

Zoom for Healthcare

Guidelines for Health Care Providers

Zoom for Healthcare is a secure, web-based virtual care video conferencing platform that **connects patients to health care providers** (HCPs), as well as family and friends via a mobile device, tablet or computer, from any location with an internet connection.

Zoom for Healthcare has been approved by DHW, NSHA and IWK for use related to virtual care services provided by Primary Care, NSHA and IWK HCPs.

The following **guidelines** have been developed by NSHA IM/IT Virtual Care in collaboration with NSHA and IWK Privacy Offices, and NSHA IM/IT Primary Care to highlight key requirements related to the provision of virtual care using Zoom for Healthcare.

Non-NSHA/IWK Providers who are not delivering services on behalf of NSHA or IWK, are considered to be custodians of patients' personal health information and it is recommended they follow these guidelines.

HCPs conducting **clinical case conferences and consults** must follow the [Clinical Case Conferences - Zoom for Healthcare](#) guidelines.

Clinical Practice Guidelines and Policies

HCPs must be aware of [clinical practice guidelines](#) for their profession and are required to review any relevant policies and departmental or program guidelines, such as:

- [NSHA Virtual Care Policy](#)
- [NSHA Electronic Messaging Policy](#)
- [IWK Telepractice Policy](#)
- [IWK Consent to Treatment Policy](#)

Consent

HCPs are responsible to obtain **verbal consent to communicate via electronic messaging prior** to first contact. (NSHA requirement for written consent waived due to pandemic).

HCPs are responsible to obtain **verbal informed consent** from patients **each time** they receive care via Zoom for Healthcare. HCPs must:

- Send the **Patient Information Guide – Zoom for Healthcare** to patients in advance of their **first** appointment to allow them the opportunity to review.
- Allow patients to **ask questions** about the technology.
- Give patients the **option to not use the technology** at any time.

HCPs are responsible to ensure all **virtual appointment participants** (e.g. family, friends, interpreter, etc.) are identified and the patient provides **verbal consent to sharing of personal health information** (PHI) with all **present** in the virtual appointment.

HCPs providing [virtual group patient education](#) must follow the steps below to ensure patient are informed about the risks and benefits of virtual group patient education (no verbal consent is required).

- Display '[Introduction Slide- Zoom for Healthcare](#)' at the start of their session.
- Read '[Script for Providers – Zoom for Healthcare](#)' prior to beginning the session.

Privacy/Confidentiality

NSHA and IWK are committed to ensuring the privacy of Nova Scotians' personal health information (PHI) in accordance with the [Personal Health Information Act \(PHIA\)](#).

HCPs must ensure:

- each patient/virtual appointment/clinic has a unique Zoom for Healthcare Meeting ID and password which is not re-used for another patient/virtual appointment/clinic.
- the meeting ID/password/link is not shared inappropriately.
- the appropriate Zoom for Healthcare meeting settings are enabled/disabled as required (e.g. waiting room, password, join before host, etc...).
- no identifying PHI is contained in the meeting request/invitation.
- no recording programs/devices are used without the patient's verbal consent (NSHA requirement for written consent waived due to pandemic).
- NSHA/IWK devices provided to patients are cleared of any identifiable personal information from the previous patient/user (e.g. delete cached data, deactivate/reactivate the device, etc...).
- virtual appointments are conducted from a secure/private location (use a headset or earphones if possible).
- 'leave the call' and/or 'end meeting for all' to disconnect all participants following each virtual appointment.
- electronic devices are safeguarded for privacy/confidentiality.
 - **NSHA/IWK:** If you are delivering services on behalf of NSHA/IWK it is preferred that an NSHA/IWK corporate device is used for virtual care. However, if you cannot obtain a NSHA/IWK corporate device and must use a personal/non-NSHA/IWK device, **do not record and/or store patient PHI on your personal device.**
 - **Non-NSHA/IWK:** If you **are not** delivering services on behalf of NSHA/IWK and must store patients' PHI on a device (e.g. virtual care videoconference/teleconference, clinical notes, patient name in contact list, etc...) **you must safeguard the device:**
 - Ensure that the device can only be accessed using a complicated password, or a biometric identifier (e.g. fingerprint).
 - Do not share the device with another person, including a family member.
 - Lock the device when it is unattended.
 - Consider encrypting the device.

For more information related to privacy, visit the [Canadian Medical Protective Association \(CMPA\)](#) website and also view their [eCommunications infographic](#).

You can find additional resources on the [NSHA Privacy intranet page](#) and the [IWK Virtual Care Privacy page](#) on Pulse.

Patient Selection

A virtual appointment should be offered only to **appropriately selected patients** to ensure the needs of the patient are assessed in relation to the capacity of the HCP to meet those needs via a virtual appointment. The following patient selection **considerations** are intended to provide general direction for HCPs offering virtual appointment services. **Clinical judgement** must be used in determining whether a virtual appointment is the most appropriate method of care on an individual basis. (E.g. urgency, provider shortages, initial assessments or follow-ups, etc...)

- 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 appointment, the appropriate type and method for a subsequent appointment is determined collaboratively with the patient and other care team members. Ensure the patient understands who is responsible for ongoing care and next steps.

Patient Safety

- **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 if an immediate emergency response as needed.
- Enter all patient safety concerns related to Zoom for Healthcare, into **SIMS** under **'Care Management'** and select **'Telehealth'** as the **'Specific Event Type'**. (If you are not delivering care on behalf of NSHA/IWK, follow your incident investigation processes and inform virtual care and privacy of any incidents.)
- Consider establishing a **plan to provide in-person, non-emergency care** as needed (e.g. specific office hours, a coverage arrangements, a specific local clinic, etc...).

Patient Identification

HCPs are responsible to **verify the identity of patients** via the **two client identifier** before beginning a virtual appointment. HCPs should also ask the patient to show their **MSI card** or read the number off of the card at the start of the visit.

Registration

Outpatients receiving care via Zoom for Healthcare should be registered as needed by the **provider site** using the **same process as an in-person appointment**. Those with existing telehealth/virtual care registration codes may continue to use these.

Additional resources for NSHA are found in the Zoom for Healthcare orientation package: [NSHA Booking and Registration Guide](#), [Registration – Virtual Care Information for Physicians](#) and [Non-Physicians](#).

Documentation

HCPs are responsible to **ensure the following items are documented** in the patient's health record **in addition** to standardized documentation policy and procedures.

Outpatient:

- This was a virtual appointment using Zoom for Healthcare
- The patient's location (home, work place, etc.)
- Informed consent obtained
- Summarize any relevant communication via video or chat
- Identify all participants in attendance
- Any incidents that impacted the delivery of care
- Any significant technical issues

Acute Care:

Prior to using Zoom for Healthcare to communicate with the acute care patient, the following must be documented as part of the patient's health record:

- Zoom for Healthcare **Staff Checklist** reviewed
- **Informed consent** obtained

Any time Zoom for Healthcare video or chat is used to communicate with the acute care patient, the following should be documented:

- Communicated via Zoom for Healthcare
- Summarize any relevant communication via video or chat
- Identify all participants in attendance
- Any incidents that impacted the delivery of care
- Any significant technical issues

Infection Control

Follow infection control routines and device cleaning occur each time the devices is shared between individuals.

- [NSHA IPAC Electronic Device Guidelines](#)
- [IWK IPAC Guidelines](#)

Contact Us

If you have questions related to **privacy**, please contact Privacy@nshealth.ca or Privacy@iwk.nshealth.ca

If you have questions regarding **Zoom for Healthcare** or other virtual care platforms, please contact VirtualCare@nshealth.ca.