFETY	9
7.0	PATIENT SELECTION	10
8.0	CONSENT, DOCUMENTATION & REGISTRATION	11
9.0	EMAIL TEMPLATE TO PATIENTS	12
10.0	VIRTUAL VISIT INFORMATION GUIDE	13
11.0	TIPS FOR PATIENTS	14
12.0	QUICK START - GUIDE FOR PATIENTS	15
13.0	PATIENT EXPERIENCE SURVEY (OPTIONAL)	16
14.0	WALKTHROUGH GUIDE FOR HCPS	17

1.0 First Steps



Introduce yourself to Medeo!

Visit the Medeo Website: www.medeohealth.com

Take a look at the [support page](#) where you will find tips, troubleshooting, an [interactive walkthrough](#), and a [video demo](#).



What you need to get STARTED

- NSHA-approved computer with high-speed Internet
- Download the free [Google Chrome](#) browser (contact [IT self-serve](#) if you experience any difficulties with this installing)
- HD Webcam, microphone and speakers or headphones (order through [IT self-serve](#))
- Skype for Business for training purposes (order through [IT self-serve](#))
- Manager/Director approval



Talk to your Program Manager/Director

If you think **home-based virtual visits** will be a great fit for your clinical service area, talk to your Manager/Director to obtain approval. Once you have approval, a Virtual Care Lead will be in touch with you to set up an intake meeting to get things started.

2.0 Setup and Training Process

1. Intake

The manager of the service area initially contacts VirtualCare@nshealth.ca to inquire about integrating virtual visits into their service area. A Virtual Care Lead (VC Lead) is assigned to follow up and discuss virtual care options in relation to the intended purpose. The manager will identify clinician names, and provide a cost center for billing. The manager and VC Lead will also discuss training needs and technical requirements.

2. Confirm Technical Requirements

The clinician/manager confirms with the assigned VC Lead that the technical requirements are met.

3. Training & Clinical Orientation

The assigned VC Lead will contact the clinician to arrange a clinical orientation and training on the Medeo platform via Skype. The VC Lead will review the contents of this guide together with the clinician, complete a demonstration on the Medeo web-based platform, as well as answer any questions.

4. Insurance/College

If necessary, the clinician contacts their private insurer and/or professional college to inform them that they will be conducting Virtual Visits/Virtual Care and to inquire about professional practice standards/guidelines.

5. Mock Clinical Walkthrough

If the clinician wishes to do a mock virtual visit before offering this service to their patients, the can contact the VC Lead to arrange a time to practice.

6. Ready, Set, Go!

Congratulations! You are now ready to begin offering virtual visit services to your patients!

3.0 Technical Requirements

The following basic system requirements are required for virtual visits for both patients and health care providers (HCPs). Further detailed technical information can be obtained from the [Medeo system requirements support page](#).

Health Care Provider:

- Computer with high-speed Internet
- Webcam / microphone and speakers or headphones
- Google Chrome browser (free download)

Patients:

- Android or iOS smartphone or tablet
- Medeo app (download free from the Android Play or iTunes stores)
- WiFi or 4G LTE connection (for video visits)

IMPORTANT: *Patients are responsible for any charges related to their internet data usage. If patients are using data on a mobile device (instead of a wireless “Wi-Fi” connection) they should be aware that video streams require significant data.*

or

- Computer with high-speed Internet
- Webcam / microphone and speakers or headphones
- Google Chrome browser (free download)

Peripheral Equipment:

Peripheral equipment (webcam, microphone, headset) can be ordered through [IT Self-Serve](#). Headsets range in price from \$50 - \$90; HD webcams (with built in microphone) range from \$30-\$50.

Below are the steps to access the non-standard-hardware request form through [IT Self-Serve](#):

Request Product or Service > Computers or Accessories > Non-standard Hardware > Request non-standard hardware

Complete the non-standard hardware request form and select the peripheral equipment you require. If the hardware you require is not in the list, such as the JabraSpeak, which is a dual speaker and microphone, enter the product information to the best of your ability.

In the ‘Purpose/Business Case’ field, copy and paste the following text:

To be used for patient care with APPROVED telehealth/virtual care application Medeo. Recommended by IM/IT Virtual Care. We will be starting this patient care initiative on *<insert date>* so will require this item no later than *<insert date>* to ensure adequate time for setup, testing and training.

4.0 Roles and Responsibilities

To ensure the success of your virtual visit initiative, please consider the following **key responsibilities** for your service area as well as the ways in which Virtual Care can support you.

Clinical Service Area:

Each service area is responsible for the following:

Financial Resources

All costs associated with the Medeo subscription fee per provider (\$99/month – physician; \$44.10/month - other health care professionals). Cost Billing starts the day the account is created (usually coincides with training) and is pro-rated for the first month.

Administrative Support

All duties related to liaising with patients, scheduling, and registration support.

Selection Process - HCP

Selection/recruitment of appropriate HCPs who will provide virtual visits.

Selection Process - Patients

Selection/recruitment of appropriate patients who will receive virtual visits.

Equipment

All technical equipment required (i.e. laptop/tablet/desktop, camera, speakers, monitor, headset).

Key Contact

Identification of key contact person to liaise with Virtual Care Lead for administrative planning purposes.

Virtual Care:

Virtual Care is responsible for the following:

Key Contact

Designated Virtual Care Lead to liaise with the service area to support and facilitate virtual visit requests.

Account Setup

Coordinate account setup for charge back processes.

Orientation (HCP)

Provide test call prior to Medeo training, walkthrough of the orientation toolkit to HCPs (equipment/technical requirements, patient selection criteria, informed consent process and complete a simulated virtual visit).

Medeo:**Training**

Setup HCP account and provide education on how to use Medeo.

Technical Support (HCP)

Provide support for HCP via phone (1-855-503-8455) or email (account issues and general troubleshooting).

Technical Support (Patients)

Provide support for patients via online support form (account issues and general troubleshooting).

5.0 Administrative Assistants

If you are an Administrative Assistant supporting a Health Care Provider (HCP) who will be offering virtual visit services using Medeo, please advise the VC Lead assigned to work with your service area so they can provide you with training.

Important Highlights

The following are key sections from the Provider Toolkit to review, which are relevant to the Administrative Assistant role:

3.0 Technical Requirements

- Ensure you are familiar with the basic [system requirements](#) for patients and providers.
- Directions to request peripheral devices (webcam, monitor, etc...) from IT Self Serve are included in this section.

4.0 Roles and Responsibilities

- Administrative responsibilities in relation to virtual visits are identified in this section.

8.0 Consent, Documentation and Registration

- If you will be the initial point of contact to offer patients the option to attend their appointment virtually, please ensure you are familiar with the key points outlined in the first section of this document so that you are comfortable speaking about them.
- If you will be registering patients on behalf of a HCP please review this section and ensure you are aware of the process, as it is different from regular Telehealth appointments.

9.0 Email Template to Patients

- If you will be sending the virtual visit welcome email to patients, please ensure you are familiar with the email template in this section and are comfortable attaching the indicated documents.

13.0 Patient Experience Survey

- If a HCP you support has decided to send patients the optional Patient Experience Survey, please follow up each appointment by email within 24 hours and provide them the link to the online survey for them to complete.

6.0 Patient Safety

Health Care Providers are responsible to:

- Appropriately select patients according to established guidelines for your service-area.
- Provide care/treatment in accordance with clinical practice guidelines.
- Be aware of patients' location and proximity to emergency services.
- Request patient's next of kin (NOK) or alternate support person in the event of an emergency.
- Call 911 or follow standard emergency protocols using clinical judgement for an immediate emergency response as needed.
- Enter all patient safety concerns related to Medeo, into SIMS under '**Care Management**' and select 'Telehealth' as the 'Specific Event Type'

More Information:

[CPSNS – Professional Standards Regarding the Provision of Telemedicine Services](#)

7.0 Patient Selection

A virtual visit should be offered only to **appropriately selected patients** to ensure the needs of the patient are assessed in relation to the capacity of the health care provider (HCP) to meet those needs via a virtual visit.

The following patient selection considerations are intended to provide general direction for HCPs offering virtual visit services. Clinical judgement must also be used in determining whether a virtual visit is the most appropriate method of care on an individual basis, as in the case of an emergency, provider shortages, or for an initial assessment.

Considerations for Patient Selection:

- clinical diagnosis/severity (consult clinical guidelines)
- risk (patient or provider)
- acuity/complexity
- cognitive ability
- physical or mental disabilities
- access to reliable internet connection
- access to a private, safe location
- financial considerations (i.e. transportation, child care, internet and/or electronic device)
- willingness/interest
- culture/language
- physical assessment required
- ability to verify patient identity
- HCP is licensed to practice in the patient's jurisdiction (as required by the applicable governing regulatory body)

Where a need for follow-up is identified during a virtual visit, the appropriate type and method for a subsequent appointment is determined collaboratively with the patient and other care team members.

More Information:

[CMPA – Videoconferencing consultation: When is it the right choice?](#)

8.0 Consent, Documentation & Registration

Patient consent to receive care via Medeo videoconference technology is considered to be **informed implied consent**. As part of the process to initiate a virtual visit, the patient is required to accept the appointment invitation, create an account, and agree to the vendor terms and conditions.

The **HCP is responsible** to ensure:

- Patients must receive the **Virtual Visits Information Guide** in advance and have the opportunity to review
- Patients must be allowed to ask questions about the technology
- Patients must be given the option to not use the technology at any time

For more information refer to the [Walkthrough Guide in Section 14](#).

Documentation

Please ensure that the following items are recorded in the patient's health record:

- This was a virtual visit using Medeo.
- The patient's location (e.g. home, work, school, other).
- Any unusual occurrences (e.g. withdraw of consent, technical issues).
- If you had to modify an existing standard of practice because of the technology or if the technology interfered with the visit.

Registration

Patients scheduled for a virtual visit should be registered **by the provider site** using the **same process as an in-person appointment, with the appropriate telehealth registration code**.

This process is different than the usual telehealth registration. There is no registration at a receiving site since the patient is in a personal location.

9.0 Email Template to Patients

Hello [patient first name],

You have been scheduled for a virtual visit with [HCP - first name last name] on [date] at [time]. By now you should have received your appointment invitation by email.

If you have not received your emailed appointment yet, please check your spam folder first. If you still have not received the email, please contact our office at [phone number] or [email address] as soon as possible so we can ensure your appointment invitation is sent.

To help you prepare for your virtual visit and to ensure you receive the best care, please take a look at the attached **Virtual Visit Information Guide, Tips for Patients** and the **Quick Start Guide**.

[Closing Greeting],

[Sender Name and Contact Information]

(Insert Patient Evaluation Link if required)

After your appointment we invite you to participate in our [short online technical survey](#) about your virtual visit experience.

Virtual Visit

Information Guide



What is a virtual visit?

A virtual visit connects you with your health care provider through a private video appointment using a secure, web-based service. This service can be used on your computer, smart phone, or tablet to allow you to see, hear and talk with your health care provider from a personal location of your choice.

What do you need?

- ✓ Android/Apple(iOS) smartphone, tablet or computer (with webcam/microphone);
 - ✓ Free Medeo app (download from Google Play or Apple App Store) or Google Chrome browser, high-speed internet; and
 - ✓ WiFi or 4G LTE connection
- *IMPORTANT: You are responsible for any charges related to your internet data usage. If you are using data on a mobile device (instead of a wireless "Wi-Fi" connection) be aware that video streams can require significant data.*

What are the benefits of a virtual visit?

- Receive care in your own home, or a personal location of your choice.
- Access to some health care services that normally would not be available without travelling.
- Reduce the expense and stress of travelling for health care services.
- Family/friends can join you at your location to be part of the appointment.

What are possible risks of a virtual visit?

As with any technology, there is a potential risk for equipment failure. If this occurs, you and your health care provider will talk about other options, such as:

- Continuing the appointment by telephone;
- Rescheduling the virtual visit to a later date; or
- Scheduling an in-person appointment.

If you or your health care provider feel the virtual visit is not meeting your needs, the appointment can end and other arrangements will be made. At any time, you can choose not to have a virtual visit.

What about my Privacy?

Nova Scotia Health Authority is committed to protecting the privacy of your personal health information, in accordance with the [Personal Health Information Act](#). In rare instances, health and security protocols could fail, causing a breach of privacy of personal health information.

You are responsible to choose a private place for your virtual visit.

[Nova Scotia Health Authority Privacy Statement](#) [IWK Privacy Statement](#)

Virtual Visit Tips for Patients

Virtual visits are a convenient and easy way to meet with your health care provider from your home or a personal location of your choice.

Think about the best location for your virtual visit:

- 1 Privacy**
Will other people be able to hear your conversation?
Choose a space where you feel you can talk openly.
- 2 Noise**
Will there be any background noise or distractions?
Examples: Pets, TV/Radio, children, outdoor noise, etc.
- 3 Comfort**
Will you be comfortable in the same location for the entire appointment?
- 4 Surroundings**
Are there any personal items or clutter in the background?
Decorations/photos/furniture in the space behind you can be seen by your health care provider.

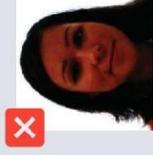


5 Lighting

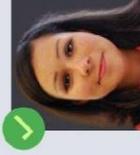
Have you considered the lighting in your room?

Too bright/too dark makes it hard for your health care provider to see you.

Have all lights and windows in front of you if possible.



Lighting behind you from windows or lights can create dark images and shadows.



Lighting in front of you provides a clearer image.

6 Reminders

Make sure the camera is positioned directly toward your face at eye-level (not angled up or down).

Make sure your speakers are working, the volume is turned up and the microphone is not too close to the speakers.

Using headphones may help improve audio quality.



Position of the camera is too high for eye contact.



Position of the camera is at same height as your eye for good eye contact.

Please Note: Your appointments will not be recorded and no pictures will be taken. If you wish to make a recording for your personal use, please discuss with your health care provider.

Quick Start Virtual Visit

What Do I Need?

Highspeed Internet/
WIFI Connection



or



4G LTE connection

IMPORTANT: you are responsible for any charges related to your mobile data usage. If you are using data on a mobile device (instead of a wireless "Wi-Fi" connection) be aware that video streams can require significant data.

Computer with
Google Chrome
(free download from
www.google.com/chrome)



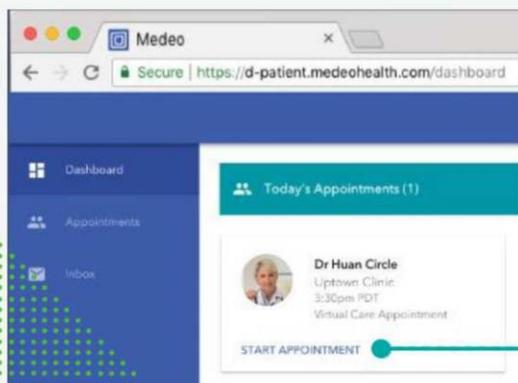
or



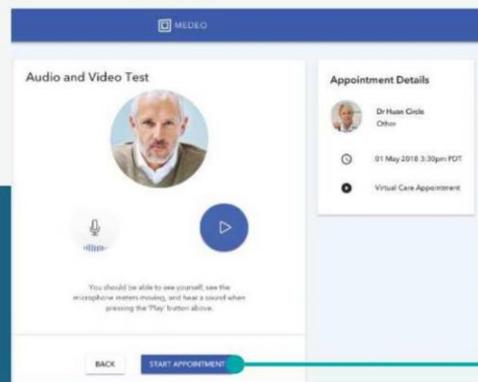
Android/Apple smart phone or tablet
with the free Medeo app (download
from Google Play or Apple App store)



How Do I Join My Appointment?



- 1 Sign in to your **Medeo** Account: <http://patient.medeohealth.com>
- 2 Once you are signed in, click **START APPOINTMENT**
- 3 Review your information and click **CONTINUE**
- 4 Complete the Audio and Video test and click **START APPOINTMENT**



Don't Forget...

Make sure the camera is
positioned directly toward
your face at eye-level



Place all lights in front
of you if possible



Remove personal items
or clutter you don't
want in the background



**Need
Help?**

Medeo Support and FAQ



13.0 Patient Experience Survey (optional)

We would appreciate you taking a few minutes to give us feedback on your virtual visit. Your responses will be used to help improve virtual care services in the NSHA and IWK. Thank you. [Link to Online Survey](#)

1. Did you have any problems using Medeo?

- Yes
- No

If yes, what was the problem(s)?

- Audio
- Video
- Could not connect to the appointment
- Other, please specify

2. Where did you get help to fix the problem?

- Medeo online support
- Family/friend
- I did it on my own
- Other, please specify

3. Where you able to fix the problem? Please explain.

- Yes
- No

Please explain.

4. If you used Medeo online support, please rate your experience.

- Very helpful
- Somewhat helpful
- Not helpful

If you rated your experience “not helpful”, please explain why.

5. How could we improve your experience using Medeo?

- Support by phone for technical issues
- Support by email for technical issues

Any additional comments.

14.0 Walkthrough Guide for HCPs

Initial Offer of Virtual Visits to Patient

- ✓ Provide the patient the option to attend their appointment virtually with no travel required.
- ✓ Explain that it will allow them to see, hear and talk on their device from a location of their choice and the HCP will be able to see, hear, and talk to them from their office.
- ✓ Explain the appointment would be done using a free, web-based program called Medeo.
- ✓ Ask if they have the technical requirements needed to use Medeo:
 - Android/Apple(iOS) smartphone, tablet or computer (with webcam/microphone);
 - Medeo app (download for free from Google Play or Apple App Store) or Google Chrome browser if using a computer; and
 - High-speed (stable) internet, WiFi or 4G LTE connection.
- ✓ If the patient does not have the technical requirements, they will not be able to do their appointment virtually. The patient should be redirected back to their care provider or offered another option.
- ✓ If the patient does have the technical requirements, ask if they are interested in attending their appointment this way.
- ✓ If the patient **is interested**:
 - Ask the patient for their email address;
 - Provide the patient with an appointment date and time;
 - Explain to the patient that they will receive two emails:
 - An email from the service area (HCP) that will include the Virtual Visit Information Guide (benefits, risks, privacy), Quick Start Guide (technical requirements) and Tips for Patients (room and camera setup); and
 - An email invitation from Medeo for their online appointment. Follow the instructions in the email - accept the appointment invitation, create a new account, and test their device.
- ✓ Ask the patient if they have any questions.

Create the Virtual Visit Appointment

- ✓ Login to Medeo and create the appointment/add the patient
- ✓ Send the Template Email (if this is the first time for this patient) and attach the three patient resources
 - Virtual Visit Information Guide (benefits, risks, privacy)
 - Quick Start Guide (technical requirements)
 - Tips for Patients (room and camera setup)
- ✓ Schedule the patient as per usual clinic processes

Join the Virtual Visit:

- ✓ Open Chrome and login into Medeo to join the conference with the patient
- ✓ Ask the patient if they can hear and see you.
- ✓ Patient identification – Ask the patient for their full name and date of birth.
- ✓ Ask the patient if they are in a private location.
- ✓ Ask the patient if there is anyone else in the room with them.
- ✓ Discuss options to reschedule if the technology fails and make a plan (e.g. phone call).
- ✓ Advise the patient that the appointment will not be recorded and no pictures will be taken by either the patient or the HCP.
 - Note: Patients have been asked in Tips for Patients to discuss with the HCP if they wish to record.
- ✓ Advise the patient that if the virtual visit does not meet their, or the HCP, needs this will be discussed and other arrangements will be made.
- ✓ Ask the patient if they have any questions.
- ✓ Ask the patient if they are comfortable and are ready to start the virtual visit.

End the Virtual Visit:

- ✓ Ask the patient how they felt about doing their appointment virtually.
- ✓ Ask the patient if they want to attend their next appointment (if required) virtually.
 - If the patient **is not interested**, they should be redirected back to their primary health care provider and offered another option.
 - If the patient **is interested**, advise them that they will receive a virtual visit email invitation for their online appointment.
- ✓ (Varies by service area) Remind the patient of the evaluation link at the bottom of the appointment email that was sent from you – the email with the 3 documents. Note it is optional to complete the (short) survey online at the end of their virtual visit and that their feedback is appreciated. If they do not have that email saved, send the survey link in a separate email after the visit.
- ✓ Thank the patient, say goodbye and leave the virtual visit.

Ensure patients are registered and all items are documented on the patient’s health record ([see section 8](#)).

More Information:

[CMPA – Telemedicine – Opportunities, Challenges and Obligations](#)