OTN Training Reference Manual
Clinical Consultations

About this Guide

The purpose of this guide is to provide support for Telemedicine/Site Coordinators (TMC) as they proceed with training through OTN's Asynchronous and Synchronous Training Programs. This Guide is for reference only and should not be used in lieu of training.

Modules Related to This Guide

Clinical Telemedicine Certification
Physician Consultations

Learning Objectives:

Upon completing OTN's Clinical Consultation Module and using this guide as reference, you will be able to:

- Describe a site's responsibilities throughout (before, during and after) a clinical consultation via telemedicine.
- Explain proper etiquette for a telemedicine clinical consultation to others.
- Communicate the key steps for arranging and scheduling an initial clinical consultation and follow-up(s).
- Identify the key activities associated with preparing the site, patient and consultant for a clinical consultation via telemedicine.
- Connect a consultation.

Links to Website

Please note that references and links to OTN's website are included throughout this document,.

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Part 1: Pre-Consultation

1.1 Arranging a Consultation

The first step in a telemedicine event is the arrangement of the virtual consultation. This activity is typically coordinated between the referring practitioner and the consulting physician. The TMC will be contacted by a physician or OTN's Contact Centre to set up the consult using telemedicine.

Identifying an appropriate consultant: For an initial consultation, the process generally begins with a request from a practitioner to refer a patient to a consulting physician or allied health professional via telemedicine.

- If the referring practitioner knows which consultant s/he would like to refer their patient to, the role of the patient site TMC is to work with the consulting site to arrange a date and time.
- If the referring patients does not know which consultant s/he'd like to use, OTN may be able to assist your site in finding a consultant in the relevant specialty or sub-specialty that is willing to see new patients via telemedicine.

Click here to access an OTN referral form.

Organize pre-consultation logistics: The referring practitioner is generally responsible for organizing any additional pre-consultation information or tests requested by the consultant. (e.g., patient's previous health records, diagnostic images, lab test results.)

The TMC/ Clinician ensure that organizational policies regarding the release of personal health information are observed. Consult your organization's clinical protocols and *Personal Health Information Protection Act* (PHIPA) Guidelines for additional information on these matters.

1.2 Scheduling a Consultation

- All events must be scheduled with OTN using the Ministry of Health and Long Term Care (MOHLTC) reporting metrics.
- OTN offers Members two ways of scheduling their clinical events:
- -through OTN's self-scheduling portal (Ncompass); or
- through the Contact Centre.
- Your OTN Regional Manager (RM) will discuss and recommend appropriate scheduling options for your site/program.

1.3 Preparing for a Consultation

On the day of the consultation, the TMC must ensure that both the room and participants are appropriately prepared..

Check the videoconference system: The TMC should arrive in the Telemedicine clinic at least twenty minutes prior to the session to:

- Ensure that the system is properly connected and ready for the videoconference.
- Ensure that all camera presets are established and that all necessary peripheral devices are properly connected to the videoconference system.
- Ensure that equipment Quick Reference Guides are available as required.

Ensure necessary forms are available: The TMC must ensure that all necessary forms associated with the consultation, <u>including the Telemedicine Clinical Protocol (if applicable)</u> are available before the session begins.

Other forms may include:
- OTN privacy information;
- requisition forms;
- session documentation forms;
- telephone/fax numbers for local pharmacies;
- your own fax number;
- consent checklist;
- prescription pads;
- equipment Quick Reference Guides (QRGs); and
- referral forms.

In the event that any technical difficulties occur during the event, the TMC should have the following information available:

- OTN Service Desk contact number: 1-866-454-OTN1 (6861).
- The consultation TSM/event ID number.
- Your site and system number.

Prepare the room: The objective is to create a virtual environment which best mimics a standard face-to-face consultation environment. Some telemedicine-specific considerations might include:

- Appropriate clinic space (i.e., not a boardroom.)
- Medical equipment that may need to be brought in to the telemedicine space.
- Arranging the furniture and equipment to ensure proper views of the patient while ensuring patient privacy.
- Adjusting the lighting to ensure good quality video (avoid window glare).
- Hanging a "session in progress" sign on the outside of the door to the room.
- Deferring any telephone calls and pages for the duration of the session.

Register the patient: OTN recommends that all patients be registered for telemedicine consults at both the consulting and patient sites. Members are encouraged to follow their existing organizational registration or patient check in processes, and to identify the patient consultation as a telemedicine visit.

Prepare the Patient (if at your site)

- The patient should arrive 15-30 minutes prior to their appointment in order to register and prepare for the consult.
- Where appropriate, ask the patient to change into a hospital gown.
- Depending on the telemedicine protocol, clinical interventions may be required prior to the consultation.

Development of clinical protocols:
TMCs at a consulting site are encouraged to work with the consultants to develop specific telemedicine clinical protocols or procedures.

- These protocols establish the consultant's requirements for the visit and should be designed to help all TMCs understand the process and requirements for specific patient examinations with that consultant.
- Your OTN Regional Manager is available to assist with the development of these protocols. Templates and guidelines are available in the Guidelines section of the Member Resource Library on the OTN website.

1.4 Videoconference Process, Privacy and Consent

<u>**Patient Site**</u>

Before the consultation begins, there are a few things TMCs should discuss with the patient and consultant.

Explain the telemedicine process: The patient site TMC will explain the telemedicine process to the patient and how it may differ from a standard face-to-face consultation.

Obtain consent from the patient: Using OTN's "Telemedicine Consent Information Checklist", the patient site TMC obtains verbal consent from the patient to participate in a telemedicine consultation.

- The telemedicine consent process should also be outlined in your own organization's privacy policies.

The consent checklist, patient brochure and "Clinical Consultation Etiquette" can be found in the Member Resource Library on OTN's website.

Explain the consultation process: The consultant site TMC should explain the consultation process to the consultant and how it may differ from a standard face-to-face consultation, including that:

- 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 moving it or obstructing it with papers interferes with sound quality;
- anyone in the room who may be off camera needs to be introduced
- the patient has provided verbal consent to participate in the telemedicine consultation and has been made aware of privacy provisions..

Part 2: During the Consultation

2.1 Connecting the Participating Sites

- The consultant will *initiate* the call to the patient site unless otherwise agreed upon; *or*
- The call has been scheduled to auto initiate so will start and end automatically at the pre-scheduled times.

Urgent or emergent connections can be made but are not typically pre-scheduled . *However* these types of events MUST be reported to OTN's Scheduling Services.

2.2 Beginning the Session

Patient Site / Consultant Site

Introduce everyone: All participants at the patient and consultant sites should introduce themselves and anyone else in the room. Pan the camera or zoom out to ensure that the remote site can see everyone when they are introduced.

Patient Site

Present the patient and facilitate the consultation: There are several roles that the patient site TMC must fulfill during the consultation. The TMC's professional background (clinical or not) will dictate who performs these roles.

- If a referring practitioner attends the consultation with the patient, s/he may be asked to assist with the clinical examination on behalf of the consultant.
- If the TMC does not have a clinical background, s/he will need to arrange for the appropriate healthcare professional to help during the consultation.

For example, the consultant may request physical exams that are outside a TMC's scope of practice as outlined by their professional regulatory body.

Consultant Site

Facilitate and direct the consultation: The consultant site will have several roles during the consultation:

- The TMC may attend the consultation with the consultant depending on the support the consultant requires.

2.3 Discussing Follow-up with Patient

Patient Site / Consultant Site

Identify future testing and follow-ups: Before the session is concluded, all parties should be made aware of their roles.

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 arranges this using standard processes.

Part 3: After the Consultation

3.1 Scheduling a Follow-Up Telemedicine Consultation

If the consultant has requested a follow-up by telemedicine, this should be scheduled through either OTN's Contact Centre or through Ncompass.

3.2 Follow-up Activities

The following are some potential follow-up activities that may be required after a consultation. Please ensure that you follow your own organizational clinical protocols and documentation practices.

Patient Site

Patient site responsibilities: The responsibilities of the patient site (TMC and referring practitioner) will usually depend on the outcome of the event.
- **Assisting the consultant in coordinating post consultation activities.**

Consultant Site

Consultant site responsibilities: The responsibilities of the consultant site (TMC and consultant) will usually depend on the outcome of the event and could include the following:

- recommendations for patients to have laboratory or diagnostic tests performed.

Faxing prescriptions: Both the Ontario College of Pharmacists (OCP) and the College of Physicians and Surgeons of Ontario (CoPSO) have policies regarding the faxing of prescriptions. OTN recommends that consultants comply with the policies of the OCP and CPSO.

OTN's "Guidelines for Faxing Prescriptions", can be found in the Guidelines section of the Resource Library in the Members section of the OTN website.

3.3 Documentation and Reporting

The TMC must ensure that proper documentation and reporting protocols are followed.

Patient Site / Consultant Site

Patient records: The TMC should document the consultation as per their organization's policies and processes.

Reporting unscheduled events: For unscheduled, point-to-point clinical events, sites will report activity through OTN regional staff or OTN's Scheduling Services.

Documentation and storage of patient records: 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 patient site. More information can be found in the *"Documentation and Storage of Patient Telemedicine Records at Member Sites"* policy in the TMC Resource Library of the OTN website. Contact your Regional Manager for further information.

Clinics-Some things to consider

*This is not an exhaustive list. Please speak with your Regional Manager prior to initiating new clinics.

Space: Clinical space that can accommodate people and equipment.
Timing: Time between patient appointments to complete protocol requirements.

Human Resources: One appropriate health care provider is required; however in the absence of a TMC with a clinical background, additional support may be required and/or recommended.

Privacy: Ensure optimal patient privacy.
Scheduling: A number of Scheduling options are available. Please discuss which option(s) are appropriate for your clinics with your Regional Manager.

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Clinical Exams	Tip
Equipment - AMD Exam	Remember to unfreeze an image on the patient exam camera at the end of the consult
	When looking at large areas of the body before freezing an image, move the camera slowly so as to optimize image transfer.
	Use "REF" button on the patient exam camera when looking at shiny or wet surfaces (e.g. bald heads, serous wounds)
	Using tripod for patient exam camera for edema and pedal assessments
	Use a tripod when using the patient exam camera, particularly when using the 50x magnification lens
Equipment - Laptop	When using the laptop in a clinical environment: 1. Test laptop to see image/presentation on the videoconferencing system 2. Advance films, ct images slowly to optimize image transfer
Equipment - Presets	Set up peripherals as pre-sets on the videoconferencing equipment (Polycom)
	Camera needs preset of full body view (assessment of dyskinesias)
Equipment - Steth	Mute microphone at patient site when using the digital stethoscope
	Participants at patient site should remain silent when using the stethoscope so as not to transmit noise
Equipment - Telepresence	Remember to look at the camera not the monitor to create "eye contact" as best as possible

Clinical Exams	Tip
Resources - Training	Staff are trained to use telemedicine equipment prior to the consultation
Setup - Privacy	Remember to hang a sign on the door indicating telemedicine session in progress
	Remember privacy settings for the v/c equipment in between patients
	Assess what can be heard outside the clinical space. Mitigate what can be heard by using a radio, padded doors, white noise machine.
	Remember to disconnect mobile systems in multipurpose clinical spaces
Setup - Microphone	Make sure to turn off both monitor and codec
Setup - Patient Exam	Use cloth gowns for stethoscope exams, gowns on backwards
	Have blanket/gown draped over chair, behind the limbs for patients to sit on when assessing lower extremities.
	Blue pads are good backdrop for skin assessments
	For patients with movement disorders, seat in chairs without wheels and with arms
	Sputum can be best viewed on a blue pad
Setup - Resources	Review the protocol prior to the consultation
	Staff are trained to use telemedicine equipment prior to the consultation
	Ensure proper supplies and resources are in the room
Setup - Room	Ensure your space is appropriate for clinical telemedicine consultations
Setup - Stretcher	No paper on the exam table

Clinical Exams	Tip
	Stretcher needs to be available for cardiology assessments.