

The Essentials to Getting Started with Virtual Care Checklist

<https://www.albertadoctors.org/leaders-partners/ehealth/virtual-care#essentials>

May 7, 2020

- Obtain patient email addresses and/or mobile numbers
 - Email addresses can be used for communicating new Virtual Care services to groups of patients, and depending on the virtual care tool can be used for sending the virtual visit link/URL to a patient.
 - Mobile numbers are useful for communicating with a patient if there are any issues with the virtual visit, or to ensure they are ready for the visit.
- Inform patients
 - Patients should be aware of what Virtual Care services (phone, secure messaging, video visits) are being provided and how they will be communicated (via clinic or provider email address, text message, invite via application, etc.)
- Confirm patient identity
 - If a patient is previously known to the physician or staff, identity verification may be as simple as recognizing each other's voice
 - If not, ensure a process is in place to verify identity of the patient or their agent. This can be done by asking for full name, date of birth or one other key piece of information such as postal code
- Obtain patient consent
 - Verbal consent documented in the patient's chart is fine as a minimum. CMPA recommends the use of a signed informed consent form. View [Word version](#) or [PDF version](#)
 - CPSA has provided guidance on obtaining and documenting consent in the following [COVID-19 Virtual Care Statement](#).