

# GETTING PATIENTS BACK TO PRACTICE

## For Both Virtual and In-Clinic/Blended Visit Models

### Purpose of This Guide

This document is intended to assist clinics with getting patients back to practice through virtual care visits and blended models where virtual care visits are offered in addition to in-clinic visits. **Having a way to communicate quickly with patients is key and will ensure they know what is available and when, how they can be seen (options) and what to expect and prepare for prior to their next visit.**



The guidance provided by Dr. Bonnie Henry and the College of Physicians and Surgeons of BC (CPSBC) during the COVID-19 pandemic<sup>1</sup> has had a strong impact not only on clinicians but also on the public. Patients are staying at home, trying not to add pressure to an already stressed healthcare system. Others may not realize that care is still available and can be accessed virtually, via phone or video, or in-person if necessary. As a result, primary care physicians are experiencing a dramatic drop in their practice visits. This impacts patients’ wellbeing, worsens their health outcomes, and negatively affects the economic sustainability of the practice.

However, some clinics are currently developing effective processes to ensure they can provision care safely, in-clinic and virtually. Some see the current situation as a chance to re-think and improve the way they serve their patients. Anticipating the ‘new normal’, clinics can take steps to prepare and blend virtual care into their daily workflows. This guide describes best practices and success stories that can be replicated and transferred beyond this immediate crisis to strengthen your practice over the long-term.

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<sup>1</sup> College of Physicians and Surgeons. COVID-19 Important update from the registrar. April 21, 2020. <https://www.cpsbc.ca/files/pdf/2020-04-21-COVID-19-Important-update-from-the-registrar.pdf>

## High-Level Workflow Poster: Getting Your Patients Back to Practice

### 1 Review Patient Panel



- Review your EMR to determine which patients are active and suitable for virtual visits.
- Consider working with your Regional Support Team (RST) coaches to [identify patient panels](#) who might benefit from proactive follow-up (i.e. diabetes etc.)
- Decide [what your clinic can provide virtually](#) and review your schedule over the last few weeks.

### 2 Create Patient Mailing Lists



- Gather patient contact info: current email and phone number.
- Select the [appropriate communication tools and channels](#) to contact your patient population.

NOTE: Only use minimal need-to-know private patient data in 3rd party tools e.g. name, email, phone #.

### 3 Obtain Consent



- Decide whether you will collect consent via form or verbally. See [DTO Virtual Care Toolkit](#) for guidance.
- Ensure you tell patients how you protect their privacy and that they can opt out at any time.
- Plan on how to document the consent in your EMR.

NOTE: Current COVID-19 emergent approach for security is temporary. Plan for a long-term solution for obtaining and documenting patient consent.

### 4 Spread The Word: Clinic is Open!



- [Engage patients in conversation](#) about benefits of virtual care and propose a virtual appointment when appropriate.
- Draft communication messages to let patients know that your clinic is open and that virtual care visits are available. See the [Templates for Patient Communication](#) section.

### 5 Prepare Patients for Virtual Visits



- Provide patients with clear instructions on how to connect to the virtual visit and how to be prepared. See patient handout examples on [DTO website](#).
- Have an MOA to conduct a test prior to the very first visit with patients who might have reservations.
- Suggest assistance from a family member, care giver, or trusted friend during the visit to assist with troubleshooting or to support with examination.

### 6 Adjust Your Workflow



- Allow time for staff training. Consider [Quality Improvement Cycle](#) for introducing workflow changes.
- Have a process for audio/video problems e.g. switching quickly to a phone call.
- Decide how you can provide patients with prescriptions, lab requisitions, or handouts. Different EMRs offer different options.

## Preparation and Planning

During this time of uncertainty, **patients need clarity and reassurance**. They need to hear that their care providers are still available to care for them and provide support, whether via phone, video or in-person with safety precautions in place.

Clinical staff can adapt their daily workflows when working from home or only part-time from the office. **Involve your clinical team in planning** workflow changes, rolling out virtual visits and preparing to educate and engage patients or troubleshoot common issues.

## Define Your Key Messages

The following are examples of key messages you may want to incorporate in your communications with patients:

What Patients Need to Hear	What Patients Need to Know
<ul style="list-style-type: none"> <li>▪ We are a trusted source of information.</li> <li>▪ We are still available to connect virtually. If patients have a concern, we are just a click or a phone call away. It is not a burden to contact us.</li> <li>▪ We have capacity to help. Preventative and proactive care is more important now than ever.</li> <li>▪ We know you best. As family physicians, we know your medical histories, your families, your circumstances, and we are in the best position to meet your medical needs.</li> <li>▪ If patients need to be seen urgently, we will arrange a safe way to see them in person.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Who is a suitable candidate for virtual care vs. in-person supports (i.e. urgent, call 9-1-1)?</li> <li>▪ What services are available via phone or video vs. more suited for in-person visits?</li> <li>▪ When the doctor is available for appointments?</li> <li>▪ Where they can book appointments and learn more information?</li> <li>▪ Why are we using virtual care? Why it is important to contact your doctor, especially for ongoing health conditions?</li> <li>▪ How can patients prepare for a virtual visit and what to expect?</li> </ul>

## What Your Clinic Can Provide Virtually

Many patients may be unaware about what services they can access virtually through their family practice. In order to communicate about options, it is important to **define what you have the capacity to offer**. Be transparent about when you may need to arrange an in-person visit. Reassure them that adequate precautions are taken. Good communications is key. It's what doctors do best!

## Examples of Activities for Virtual Visits and Blended Virtual/In-clinic Model

▶ You need to determine what you are comfortable with offering virtually. Reviewing your schedule over the last few weeks could help with identifying potential patients and visit types.

### Examples of what can be done via video or phone<sup>2</sup>

- Treatment of common illnesses
- Help with anxiety or stress in uncertain times
- Preventative care, including disease prevention and health promotion
- Assess and treat urinary, sinus and minor skin infections
- Chronic Disease Management and other high risk patients
- Complex care visits including advanced directives
- Primary mental health care
- Palliative care
- Pre-natal and maternity care check ins
- Healthy child development assessments
- Youth health
- Rehabilitation advice
- Weight loss
- Smoking cessation
- Review lab, imaging and specialist reports
- Referrals to and coordination with other levels of care (hospitals and specialist care)

### Examples of what could be delivered in-person with safety precautions:

- Immunizations
- Well baby visits (physical exam)
- Geriatric care, including home health and long-term care
- Hospital Care
- Emergency Room Medicine
- Essential Surgeries

▶ Physicians may consider sending instructions in advance or during the visit about what patients can do from home to assist in self-examination and reporting.

### Enabling patient participation in virtual exams:

- Recording vitals – (e.g. manual heart rate or digital blood pressure monitor etc.)
- Height, weight and head circumference for growth and development visits
- Send pictures or documents (ideally by secure EMR patient portal or secure email)
- Range of motion
- Strength vs. gravity or with a partner/parent/roommate
- Palpitation self-exam or with a partner/parent/roommate

<sup>2</sup> Adapted from My Family Doctor Cares campaign from BC College of Family Physicians <https://bccfp.bc.ca/myfamilydoctorcares/>

## Resources for Patient Virtual Visits

Resources that may be helpful in preparing for virtual exams or as instructions for patient self-exam may include:

- [Virtual Care During a Pandemic](#) Canadian Pediatric Association
- [Virtual Care Playbook – What can be Safety Assessed and Treated](#) Canadian Medical Association

## Tips and Examples of Approaches

### Select Tools for Patient Communication

There are different methods to contact your patients to share announcements or educational information. Your patients must know that you as their family physician is adding virtual care visits to your regular practice. Channels to be used include:

- **Email** – Can be used to send patients invitation with a link to access virtual visit. Some email software solutions enable you to email groups of patients with information about the new virtual care services. Email communication is also convenient for clinic staff.
- **Website** - Creating or updating a clinic website to let patients know how they can book virtual care appointments or access safe in-person visits.
- **Pathways BC Virtual Care Directory** – Public-facing directory (launching soon) gathering information which physicians are offering virtual visits where clinics can edit their profile. It is a practical alternative for a clinic website. To create your clinic profile, [register here](#).
- **Social Media** – Consider sending updates via social media or retweeting #virtualCARE campaign posts from Doctors of BC.
- **Text messages** – Utilizing a texting solution to reach group of patients with information. Ensure it would not cause information overload.
- **In-person conversation** – Do not miss the opportunity to engage in conversation either during the office visit or when patient contacts the reception. Capitalize on trust you already build.

If you are missing email addresses but have phone numbers, consider launching a campaign to collect email addresses by calling patients directly (search for VOIP Phone and Contact Masking Tools) or by using text messaging apps.

For more information about specific technology tools, [contact DTO](#).

### Tips for Contacting Patients

- Frame the messages in your own voice – be as 'familiar and friendly as possible'
- Identify yourself clearly by letting them know which clinic you are from by name.

- Consider using a digital phone number (see [VOIP Phone and Contact Masking Tools](#)) to mask your personal number and ensure that the name of your clinic shows up on call display
- Set up call forwarding to re-route clinic phone calls to the MOA who is on shift/on call
- Create a clear voicemail advising patients that the clinic is still open and how they can request a virtual care visit
- Add an update to your website announcing that changes to clinic services and how to book appointments

## Template Examples for Patient Communication

### Resources

Doctors of BC has developed a variety of templates and resources to help clinics get patients back to practice.

- [Doctors of BC Support for Physician Outreach on Virtual Care](#) Doctors of BC has developed a package for physicians that provides materials to help spread the word to the public and patients. The package includes templates for patient e-mails, social media posts, newspaper op-eds, advice on how best to reach out to specific media outlets and messaging. To access the package, physicians can log into the [Doctors of BC members portal](#) (login required).
- [Clinic Transition to Virtual Care Poster](#) - Editable/printable poster (MS Word) for clinics to notify patients that they are providing some of their care and visits virtually, either over the phone or video. [English](#) | [Arabic](#) | [Chinese](#) (simplified) | [French](#) | [Hindi](#) | [Korean](#) | [Farsi](#) | [Punjabi](#) | [Spanish](#)
- [Virtual Care for Patients – FAQ & Troubleshooting Tips](#) - Information to help patients prepare for virtual care visits. Designed for clinics to share with their patients as a resource guide.

### Website Template: Practice Announcement

We are here for you! Our team is still providing patient care during these challenging times. Now more than ever, we want to stay connected with you and we have the capacity to continue providing care. Virtual appointments are available by telephone and face-to-face video conferencing. Procedures are in place to arrange an office visit should you need to be seen in-person for an examination, following your virtual consultation.

Please do NOT show up at the office if you do not have a booked appointment. Always call to make arrangements and obtain specific instructions to follow. Your cooperation with this is essential so that we can keep everyone safe.

- Provide instructions on how to book an appointment
- What to expect during a virtual visit
- When to contact the clinic vs. when to access emergency / urgent care

## Email Marketing Template: Expressed Consent Campaign

Dear (Patient Name),

Your health care is important to us. In order to provide you with the best possible care, we occasionally send convenient electronic communications to our patients about their health care and the services we offer.

The mobile device(s) and email associated with your patient files at (PRACTICE NAME) can be found below:

(888) 888-8888

[Email]

You are currently set to receive text messages for appointment reminders and information about your health care treatment, but you will not receive text messages or emails about the services we offer. If you wish to change your preferences in order to receive electronic communications or if you wish to decline receiving all messages from (PRACTICE NAME), [[click here – linked to unsubscribe](#)]. This will not affect your ability to receive care.

Click here to go to a [[web page or form](#)] where you will be able to provide your consent for receiving electronic communications from time to time about the services we offer our patients.

Our goal is to provide you with relevant and useful information about your health care and services we offer for improving your health. Thank you!

## Email Template: Virtual Care – Introduction for Patients

In order to expand our services and availability to patients, our clinic will be introducing virtual care visits as of *[Date]*. Patients will now be able to connect with their family doctor from the location of their choosing, using their smartphone or computer.

Check out the [Virtual Care - Quick Start Guide for Patients PDF](#) attached to this email for more information about how to access this new service. To sign up for a virtual care visit, refer to our *[Website]* for appointment availability and clinic hours. For questions or assistance with troubleshooting, please contact the clinic at *[Clinic Phone]* or *[Email]*.

## Email Signature Disclaimer: when sending emails to patients

Consider including the following disclaimer when sending emails to patients:

**DISCLAIMER:** *Please note, we cannot guarantee the confidentiality of information transmitted through e-mail. Please be aware of this limitation when contacting us.*

## Email Template example: Virtual Care – Visit Email Invitation

This is a courtesy reminder of your virtual care appointment at *[Name of Clinic]*:

[Date & Time]

[Virtual Care Meeting Link]

[Teleconference Phone # and Meeting ID]

[Application help link or clinic contact info]

Please ensure you read the [Virtual Care - Quick Start Guide for Patients PDF](#) and any attachment accompanying this email, as they contain important information regarding your appointment(s).

#### **Need to cancel or change your appointment date?**

Please respond to this email or contact the clinic at *[phone number]* with at least 24 business hours advance notice to avoid missed appointment fees.

**NOTE:** *Depending on the platform, clinics may opt to utilize a virtual waiting room model or to send set up scheduled virtual care sessions. The following template can be used as an email invitation for scheduled virtual care appointments.*

## Email Signature Disclaimer: Virtual Care – Visit Email Invitation

Consider including the following disclaimer in your virtual care invite emails or website pages:

**DISCLAIMER:** *This virtual care visit, email invite and any attachment(s) is/are for authorized use by the intended recipient(s) only and must not be read, distributed, disclosed, used or copied by anyone else. If you are not the intended recipient, please notify the sender immediately, disconnect and delete any attachment(s). Patients may be redirected to the clinic for an in-person visit at any time if the concern is deemed not appropriate for virtual care. Thank you.*

## Support Available

### Doctors Technology Office (DTO) Virtual Care Enablement Program

Supporting the implementation of virtual care technology across the province with:

- **Virtual Care Peer Support Network:** a provincial network of Physician and MOA Peer Mentors to support their colleagues, and/or help facilitate webinars and learning sessions.
- **Virtual Care Learning Series:** a set of video tutorials and real-life physician and MOA case studies on how to optimize the use of common virtual care tools. Visit the [DTO YouTube page](#) for info:
  - Using Zoom for Healthcare for Virtual Visits - [Video Tutorials](#)
  - Using Doxy.Me for Virtual Care – [Video Tutorials](#) | [Webinar Recording](#) | [PPT Slides](#)
  - Using MailChimp and Fongo Works for Patient Communications – [Video Tutorials](#) | [Webinar Recordings](#) | [PPT Slides](#)
- **Webinar Sessions:** regular webinars are offered to support you with getting started and optimizing use of virtual care. A list of available webinars can be found [here](#).



## Practice Support Program

The [Practice Support Program \(PSP\)](#) assists physicians and Medical Office Assistants (MOAs) to build and enhance their practices through a range of activities and initiatives. Actions can include in-practice visits, peer mentor consults, learning opportunities, and using data tools. Many improvements are focused on introduction of virtual care.

Here are some examples of using panel data for patient outreach:

- Contacting COPD and asthma patients to ensure they have action plans in place.
- Proactively reaching out to patients who need routine chronic disease management care.
- Running reports of upcoming medication expiry and doing outreach to renew/check in with patients.
- Checking in with patients over 60 who may be at increased risk.



By participating in Quality Improvement Cycles facilitated by PSP, **family doctors and each eligible practice team member can receive payment for one to 15 hours. Physicians may also earn up to 45 certified MainPRO+ credits.** More information is available [here](#).

## Public Campaign

To remedy this situation and to raise awareness that ongoing care is critical, the College of Physicians and Surgeons of BC and Doctors of BC has launched [a public campaign](#) that promotes safe options for continuing medical appointments with video, phone, and also in-person. It educates patients through that virtual appointments can work and that clinical practices are available to support – here is a [video example](#) from the [MyFamilyDoctorCares.ca](#) campaign.



**Doctors Technology Office (DTO)** is here to support you, please reach out with your virtual care questions to:  
 ☎ 604 638-5841 ✉ [DTOinfo@doctorsofbc.ca](mailto:DTOinfo@doctorsofbc.ca) 🌐 [www.doctorsofbc.ca/doctors-technology-office](http://www.doctorsofbc.ca/doctors-technology-office)