

Checklist: Patient consent to participate in a video visit

Steps to securing informed consent	√
1. Orientation <ul style="list-style-type: none"> • Introduce the patient to the video solution, how it works, and how it can be accessed (via website or app). • Explain the email invitation with link and need to test the connection prior to the appointment. 	
2. Confidentiality/Privacy <ul style="list-style-type: none"> • Assure the patient that no other parties can see the interaction online and that the video visit is secure. 	
3. Recording <ul style="list-style-type: none"> • Assure the patient that the session, which takes place in “real time”, is not recorded. 	
4. Technical Considerations <ul style="list-style-type: none"> • Explain the sound delay. • Advise the patient to wait their turn and pause before speaking. • Advise the patient to use a normal speaking voice. • 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. 	
5. Contingency Management <ul style="list-style-type: none"> • Explain that the health care provider may determine during the interaction that an in-office assessment may be needed. • Explain that the patient has the right to refuse to participate and the right to decline the video visit at any time. • 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). 	
Follow-up Instructions <ul style="list-style-type: none"> • 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. 	
Opportunity for Questions and Feedback <ul style="list-style-type: none"> • Ask the patient if they have any questions about the process. • Advise the patient that the video solution may prompt them to participate in a satisfaction survey after the video visit. 	
Consent <ul style="list-style-type: none"> • Request consent to participate in the video visit from the patient or substitute decision maker. • 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. • For further information and guidance on obtaining and documenting consent, refer to the Canadian Medical Protective Association’s Consent to Use Electronic Communications. 	

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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.