

# Patient Agreement (Consent) to Participate in Virtual Visits

## What Clinicians Need to Know

### Process for Virtual Care

#### What Information should be Provided to Patients about Virtual Care?

Virtual Care uses telephone, video, email, or messaging technology to provide clinical care. When offering a virtual visit (e.g., telephone or video), patients should be informed prior to the visit, about:

- The benefits and limitations of virtual visits;
- How to prepare for a virtual visit, and;
- That they can request in-person alternatives.

Virtual visit information can be provided to patients by any member of the healthcare team using a variety of supports (e.g., verbal, handout, email, mail). *Refer to the Virtual Health patient resource: [Learn about Virtual Visits for Healthcare](#).*

#### What do I Need to Obtain from the Patient?

##### Verbal Agreement to Proceed with the Virtual Visit using Technology

A patient's verbal agreement to the use of technology must be obtained to proceed with a virtual visit. This should be confirmed by the healthcare provider, at the time of the visit, who will be responsible for conducting and documenting the visit.

- It is not necessary to obtain verbal agreement for subsequent encounters in the same episode of care. This should be re-evaluated if there is a significant change in clinical or logistical circumstances. In all cases, healthcare providers should adhere to requirements of their professional college or regulatory body.

##### Confirm Patient Identity

At the beginning of the virtual visit, the identity of the patient must be validated using two or more patient identifiers, as per the [AHS Patient Identification Policy, PS-06](#).

#### What Should I Document?

Documentation of the virtual visit within the patient's clinical record should include the following:

- The patient was provided with information about virtual care and a virtual visit was offered;
- Verbal agreement to the virtual visit was obtained from the patient;
- The patient verified his/her identity at the beginning of the virtual visit using (provide patient identifiers utilized);
- OR;
- The patient was offered or began a virtual visit and subsequently refused the virtual visit and an alternate method of care was arranged.

NOTE: AHS and professional regulatory bodies have policies and published standards about informed consent to healthcare interventions that must be adhered to, independent of the mode of encounter. Virtual healthcare decision-making is not exempt from the [AHS Consent to Treatment/Procedure\(s\) Policy, PRR-01](#).

### Script for Clinician Communication with Patients

This sample script may be customized to facilitate conversations with patients or their proxies.

#### Pre-appointment

*A virtual visit to the (CLINIC NAME) clinic with (CLINICIAN NAME) has been arranged for you on (VISIT DATE/TIME).*

*I would like to share some information with you about virtual visits (provide verbally or share resource with patient).*

*Do you have any questions about this information? Would you like to proceed with the planned virtual visit?*

*If you have questions about your visit, please contact [CLINIC NAME] via [CONTACT].*

#### Start of Appointment

*Hello, my name is (CLINICIAN NAME, ROLE, and PURPOSE).*

*Can you please confirm your identity by providing me with (REQUEST 2 PATIENT IDENTIFIERS)?*

*Do you have any questions about the information you received regarding attending a virtual visit?*

*Would you like to proceed with the virtual visit today?*

*If at any time you wish to end this virtual visit, please let me know and I will arrange an alternate appointment type for us to meet at another time.*

*We are scheduled to meet today to (PROVIDE NATURE OF THE VISIT & INITIATE VISIT).*

#### Documentation

*(PATIENT NAME) was provided with information about virtual care and was offered a virtual visit using (TYPE OF TECHNOLOGY USED). (PATIENT NAME) accepted the virtual visit.*

*(HEALTHCARE PROVIDER NAME) verified (PATIENT NAME) identity at the beginning of the virtual visit, using (INDICATE TWO IDENTIFIERS UTILIZED).*