Contents

Why Use Virtual Care and Zoom?

AHS Virtual Health, enables clinicians to deliver health services, expertise and information in real time *over distance*, improving access and eliminating barriers to patient care across Alberta and beyond. Our goal is to support quality virtual care - anytime, anywhere.

AHS has initiated an agreement for an Enterprise version of Zoom videoconferencing. Zoom software allows providers flexibility to connect with patients virtually, such as in the home, on **any device that meets minimum hardware and software requirements.** AHS Zoom encryption meets AHS security standards. It is different from the public (free) version of Zoom, which should not be used to book AHS virtual clinical appointments.

This kit combines resources from Virtual Health, Connect Care, and Zoom. As information evolves, this kit will be updated. Physicians may also use the Connect Care Physician Manual – Virtual Care.

Your AHS Zoom Account

Accessing your AHS Zoom Account

Activate your account here: https://albertahealthservices.zoom.us. For additional detail to launch your account, refer to Access your Account resource on the Virtual Health Insite page or Virtual Health External webpage.

Use your formal email address as is listed in the AHS Active Directory, such as first.lastname@albertahealthservices.ca (not abbreviated).

Basic Account Features

- Host up to 200 participants
- Unlimited 1 to 1 meetings
- 40 minute limit on meetings with more than 2 people

- High Definition video (720p) and voice
- Screen sharing
- Join by telephone call-in
- Health-grade encryption

Advanced Account

AHS has advanced licenses that are available at a cost to the organization. Additional approval is required. In addition to the basic account features, the advanced license has:

- No time limit for meetings with more than 2 people

- The ability to book on behalf of another person (*Scheduling Privilege*)

To request an advanced account review the *Advanced Account Provision – Clinical Care Guiding Principles* and complete the *Advanced License Request Form* both located on the Virtual Health Insite page or available by contacting AHS Virtual Health. To view a list of additional advanced account features visit the Zoom Support Page. If any questions or assistance contact VirtualHealth.Info@albertahealthservices.ca.

Considerations for Virtual Visits for Patient Care

Zoom Algorithm Using An AHS Basic Account: Single Provider to Patient Consultations
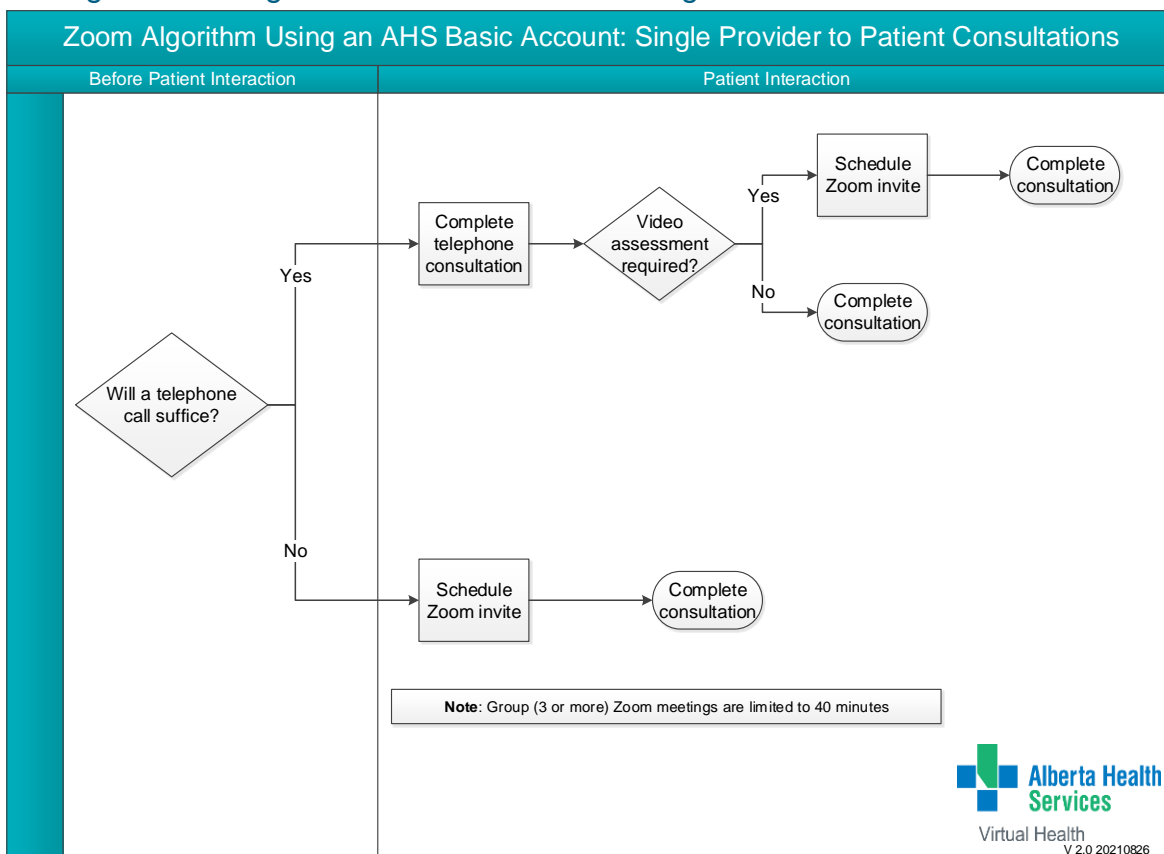
Screening of Patients for Zoom

If video is required for the appointment, and the patient agrees to meet virtually, review the *AHS Virtual Health Zoom Screening Tool*, available on the Virtual Health Insite page or by contacting AHS Virtual Health. This document includes technical requirements and clinical considerations to support the visit.

Schedule and Join a Zoom Appointment

Review **important** privacy information and instructions to book meetings and safely distribute AHS Zoom meeting details in the *Schedule or Join a Zoom Meeting* document on the Virtual Health Insite page or Virtual Health external webpage. Virtual visits are to be registered / scheduled within the clinical record of care (e.g., Connect Care, Sunrise Clinical manager, paper chart).

Clinician Guidelines

Privacy and Confidentiality

- By using the AHS Enterprise Zoom account, calls are private and secure.
- Clinical sessions should be held in a confidential and private setting (e.g., with a door that closes).
- Do not activate video sharing immediately when joining the meeting; instead, turn on at the point of business or clinical need (e.g., for wound observation) and only for as long as needed.
- In the event of screen sharing, ensure all non-related patient records, programs and files are closed prior to initiating call; ensure all alerts disabled or applications that could have confidential content or pop-ups (e.g., Outlook) are closed.
- **Best Practices**: To prevent unwanted screen-sharing, select ⌃ beside **Share Screen** and under **Who Can Share** set to **Only Host**. Additionally, reduce computer screen resolutions (e.g., 1280*800 or less) when screen-sharing to optimize viewing and bandwidth.
- Disable virtual background unless it is required for therapeutic purposes
  - For therapeutic use (e.g., a solid colored background may decrease visual clutter, a green screen with house image to play hide and seek for pediatric patient engagement): consider benefits and risks prior, discuss same with the patient, and obtain patient verbal agreement to use a background. Start it after the patient has joined and can see the actual back ground first.
- When requesting patients to register for a Zoom appointment, please limit collection of identifiable health information to their first name, last name, and/or email address. This complies with AHS Zoom privacy requirements.
- Clinicians are to introduce themselves by Name, Occupation and Department (NOD).
- Verify patient identity using approved Patient Identifiers. Refer to the *AHS Patient Identification Policy and the Virtual Health Provider & Patient Identity Verification* recommendation on Virtual Health Insite page or Virtual Health external webpage.
- 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 Health Care Provider (who will be responsible for conducting and documenting the visit) at the time of the visit, to ensure the patient still agrees.
- Patient/family members and anyone else present should be introduced.
- Information collected by AHS staff for the purposes of treatment and care during the appointment will be kept confidential, as guided by Alberta's *Health Information Act*.

Key Resources:
- Refer to *Virtual Health Recommendations* on Virtual Health Insite page and Virtual Health external webpage

- *Connect Care Physician Manual – Virtual Care*: https://manual.connect-care.ca/Communications/virtual-care

Patient Agreement (Consent)

When offering a virtual visit (e.g., telephone or video), patients should be informed by any member of the healthcare team prior to the visit about the benefits and limitations of virtual visits and how to prepare for the visit. A patient's verbal agreement to the use of technology must be obtained to proceed with a virtual visit and confirmed by the healthcare provider at the time of the visit. The patient's voluntary acceptance or refusal to attend a Virtual Health appointment is to be documented in the patient's Health Record. If the virtual appointment will include a treatment or procedure, informed consent must be obtained by the patient as per AHS policy.

Key Resource:
- *Patient Agreement (Consent) to Participate in Virtual Visits What Clinicians Need to Know* on Virtual Health Insite page and Virtual Health external webpage
- AHS Policy PRR-01 Consent to Treatment/Procedure(s)

Downtime

Downtime procedures are used in the event of technical difficulties when a patient and clinician are unable to connect. Clinical programs should develop their own individualized downtime procedures that can be shared with clinicians and patients prior to their appointment. Example downtime procedures are listed below and may be customized based on the needs of the clinical program.

Example downtime procedures:
- Clinician and/or patient to follow troubleshooting tips located in the Zoom Support Kit for Clinicians or the Zoom Patient Support Kit.
- If unable to connect, revert to phone call (e.g., after 5-10 minutes of troubleshooting) or reschedule encounter for another time (virtually or in-person)
- It is important for patients to have a contact number for the clinic on the day of the session in the event of technical issues and patients are required to contact the clinic.

Recording

Recordings of virtual visits are only appropriate if there is a specific purpose for the recording (e.g., to monitor and document treatment progress, student supervision, staff education, special projects, or quality assurance). Be advised, a patient might record sessions using other technologies. For more information review *Recording Virtual Visits by AHS Health Care Providers* located on the Virtual Health Insite page or Virtual Health external webpage.

Clinical Documentation

- Document the patient's verbal agreement to meet virtually and method used (e.g., Zoom, Skype)
- Document the virtual visit in the patient's health record (e.g., Connect Care, SCM, paper chart), in accordance with AHS Clinical Documentation Process Directive #1173-01
- Physicians may refer to *Connect Care Physician Manual – Documentation Norms***:** https://manual.connect-care.ca/norms/Documentation-Norms

Clinician Support

- *Connect Care Physician Manual – Virtual Care***:** https://manual.connect-care.ca/Communications/virtual-care
- *Infection Prevention & Control Best Practice Recommendations Bedside Computers and Electronic Devices* https://www.albertahealthservices.ca/assets/healthinfo/ipc/if-hp-ipc-cleaning-disinfection-info.pdf
- *Infection Protection and Control in the Virtual Care Environment:* https://www.albertahealthservices.ca/assets/info/ppih/if-ppih-covid-19-vh-ipc-in-virtual-care.pdf
- Ensure you have a **reliable internet network connection** (600kbps for high quality video, and 1.2 Mbps for high definition video – *these vary slightly higher for group calling*)
- **Minimum system requirements**: https://support.zoom.us/hc/en-us/articles/201362023-System-requirements-for-Windows-macOS-and-Linux
- **Minimum mobile device and tablet requirements**: https://support.zoom.us/hc/en-us/articles/201179966-System-requirements-for-iOS-iPadOS-and-Android

Troubleshooting

- **Audio is not working on mobile device**: https://support.zoom.us/hc/en-us/articles/204484835-My-audio-is-not-working-on-iOS-or-Android
- **Echo caused by participant** connected to the appointment audio on multiple devices, or two participants joined in from the same locale. More information: https://support.zoom.us/hc/en-us/articles/202050538-Audio-Echo-In-A-Meeting
- **Video camera not working**: https://support.zoom.us/hc/en-us/articles/202952568-My-video-camera-isn-t-working
- For questions about Zoom for corporate, educational, non-clinical use, or for non-urgent AHS technical support, contact AHS Zoom.
- For clinical workflow support using Zoom, contact Virtual Health.

Please note AHS Virtual Health frequently reviews and updates documents. To ensure you are using the most current version, please download directly from the Virtual Health internal or external webpage at the time of use.