**SAMPLE Virtual Visits Policy**

**Sample Only**: The following is a sample only. It is **not** legal advice. You will have to adjust this sample to your organizational situation. It’s not perfect. You may want to use it as a temporary policy to allow your staff and patients to get into virtual visits ASAP. Note the grey shaded text below should probably remain in your policy as a heads up to future folks that (1) this is a temporary policy; (2) it was created in a pandemic; (3) it may need to be adjusted.

MARCH 2020: Due to the state of emergency in Ontario related to the COVID-19 pandemic, we have introduced virtual visits in order to follow the instructions from our local, provincial and federal public health authorities for social distancing. To provide virtual visits to patients, we may be using technology that we have not used before. We are still working through the details of how the systems work and the kinds of services we can deliver to patients safely. This policy and the consent form explain how we will work together with patients during this uncertain time. This policy is temporary for the purposes of managing the emergency.

**Eligible Types of Visits by our Clinicians**

The following clinicians are permitted to provide the following kinds of virtual visits:

<list types of clinicians and types of appointments>

We do not use virtual visits for any other kinds of visits including the following:

<list types of clinicians and types of appointments>

**Approved Technology**

We are now using the following technology:

<list technology such as …>

* Ontario Telehealth Network
* Zoom (for healthcare businesses) (with or without patient webcam)

Please do not use other technology or personal devices without asking your <role of who can override policy>.

**Documentation**

Ensure you are making appropriate notes and documentation of all visits held virtually as you would an in-person visit. Do not use any recording function for the virtual visit. Remind patients also not to record on their end. If you need to take a photograph or make a recording, you must have the individual patient’s permission and you will need to take precautions to properly document the recording in the usual electronic health information system or record.

**Working from Home**

Working from home creates additional challenges for clinical professionalism, boundaries and privacy. These are extraordinary times, but we need to do our best to meet good clinical standards.

1. Devices

Please use one of our computers issued to you. If you have to you a personal device, please speak with your supervisor first. If using portable storage devices, such as USBs and portable hard drives, if possible, ensure they are encrypted and password protected.

1. Private Space

Extra care is necessary to ensure family members or others with whom you are sharing space cannot see or overhear your virtuals visits.

1. Technology

* Do not post publicly your meeting ID, Room ID or other consultation identifiers (such as on websites or social media posts)
* Do not use public wifi
* Use our virtual private network to remote into our office computer system
* Do not download personal health information records on your own personal device
* Password protect your device
* Lock your computer when it is not in use by you
* Do not share your passwords
* Have a different password personally and prefessionally
* If possible, use work email accounts rather than personal ones for work-related emails involving personal data
* Before sending an email, check that you’re sending it to the correct recipient, particularly for emails involving personal data
* Do not click on anything strange or weird emails. Especially related to “invoices” or “change your password”. These are likely hacking attempt emails.
* Keep your software up-to-date

1. Paper
   * Only remove personal information from the office if it is necessary to carry out your job duties
   * Avoid printing documents with personal health information at home
   * Do not leave paper that has personal health information on it available to anyone else in your home
   * When not working, keep all paper for work in a bag, locked room or some other secure place and do not leave files in your car
   * Securely destroy all paper records with personal health information (bring to office)

Note: merely removing someone’s name from a record does not necessarily anonymize the record

1. Blocking your personal/home number
   * If you are using a personal phone (landline or mobile) ask your telecom provider or check their website how you can block your number when using it for virtual visits
2. Consultation and Debriefing
   * Clinicians are reminded you can still contact colleagues to consult or debrief remotely to reflect how we would normally support each other

Do your best to protect privacy. We have heard there have been attempts at cyberattacks during the pandemic. If you suspect your records or a virtual visit has been compromised, let <role> know immediately.

**Notice to Participating Patients**

Please use the following script called the “Virtual Clinical Visit Consent” to explain to patients what a virtual visit is and is not and ask them to verbally agree to the terms (offer them the link on the website to the form or offer to email them a written copy of the script if they would like one).

**Virtual Clinical Visit Consent– Script To be Read to Patients**

Before we book a virtual visit, I need to explain a few things. Virtual visits are new to us because of the state of emergency.

Description

* We use video and audio technology so we can see and hear each other
* We recommend you be in a quiet place for your virtual visit so that others cannot overhear the session (unless you want to include others in your visit – please tell us who is with you)
* You will be asked for details of what is happening and your health history – these questions may be very personal and sensitive
* Details of your virtual visit will be recorded in your health record just like in an in-person visit
* We will not make a recording of the virtual visit. We ask that you not record the visit either.
* We may ask to take photographs if necessary to treat you – we will tell you before we take any photograph

Limits

* Virtual visits are not appropriate for emergencies – please call 9-1-1
* We may not be able to have a virtual visit with you if we need to touch you as part of the examination
* Time may be limited based on the availability of our staff during the pandemic
* This service may not be available after the pandemic – we may need to end it at any time

Privacy

* We have taken appropriate steps to preserve your privacy based on this emergency situation
* However, we cannot provide you with the same guarantee of security and confidentiality as if you were seen in person
* Our staff who are doing the virtual visit may be working from home because of the pandemic – they will also try to find a quiet place away from others in their household

Risks

* It is possible there could be a problem with the technology and your session could be cut short or interrupted
* The quality of the video or audio may not be good enough for a health care provider to assist you virtually or could negatively impact the quality of the care you receive

A copy of this information is available on our website or I could email it to you.

Do you have any questions?

Are you happy for me to book you a virtual visit based on those limits and risks? (NOTE TO STAFF: Record consent in the chart)