## When to use virtual appointments?

➢ **Follow-ups by phone remain the preferred method to use.**
➢ Virtual appointments can replace face-to-face appointments **at the discretion of the professional**.
➢ Only a professional can initiate a virtual appointment.

## Checklist BEFORE beginning a virtual appointment

| *For the Professional* | *For the User* |
|---|---|
| Prerequisites:<br>▪ Have access to headphones and a camera<br>▪ Have an internet connection<br>▪ Activate your *ZOOM* license | Eligibility criteria:<br>• Have an internet connection<br>• Have an email address<br>• Be open to using technology<br>• Be comfortable using the technology (or have the help of a family member or <u>a professional</u>)<br>• Have access to the required equipment (computer with camera, tablet, or smartphone) |

## At the end of the appointment:

➢ Please remind the user to complete the **evaluation form** (the results of this form are anonymous and professionals do not have access to them).

## Following the appointment:

➢ Note in the **user's file** that the consultation was carried out as a virtual appointment.

**?** Visit the Quebec Telehealth website
for all documents and tools: telesante.quebec

<u>Suggested consent request:</u>

Note that all information shared during our virtual encounter is considered confidential. Although telehealth uses secure and certified technologies, there are privacy risks associated with any digital communication. You can help mitigate that risk by being in an environment that facilitates maintaining confidentiality. In addition, this consultation will not be recorded nor used for purposes other than those intended. Please let me know if you understand and agree.

## STEP 1  -  Installing the technology and preparing for a virtual appointment

The welcome email I received outlines my **FOUR** next steps:

**Prerequistes :**
- An active *ZOOM* license
- An internet connection
- Headphones and camera

**1.** I register for one of the planned virtual appointments. Link to register is in the welcome email. Problems with this step → Notify the orientation team by replying to the welcome email.

**2.** I install *ZOOM* on my computer.

**3.** I simulate a virtual meeting with a colleague.

**4.** I participate in the orientation meeting.

**?** **A problem with steps #2-3 ?** I first consult the telesante.quebec site (click here to consult the site).

→ | REACTS | TEAMS | ZOOM | →

I click on the *ZOOM* tab

If a problem persists: I consult my establishment's designated resource.

## STEP 2 – Evaluating the possibility of a virtual appointment with a user

**I confirm** (in-person or on the phone) if the user is **eligible for virtual appointments:** (see the criteria in the table on the previous page)

**NO** **the user is not eligible:** I assess the possibility of making a telephone follow-up and if not, of maintaining the usual procedures.

**YES** **the user is eligible:**

**1.** I explain **how it works** and **ask for their consent** (I note the consent in the file).

**2.** I note their **phone number** and **email address.**

**3.** I inform them that they will receive an orientation email with details for the virtual appointment.

## STEP 3 – Preparing for the virtual appointment

### Scheduled virtual appointment

**1.** I send the Orientation Email to the user including the User Guide document and the instructions for performing a test. (For User Orientation Email template: see the welcome email I received).

**2.** I tell the user that they must communicate with me if they have any problems at this stage.

If the user cannot install the technology or proceed with the test, I will review the appointment procedure for the follow-up.

**3.** I plan the virtual appointment (Schedule a Meeting option in *ZOOM*) and send the invitation email to the user. (For User Invitation Email template: see the welcome email I received).

### Unscheduled virtual appointment

(example: I am on the phone with the user and we agree to have a virtual meeting immediately)

**1.** I schedule the virtual appointment (option in *ZOOM: Schedule a meeting*)

**2.** I send the invitation email to the user (For User Invitation Email template: see the welcome email I received).

## STEP 4  -  Initiating the virtual appointment

A technical problem prevents the virtual appointment OR occurs during the virtual appointment?

Only next possible step: Call the user at the # they provided (the user must have their phone near them).

**At the end of the virtual appointment:**

I schedule a follow-up (method, date). I send the evaluation form link using the *ZOOM* chat option.