TELUS PS Suite EMR Guide: Virtual Care

Introduction

The purpose of this document is to provide some quick and easy steps in using your PS Suite EMR to provide virtual care.

Virtual Care Tool Set

TELUS Health has created an integrated set of tools for virtual care for PS Suite. Please visit the virtual visit and patient portal pages of the TELUS Health website.

The full set of tools that assist virtual care in PS Suite are:

- Automated appointment reminders
- Digital patient forms
- EMR access on the go
- Online appointment booking
- Patient check-in kiosk
- Patient portal
- Clinic-to-clinic communications
- Wait room management
- TELUS EMR virtual visit

See https://www.telus.com/en/health/health-professionals/clinics/emr-add-ons for more information or contact your TELUS PS Suite client services representative.

Note: the TELUS PIA amendment for the virtual care tools has not yet been accepted by the OIPC.

Selecting Virtual Care Delivery Method

Before using this guide, it is suggested that you review the Select the optimal care delivery method for patient needs tool. This tool will help you ensure that your clinic has the appropriate safeguards, processes, and tools in place to deliver virtual care

Patient Consent

1. Verbal consent documented in the patient's chart is fine as a minimum. However, CMPA recommends the use of a signed informed consent form. This will allow the clinic to provide virtual care without needing to obtain consent for every virtual appointment. See the Informed Consent and Documenting Consent section of this document for more information.

2. Consider flagging paneled patients who have not yet signed a consent form in the EMR so the clinic team can quickly see patients who need to sign the form when they come to the clinic. Consider flagging patients who are not comfortable with virtual visits and/or e-messaging so your whole clinic team is aware.
Flagging could be done using a stamp in the patient's chart. See the Virtual Visit Stamp Template section of this document for more information.
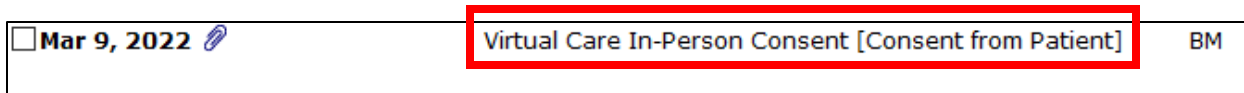
Informed Consent and Documenting Consent

Patients need to be informed of what virtual care services are being provided and how they will be communicated (via clinic or provider email address, text message, invite via application, etc.). Verbal consent documented in the patient's chart is fine as a minimum. CMPA recommends the use of a signed informed consent form.

Principles:

- Clinic team members and providers should all be aware of the common clinic process is for informing patients and documenting consent.
- Where consent is documented in the EMR should be consistent, so all clinic team members know where to find the information. Consent needs to be documented once, not for every encounter.
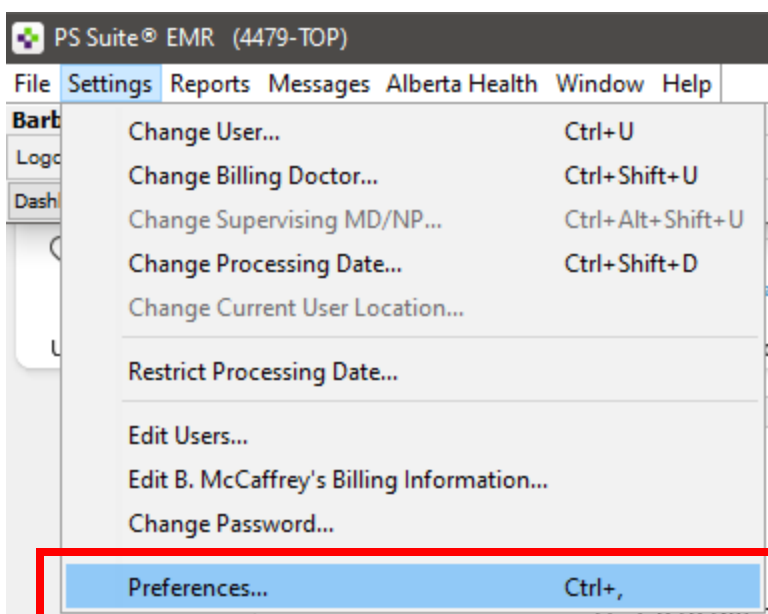
1) Electronic Consent Form

TELUS PS Suite has a built-in Virtual Care Consent Form that covers both in person and verbal consents. The form can be printed out for patients to fill out and scanned into their chart as a report. When adding the document to patient charts, ensure that your clinic uses a consistent report category and subcategory (e.g., 'Virtual Care In-Person Consent [Consent from Patient]').

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The clinic EMR administrator can create a new report subcategory by going to:

a) 'Settings' → 'Preferences...'

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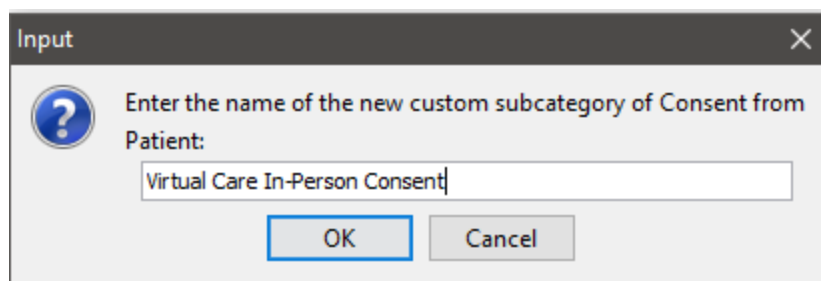
b) In the new window that pops up, click 'Report Categorization' → 'Category Management' tab → Select the PS Category to which you want to add a subcategory → Click 'Add'
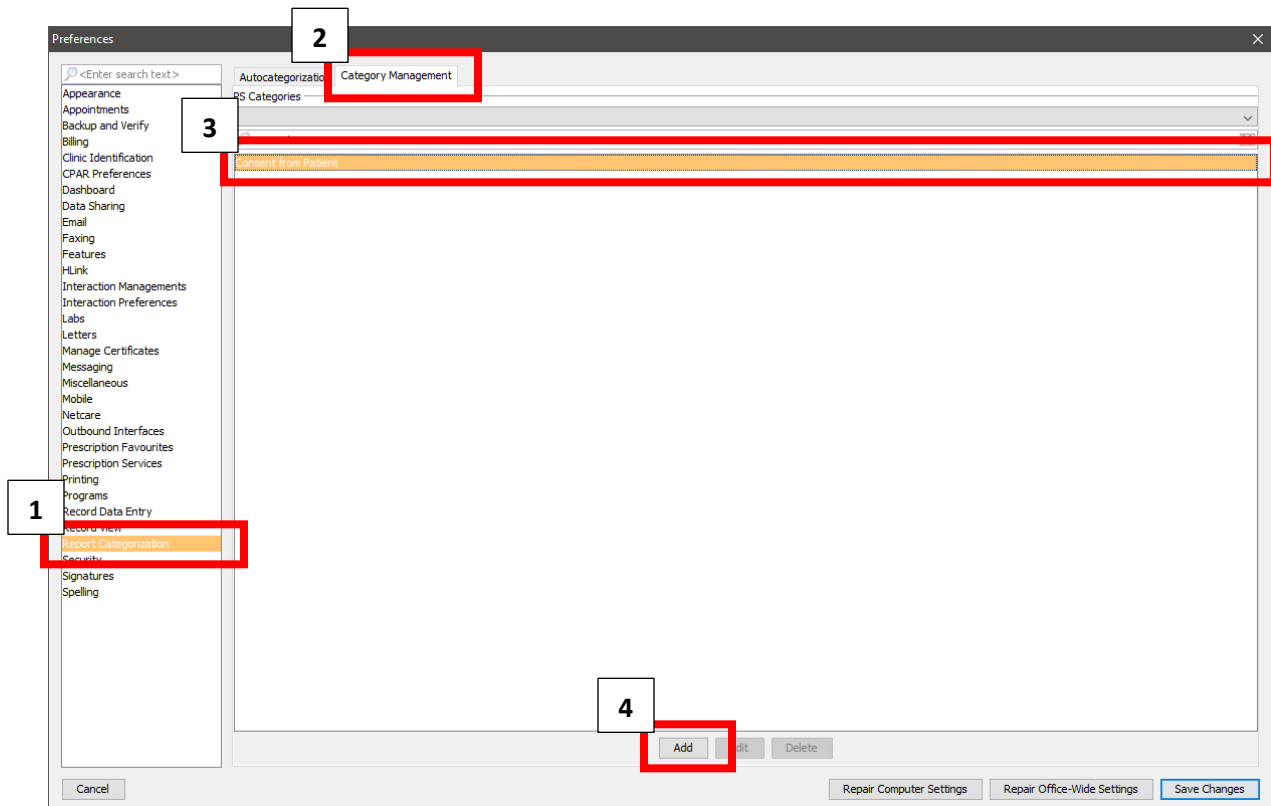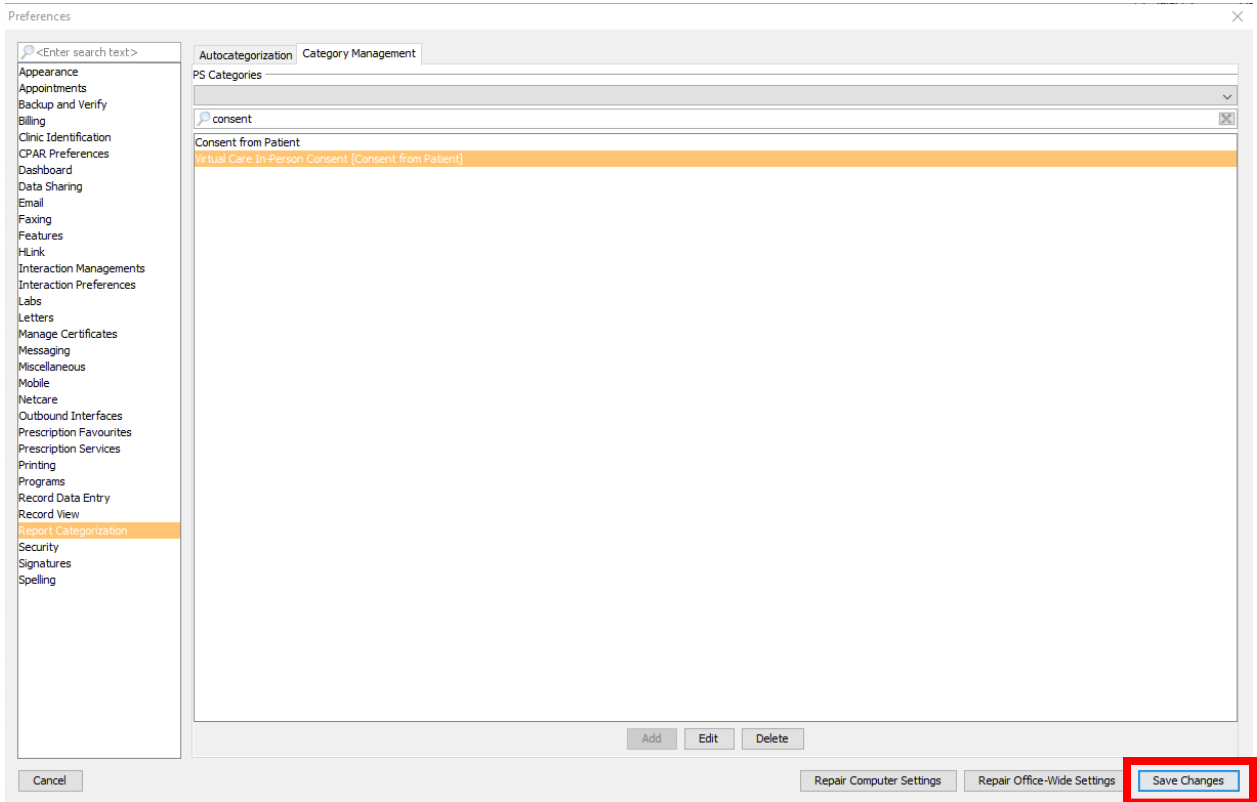

c) Type the name of the subcategory in the new window that opens → Click 'OK'

d) The new subcategory will appear in the PS Categories list as 'Subcategory [Report Category]'

e) Click 'Save Changes'

Note: if your EMR does not have the Virtual Consent custom form:

a) Go to the PS Suite Custom Forms Library → Open the 'Alberta Forms' section → Scroll down until you see the 'COVID-19 - Virtual Care Consent - March2020' form → Click 'Download'
b) See the Importing Custom Forms PS Suite online help file for instructions on how to upload the downloaded form into your EMR.

2) Verbal

For patients booking a virtual visit over the phone and without a signed consent form, the clinic may document consent verbally and use one of the following methods to document:
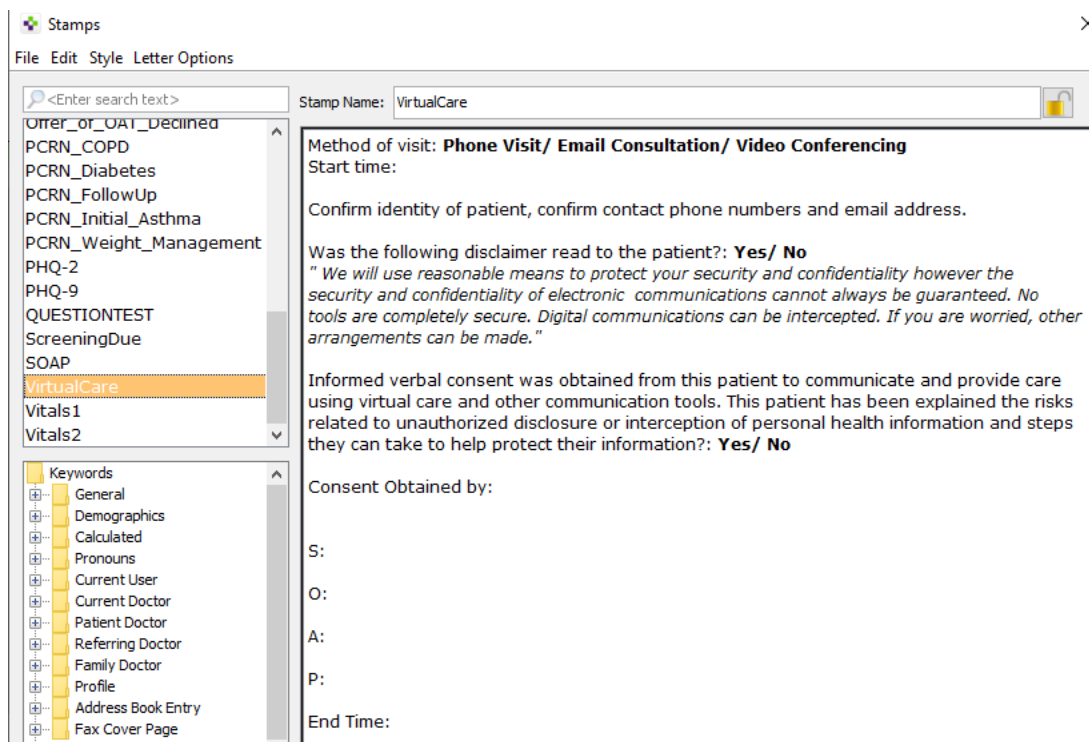
i. **Custom Form** – use PS Suite's built-in Virtual Care Consent custom form that covers both in person and verbal consents. The form can be printed out for patients to fill out and scanned into their chart as a report. When adding the document to patient charts, ensure that your clinic uses a consistent report category and subcategory (e.g., 'Virtual Care Verbal Consent [Consent from Patient]')

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ii. **Stamp** - Stamps are very versatile and powerful tools for use with your progress notes. They enable any team member to quickly enter a formatted block of text, using special characters as shortcuts for quick data entry. They save time by entering blocks of repetitive text, and ensure that data is uniformly formatted, even with multiple users, which makes searching for data much easier.

In addition, stamps can serve as a mnemonic device and can remind you to enter patient data. You can create your own stamps, edit those that are included with the system, or import stamps from other physicians who use PS Suite EMR. For more information, see Creating and Editing Stamps or Importing and Exporting Stamps.

Below is an example of a stamp that includes verbal consent and the SOAP note layout.

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Or simply the informed consent itself.
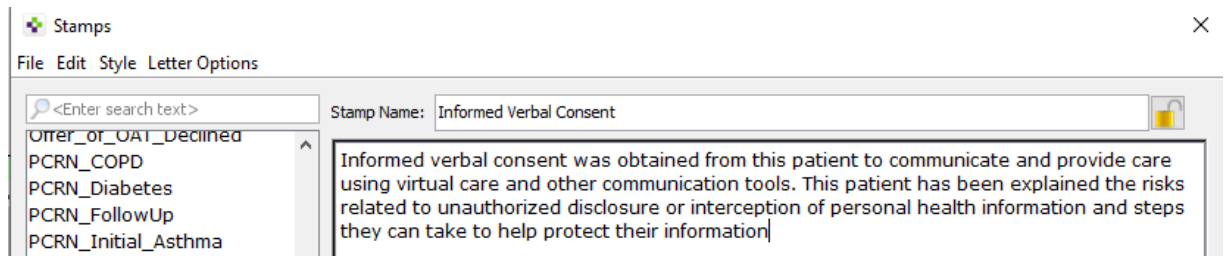
3) Paper form

Clinics may choose to download and print the virtual care consent form available from the CMPA here. Once signed, the paper form can be scanned and attached to a note in the patient's chart.

Always ensure that forms are scanned into the EMR using a standardized terminology such as "Virtual Care In-Person Consent [Consent from Patient]". This will enable searches and ease of finding this document if required.

Virtual Visit Stamp Template

The PS Suite EMR does not have a standard way of documenting virtual visits. As an alternative, consider creating a stamp that allows you to easily document visit start time, visit finish time and patient verbal consent.

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Start time:

Confirm identity of patient, confirm contact phone numbers and email address.

Was the following disclaimer read to the patient?: **Yes/ No**
" We will use reasonable means to protect your security and confidentiality however the security and confidentiality of electronic communications cannot always be guaranteed. No tools are completely secure. Digital communications can be intercepted. If you are worried, other arrangements can be made."

Informed verbal consent was obtained from this patient to communicate and provide care using virtual care and other communication tools. This patient has been explained the risks related to unauthorized disclosure or interception of personal health information and steps they can take to help protect their information?: **Yes/ No**

Consent Obtained by:

S:

O:

A:

P:

End Time:

For more information about creating and inserting stamps, see the [Creating and Editing Stamps](#) and [Inserting a Regular Stamp](#) PS Suite EMR online help files.

Record Patient Contact Start and Stop Times

Recording visit start and finish times is required for all types of virtual visits. It is recommended that you use a stamp with fields to record both times.

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Informed verbal consent was obtained from this patient to communicate and provide care using virtual care and other communication tools. This patient has been explained the risks related to unauthorized disclosure or interception of personal health information and steps they can take to help protect their information?: **Yes/ No**

Consent Obtained by:

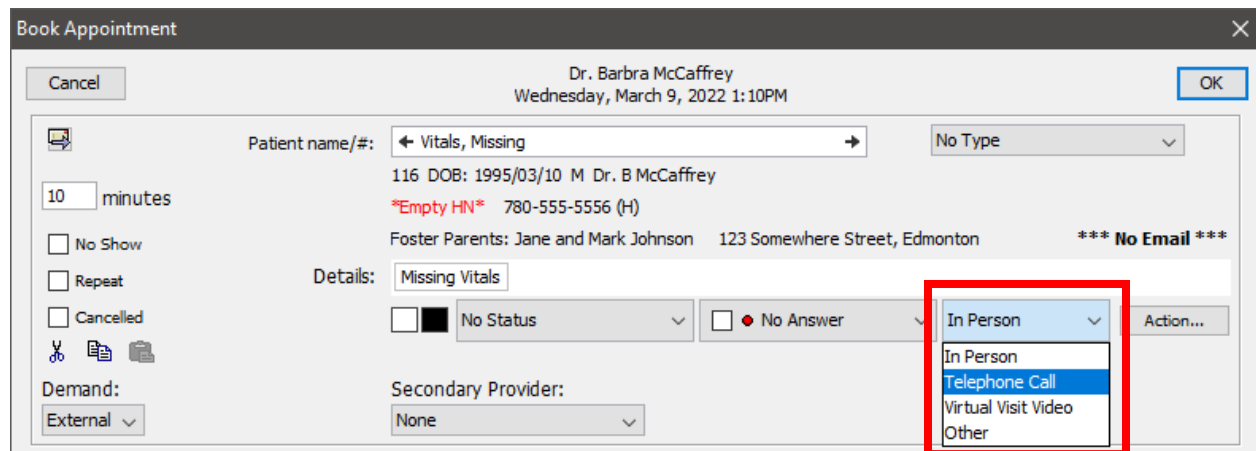
S:

O:

A:

P:

End Time:

Other Features That Can Assist in Efficiency and Virtual Care

1) Up to Date Patient Demographics

It is important to have standard front office procedures for keeping the patient e-mail and cell phone number up to date in the 'Patients' demographics window if using appointment reminders and confirmations as well as the patient portal.

2) Record the Type of Appointment

When booking appointments, ensure that you specify the type of virtual appointment using the 'In Person' drop-down menu.

Acknowledgement

The AMA would like to acknowledge the members of the PS Suite EMR Network co-design team including members from the Edmonton Southside PCN as well as TELUS.

References

Alberta Medical Association: Virtual Care
https://www.albertadoctors.org/leaders-partners/ehealth/virtual-care

Guide to Select the optimal care delivery method to meet patient needs
https://actt.albertadoctors.org/file/3.2_Primary_Guide.pdf

College of Physicians and Surgeons of Alberta, Virtual Care, Standard of Practice
https://cpsa.ca/physicians/standards-of-practice/virtual-care/

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