



# EVIDENCE-BASED CLINICAL PRACTICE GUIDELINE

## TELEHEALTH

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# Telehealth Clinical Practice Guideline

The objective of this Clinical Practice Guideline (CPG) is to provide guidance to Doctors of Optometry on the appropriate use of telehealth services and telehealth platforms. It is based on the best available and most current optometric and medical clinical evidence and research. It is not intended to replace professional discretion and judgment; nor is it intended to be used as an all-encompassing clinical manual. New technologies are emerging that allow for more indirect and remote ways of providing consultative, diagnostic, management and treatment services. As such, clinicians must base their assessment, diagnostic, management and treatment regimens on the specific needs of the patient at that point in time.

We wish to acknowledge the College of Physicians and Surgeons of Alberta (CPSA), the College of Optometrists of Ontario (COO) and the Federation of Medical Regulatory Authorities of Canada (FMRAC) for their previously published Telemedicine and Refraction Guidelines that were consulted in the development of this CPG.

Telehealth means the provision of optometric consultation, diagnosis, management and treatment services through electronic communication where:

- The patient and optometrist are in different locations; or,
- The optometrist and another health professional are in different locations.

The Alberta College of Optometrists (ACO) supports the use of the telehealth services for Albertans between optometrists and ophthalmologists in appropriate circumstances, provided that:

- Both practitioners are registered with and meet the Standards of Practice and Clinical Practice Guidelines for their respective regulatory colleges (CPSA and ACO).
- Patient privacy rights are protected.
- Patients retain the right to access the practitioner (e.g. optometrist/ophthalmologist) of their choice.
- Practitioners always act in the best interests of the patient; and, only provide appropriate and optimal health care services.

## Goals

**When considering the use of telehealth services, every optometrist should strive for the following goals:**

- 1. Identify those patients who may benefit from telehealth services.**
- 2. Collaborate and communicate with patients, legal guardians and/or other health care practitioners in order to:**
  - **Increase access to competent vision care services,**
  - **Maximize a patient's visual status and quality of life,**
  - **Improve patient compliance and outcomes,**
  - **Reduce the possibility of duplication of tests and services, and,**
  - **Provide vision care services in the most efficient and effective manner.**

## **Specific Guidelines**

1. A refraction, when performed by itself, does not provide sufficient information to allow an optometrist to design and issue an appropriate prescription for vision correction. Optometrists must not supervise a remote or on-line refraction; or, issue, generate or sign an optical prescription derived from a remote or on-line refraction.
2. Optometrists who practice telehealth for a patient located in Alberta must:
  - Be a member in good standing and hold an active Alberta College of Optometrists Practice Permit.
  - Adhere to the ACO Standards of Practice, Guidelines to the ACO Standards of Practice and ACO Clinical Practice Guidelines.
  - Maintain proper professional liability insurance that covers the provision of telehealth services.
  - Abide by the legislative scope of practice as outlined in the *Alberta Optometrists Profession Regulation*.
  - Abide by all Alberta and Federal privacy legislation requirements.
  - Have sufficient clinical and technological training and competency to manage patients appropriately via telehealth.
3. Alberta optometrists who practice telehealth for patients located outside of Alberta must comply with the licensing and registration requirements of the jurisdiction in which the patient is located.
4. Optometrists must not issue, generate or sign an optical or pharmaceutical prescription, by electronic or other means, unless the optometrist:
  - Obtains an appropriate history and conducts an appropriate examination of the patient adequate to establish a diagnosis and identify underlying conditions,
  - Specifically considers the effects of ocular and systemic health conditions, binocular vision and accommodative status and the occupational and avocational visual environment and demands,
  - Ensures there are no absolute contraindications to the treatment recommended or provided, and,
  - Has an appropriate, informed discussion and consent to ensure the patient understands the risks, benefits and course of action if concerns are identified.

5. **Notwithstanding sections 3 and 4, an optometrist may issue a prescription without meeting the full scope of the requirements listed in Section 3 and 4 in the following circumstances:**
  - **For emergency treatment of a patient.**
  - **In consultation with another optometrist or other health care practitioner who has an ongoing relationship with the patient and who has agreed to provide ongoing supervision of the patient's treatment.**
  - **In an on-call or cross-coverage situation in which the prescribing optometrist has access to the patient's medical and/or optometric records.**
  
6. **For the provision of all telehealth services, the optometrist must:**
  - **Document the patient encounter and ensure that all health information is collected, protected, maintained, used, corrected, amended and disclosed in an appropriate, lawful and confidential manner.**
  - **Obtain and document verbal or written consent with the patient to provide optometric services via telehealth.**
  - **Obtain and document verbal or written consent for providing optometric services via telehealth with all other health care practitioners involved in the provision of the telehealth services.**
  - **Establish a proper optometrist-patient relationship before any telehealth services are provided by:**
    - **Disclosing their identity, location and licensure status to the patient.**
    - **Taking appropriate steps to confirm the identity of the patient.**
    - **Disclosing any fee that may be charged in advance of any procedure being performed.**
    - **Collecting sufficient information in order to provide services in a safe and competent manner.**
  - **Be prepared to provide appropriate follow-up care when required.**
  - **Be prepared to refer the patient to another practitioner for additional testing, management or treatment when the patient's condition requires a referral to another health care practitioner.**
  - **If required, submit an update to their Privacy Impact Assessment (PIA) with the Office of the Information and Privacy Commissioner of Alberta (OIPC).**
  - **Use an appropriate and secure platform to provide telehealth services. For example, Skype is not allowed as a telehealth platform due to privacy issues and limited security protocols.**
  - **Only include the minimum necessary amount of personal information in text and/or email messages in order to provide the service in a safe and competent manner.**