

QHR Accuro EMR Guide- Virtual Care

Introduction

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

Virtual Care Tool Set

Accuro offers **Accuro Engage**, a set of tools clinics can add on to their EMR for virtual care. For more information please visit the [Accuro Electronic Medical Records Accuro Engage](#) website.

The set of tools available to enable virtual care in Accuro include the following:

- On-line booking & notifications
- Appointment reminders and confirmations
- Digital patient forms
- Patient portal and patient messaging
- Video visits
- Video visit chat integrated into patient chart
- Mobile suite

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 acceptable 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.
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.

Informed Consent and Documenting Consent

Patients need to be informed of what virtual care services are being provided and how they will be delivered (via clinic or provider email address, text message, invite via application, etc.).

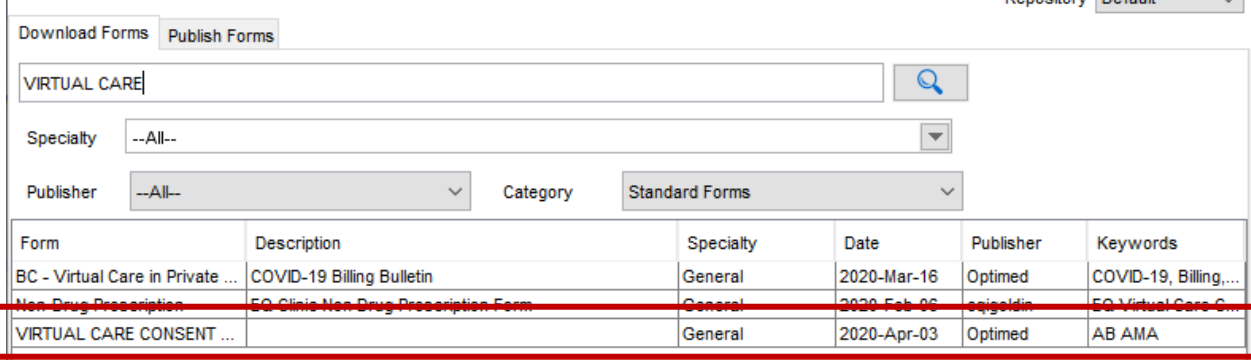
Principles

- Clinic team members and providers should all be aware of the standard clinic process for informing patients and documenting consent.

- Consent should be documented in a consistent location in the EMR so everyone knows where to find the information.
- Consent needs to be documented once per patient, not for every encounter.

1. Electronic Consent Form

The Accuro team has built a Virtual Care electronic consent form that can cover both in person and verbal consents. In the Publish/ Download library, search VIRTUAL CARE CONSENT. Download and use as needed.

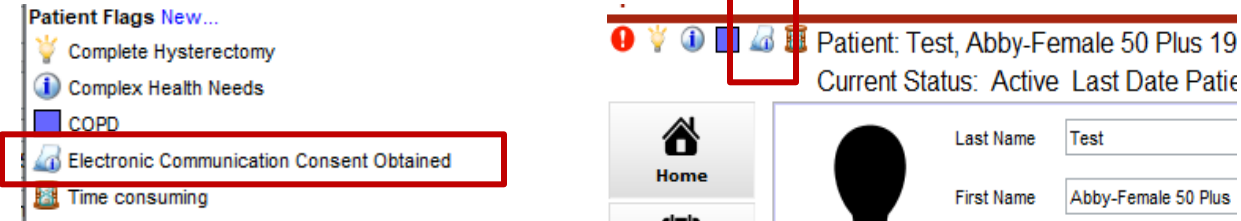


The screenshot shows a search interface with the following filters: Search: VIRTUAL CARE, Specialty: --All--, Publisher: --All--, Category: Standard Forms. The results table is as follows:

Form	Description	Specialty	Date	Publisher	Keywords
BC - Virtual Care in Private ...	COVID-19 Billing Bulletin	General	2020-Mar-16	Optimed	COVID-19, Billing,...
Non-Drug Prescription	EQ-Clinic Non-Drug Prescription Form	General	2020-Feb-06	eqigoldin	EQ-Virtual-Care-C...
VIRTUAL CARE CONSENT ...		General	2020-Apr-03	Optimed	AB AMA

2. Patient Flags

Patient flags are a handy way to visually indicate a patient's preferences. If you create and customize patient flags, remember to give all team members a list so they know what they mean. Once the flag has been created by the clinic it will appear beside the name in the name banner within the chart.





The left side shows a list of patient flags under 'Patient Flags New...':

- Complete Hysterectomy
- Complex Health Needs
- COPD
- Electronic Communication Consent Obtained
- Time consuming

The right side shows a patient's name banner: 'Patient: Test, Abby-Female 50 Plus 19' with 'Current Status: Active Last Date Patie'. A red box highlights the flag icons above the name banner.

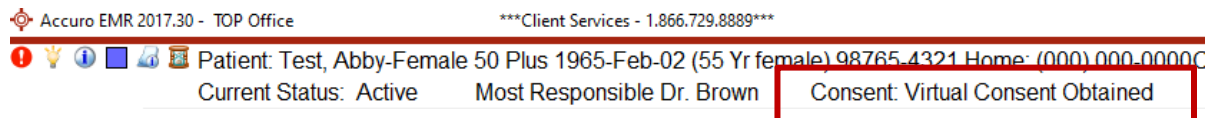
Creating Custom Flags

1. Press F7, Patient Tasks
2. Right-click anywhere on the white background and select New Flag.
3. Select "Manage"
4. To create using an existing icon select , the Edit Alert Flags window is displayed. Select  and choose an icon from those displayed.
5. Type in the patient flag details in the field to the right of the flag icon.
6. Select OK to save the new flag.


Solid square icons can be created with various colors and used in place of icons. Search “Creating Custom Flags” in the Accuro hep files for more information.

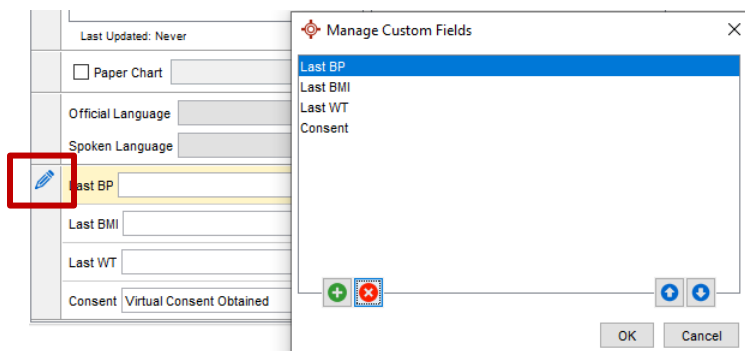
Option 1: Customize the name banner

By customizing the name banner, consent can be displayed for all members of the team regardless of whether they are in the chart or not. Below is an example of how it may look once configured.



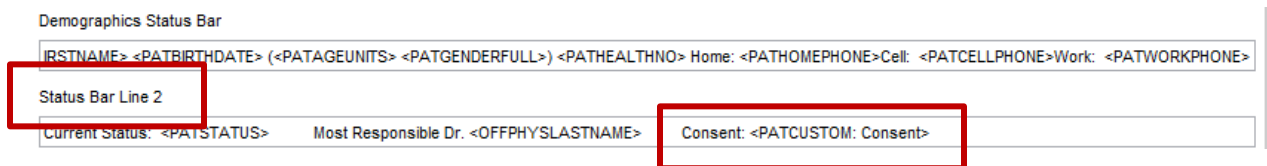
Before configuring the name banner, the custom field must be created.

1. In the demographics screen under the “Other” tab, scroll down to the bottom
2. Select the blue pencil bottom left
3. Select  and enter a field name, Select “Add”. The field will now appear.



Next Customize the name banner

1. Select the Target > File > User Preferences
2. Select “Display” on left column > then Display again on the top ribbon
3. On Status bar Line 2, Type in “Consent” as shown below.
4. Right click on the line right after the word you just entered, Select “Patient”, then “Custom Fields”
5. Select the custom field you just created.
6. “Apply”, then “OK”





Special note: Another option for standardizing how consent is recorded is to add it to the medical history band. Creating a patient flag or customizing the name banner allows anyone on the team to see the information. In the Medical History Band, this would only be available when opening the chart. Decide what workflow is ideal for the practice.

3. Verbal Consent

The clinic may collect consent verbally and use a Macro to document in the chart. When obtaining verbal consent the CPSA recommends this phrase be inserted into an encounter note:

“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”

Build a Macro with the above paragraph alone or together with a SOAP note to insert consent quickly.

4. Paper Form

Clinics may use a paper form. Print out a paper copy of the virtual care consent form from the EMR for in-person signing or the template below is also available from the CMPA [here](#).

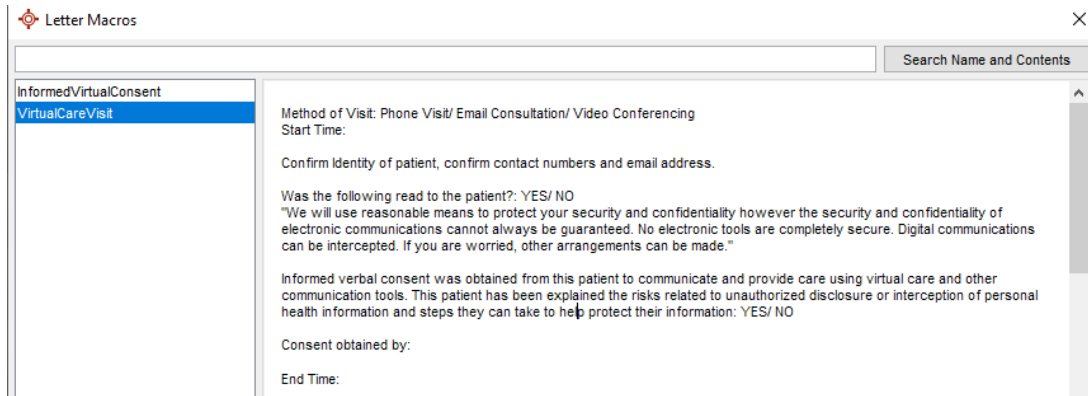
Always ensure that forms are scanned into the EMR using a standardized terminology such as “Electronic Communication Consent”. This will enable searches, and make finding the document easier should it be required.

Macros

Macros are very versatile and powerful tool for use with your progress notes. They enable any team member to quickly enter a formatted block of text. They save time by entering blocks of repetitive text and ensure that data is uniformly formatted and serve to remind the user to enter data, even with multiple users, which makes searching for data much easier. **Pro tip:** *Using the macro wizard, create macros to enter Date and Time into chart notes. Example: Configure the letter “T” as a macro. In a chart, enter “T> control> enter” and it will insert the current time into the note. Very helpful for start and end times of a note. Use “D” for date. Another helpful one is the F12 key, to insert the user name, date and time.*

To create a Macro:

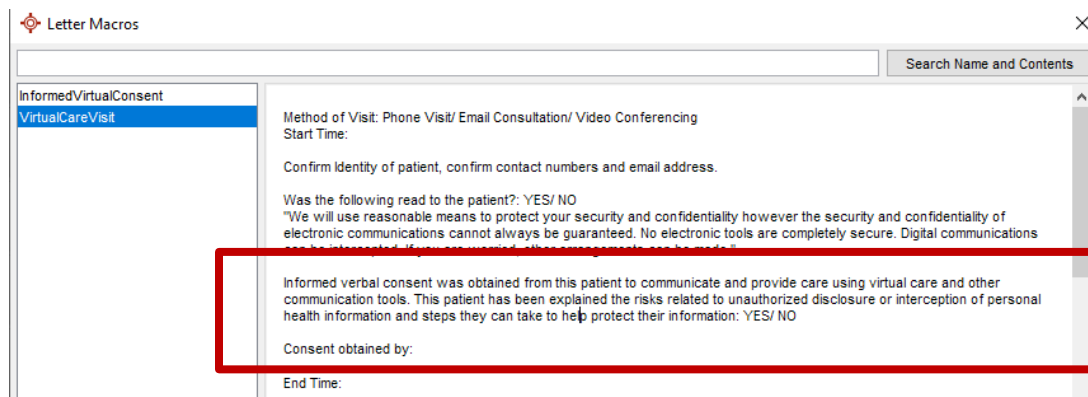
1. From within a SOAP note, right-click and select “Find Macro”
2. Letter Macros box will appear. Select “New”, enter a name with no spaces.
3. Type Macro content in large square box and “Close”



Once the Macro has been created it is ready for use.

1. From the SOAP note, right-click and select “Find Macro”
2. Highlight the Macro you just created and click “Select”. This will insert it where the cursor is.

Create a Macro for virtual visit OR simply the informed consent itself.



Acknowledgement

The AMA would like to acknowledge the members of the Alberta Accuro EMR Network co-design team and members from the Edmonton Southside PCN facilitation and EMR teams.

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/>