TELEMEDICINE CLINICAL PROTOCOL

Organization: Windsor Regional Hospital

Service/Program/Clinic: Consulting Services

Consultant: Ontario Specialist Physician

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Date Protocol Effective: January 2013

Date Protocol last reviewed: January 2013

1.0 Overview
The Windsor Regional Hospital (WRH) is committed to offering a consistent, standardized telemedicine (TM) protocol for hospital-based or community-based patients that require a consultative appointment with a Health Care Provider (HCP) within Ontario using Windsor Regional Ontario Telemedicine Network (OTN) cameras.

Inclusion Criteria
- Ontario residents with valid OHIP coverage
- In-hospital patients who require a consult with a HCP within Ontario regarding their treatment
- Community and out-patients requiring a specialist consultation appointment before/after surgery or as part of their medical treatment plan as requested by their physician

Exclusion Criteria
- Any patient deemed inappropriate for videoconferencing
- Patient/Substitute Decision Maker/POA for Healthcare that does not consent to telemedicine appointment

2.0 Referral and Scheduling Procedure
- All Clinical referrals will be sent to the appropriate TM RN for review by completing and faxing the TM Patient Referral (Chronic Disease, Adult & Children’s Mental Health, and Cancer Program).

WRH Telemedicine Nurse:
- If the appointment is with a known consultant for follow up, the WRH TM Patient Referral form can be sent to the corresponding TM RN as per consultant guidelines from the referring site to the consulting Physician.
- The scheduling will be done by WRH through the 2 sites as an Ncompass clinic event
- Consulting or Referral site will indicate the following on the TM Patient Referral form:
  - site camera number
  - specialty required
  - priority of consult
  - type of appointment: initial or follow-up
Preferred time and date of appointment
- Length of time required
- Preliminary tests required
- Appropriate health care professional needed to facilitate the consult
- Peripheral tools, assessment or equipment required to perform the consult

- Once the referral is deemed appropriate, the TM RN will book a room and a camera for patient and/or HCP on Ncompass as an auto-initiate session as per the requests listed on the Patient Referral Form
- The TM RN will:
  - Review the request and coordinate the appropriate health care professional needed to facilitate the consult if required
  - Notify participating WRH personal of confirmation of the appointment by email or phone call
  - Fax the completed TM forms to admitting so that patient can be registered

**OTN Scheduling:**
- Assists in locating an appropriate consultant for the patient, as needed.
- When OTN assists with the location of a consultant or schedules an event, the OTN Referral Form (see attached form) must be used.
- Once the event details have been confirmed, OTN scheduling will report back to the TM RN with confirmation of the patient date, appointment time and consultant name, location and contact information
- OTN scheduling to schedule appointment in Ncompass-scheduled to auto initiate

### 3.0 Preparation Requirements
- The referring/consulting physician orders any tests and shares copies with any other physicians as required (e.g. previous health records, diagnostics imagines and lab test results) prior to TM appointment. Release of personal health information will occur according to WRH Privacy Policies.
- Specific examinations will be determined by the physician before the TM appointment such as assessments, labs, and relevant reports and will be indicated on the TM Patient Referral Form.

**Patient Preparation:**

**Inpatient**
- Appointment is confirmed by the TM Nurse with the nursing floor by phone call or email as soon as the event is booked.
- Preliminary test, labs are completed by the nursing unit and sent to referring physician with nursing unit contact information at least three days prior to the scheduled clinical event.
- The physician’s clinic will inform the Inpatient Nursing Unit if there is a need to repeat a test or additional test are required.
- The nursing unit will provide the patient/family/SDM/POA with an OTN brochure and inform of event details including:
  - Scheduled time and date of appointment
  - Duration of appointment
  - Preliminary tests required
  - Requirement to be in studio 15 minutes before scheduled start time
The patient’s nurse or acceptable substitute will accompany patient to the TM studio at least 15 minutes prior to start of sessions and remain during consultation.

**Outpatient:**
- The Consultant site will provide the outpatient with requisition for any preliminary tests or labs required to complete TM event.
- The Host site will contact patient to confirm appointment via phone and/or letter with the following details:
  - Scheduled time and date of appointment
  - Duration of appointment
  - Preliminary tests required
  - Requirement to be at hospital 30 minutes before scheduled start time
  - Directions to hospital, admitting department and TM studio
- Instructed to bring their OHIP card, list of current medications, a translator if necessary and any other logs or test results as requested by specialist.

**Telemedicine Studio Preparation**
- Whenever possible, the room should be scheduled at least ½ hour before and after the appointment to ensure no scheduling conflicts and allow for equipment transfers.
- The room should be private, with an area for the client to change into a gown, as needed
- Depending on the type of appointment, the studio should be equipped with the necessary equipment to perform an exam, e.g. BP cuffs, SpO₂ monitor, AMD camera (if incisions need to be viewed)
- Consent forms need to be available for the nurse or other HCP to explain to the client and need to be signed off by the nurse or other HCP prior to the commencement of the videoconference.

**Patient Registration:**
- All out-patients shall be registered for tracking purposes. In-patients do not need to be re-registered, but will be given a TM clinical event number and tracked through Ncompass by the TM Nurse.
- Out-patients will be registered through admitting using the appropriate referral form- see policy

**Referring Site/Patient Site:**
- On the day of the consultation, the nurse/HCP should ensure that both the room and the participants are appropriately prepared and communicates with the TM coordinators to assist in the process when necessary
- The nurse or HCP should arrive 30 minutes prior to the session to ensure:
  - The system is connected properly and ready for the conference
  - Presets are established and that all necessary peripheral devices are properly connected to the videoconference system
- The nurse/HCP should ensure all necessary forms are available for the consultation including:
  - OTN privacy information
  - Requisition forms
  - Documentation forms
  - Telephone/fax numbers for local pharmacies
  - Fax number for patient and consulting site
Consent checklist
Equipment quick reference guides

- Prior to the appointment, the patient is given the brochure, “Your Telemedicine Appointment” for review. Any questions or concerns may be answered at that time.
- The HCP/nurse facilitating the TM appointment:
  - Preserves patient privacy by closing the door and hanging the “Session in Progress” sign.
  - Completes the “Consent to Participate in a Telemedicine Consultation Checklist” signifying that patient has provided verbal consent to participate in the telemedicine consultation and has been made aware of privacy provisions.
  - Informs patient that the Consultant will be on a secure encrypted network and will not record the session without the patient’s consent
- The nurse/HCP explains how the system works to the patient and how it may differ from a face to face visit including:
  - There is a slight delay in sending and receiving video and audio signals;
  - The microphone is designed to pick up sound from around the room so the patient can speak in a normal voice, should not move or obstruct the microphone as this will interfere with the sound quality.
  - Anyone in the room including people who may be off camera will be introduced;

Specialist Site:
- On the day of the consultation, the specialist will ensure that both the room and the participant(s) are appropriately prepared.
- The specialist site will follow and adhere to both privacy legislation and any policies governing TM at that site.
- Any exams requested by the Consultant will be performed prior to the start of the telemedicine session and results will be provided.

4.0 Telemedicine Session
Starting Telemedicine Sessions
- Before beginning the telemedicine appointment, the nurse/HCP verifies the identity of the patient using two patient identifiers, full name and birth date.
- The consultant will introduce anyone in the room on the remote end of the videoconference (this could include the consultant, nurse, staff, student, etc.)
- The patient encounter continues with examination and assessment components as required.

Examination and Assessment Requirements
- Patient appointment may include:
  - Interview style appointment with some nursing assessment at patient host site
  - Nursing assessment may include, but is not limited to: Height, weight, surgical site examination, dressing check, vital signs, glucometer
  - Additional assessment may be performed if deemed necessary per consultant’s specific request

Ending Telemedicine Sessions
- The consultant makes recommendations for follow-up, replicating as closely as possibly to how an in-person visit is managed.
The consultant will send any orders to the referring physician. If the consultant has privileges at WRH, the RN can take the orders as per College of Nurses of Ontario (CNO) standards for accepting telephone orders, including read back to confirm accuracy.

Any medication orders will be faxed to the patients’ pharmacy by the consulting Physician. The RN will not take medication orders through telemedicine.

The telemedicine session is documented per WRH Health records Policy.

The patient is informed if a follow-up visit is required and whether the next visit will be by telemedicine or in-person.

**Follow-up**

**Referring Site/Patient Site:**

- The nurse/HCP will confirm with consultant any testing and follow-up for the patient prior to concluding the session and all parties will be made aware of their roles.
- The responsibilities of the referring site will depend on the outcome of the event and usually consists of assisting the consultant in coordinating post consultation activities.

**Consultant Site:**

- The consultant should communicate to the patient whether there is a need for a follow up appointment (either via telemedicine or face to face) and arrange this using standard processes.
- The responsibilities of the consulting site will depend on the outcome of the consultation (e.g. follow-up appointment, additional tests, prescriptions, referrals)

**Documentation and Reporting:**

- Consultations should be documented as part of a patient record according to the same guidelines and standards as traditional face to face patient visits.
- OTN recommends that any consultation is documented at both the consultant site and the referring/patient site.
- Proper documentation, as per applicable regulatory bodies should be maintained on WRH documentation records.