

TELUS Wolf EMR Guide- Virtual Care Tip Sheet

Introduction

The purpose of this document is to provide some quick and easy wins in using your Wolf EMR during COVID-19. Some key principles at this time are to:

- 1) [Obtain and Document Virtual Contact Information](#)
- 2) [Set Up Macros to Streamline Entry of Common Phrases](#)
- 3) [Obtain and Document Informed Consent for Virtual Visits](#)
- 4) [Record Patient Contact Start and Stop Times](#)
- 5) [Document Patient Interactions following required virtual care documentation practices](#)
- 6) [Record COVID-19 Screening and Assessment Data in Searchable Fields](#)
- 7) [Create a Virtual Visit Template](#)

1) Obtain and Document Virtual Contact Information

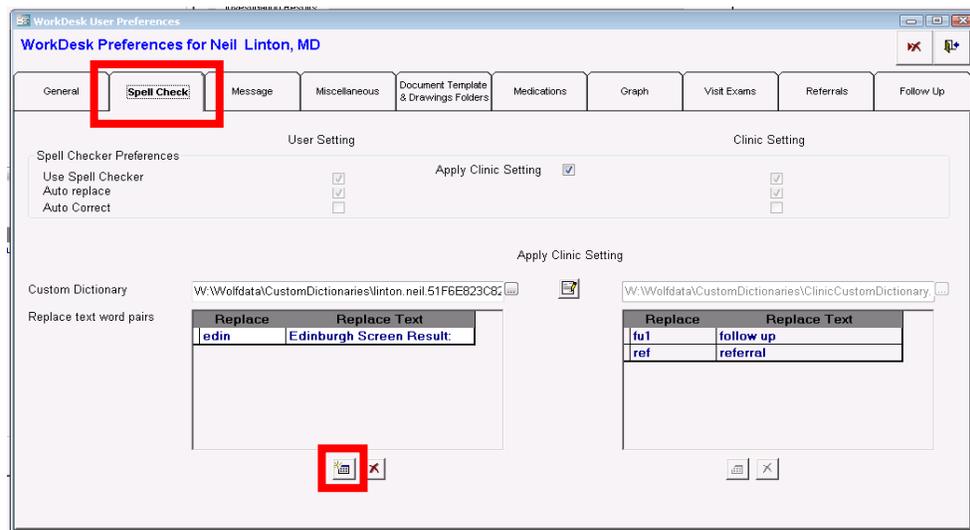
- a) Document patients' e-mail addresses and cell phone numbers in the patient chart (Patient Maintenance → 'Name/Addr/Phone' tab) as these are required for virtual care purposes
- b) Clinics already using on-line scheduling and text reminders are well poised for virtual care services

2) Set Up Macros to Streamline Entry of Common Phrases

This feature allows you to save time by using an abbreviation (keyboard shortcut) to enter a phrase, paragraph or entire long set of text. As a clinic is adapting to new virtual care office processes any phrase that a user finds themselves using twice or more per day should be saved as a macro. See section on "obtaining and documenting consent" for recommended wording for consent documentation.

To create macros to help speed up time spent on charting:

- a) Open the Workdesk → Click on the 'Configure' tab at the top of the Workdesk → Click on Configure Workdesk
- b) In the new window that pops up, go to the 'Spell Check' tab and click on the  icon near the bottom of the window



c) In the new field that appears, enter a word or abbreviation that you would like to use as your macro that will be linked to a longer phrase in the “Replace” box.

Replace	Replace Text
edin	Edinburgh Screen Result:
ptct	Informed Verbal Consent

d) Then, enter the entire phrase in the “Replace Text” box. In this case we chose “ptct” as the short text to be replaced by the longer phrase “Informed Verbal Consent Obtained”

e) To insert the macro into a patient chart, type the autocomplete abbreviation (in this case “ptct”) into your text box and then click the **Spacebar** or **Enter**. Below are examples of how macros can be used to document patient consent as a:

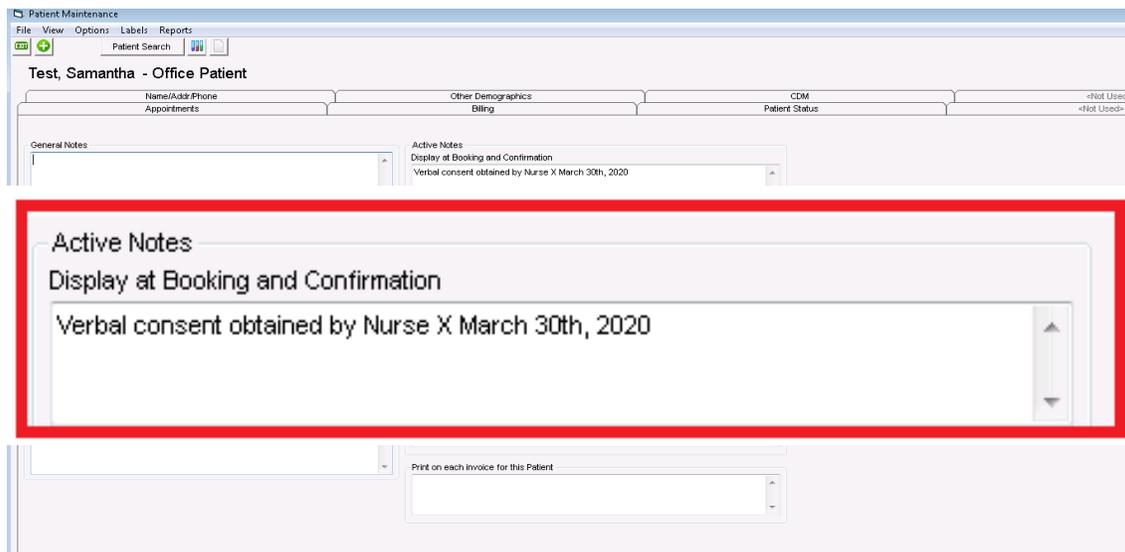
(1) Visit Note

SUBJECTIVE Informed Verbal Consent Obtained |

Open Hx
Builder

Or

(2) Appointment Booking Note



Patient Maintenance

File View Options Labels Reports

Patient Search

Test, Samantha - Office Patient

Names/Addr/Phone Appointments Other Demographics Billing CDM Patient Status -Not Used- -Not Used-

General Notes Active Notes Display at Booking and Confirmation Verbal consent obtained by Nurse X March 30th, 2020

Active Notes Display at Booking and Confirmation Verbal consent obtained by Nurse X March 30th, 2020

Print on each invoice for this Patient

See these helpful Wolf EMR Help Files for additional information on creating and using macros:

- [Creating auto-replace text](#)
- [Using auto-replace text](#)

3) Obtain and Document Informed Consent for Virtual Visits

Following the [CPSA advice on virtual care](#), while regulated virtual care platforms are preferred, unregulated virtual platforms may be used in pandemic circumstances. When using virtual platforms for health purposes, it is recommended that express patient consent is obtained, even verbally, and recorded in the chart note.

The following statement (from the CPSA) can be pasted in a chart note:

“Informed verbal consent was obtained from this patient to communicate and provide care using virtual care and other communication tools. This patient has been explained the risks related to unauthorized disclosure or interception of personal health information and steps they can take to help protect their information.”

Patients need to be informed of what virtual care services are being provided and how they will be communicated (via clinic or provider email address, text message, invite via application, etc.). Verbal consent documented in the patient’s chart is acceptable as a minimum during COVID-19. CMPA recommends the use of a signed informed consent form where possible.

Principles:

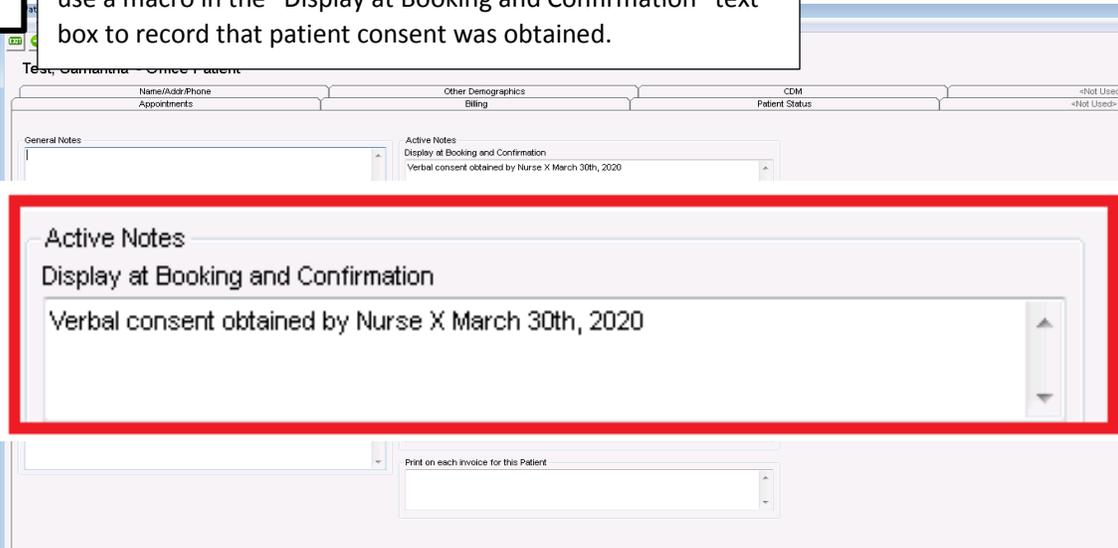
- Clinic team members and providers should all be aware of the common clinic process for informing patients and documenting consent.
- Consent should consistently be documented in the EMR using a standard process so all clinic team members know where to find the information. Consent needs to be documented once, not for every encounter. Consider creating a rule to identify patients who book appointments and have not yet provided consent.
- Consent is valid as long as the parameters of what the patient is consenting to do not change. For example, patient consented to virtual care today. In 6 months a patient portal is implemented in the clinic. Consent will need to be recollected/re-signed as the patient did not agree to portal use in the original consent.

A. Verbal Consent – for Patients Booking a Virtual Appointment and Who Will Not Be Visiting the Clinic to Sign a Consent Form

For patients booking a virtual visit and without a signed consent form, the clinic may document consent verbally and use one of the following methods to document:

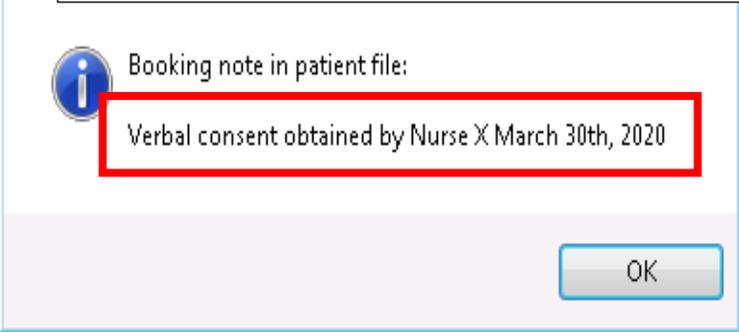
- i. **Macro** – use a macro to document in a place where all providers and team know where it is located. Below is an example of how a macro can be used to flag that patient consent has been obtained for a patient at the time of booking:

1 Go to the “Notes” tab of the Patient Maintenance screen and use a macro in the “Display at Booking and Confirmation” text box to record that patient consent was obtained.



The screenshot shows the Patient Maintenance screen with the 'Notes' tab selected. A red box highlights the 'Active Notes' section, specifically the 'Display at Booking and Confirmation' text box, which contains the text: 'Verbal consent obtained by Nurse X March 30th, 2020'.

2 The next time an appointment is booked for the patient, a window will pop up notifying you that patient consent was obtained.



The screenshot shows a notification window with an information icon and the text: 'Booking note in patient file: Verbal consent obtained by Nurse X March 30th, 2020'. The text is enclosed in a red box, and there is an 'OK' button at the bottom right.

- ii. **SOAP Template** - Consider using a standardized SOAP template with a pre-populated “Subjective” field to record that patient consent was obtained. The “Subjective” field can also be used to document information such as that the patient’s identity was verified and that, although not required at every visit, a disclaimer was read to the patient at the beginning of the visit (see below screen shot).

S.O.A.P		Record Details
Template Search:	<input type="text" value="Virtual Visit Template"/>	No F
CHIEF COMPLAINT	<input type="text"/>	Inve
SUBJECTIVE	<ul style="list-style-type: none"> •Establish Identity of the patient, Spell last name, DOB, PHN and address. <Yes><No> •READ THE FOLLOWING DISCLAIMER TO PATIENT <Yes><No> "We will use reasonable means to protect your security and confidentiality however the security and confidentiality of electronic communications cannot always be guaranteed. No tools are completely secure. Digital communications can be intercepted. If you are worried other arrangements can be made." •Informed Verbal consent obtained. <Yes><No> 	Lab Pen At A Can
OBJECTIVE	<input type="text"/>	No C Prot

Note: A red arrow points to the 'SUBJECTIVE' field content.

See these Wolf EMR Help Files for additional information on configuring and using SOAP templates:

- [Using SOAP templates](#)
- [Managing SOAP templates](#)

- iii. **Virtual Visit Exam Template** - A virtual visit exam template can be created that makes it easy to document verbal patient consent. This template can also be built to assist in delivering a virtual visit and document information such as who provided the consent, whether the patient disclaimer was read to the patient, and the type of visit (see below screen shots).

Consent Obtained:

- Yes Verbally**
- Yes Written**
- Already documented on chart**
- Patient Declined**

Patient or Agent:

- Patient**
- Patient**
- Patients Agent**

Disclaimer Read to Patient:

- Yes**
- No**
- Read to Patient previously and Documented on chart**

Type of Visit:

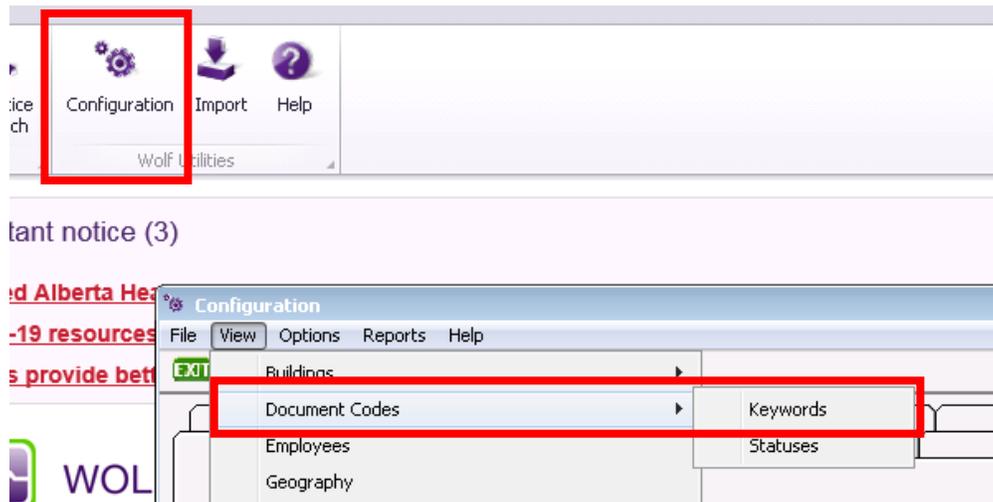
- Phone Call**
- Email Consultation**
- Video Conference**
- Phone Audio Via Video Conference**

Also see these helpful resources for additional information on configuring and using exam templates:

- ACTT Resources
 - [Exporting and Importing Exam Templates](#)
- Wolf EMR Help Files:
 - [Customizing structured exam templates](#)
 - [Using structured exam templates](#)

B. Written Consent – for Patients with an In-Person Appointment

The Wolf EMR does not currently have a SMART form for obtaining signed patient consent. As an alternative, it is suggested that you download a [Word](#) or [PDF](#) copy of the CPSA’s patient consent form and save it in the EMR as a SMART form. The form can be printed out for patients to fill out and scanned into their chart as a document. When adding the document to patient charts, ensure that your clinic uses a consistent keyword such as “Virtual Care Consent”. The clinic EMR administrator can create a new document keyword by opening the ‘Configuration’ window → View → Document Codes → Keywords



Once the virtual care consent keyword is configured, it can be used to record the SMART form in the patient chart:

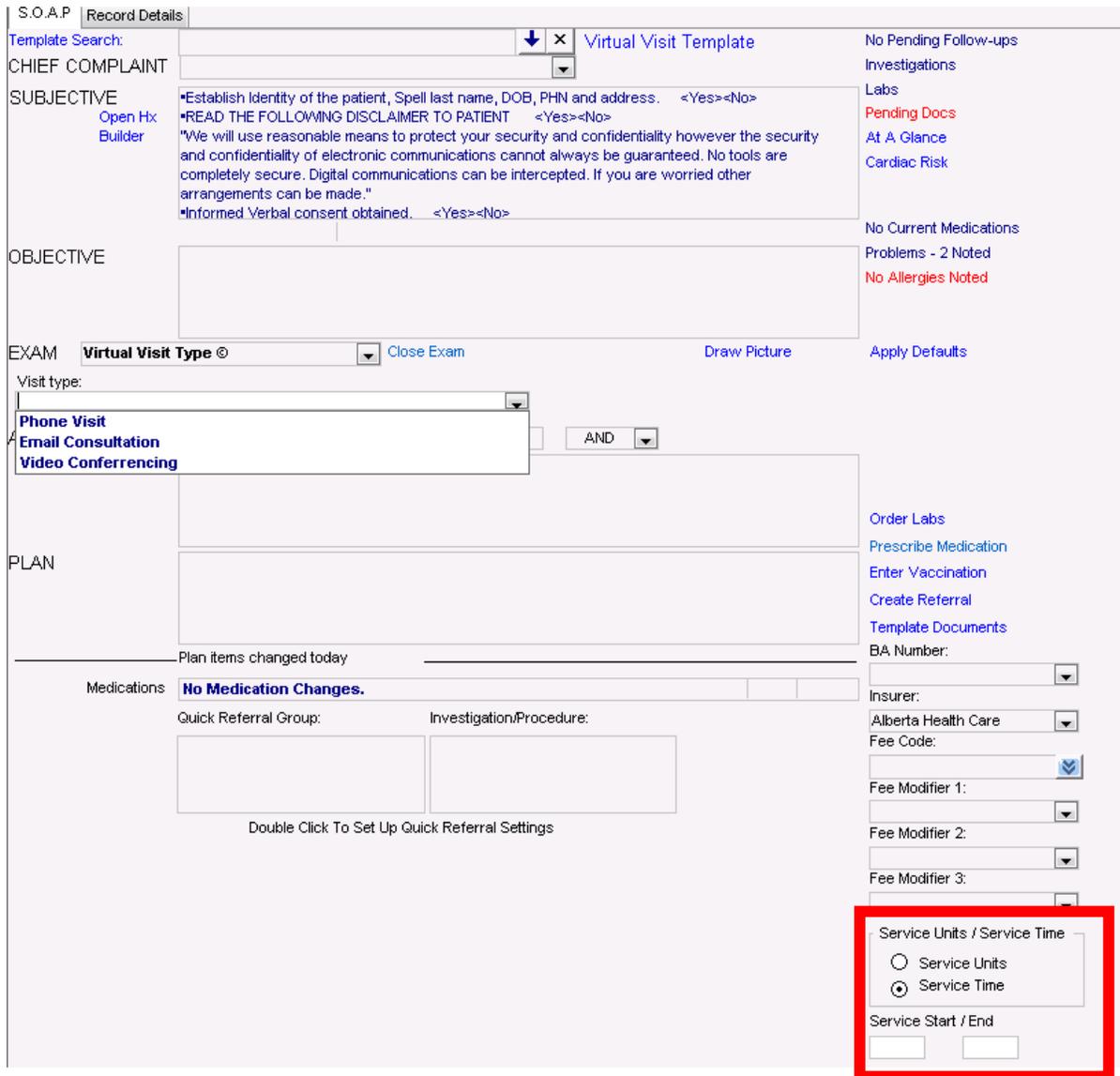
Date	Status	Document Type	Ordered By	Keyword One	Keyword Two	Keyword Three	Content Type
03-Apr-2020	Physician			Virtual Care Consent			
18-Feb-2020	Physician	Assessment					PHYS Screening Questionnaire

See these helpful resources for additional information on importing SMART forms and saving them as documents in patient charts:

- ACTT Resources:
 - [Changing Document Keyword List in Telus Wolf](#) – 2.5 min video
 - [Linking Documents with Keywords in Telus Wolf](#) – 4.5 min video
- Wolf EMR Help Files:
 - [Sharing SMART Forms](#)
 - [Opening SMART Forms](#)
 - [Linking documents to patient charts](#)
 - [Scanning printed documents \(using Fujitsu ScanSnap scanners\)](#)

4) Record Patient Contact Start and Stop Times

Recording visit start and finish times is required for all types of virtual visits. Use the Service Start/End time fields at the bottom of the visit template to document both times.



The screenshot shows a medical record template with the following sections and fields:

- S.O.A.P Record Details:** Includes a 'Template Search' field with a dropdown arrow and a 'Virtual Visit Template' button.
- CHIEF COMPLAINT:** A text input field.
- SUBJECTIVE:** Contains a text area with a disclaimer: "Establish Identity of the patient, Spell last name, DOB, PHN and address. <Yes><No> *READ THE FOLLOWING DISCLAIMER TO PATIENT <Yes><No> *We will use reasonable means to protect your security and confidentiality however the security and confidentiality of electronic communications cannot always be guaranteed. No tools are completely secure. Digital communications can be intercepted. If you are worried other arrangements can be made." *Informed Verbal consent obtained. <Yes><No>". There are also links for 'Open Hx Builder', 'Pending Docs', 'At A Glance', and 'Cardiac Risk'.
- OBJECTIVE:** A text input field.
- EXAM:** Includes a 'Virtual Visit Type' dropdown menu, 'Close Exam', 'Draw Picture', and 'Apply Defaults' buttons. A 'Visit type:' dropdown menu is open, showing options: 'Phone Visit', 'Email Consultation', and 'Video Conferencing'. There is also an 'AND' dropdown menu.
- PLAN:** A text input field. Below it, there are buttons for 'Order Labs', 'Prescribe Medication', 'Enter Vaccination', 'Create Referral', and 'Template Documents'. A 'BA Number:' dropdown menu is also present.
- Medications:** Shows 'No Medication Changes.' and a 'Quick Referral Group:' field.
- Investigation/Procedure:** A text input field.
- Service Units / Service Time:** A section highlighted with a red box, containing two radio buttons: 'Service Units' (unselected) and 'Service Time' (selected). Below this are two text input fields for 'Service Start / End'.

B. The Assessment Tool SMART Form can be used by providers to document patient encounters during the COVID-19 pandemic

<u>PATIENT INFORMATION</u>		Assessment Date: April 3, 2020
Patient Name: David Test		
PHN: 0000000000	DOB: 01-Jan-1980	
Address: 123 Street Vancouver, BC 123 456		
Tel (H): (213) 456-9874	Tel (C):	Tel (W):
<u>ASSESSOR INFORMATION</u>		
Name: Neil Linton, MD		
Address: Toward Optimized Practice 12315 Stony Plain RD second line Edmonton, AB T2R 0S9		
Billing #:	Phone: (403) 555-1234	Fax: (403) 555-2345
Contact Method	<input type="checkbox"/> Telephone <input type="checkbox"/> Virtual Call <input type="checkbox"/> In Person	
Assessment with	<input type="checkbox"/> Patient <input type="checkbox"/> Patient Representative	
Start Time: []	End Time: []	
Reason for Encounter	<input type="checkbox"/> Flu-like symptoms <input type="checkbox"/> Other	
Symptoms:		
Fever	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Cough	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Difficulty Breathing	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Risk Factors	<input type="checkbox"/> Age >65 years <input type="checkbox"/> Asthma <input type="checkbox"/> Cardiac Disease <input type="checkbox"/> Chronic Neurological or Neuromuscular Disorder <input type="checkbox"/> COPD <input type="checkbox"/> Diabetes <input type="checkbox"/> Immunosuppressed <input type="checkbox"/> Liver Disease <input type="checkbox"/> Malignancy <input type="checkbox"/> Smoker <input type="checkbox"/> Post-partum (<6 weeks) <input type="checkbox"/> Pregnancy <input type="checkbox"/> Renal Disease <input type="checkbox"/> Respiratory Disease <input type="checkbox"/> Recent travel outside of Canada (<14 days) <input type="checkbox"/> Patient is a healthcare worker <input type="checkbox"/> Close contact with PUI <input type="checkbox"/> Other []	
Severity	<u>SELECT ONE</u>	
COVID-19 Status	<u>SELECT ONE</u>	
Self-isolation	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Treatment Plan		
[]		
Handouts	How to isolate at home when you have COVID-19 How to care for a person with COVID-19 at home: Advice for Caregivers Public Health Agency of Canada	

6) Record COVID-19 Screening and Assessment Data in Searchable Fields

Consider creating a COVID-19 exam template to document COVID-19 screening and assessment data that can be pulled using the Practice Search. Below is an example of what such a template could look like.

EXAM	Virtual Visit Type ©	Close Exam	Draw Picture	Apply Defaults
Patient or Pt Agent:	<input type="text"/>		Present Risk Factors:	Yes (See below drop downs to identify)
Disclaimer Read:	<input type="text"/>		Age over 65:	No
Verbal Consent given:	<input type="text"/>		COPD:	<input type="text"/>
Symptoms:	<input type="text"/>		Asthma:	<input type="text"/>
Fever:	<input type="text"/>		Cardiac Disease:	<input type="text"/>
Cough:	<input type="text"/>		Chronic Neurological or Neuromuscular Disorder:	<input type="text"/>
Difficulty Breathing:	<input type="text"/>		Diabetes:	<input type="text"/>
Exposure risk:	<input type="text"/>		Immunosuppressed:	<input type="text"/>
Travelled outside Canada in last 14 days:	<input type="text"/>		Liver Disease:	<input type="text"/>
Close Contact with Confirmed case of COVID:	<input type="text"/>		Malignancy:	<input type="text"/>
Close Contact to someone with URTI who travelled:	<input type="text"/>		Smoker:	<input type="text"/>
Advice to patient:	<input type="text"/>		Post Partum under 6 weeks:	<input type="text"/>
Maintain Self isolation call 811 if worsens:	<input type="text"/>		Currently Pregnant:	<input type="text"/>
Call 811 immediately:	<input type="text"/>		Renal disease:	<input type="text"/>
Arrange for Physician Call back:	<input type="text"/>		Respiratory Disease:	<input type="text"/>
Call 911 or proceed to nearest ED:	<input type="text"/>		Health Care Worker:	<input type="text"/>
			Close contact with PUI:	No

Also see these helpful resources for additional information on configuring and using exam templates:

- ACTT Resources
 - [Exporting and Importing Exam Templates](#)
- Wolf EMR Help Files:
 - [Customizing structured exam templates](#)
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7) Create a Virtual Visit Template

For faster documentation of the required virtual appointment fields, consider creating a virtual visit template. See below screen shots of two example virtual visit templates.

Also See these Wolf EMR Help Files for additional information on creating and using visit templates:

- [Using structured exam templates](#)
- [Using SOAP templates](#)
- [Entering notes using shortcuts and templates](#)
- [Configuring appointment reasons](#) (see “Default Visit Template” section)

Version 1

The screenshot displays the 'Virtual Visit Template' configuration screen in the Wolf EMR system. The interface is divided into several sections:

- Template Search:** A dropdown menu is set to 'Virtual Visit Template'.
- SUBJECTIVE:** Contains a text area with a disclaimer: "Establish Identity of the patient, Spell last name, DOB, PHN and address. <Yes><No>". Below it, another text area reads: "READ THE FOLLOWING DISCLAIMER TO PATIENT <Yes><No>". A third text area contains: "We will use reasonable means to protect your security and confidentiality however the security and confidentiality of electronic communications cannot always be guaranteed. No tools are completely secure. Digital communications can be intercepted. If you are worried other arrangements can be made." A fourth text area says: "Informed Verbal consent obtained. <Yes><No>".
- EXAM:** A dropdown menu is set to 'Virtual Visit Type'. Below it, a 'Visit type:' dropdown menu is open, showing options: 'Phone Visit', 'Email Consultation', and 'Video Conferencing'.
- PLAN:** Includes a 'Medications' section with the text 'No Medication Changes.' and a 'Quick Referral Group' field.
- Right Side Panel:** Contains various action buttons and fields: 'No Pending Follow-ups', 'Investigations', 'Labs', 'Pending De', 'A.A. Glanc', 'Cardiac Ris', 'Current Medications', 'Problems - 2 Noted', 'No Allergies Noted', 'Order Labs', 'Prescribe Medication', 'Enter Vaccination', 'Template Documents', 'Insurer: Alberta Health Care', 'Fee Code:', 'Fee Modifier 1:', 'Fee Modifier 2:', 'Fee Modifier 3:', and 'Service Units / Service Time'.

Four callout boxes provide additional instructions:

- Top Right:** "Establish Identity, Read disclaimer, and Obtain consent." (Points to the Subjective section)
- Middle Right:** "Make sure to be clear of the method of communication. This can also include text messaging." (Points to the Visit type dropdown)
- Bottom Right (Top):** "Click on Template Documents to access the online self-assessment. (Any link can be attached here)." (Points to the Template Documents button)
- Bottom Right (Bottom):** "Note that documenting patient contact start and end times is required for virtual visits." (Points to the Service Units / Service Time section)

Version 2

S.O.A.P Record Details

Template Search: COVID check in Template

CHIEF COMPLAINT

SUBJECTIVE

- Established identity of the patient. (Phone: Patient spell last name, DOB, PHN and address; Video: showed driver's license)
- Verbal/Written consent obtained and disclaimer shared with patient. See Documents for confirmation of this.
- Consent obtained by:
- Date:

OBJECTIVE

HISTORY - Age over 65: No
 MEDICAL - Present Risk Factors: Yes (See below drop downs to identify), Close contact with PUI: No, Present Risk Factors: Yes (See below drop downs to identify), Close contact with PUI: No

EXAM Virtual Visit Type

Patient or Pt Agent:

Disclaimer Read:

Verbal Consent given:

Symptoms:

Fever:

Cough:

Difficulty Breathing:

Exposure risk:

Travelled outside Canada in last 14 days:

Close Contact with Confirmed case of COVID:

Close Contact to someone with URTI who travelled:

Advice to patient:

Maintain Self Isolation call 811 if worsens:

Call 811 immediately:

Arrange for Physician Call back:

Call 911 or proceed to nearest ED:

Present Risk Factors: **Yes (See below drop downs to identify)**

Age over 65:

COPD:

Asthma:

Cardiac Disease:

Chronic Neurological or Neuromuscular Disorder:

Diabetes:

Immunosuppressed:

Liver Disease:

Malignancy:

Smoker:

Post Partum under 6 weeks:

Currently Pregnant:

Renal disease:

Respiratory Disease:

Health Care Worker:

Close contact with PUI: **No**

ASSESSMENT Structured AND

Text 079.82. 079.82 079.82

PLAN

Click on File Name to View Linked Documents or Double Click on Linked Smart

Linked Documents

File:	COVID-19 Assessment
File:	Public Health Agency of Canada
File:	How to care for a person with COVID 19 at home

Linked Smart Forms

Order Labs
 Prescribe Medication
 Enter Vaccination
 Create Referral
 Template Documents

BA Number:

Insurer:

Alberta Health Care

Fee Code:

Fee Modifier 1:

Fee Modifier 2:

Fee Modifier 3:

Service Units / Service Time

Service Units
 Service Time

Service Start / End

Pt or agent

Yes / No for all of these drop dropdowns

Advice given / Not Required

Advised of this / Not Required

All risk factors have fixed list answers; you must select one from the drop down, all of which are Yes/No except Malignancy- (Current/Past/None)

Acknowledgement

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References:

Alberta Medical Association: Virtual Care: Helping physicians minimize the risk of exposure to COVID-19
<https://www.albertadoctors.org/leaders-partners/ehealth/virtual-care>

College of Physicians and Surgeons of Alberta: ADVICE TO THE PROFESSION
COVID-19: Virtual Care
http://www.cpsa.ca/wp-content/uploads/2020/03/AP_COVID-19-Virtual-Care.pdf