

**Statement on Medical Learner Participation in Virtual Patient Assessments in Undergraduate Medical Education**

<b>Approved by:</b>	<b>Curriculum Committee</b>
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## **I. Purpose**

The Doctor of Medicine (the Program) or Undergraduate Medical Education (UME) in the Schulich School of Medicine & Dentistry at Western University supports Medical learner learning in a variety of forums that mirror patient care.

One important modality of patient care highlighted in the era of COVID-19 is virtual patient assessment. This denotes a patient assessment that excludes physical face-to-face care.

This statement will inform medical learner participation in virtual patient care during required clinical learning in the Program.

## **II. Definition**

*Virtual care has been defined as any interaction between patients and/or members of their circle of care, occurring remotely, using any forms of communication or information technologies with the aim of facilitating or maximizing the quality and effectiveness of patient care.”<sup>1</sup>*

Virtual care involves synchronous and asynchronous patient assessments:

- Synchronous: the assessment of a patient in real time using video or telephone assessments
- Asynchronous: the delivery of patient care through written or oral processes such as email, voice mail, and secure messaging.

The criteria in this document applies only to medical learners in the UME curriculum.

It is the expectation that all medical learners will be competent at the appropriate level of training during the curriculum.

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<sup>1</sup> Shaw J, Jamieson T, Agarwal P, et al. Virtual care policy recommendations for patient-centred primary care: findings of a consensus policy dialogue using a nominal group technique. J Telemed Telecare 2017;0(0):1–8.

### III. Criteria for participation in virtual patient care

Medical learner participation in a virtual patient care encounter **must** meet the following criteria as outlined in Appendix A:

1. Adequate Patient Safety
2. Contribute to medical learner Learning and Assessment
3. Adequate Learner Safety
4. Appropriate medical learner Supervision
5. Adherence to Standards for Confidentiality
6. Allowance for Patient Centred Assessment and Documentation
7. Adequate Technology

### IV. Process

For medical learner participation in virtual patient assessments:

1. Medical learners will participate at the level of their expected competence in a virtual assessment only while being supervised by clinical faculty
2. Participation in a virtual patient assessment outside Clerkship will follow the processes of an Optional Clinical Learning Opportunity (OCLO)
3. Medical learner participation in virtual patient assessments may be assessed academically as part of progression in the curriculum
4. Medical learners will be briefed by the faculty on the session in advance
5. Medical learners will comply with the patient care and privacy requirements for virtual patient assessments of the faculty members host healthcare facility. These may vary between health care organizations.
6. Medical learners participating will ensure their network connection (hardware and software) complies with [PHIPA](#) and host healthcare facility requirements
7. Patient demographic information with assessment content and information shared during the interview will be safeguarded by the Medical learner in accordance with the guidelines of the faculty host organization and [PHIPA](#)
8. Medical learners will debrief with faculty after the session concludes
9. Assessments (formative or summative), in accordance with the nature of the session, will occur after the session in direct feedback to the Medical learner by the supervising faculty
10. Medical learners may not record any Sessions may not be recorded or used for any other purposes than providing patient care
11. Medical learners participating could register in advance for [OTNHUB](#) access
12. To meet provincial privacy regulations, sessions should only occur in the host faculty member's healthcare facility site. Where circumstances require sessions to occur outside the host faculty members healthcare facility site, the following will apply:

For virtual patient care/assessments accessed by medical learners outside the host healthcare facility, the Department Chair/ Chief or delegate must approve and accept responsibility for ensuring medical learners understand what is meant by privacy and confidentiality and how to protect the security of patient information and documentation when outside the network security of the host healthcare facility.

If a medical learner is required to participate in virtual patient care/assessments during a required learning experience outside the host healthcare facility (i.e. from home), the Medical learner must discuss with their supervisor(s) their ability to participate while meeting provincial privacy requirements as outlined in the [Personal Health Information Protection Act \(PHIPA\)](#). If a Medical learner is unable to assure privacy requirements, the Medical learner must notify and discuss this with their supervisor(s) to arrange appropriate alternative learning experience(s).

## Appendix A

Criteria	Key Considerations	Conditions
Patient Safety	<ul style="list-style-type: none"> <li>Does the medical learner participation affect patient safety?</li> </ul>	<ul style="list-style-type: none"> <li>Is the platform used <a href="#">PHIPA</a> compliant and approved by governing bodies?</li> <li>Is the patient visit appropriate for learner education level?</li> <li>Does the learner presence impact patient care outcomes?</li> </ul>
Learning and Assessment	<ul style="list-style-type: none"> <li>Does the encounter provide an experience that is valuable to curriculum objectives?</li> <li>Can the encounter offer a competency-based assessment for the medical learner?</li> </ul>	<ul style="list-style-type: none"> <li>Has the medical learner been adequately prepared?</li> <li>Does the session deliver to Program competencies and EPAs?</li> <li>Is the medical learner a meaningful participant at their level of competency?</li> <li>Is there a process for learning outside the session?</li> <li>Can there be effective formative and summative assessments?</li> </ul>
Medical Learner Safety	<ul style="list-style-type: none"> <li>Is the medical learner safe during and after the assessment?</li> </ul>	<ul style="list-style-type: none"> <li>Has there been planning to address any safety to learner from the session?</li> <li>Has there been screening to ensure the learner personal phone and/or email identity is secure and protected?</li> <li>Does the medical learner have access to supports for issues that may arise from the encounter?</li> <li>Does medical learner liability coverage address the encounter?</li> </ul>
Learner Supervision	<ul style="list-style-type: none"> <li>Is the medical learner provided supervision appropriate for their level of competency and risks from the encounter?</li> </ul>	<ul style="list-style-type: none"> <li>Is the medical learner fully supervised?</li> <li>Does the medical learner require accommodations for participation?</li> <li>If the medical learner requires immediate assistance during a virtual patient assessment, can they quickly access the consultant/resident?</li> </ul>
Confidentiality	<ul style="list-style-type: none"> <li>Is the patient and personal health information secure in the session to protect their personal identity and disclosures?</li> </ul>	<ul style="list-style-type: none"> <li>Did the patient and family consent to the encounter?</li> <li>Is the medical learner using hardware and software compliant for <a href="#">PHIPA</a>?</li> </ul>

Criteria	Key Considerations	Conditions
		<ul style="list-style-type: none"> <li>• Is the medical learner in a secure location?</li> <li>• Is the patient information safeguarded in and from the environment, they are located?</li> </ul>
Patient Centred Process	<ul style="list-style-type: none"> <li>• Does the assessment meet key aspects of effective quality care?</li> </ul>	<ul style="list-style-type: none"> <li>• Is the assessment adequately documented?</li> <li>• Are other health professional roles valued and included (where needed)?</li> <li>• Is the assessment sensitive to the patient and family cultural and personal determinants of health?</li> </ul>
Technology	<ul style="list-style-type: none"> <li>• Will technology support medical learner pedagogy, assessment and patient care objectives?</li> </ul>	<ul style="list-style-type: none"> <li>• Is the technology easily accessible?</li> <li>• Is the hardware available able to deliver the session effectively and safely?</li> </ul>