

Enhancing Management of Chronic Conditions Using Virtual Care During COVID-19: Email and Secure Messaging

There are benefits to using email and secure messaging. Asynchronous virtual visits facilitate proactive care and patient self-management, which supports continuity and quality of care for patients.

Health care providers may feel hesitant when adopting email and secure messaging, particularly about:

- A lack of compensation for the time invested
- Unrealistic patient expectations about provider response times and frequency of visits
- Privacy and security concerns
- Feeling overwhelmed with the amount of requests and messages

This resource offers tips to address these concerns and helps providers enhance their practice by using email and secure messaging.



1. Use email and secure messaging to save time

Some providers feel that the time saved by using email and secure messaging justifies their use, despite the lack of compensation received and time invested. Consider the value of these tools for your clinic and inform patients of their correct and expected use.

Ideal for:	Not ideal for:
<ul style="list-style-type: none"> • Patients with higher tech literacy/access • Patients with hearing barriers • Patients with visual barriers 	<ul style="list-style-type: none"> • Patients without access to a computer/internet connection • Addressing more complex medical issues

Appropriate use for providers and patients

Providers DO use email/messaging for:	<ul style="list-style-type: none"> • Responses to simple questions about medications or medical issues that have been discussed at another visit • Ongoing monitoring of parameters like blood pressure or blood sugar • Notifications about tests due or appointments to make
Patients DO NOT email/messaging for:	<ul style="list-style-type: none"> • Emergencies or when information is needed urgently • Requesting medical advice that is not for themselves • Exchanging sensitive medical information • Requesting a diagnosis based on a description of symptoms • Frivolous or commercial purposes



2. Ensure privacy and security when using email and secure messaging

What email services can I use?

- Reasonable steps must be made to use encrypted virtual communication with patients.
- Gmail, Yahoo and other large consumer email services are allowed for some patient exchanges, but do not support a completely secure exchange of information.

Addressing privacy and security concerns:

1. Discuss with patients the increased privacy risks when using large consumer email services (e.g. not PHIPA compliant) versus their benefits (e.g. ease of use, accessibility). Obtain documented consent to communicate with patients using such services.
2. Use secure email services designed for health care professionals. For those currently using ONE Mail Direct, Ontario Health will retire the service in 2021 and is currently not on-boarding any new clients. [TeraMach](#)¹ has been identified as the qualified vendor and will be a similar secure email service. There will be a fee for migrating accounts over to the new service and an ongoing cost for using the new system. **Please note that informed consent from patients is still required when using these platforms.**
 - See [CMPA: Consent to use electronic communications](#)² for more details on obtaining consent for email
3. Health care professionals should use secure email with one another when transferring or sharing patient personal health information, unless there is an emergency. CPSO, CNO and OCP have made an exception to allow the use of unencrypted email for the purpose of sending prescriptions to a pharmacist during COVID-19. Consent must be obtained from the patient for this purpose. For more information on PHIPA compliance from the colleges, see:
 - [CPSO: Protecting personal health information](#)³
 - i. Includes information on when to use encrypted e-communication versus when unencrypted e-communication can be considered
 - ii. Includes information on consent from minors
 - [CNO: Personal Health Information](#)⁴ and [CNO: Telepractice](#)⁵
 - i. Includes more information on appropriate personal health information practices
 - ii. Includes case scenarios of nurses and patients using virtual communication

What is secure messaging?

- Secure patient messaging platforms are PHIPA compliant and support secure messaging between patients and providers. Messages may be one-way (provider-to-patient only) or bidirectional (initiated by either patient or provider).
 - See [CMPA: Consent to use electronic communications](#)² for more details on obtaining consent for secure messaging
- Generally, a link to the message is sent to a patient's email, routing them to a secure platform where they can read and respond to it.
- Most platforms enable structured data collection through digital surveys. Many have a library of pre-made tools that clinicians can use.
- Many platforms are EMR-integrated with privacy safeguards (e.g. patient authentication). Most have additional monthly fees.
 - See [OntarioMD](#)⁶ for a list of secure messaging service options that best suit the needs of yourself and your clinic



3. Integrate email and secure messaging into practice

Clinic email

- Consider setting up at least one clinic email. Set up an automatic reply for all clinical emails that inform patients when they can expect a response and when to seek care immediately.
- Train team members to triage emails and secure messages.
- Set up a dedicated email address for collecting patient documents, photographs and data. A team member can monitor and add files to the medical record.
 - For a step-by-step guide, as well as specific workflows, see [Doctors of BC Virtual care toolkit](#)⁷
 - To see examples of email setup and use in other practices, see CEP's [Additional supports and resources - learn from another practice](#)⁸

Patient communications

- Communicate to patients about appropriate use and expectations for email/secure messaging, including response time, subject lines, etc. See: [Appropriate use for providers and patients](#).
- Use email/secure messaging for patient campaigns (e.g. virtual care available), patient experience surveys (e.g. QIP), preventive care (e.g. vaccinations, cancer screening) and recalling patients for overdue visits (e.g. pap smears, diabetes visit, etc).

Documentation

- Clinically related emails/secure messages should be recorded in your EMR. If you are using a service that is not integrated into your EMR, copy and paste emails/secure messages into the patient's record, or print and add to your paper records.

Provider self-care

- Schedule and block of time to address patient messages and emails.
- Limit the number of characters or words patients can use to make short, concise requests or comments.
- See [CEP: Mental health, well-being supports and financial programs for providers](#)⁹ for additional resources.

For more information see: [Enhancing Management of Chronic Conditions Using Virtual Care During COVID-19](#)

References

- One Link Connect - Managed Email Services [Internet]. TaraMach; 2021. Available from: https://www.teramach.com/onelinkconnect?utm_source=link.cep.health&utm_medium=urlshortener&utm_campaign=covid-yc
- Consent to use electronic communications. CMPA; 2016. Available from: https://www.cmpa-acpm.ca/static-assets/pdf/advice-and-publications/risk-management-toolbox/com_16_consent_to_use_electronic_communication_form-e.pdf
- Policies: Protecting Personal Health Information [Internet]. College of Physicians and Surgeons of Ontario; 2020. Available from: <https://www.cpso.on.ca/Physicians/Policies-Guidance/Policies/Protecting-Personal-Health-Information>
- Practice Standard: Confidentiality and Privacy—Personal Health Information [Internet]. College of Nurses of Ontario; 2019. Available from: https://www.cno.org/globalassets/docs/prac/41069_privacy.pdf
- Practice Guideline: Telepractice. [Internet]. College of Nurses of Ontario; 2020. Available from: https://www.cno.org/globalassets/docs/prac/41041_telephone.pdf
- Virtual Care [Internet]. OntarioMD. Available from: <https://ontariomd.vc/>
- Doctors Technology Office: Virtual Care Toolkit [Internet]. Doctors of BC; 2020. Available from: https://www.doctorsofbc.ca/sites/default/files/dto_virtual_care_toolkit.pdf
- Additional supports - Learn from another practice [Internet]. Centre for Effective Practice; 2021. Available from: <https://tools.cep.health/tool/virtual-management-of-chronic-conditions-during-covid-19/#additional-supports-and-resources>
- Mental health, well-being supports and financial programs for providers. [Internet]. Centre for Effective Practice; 2020. Available from: <https://tools.cep.health/tool/pc-ops-covid-19-context/#mental-health-well-being-supports-and-financial-programs-for-providers>
- Modalities to support virtual care in practice: Email and secure messaging [Internet]. Centre for Effective Practice; 2021. Available from: <https://cep.health/clinical-products/virtual-care/>

This Resource was developed by the Centre for Effective Practice and Department of Family and Community Medicine, University of Toronto. Clinical leadership for the development of the Resource was provided by Dr. Onil Bhattacharyya and Dr. Payal Agarwal and by the Enhancing management of chronic conditions using virtual care during COVID-19 Working Group. The Managing Chronic Conditions during COVID-19 Advisory Committee provided feedback and input. This Resource was also subject to external review by health care providers and other relevant stakeholders. The development of this Resource was funded by the Government of Ontario as part of the Knowledge Translation in Primary Care.

This Resource was developed for licensed health care professionals in Canada as a guide only and does not constitute medical or other professional advice. Primary care providers and other health care professionals are required to exercise their own clinical judgment in using this Resource



Enhancing management of chronic conditions using virtual care during COVID-19 is a product of the Centre for Effective Practice and DFCM. Permission to use, copy, and distribute this material for all non-commercial and research purposes is granted, provided the above disclaimer, this paragraph and the following paragraphs, and appropriate citations appear in all copies, modifications, and distributions. Use of Virtual management of chronic conditions during COVID-19: Telephone and video for commercial purposes or any modifications of the Resource are subject to charge and use must be negotiated with the Centre for Effective Practice (Email: info@cep.health).

For statistical and bibliographic purposes, please notify the Centre for Effective Practice (info@cep.health) of any use or reprinting of the Resource. Please use the below citation when referencing the Resource:

Reprinted with Permission from Centre for Effective Practice and Department of Family and Community Medicine, University of Toronto. (February 2021). Enhancing management of chronic conditions using virtual care during COVID-19: Email and secure messaging; Ontario. Toronto: Centre for Effective Practice and Department of Family and Community Medicine, University of Toronto.

Developed by:



Centre
for Effective
Practice



Family & Community Medicine
UNIVERSITY OF TORONTO

In collaboration with:

Ontario College of
Family Physicians
Leaders for a healthy Ontario



afhto
association of family
health teams of ontario

eHealth
CENTRE OF EXCELLENCE



Ontario Health
OTN

OntarioMD
Empowered Practices. Enhanced Care.

SGFP
SPECIALIST GROUP PRACTICES