

## Checklist: Patient consent to participate in a video visit

Steps to securing informed consent	✓
<b>1. Orientation</b> <ul style="list-style-type: none"> <li>• Introduce the patient to the video solution, how it works, and how it can be accessed (via website or app).</li> <li>• Explain the email invitation with link and need to test the connection prior to the appointment.</li> </ul>	
<b>2. Confidentiality/Privacy</b> <ul style="list-style-type: none"> <li>• Assure the patient that no other parties can see the interaction online and that the video visit is secure.</li> </ul>	
<b>3. Recording</b> <ul style="list-style-type: none"> <li>• Assure the patient that the session, which takes place in “real time”, is not recorded.</li> </ul>	
<b>4. Technical Considerations</b> <ul style="list-style-type: none"> <li>• Explain the sound delay.</li> <li>• Advise the patient to wait their turn and pause before speaking.</li> <li>• Advise the patient to use a normal speaking voice.</li> <li>• Advise the patient to use the “self-view” to ensure they are positioned properly in front of the camera so the health care provider can see them.</li> </ul>	
<b>5. Contingency Management</b> <ul style="list-style-type: none"> <li>• Explain that the health care provider may determine during the interaction that an in-office assessment may be needed.</li> <li>• Explain that the patient has the right to refuse to participate and the right to decline the video visit at any time.</li> <li>• Establish a plan in case there is a technical issue (e.g. ask the patient to phone the office and ensure they have the phone number).</li> </ul>	
<b>Follow-up Instructions</b> <ul style="list-style-type: none"> <li>• Inform the patient that the health care provider will communicate the need for additional appointments/tests/communication prior to the conclusion of the video visit as per the clinic’s current process/clinical protocol.</li> </ul>	
<b>Opportunity for Questions and Feedback</b> <ul style="list-style-type: none"> <li>• Ask the patient if they have any questions about the process.</li> <li>• Advise the patient that the video solution may prompt them to participate in a satisfaction survey after the video visit.</li> </ul>	
<b>Consent</b> <ul style="list-style-type: none"> <li>• Request consent to participate in the video visit from the patient or substitute decision maker.</li> <li>• Follow your organization’s policies and procedures with respect to obtaining and documenting consent, as well as to determine which form of consent (implied or express) is most appropriate.</li> <li>• For further information and guidance on obtaining and documenting consent, refer to the Canadian Medical Protective Association’s <a href="#">Consent to Use Electronic Communications</a>.</li> </ul>	

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This document is intended for use as a checklist to ensure overall readiness for video visits and to remind users of the basic consent requirements. Consent for participation in video visits undertaken through OTN is a member responsibility and OTN is not able to provide specific consent guidance to members and users. This form is not intended for use as a legal document or to fulfill consent documentation requirements.