A Guide to Creating A Virtual Connection Program for Patients and Family Caregivers.

St Joseph's HEALTH CARE LONDON

Family caregivers are valued members of a patient's health care team. During a pandemic or time when in-person connections are limited, patients and caregivers face increased stress, anxiety, loneliness and fear, worsened by restrictions on visiting.

While it has been necessary during the COVID-19 pandemic to limit the number of people in our buildings, St. Joseph's Health Care London (St. Joseph's) recognizes the importance of continuing to engage family caregivers as partners in care.

Who is considered a family caregiver?

A family caregiver is a person – family member, friend, neighbour – identified by the patient as someone who provides important personal, social, psychological and physical support, assistance and care, usually without pay, for people in need of support due to frailty, illness, degenerative disease, disability, or end of life circumstances.

Benefits of virtual connections

Maintaining connections with family and friends is an important part of the healing process for patients. *It is important to note that particularly for older adult patients, care teams need to be sensitive to the fact that social isolation can have severe consequences on these individuals and can lead to mortality.*[i]

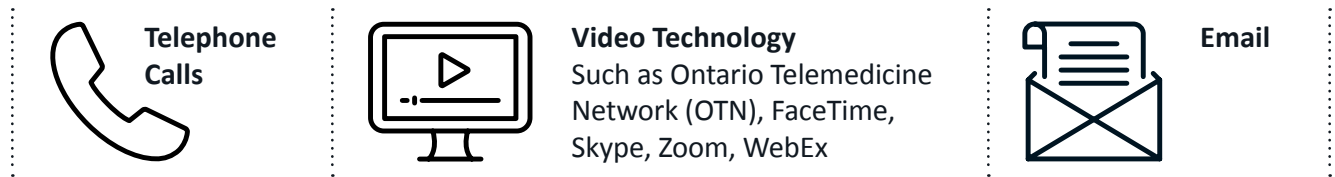Virtual connections can provide familiar comfort and support and also helps patient's:

- Overall physical and psychological well-being
- Personal and social connections – near and far – as some family caregivers live out of town, province or country
- Create opportunities to make memories
- Limit functional decline
- Prevent and manage delirium in older adult patients[ii]
- Provide important distraction

Facilitating connections also has a positive impact on health care providers as they witness beautiful, poignant moments between patients and families/caregivers.

How to connect

Virtual methods of engagement can include:

Telephone Calls

Video Technology
Such as Ontario Telemedicine Network (OTN), FaceTime, Skype, Zoom, WebEx

Email

Reasons to connect

While social connections through virtual visiting is important for patient well-being, virtual connections can also be a way to ensure family caregivers are engaged and involved in care planning and decisions. In consultation with the patient, determine if they want their family caregivers to be virtually connected for conversations on:

- Care updates
- Health teaching
- Team meetings about care planning
- Discharge summary review (planning) including what supports and follow-up will be needed after their hospital stay

Ensure you use platforms that are appropriate for care related virtual connections. At St. Joseph's all care related conversations need to occur through our approved secure platforms (WebEx or OTN). For more information, contact the Patient Relations, Privacy and Risk department at ext. 61234.

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Steps to creating a Virtual Connections Program in a health care setting

1. **Create a dedicated team**

   Having a dedicated team on the care unit who has the technical knowledge and ability to coach, support and educate patients and family caregivers will help facilitate and maintain consistency for virtual connections. Building relationships between staff and patients is a key to the success of a virtual connections program as it fosters trust and a level of comfort. Ensure team members are comfortable with using the latest technology, software and hardware required for different virtual applications. Assign team members duties as needed such as ensuring equipment is charged and scheduling/facilitating virtual connections.

2. **Make sure you have all of the technology needed for facilitating virtual connections**

   a. Make Wi-Fi free and accessible to all patients

      i. Post signs at each patient's bedside with directions on how to connect to the internet to encourage social and virtual connections

   b. Offer a variety of apps or avenues for social connections that are accessible and have wide applicability

   c. Determine the availability of the hardware needed, such as tablets and laptops

If the patient has a <u>personal device</u>:

- ask if they need help to access the device or get connected to the internet
- provide assistance as needed
- refer the patient to the sign with internet connection instructions posted at bedside; if missing, replace

If the patient <u>does not have a personal device</u>:

- explain the process for using the unit's technology (tablet/laptop) and how scheduled virtual visits with their family/friends can be arranged
- identify if there are times/days that don't work for the patient based on their preference and other scheduled appointments, for example, therapy times
- identify if the patient requires any aids to use the device (i.e., glasses, hearing aid), or what accessibility settings should be used on the device itself

d. Consider the functionality of your technology to provide:

   i. Privacy

   ii. Accessibility (large text, screen lightening/darkening, volume)

   iii. Hands-free access/interactions – Consider using a portable iPad stand on wheels with a locking mechanism or a table style book holder that can sit on an over bed table. This promotes privacy, independence, ease of use for both the patient and health care provider and supports infection and control practices.

3. **Assemble "Communication Bins"**

   Consider assembling a "communication bin" with:

   a. A binder with the following sheets:

      i. Sign out form for the device used (iPad/tablet/laptop)

      ii. Instructions for various virtual connection applications (FaceTime, Skype and Zoom)

      iii. Login information for the device and various connection applications (username/password)

   b. The iPad/tablet/laptop and charger

   c. Disinfectant and cleaning tools appropriate for the device

   Store the communication bin(s) in a secure, but central location in your care area so that it is easily accessible and top of mind for not only the dedicated team members, but also the care team. This makes the process of facilitating virtual visits with patients and families easy, efficient, affords enhanced privacy and infection control compliance.

   It is important to communicate with care team members about the process of accessing the virtual connection service and to promote continued engagement with family caregivers throughout a patient's stay. Although patient and family engagement may look different during a time of restricted family presence, such as the COVID-19 pandemic, patient and family engagement is still vital to the care and services we provide at St. Joseph's.

4. **Get proper consent**

   Informed consent is always needed before virtual connections are made. Speak to the patient (and family caregiver if appropriate) to discuss that any virtual connection made over the internet may not be secure. It's important that they understand and provide consent. Document that staff informed the patient that the connection is not guaranteed to be secure, but patient wished to proceed and that assistance was provided. If the virtual connection is made as part of health teaching or care discussions, written consent from the patient is required.

5. **Consider creating a consistent schedule for virtual connections**

   Consider setting-up connections for patients who would benefit on a reoccurring basis, such as the same day of the week and similar time of day. This is especially important for patients with cognitive challenges, so they can establish a routine/pattern for them and their caregiver(s). Tailor your virtual program to each individual patient's preferences/needs as much as possible.

6. **Document virtual care visit in patient's health record**

   Document the visit in the patient's chart. Should any questions or concerns arise regarding the patient's health care or stay, it is important to notify the appropriate care team member.

7. **Develop guidelines for proper cleaning of all equipment**

   If available, get advice from an infection control specialist to know how best to clean all equipment used and when and what wipes should or shouldn't be used depending on the technology. Some cleaners can be harmful to screens.

Communicating with patients and family caregivers

It's important to ensure patients are aware of the opportunity to have virtual visits with their family and friends. In addition to asking individual patients if they would like to participate, place a poster or tent card at patient's bedside within your care area - with messaging to encourage engagement such as, *"Are you lonely and missing your family/friends? Ask staff to connect you."* See example in Appendix A.

After confirming with the patient that they would like to participate in virtual connections, a member of the dedicated virtual connections team should reach out to the family and friends the patient wishes to connect with to confirm:

- Their interest in participating
- What equipment/device they have
- What software application they would prefer
- Their availability for scheduled visits
- Answers to questions they may have about the virtual visit.

Create clear tip sheets and resource materials for staff, patients and family caregivers to ensure successful connections. Keep these resources at the patient's bedside. At St. Joseph's, these sheets can be kept in the patient's Care Binder. Include:

- **A contact sheet** – with names, email addresses and phone numbers of the family and friends the patient requests virtual connections with. This prevents staff from having to look-up contact information for each session.

- **A virtual connection schedule** – keep a calendar with dates and times of scheduled connections. This will help keep things organized and give the patient something to look forward to.

- **Consent forms** – getting and documenting informed consent for any and all virtual connections is key to protecting patient privacy

Social connections are also important to the health of our patients.[iii]
When possible, members of the dedicated team or larger health care team should also consider how to help patients who are isolated from friends and family connect socially by providing meaningful activities for the patient to engage in. This is especially true for older adults, as well as patients who may be further isolated within the care setting due to infection and prevention control precautions. Ask the patient (and family caregiver) what they are interested in and look for opportunities within your facility or online that they may enjoy participating in.

Communicating with staff

Staff on the care unit should be sent information on your virtual connection program with specific details on how to help patients and family caregivers access the services available.

It is important to keep in mind continuity of care for patients, the caregiver and health care teams, as well as lowering possible risk of transmission of infection. Consider the timing of virtual care visits to best adhere to infection prevention and control precautions. For example, try organizing virtual visits for patients who are on droplet precautions at one time (one after another) and then arrange for patients not on droplet precautions in the next block of the schedule. Not jumping from patient room to patient room will help minimize the possible spread of infection.

[i] Holt-Lunstad J, Smith TB, Baker M, Harris T, Stephenson D. Loneliness and social isolation as risk factors for mortality:a meta-analytic review. Perspect Psychol Sci. 2015;10(2):227-237:
Nicol et al., Action at a Distance: Geriatric Research during a Pandemic. Journal of the American Geriatrics Society. 2020;68(5): 922-925.

[ii] Marcantonio, Edward R. Delirium in Hospitalized Older Adults. New England Journal of Medicine. 2017; 377(15): 1456-1466.

[iii] Van Orden, Kimberly A, et. al, Journal of Geriatric Psychiatric. Strategies to Promote Social Connections Among Older Adults During "Social Distancing" Restrictions. May 18, 2020.