

# TELUS Wolf EMR Guide- Virtual Care

## Introduction

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

## Virtual Care Tool Set

TELUS Health has created an integrated set of tools for virtual care for Wolf. Please visit the [virtual visit](#) and [patient portal](#) pages of the TELUS Health website.

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

- Automated appointment reminders
- EMR access on the go
- Online appointment booking
- 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 Wolf 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 an Exam Template field or macro in the SOAP notes section of a patient encounter. See the [User Tips in a Virtual Visit](#) 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:

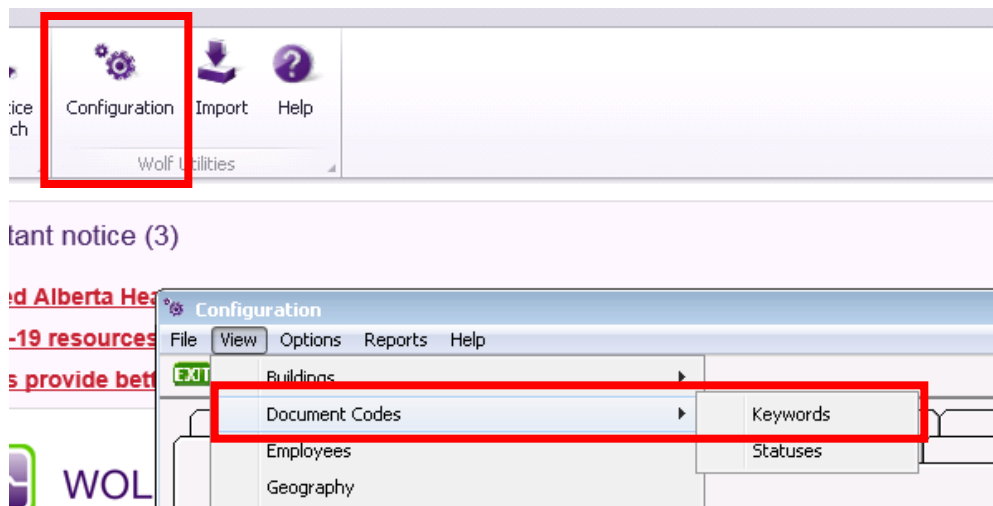
- Clinic team members and providers should all be aware of the common clinic process is for informing patients and documenting consent.
- Where consent is documented in the EMR should be consistent, so all clinic team members know where to find the information. Consent needs to be documented once, not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

### 1) Scanned Document

The Wolf EMR does not have a SMART form for obtaining signed patient consent. As an alternative, it is suggested that you download a [Word](#) or [PDF](#) copy of the CPSA’s patient consent form and save it in the EMR as a SMART form. The form can be printed out for patients to fill out and scanned into their chart as a document. When adding the document to patient charts, ensure that your clinic uses a consistent keyword such as “Virtual Care Consent”.

Date	Status	Document Type	Ordered By	Keyword One	Keyword Two	Keyword Three	Content Type
03-Apr-2020	Physician			Virtual Care Consent			
18-Feb-2020	Physician	Assessment		WPS Screening Questionnaire			

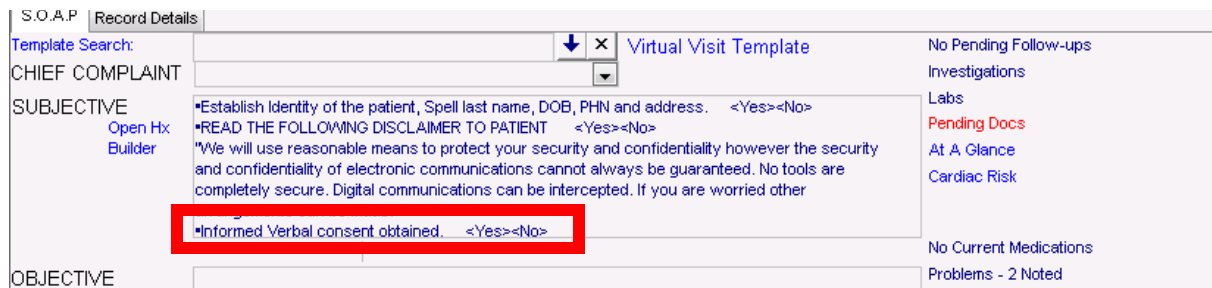
The clinic EMR administrator can create a new document keyword by opening the ‘Configuration’ window → View → Document Codes → Keywords



## 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. **Macro** – use a macro to document in a place where all providers and team know where it is located. See the [Set Up Macros to Streamline Entry of Common Phrases](#) section of this document for more information.
- ii. **Virtual Visit SOAP Template** - Consider using the SOAP Template Manager to build macros in the Subjective field of the patient visit to record that patient consent was obtained. See the [Managing SOAP Templates](#) Wolf EMR online help file for more information.

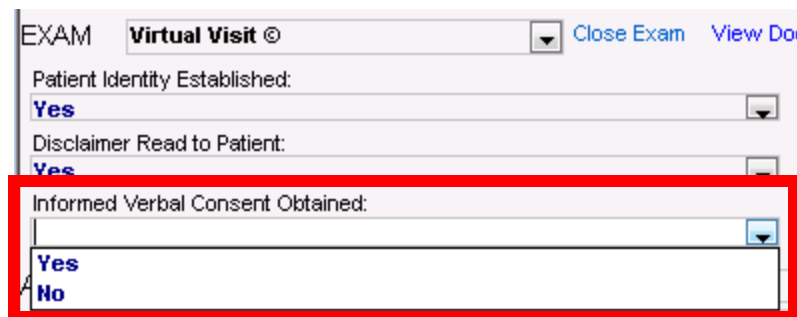


The screenshot shows the 'S.O.A.P Record Details' window for a 'Virtual Visit Template'. The 'SUBJECTIVE' field contains the following text:
 

- Establish Identity of the patient, Spell last name, DOB, PHN and address. <Yes><No>
- READ THE FOLLOWING DISCLAIMER TO 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
- Informed Verbal consent obtained. <Yes><No>** (highlighted with a red box)

 On the right side of the window, there are several status indicators: 'No Pending Follow-ups', 'Investigations', 'Labs', 'Pending Docs', 'At A Glance', 'Cardiac Risk', 'No Current Medications', and 'Problems - 2 Noted'.

- iii. **Virtual Visit Exam Template** - A custom virtual visit exam template can be created that makes it easy to document verbal patient consent. See the [Customizing Structured Exam Templates](#) Wolf EMR online help file for more information.



The screenshot shows the 'EXAM Virtual Visit ©' window. It contains three dropdown menus:
 

- 'Patient Identity Established:' with 'Yes' selected.
- 'Disclaimer Read to Patient:' with 'Yes' selected.
- 'Informed Verbal Consent Obtained:'** (highlighted with a red box) with 'Yes' selected.

 The 'Close Exam' and 'View Doc' buttons are visible at the top right.

## Virtual Visit SOAP Template

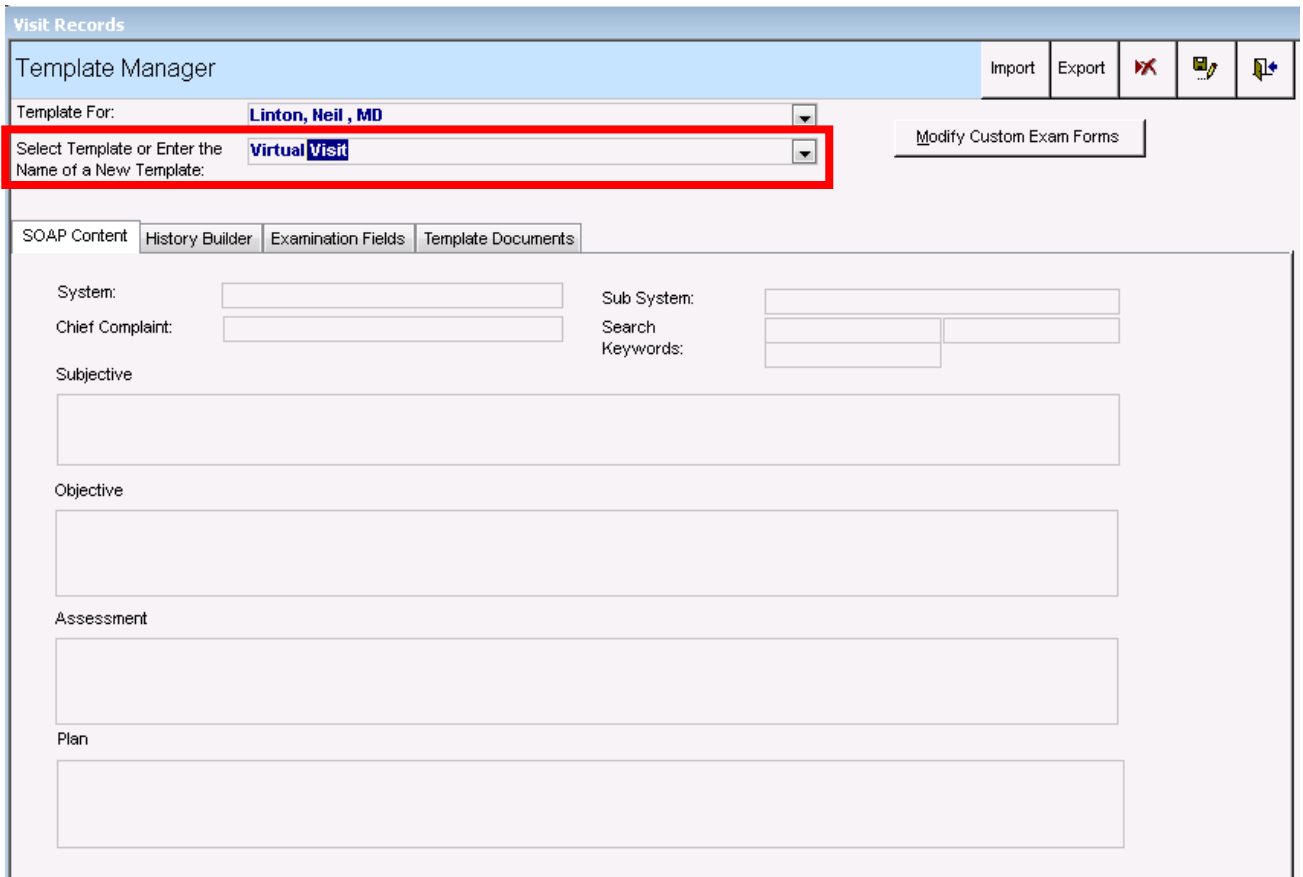
The Wolf EMR does not have a standard way of documenting virtual visits. As an alternative, consider creating a virtual visit SOAP template that allows you to easily:

- 1) [Link Frequently Used SMART Forms, Documents and Weblinks to a SOAP Template](#)
- 2) [Record Frequently Used Phrases in a SOAP Template](#)

### 1) Link Frequently Used SMART Forms, Documents and Weblinks to a SOAP Template

This feature allows you to save time by linking SMART forms and weblinks to a SOAP template. As a clinic is adapting to new virtual care office processes, any SMART form or weblink that a user finds themselves using twice or more per day for virtual visits should be saved as a template document attached to their Virtual Care SOAP template. To attach a template document:

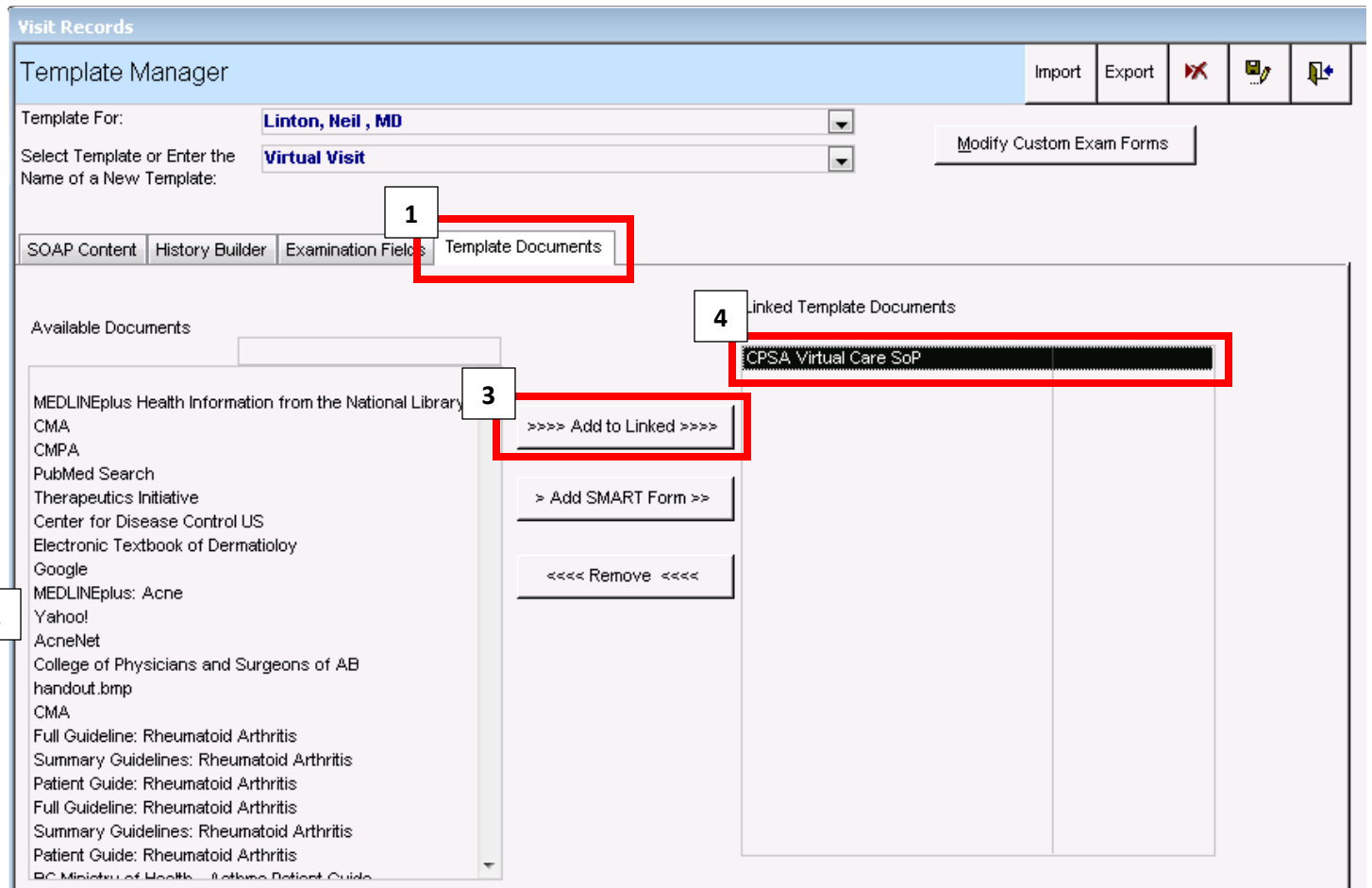
- a. Open the Workdesk → Click on the 'Configure' tab at the top of the Workdesk → Click on SOAP Template Manager
- b. In the new window that pops up:
  - Select your virtual care SOAP template from the 'Select Template or Enter the Name of a New Template' drop-down → hit 'Enter' on your keyboard  
OR
  - If you have not yet created a virtual care SOAP template, type the name of the new virtual care template in the 'Select Template or Enter the Name of a New Template' drop-down field → Hit 'Enter' on your keyboard → Click 'OK' in the New Template window that pops up



The screenshot displays the 'Visit Records' interface, specifically the 'Template Manager' window. At the top, there are buttons for 'Import', 'Export', and other utility icons. The 'Template For:' dropdown is set to 'Linton, Neil, MD'. The 'Select Template or Enter the Name of a New Template:' dropdown is highlighted with a red box and contains the text 'Virtual Visit'. Below this, there is a 'Modify Custom Exam Forms' button. The main content area has tabs for 'SOAP Content', 'History Builder', 'Examination Fields', and 'Template Documents'. Under 'SOAP Content', there are input fields for 'System', 'Sub System', 'Chief Complaint', 'Search', and 'Keywords'. Below these are large text areas for 'Subjective', 'Objective', 'Assessment', and 'Plan'.

c. To add a web link:

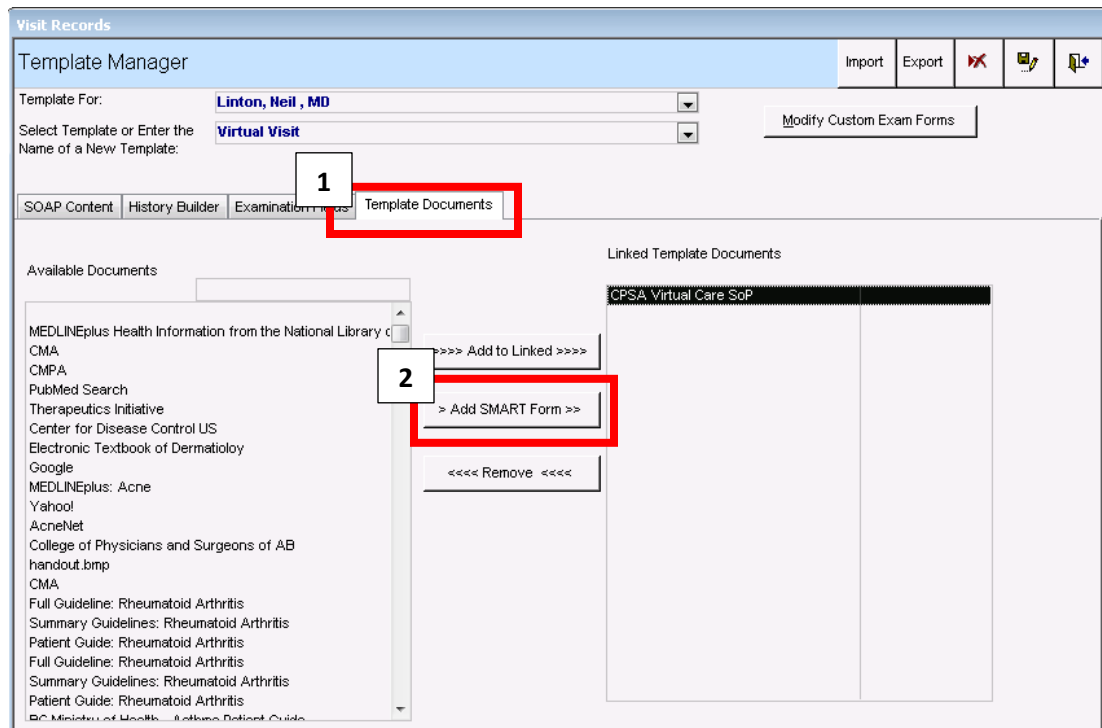
- 1) Go to the 'Template Documents' tab
- 2) Select the document you want to link
- 3) Click <<<<Add to Linked>>>>
- 4) The document will appear in the 'Linked Template Documents' list



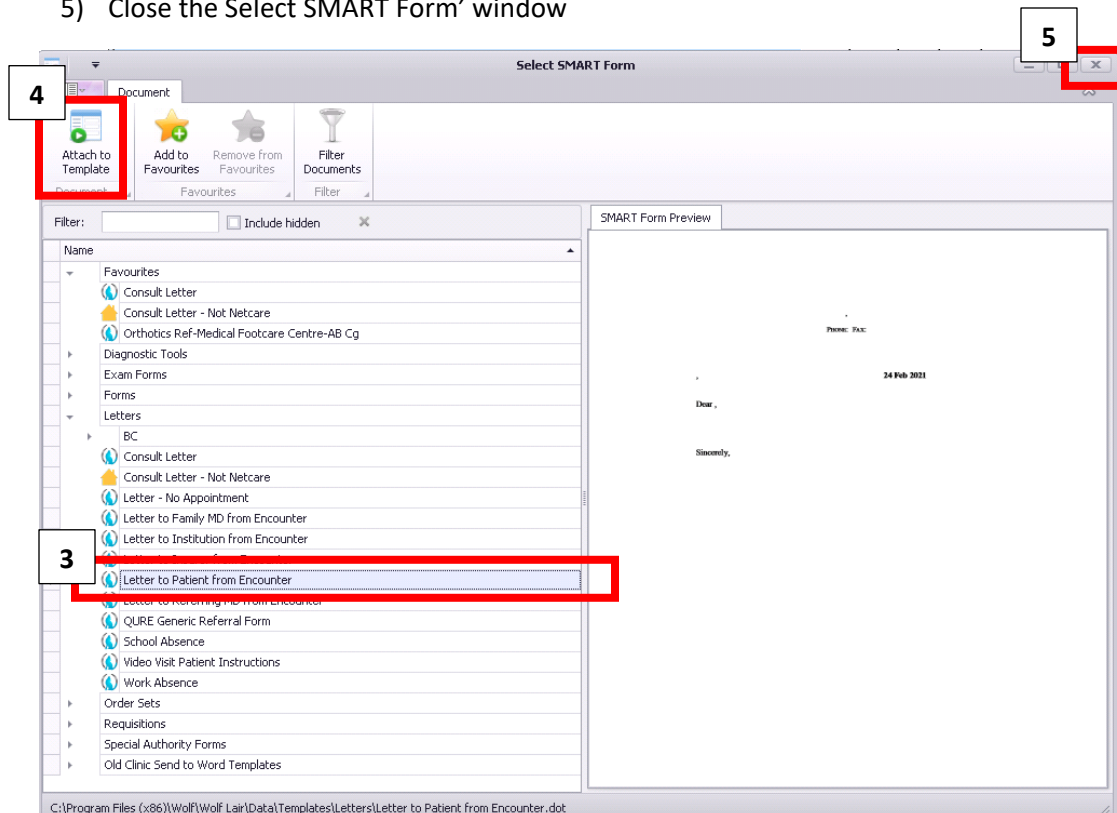
The screenshot shows the 'Template Manager' interface. At the top, there are tabs for 'SOAP Content', 'History Builder', 'Examination Fields', and 'Template Documents'. The 'Template Documents' tab is selected and highlighted with a red box and a '1' in a white box. Below the tabs, there are two columns: 'Available Documents' on the left and 'Linked Template Documents' on the right. In the 'Available Documents' list, 'CPSA Virtual Care SoP' is selected, highlighted with a red box, and a '2' in a white box is next to it. Below the list, there are three buttons: '>>>> Add to Linked >>>>', '> Add SMART Form >>', and '<<<< Remove <<<<'. The '>>>> Add to Linked >>>>' button is highlighted with a red box and a '3' in a white box. In the 'Linked Template Documents' column, 'CPSA Virtual Care SoP' is now listed, highlighted with a red box, and a '4' in a white box is next to it. At the top of the interface, there are dropdown menus for 'Template For:' (set to 'Linton, Neil, MD') and 'Select Template or Enter the Name of a New Template:' (set to 'Virtual Visit'). There are also buttons for 'Import', 'Export', and 'Modify Custom Exam Forms'.

*Note: if the weblink you want to add is not in the list of 'Available Documents', see the [Configuring Your Clinic's Internet Favourites](#) Wolf EMR online help file for instructions on how to add new weblinks.*

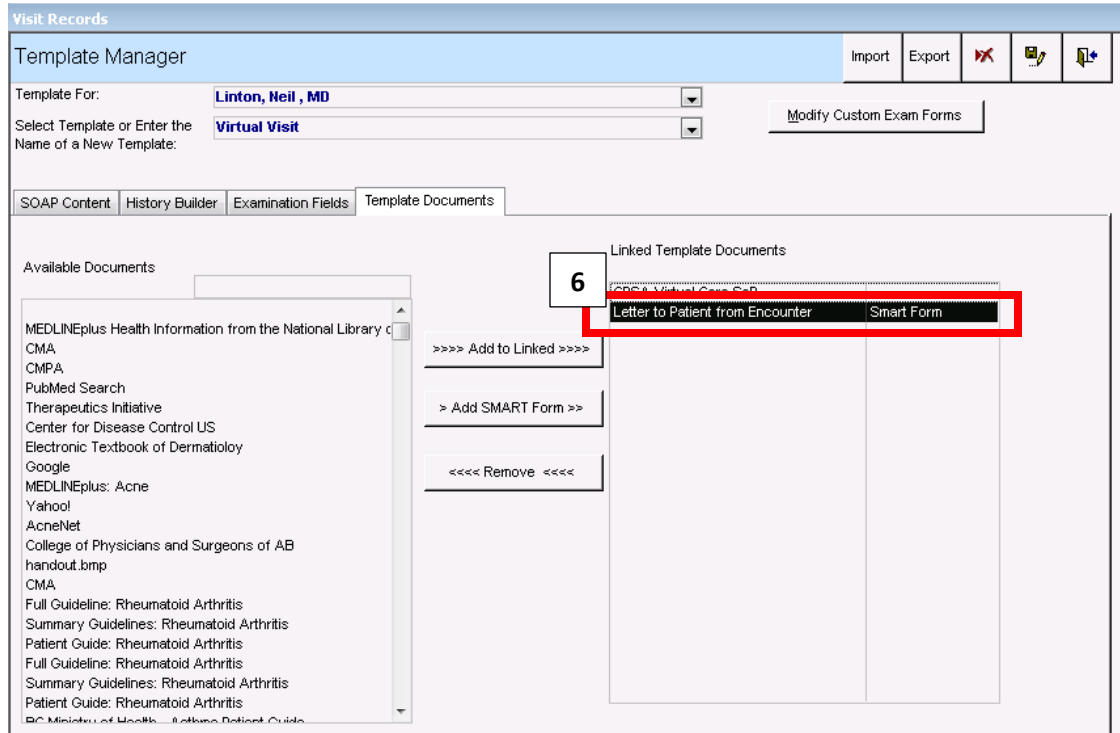
- d. To add a SMART form link
  - 1) Go to the 'Template Documents' tab
  - 2) Click >Add SMART Form>>



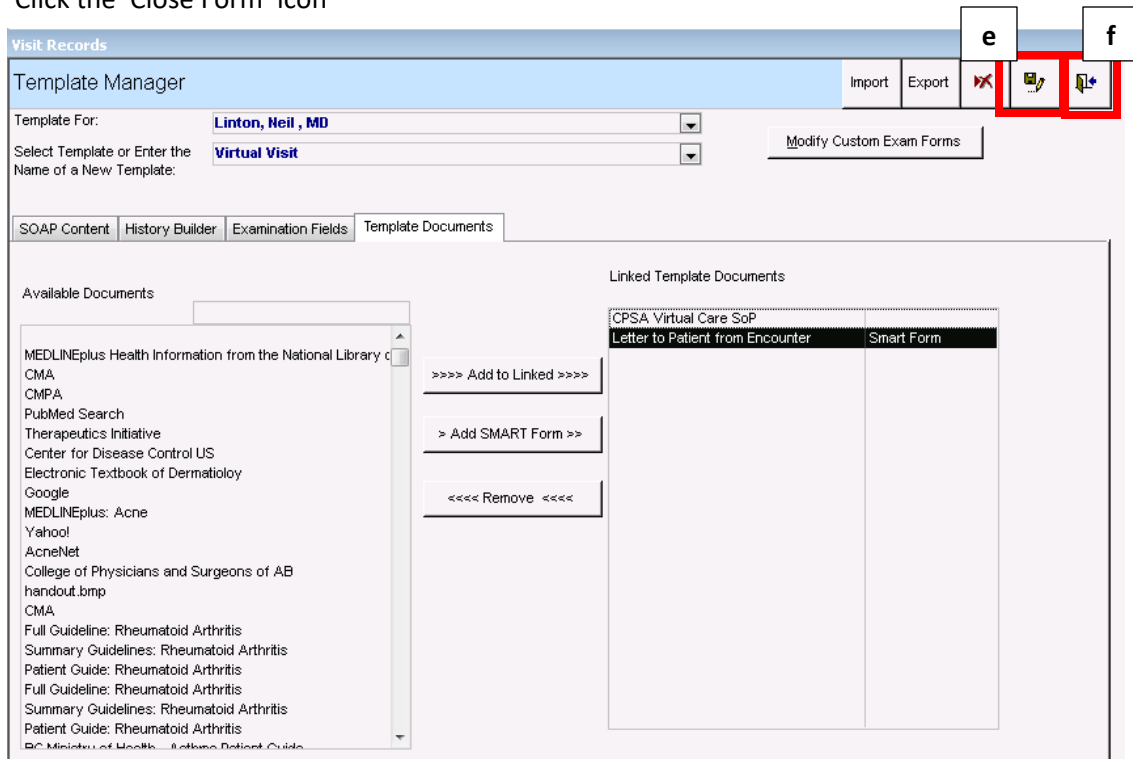
- 3) In the new window that pops up, select the SMART form you want to link
- 4) Click 'Attach to Template'
- 5) Close the 'Select SMART Form' window



6) The SMART form will appear in the 'Linked Template Documents' list



- e. Click the 'Save Template' icon
- f. Click the 'Close Form' icon



## 2) Record Frequently Used Phrases in a SOAP Template

SOAP templates can be configured to record commonly used phrases by either:

1. Putting phrases that are frequently used during virtual visits (e.g., informed verbal consent obtained) in the SOAP template's SUBJECTIVE field. See the [Managing SOAP Templates](#) Wolf EMR online help file for more information about creating SOAP templates and adding text to the SUBJECTIVE field.

S.O.A.P Record Details

Template Search: Virtual Visit Template

CHIEF COMPLAINT

SUBJECTIVE

Open Hx  
Builder

\*Establish Identity of the patient, Spell last name, DOB, PHN and address. <Yes><No>  
\*READ THE FOLLOWING DISCLAIMER TO PATIENT <Yes><No>  
\*We will use reasonable means to protect your 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 obtained. <Yes><No>

OBJECTIVE

Pending Follow-ups  
Investigations  
Labs  
Pending Docs  
A Glance  
Cardiac Risk  
Current Medications  
Problems - 2 Noted

### OR

2. Linking a custom exam template with standardized dropdown menus and phrases that are frequently used during virtual visits (e.g., informed verbal consent obtained) to the SOAP template. See the [Customizing Structured Exam Templates](#) and [Managing SOAP Templates](#) Wolf EMR online help files for more information about creating custom exam templates and attaching them to a SOAP template.

EXAM Virtual Visit © Close Exam View Docs

Patient Identity Established:  
Yes

Disclaimer Read to Patient:  
Yes

Informed Verbal Consent Obtained:  
Yes  
No



## Record Patient Contact Start and Stop Times

Recording visit start and finish times is required for all types of virtual visits. Use the Service Start/End time fields at the bottom of the SOAP visit template to document both times.

S.O.A.P Record Details

Template Search: **virtual** Virtual Visit Template Template

CHIEF COMPLAINT

SUBJECTIVE

Open Hx Builder

- Establish the identity of the patient: spell last name, BOD, PHN and address <yes><no>  
 - READ THE FOLLOWING DISCLAIMER TO 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 obtained <yes><no>

OBJECTIVE

LIFESTYLE - Smoking: Non Smoker  
 BIOMETRICS - Height: 125 cm

EXAM **Virtual Visit** Close Exam View Documents/Pictures Draw Picture Apply Defaults

Patient Identity Established: **Yes**

Disclaimer Read to Patient: **Yes**

Informed Verbal Consent Obtained:

ASSESSMENT **Virtual** AND

Text

PLAN

Plan items changed on 13-Aug-2021

Medications **No Medication Changes.**

Referrals

Quick Referral Group: Cardiology Urology Respirology

Investigation/Procedure:

Double Click To Set Up Quick Referral Settings

BA Number:

Insurer: Alberta Health Care

Fee Code: 03.03A

Fee Modifier 1:

Fee Modifier 2:

Fee Modifier 3:

Service Units / Service Time

Service Units

Service Time

Service Start / End


Pending Follow-ups  
 Investigations  
 Pending Labs  
 Pending Docs  
 At A Glance  
 Cardiac Risk  
 Medications - 15 Listed  
 Problems - 4 Noted  
 Allergies Noted: 2

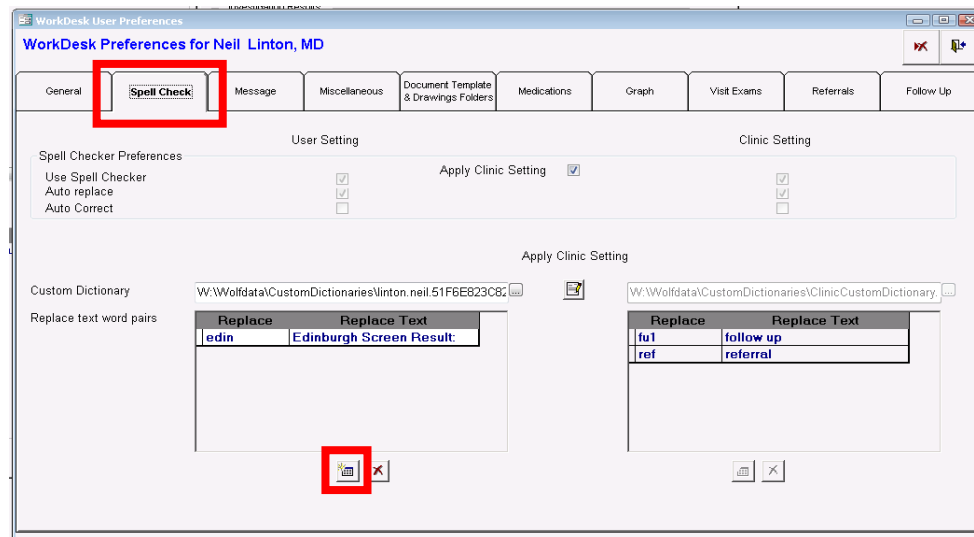
Order Labs  
 Prescribe Medication  
 Enter Vaccination  
 Create Referral

## User Tips in a Virtual Visit

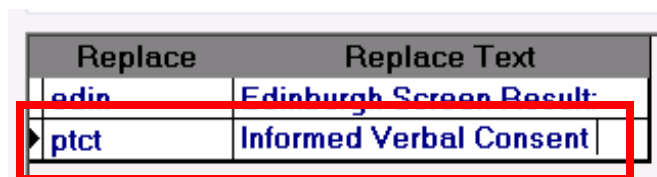
### Set Up Macros to Streamline Entry of Common Phrases

This feature allows you to save time by using an abbreviation (keyboard shortcut) to enter a phrase, paragraph or entire long set of text. As a clinic is adapting to new virtual care office processes any phrase that a user finds themselves using twice or more per day should be saved as a macro. To create macros to help speed up time spent on charting:

- a. Open the Workdesk → Click on the 'Configure' tab at the top of the Workdesk → Click on Configure Workdesk
- b. In the new window that pops up, go to the 'Spell Check' tab and click on the  icon near the bottom of the window



- c. In the new field that appears, enter a word or abbreviation that you would like to use as your macro that will be linked to a longer phrase in the "Replace" box.
- d. Then, enter the entire phrase in the "Replace Text" box. In this case we chose "ptct" as the short text to be replaced by the longer phrase "Informed Verbal Consent Obtained"



- e. To insert the macro into a patient chart, type the autocomplete abbreviation (in this case "ptct") into your text box and then click the **Spacebar** or **Enter**.

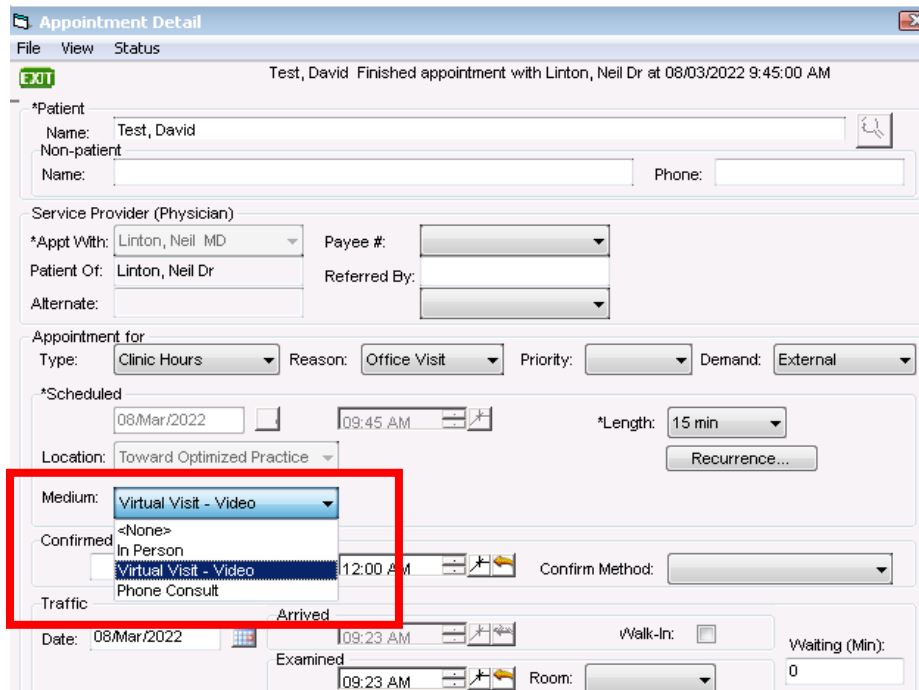
## Other Features That Can Assist in Efficiency and Virtual Care

### 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 patient demographics 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 'Medium:' drop-down menu.



The screenshot shows the 'Appointment Detail' window for a patient named David Test. The 'Medium:' dropdown menu is open, and 'Virtual Visit - Video' is selected. Other visible fields include: Patient Name (Test, David), Service Provider (Linton, Neil MD), Appointment Type (Clinic Hours), Reason (Office Visit), Priority, Demand (External), Scheduled Date (08/Mar/2022), Time (09:45 AM), Length (15 min), Location (Toward Optimized Practice), Confirmed (Virtual Visit - Video), and Traffic (Phone Consult).

## Acknowledgement

The AMA would like to acknowledge the members of the Wolf 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](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/>