

A novel trauma-informed approach to conducting sensitive examinations in a virtual care environment

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Introduction

What's the problem?

Virtual care has rapidly become a critical means of limiting the spread of COVID-19. As a result, primary care providers across Canada are now conducting sensitive examinations - including vulvar, breast, penile, testicular, and perianal exams – with the use of video technology and patient photographs. Presently, there are no provincial or national guidelines to inform the completion of sensitive examinations using virtual care modalities. Virtual care has the potential to be an empowering, patient-centred means of providing care, however in the absence of a trauma-informed approach to conducting sensitive exams in a virtual care environment, there is significant potential for harm.

When asking patients to conduct a sensitive examination over video or capture and share a photo of a sensitive body part, we must take into account professionalism standards, societal norms, potential harm to patients with a history of sexual trauma, immediate and long-term consequences for pediatric patients, and re-traumatization of individuals belonging to racialized communities that have been harmed and discriminated against by Western medicine. Pediatric patients may be especially vulnerable once they have developed self-referential behaviours and self-conscious emotions such as guilt and shame, both of which may occur as early as 15 months of age.¹

Sensitive patient photos present a unique challenge related to privacy and confidentiality. Presently, most Electronic Medical Records (EMRs) do not allow for secure transmission of photographs, and sensitive photos may be visualized by anyone who has access to the platform where photographs are received or intercepted by third parties who illegally gain access to insecure platforms.

Our proposed solution

At the St. Joseph's Health Centre (SJHC) Urban Family Health Team in Toronto, ON, we developed a novel and innovative age-based clinical framework for conducting sensitive exams in a virtual care environment. To our knowledge this is the first framework of its kind in Canada. This approach can be implemented in any primary care setting where providers are delivering both in-person and video-based care. There are no contraindications to implementation and no associated costs.

Approach to conducting sensitive examinations

According to the literature

The CMPA, CPSO, and CMA have each issued a statement and, in some cases, published reports outlining their individual support for and approach to providing virtual care. However, they do not offer specific guidance on the completion of sensitive examinations.^{2,3,4}

There is a small but growing body of literature on the topic of virtual care in COVID-19. Several studies offer some useful insights into the limitations of virtual care when conducting sensitive exams as well as unique solutions and frameworks to consider when developing a family medicine approach. In general, there is a bias towards in-person exams, particularly for gynecologic complaints.⁵ Several urological groups have leveraged virtual modalities for

sensitive exams, but they do not report patient ratings of their virtual care experience.^{6,7} At least one study references technical difficulties and concerns about impropriety when conducting sensitive exams over video.⁸

Sensitive exam framework

A set of age-based workflows are presented in Appendix One. In summary, it is proposed that:

- Sensitive exams be conducted in person whenever possible
- Providers may conduct a sensitive exam using their provincial telehealth network or Zoom for patients <15 months of age who have a dermatologic complaint in a sensitive area OR ≥ 18 years of age when the patient is unable to unwilling to attend an in-person appointment
- Providers should never conduct a virtual sensitive exam for patients 15 months - 17 years of age
- Before conducting a virtual sensitive exam for patients ≥ 18 years of age, providers should obtain informed consent by discussing risks, benefits, and contraindications. Providers should refer to the EMR stamp 'Virtual Sensitive Exam' to document informed consent and facilitate the virtual sensitive exam from start to finish
- Providers should not request or accept sensitive clinical photos as privacy and confidentiality risks are too high using our current clinical platforms

List of materials

1. **Clinical decision-making algorithms:** Age-based workflows for conducting sensitive examinations for patients 0-15 months, 15 months – 11 years, 12 – 17 years, and 18+ years. Includes age-specific example complaints and detailed workflow summaries (Figure 1a-d)
2. **Summative graphic of age-based workflows:** Quick reference tool for display in clinical spaces to aide primary care providers in deciding how best to conduct a sensitive examination (Figure 1e)
3. **EMR stamp:** Risks, benefits, and contraindications of a video-based sensitive exam are listed for the purposes of documenting informed consent. Step-by-step instructions are provided to ensure patient and provider comfort, including a pre-exam checklist, pre-exam counselling, and suggestions for how to close an exam. Easily adapted to any EMR (Appendix One)
4. **Launch Email:** Detailed email template for distribution to clinic staff to aide in facilitating the launch of a new clinical workflow (Appendix Two)

Our experience at SJHC

Our novel age-based framework for conducting sensitive exams was introduced at the SJHC Urban Family Health Team in April 2021. Anecdotally, providers in our clinic believe this framework will improve patient experience, eliminate ambiguity when deciding how to conduct sensitive exams, and help to reduce provider discomfort when facilitating video based visits and navigating the limitations of privacy and confidentiality.

Still to come

In the near future we will be participating in a pilot program to test new software for safely receiving and storing clinical photos. Once secure platforms are widely available for

transmission of photographs, sensitive photos may become a preferred and more empowering approach for patients than video-based sensitive exams.

A trauma-informed approach to conducting sensitive exams must be attuned to cultural, historical, and gender issues, and take into account the patient voice in order to promote safety, trustworthiness, and transparency.⁹ To acquire a stakeholder perspective, we plan to administer anonymous electronic surveys to all patients registered by email, and a paper-based survey to those who are not registered. Our novel framework will be adapted as necessary to meet the unique needs of our patient population.

References

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Appendix 1:

Virtual Sensitive Exam

Note to Providers: Sensitive exams using your provincial telehealth network or Zoom should only be conducted in patients < 15 months of age and ≥ 18 years of age

Informed Consent

<Conducting a sensitive exam using video technology is beneficial because you don't have to attend the clinic for a physical exam, which keeps you and others safe during COVID-19. However, although we do our best to control the environment, there are risks associated with conducting a sensitive exam virtually. These risks include potential discomfort during the exam as it is harder to share nonverbal cues over video, and poor video quality or a lost connection requiring that we complete the exam again in person. We should not go ahead with the exam if video quality is too poor to visualize the area or you are not in a private or safe space.>

Document Informed Consent

1. Does the patient understand the risks and benefits of conducting a virtual exam?
<Yes><No>
2. Are there any contraindications to conducting a virtual exam (including poor video quality, patient between the ages of 15 months to 18 years) <Yes><No>
3. Does the patient provide informed verbal consent to conduct a virtual exam?
<Yes><No>
4. Has the patient been offered the option of a chaperone if appropriate and available?
<Yes><No>

Pre-Exam Checklist

Please review the following with your patient before proceeding:

1. "I first want to assure you that I'm in a private space where no one else will be able to view your video, and this will not be recorded."
2. "Are you in a space that you consider safe and private to conduct this exam?"<Yes><No>
3. "Do you need to take a moment to inform anyone else in your household that you require privacy until the exam is complete?" <Yes><No>
4. "Some people have applications on their phone that have access to your phone's camera (i.e. Instagram). If you have your cell phone or a tablet nearby, you may wish to place the device face down."
5. "Do you have a blanket or sheet that you can use to drape yourself once changed, so you are only exposed for the duration of the exam itself?" <Yes><No><Not applicable>

Counsel Patient About Their Exam

Providers should explain all of the following to the patient before initiating the exam:

1. Describe exactly what area(s) you need to visualize and how close the patient will need to be to the camera based on the video quality.
2. Suggest how the patient can position themselves to facilitate optimal assessment, and ensure they are comfortable with positioning before proceeding.
3. "If at any time during the exam your privacy is compromised, or you should feel unsafe or uncomfortable proceeding, you can stop the exam or disconnect."
4. "Do you have any questions before we proceed?" <Yes><No>
5. "I will now leave the room for 2-3 minutes to allow you time to undress. You may choose to stop your video until I return. Once you're undressed and covered with your sheet so you are comfortable, please resume your video. I will instruct you on positioning yourself to conduct the exam once I have returned."

Conduct Exam

<Exam completed><Exam documented in progress note>

Conclude Exam

1. "I will now leave the room to allow you time to get dressed. Again you may wish to stop your video while you do so and resume when you're ready."

Appendix 2:

Our clinic has a new workflow for conducting sensitive exams! Please read this email carefully and review the workflow attached to ensure we are all creating a safe and trauma-informed environment for our patients when conducting sensitive exams in this new era of virtual care.

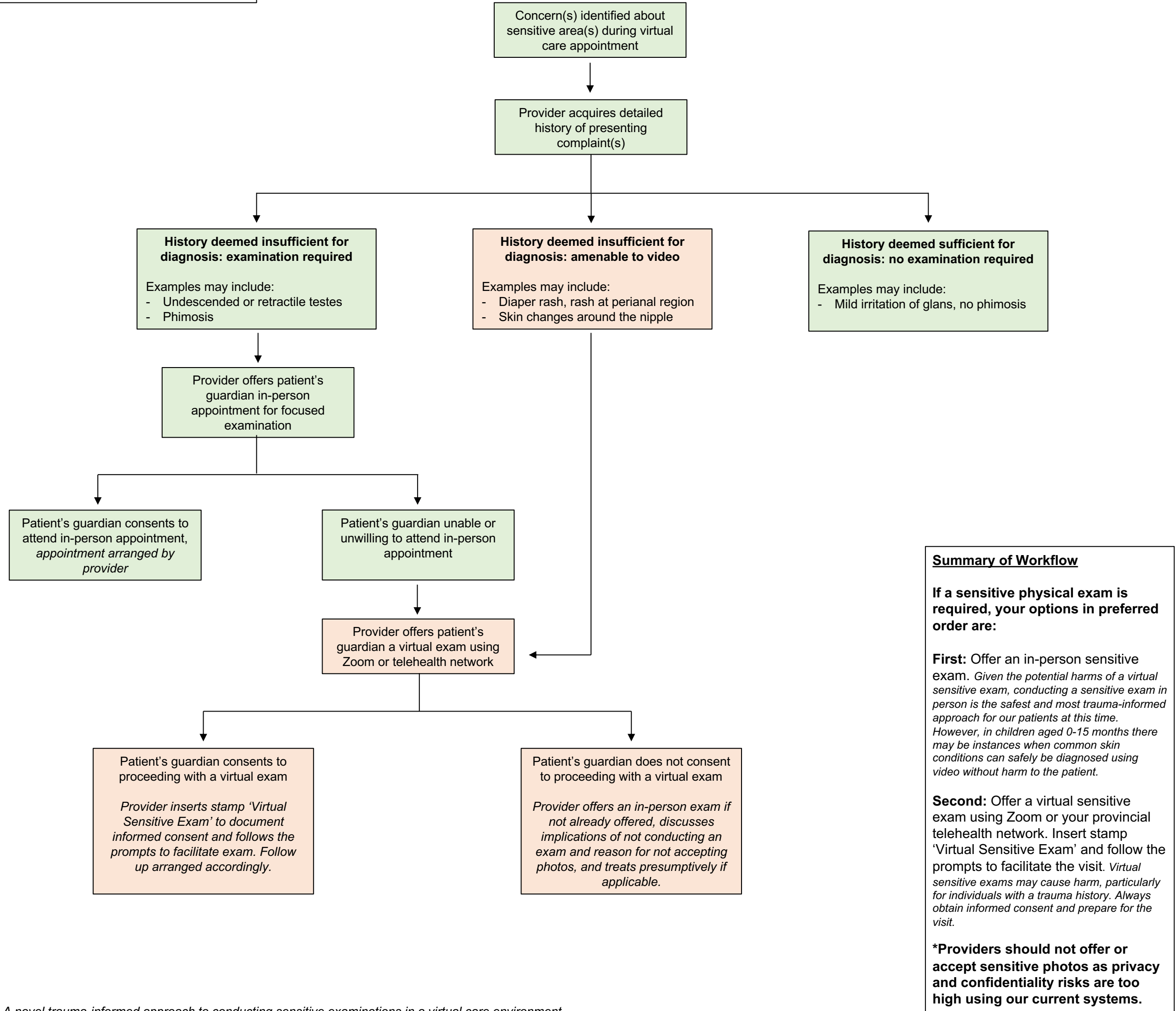
What: Sensitive exams include breast, vulvar, penile, testicular, and peri-anal exams.

- **Using this new workflow, sensitive exams should be conducted in person wherever possible.** Providers will also have the option of conducting a sensitive exam using our provincial telehealth network or Zoom for patients < 15 months of age* who have a dermatologic complaint in a sensitive area OR ≥ 18 years of age when the patient is unable or unwilling to attend an in person appointment. **15 months is chosen because it is thought to be the earliest age at which children can develop self-referential behaviour and self-conscious emotions such as guilt and shame.*
- Always document informed consent when conducting a sensitive exam over OTN or Zoom.
- Conducting sensitive exams using our provincial telehealth network or Zoom is a new skill, and there is significant potential for discomfort and harm to the patient if done poorly. **For patients > 18 years of age, providers should use the PSS Stamp entitled *Virtual Sensitive Exam* to document informed consent and facilitate these virtual exams from start to finish.**
- **Providers should not request or accept sensitive clinical photos as privacy and confidentiality risks are too high using our current systems and processes.**

Why:

- Virtual care is of critical importance to limiting the spread of COVID-19, **however there are many risks and potential harms associated with conducting sensitive examinations using virtual care modalities including Zoom/our provincial telehealth network and patient photographs.**
- When asking patients to conduct a sensitive exam over video or share a photo of a sensitive body part, we must take into account professionalism standards, societal norms, potential for patient discomfort, immediate and long-term consequences for pediatric patients, potential to harm patients with a history of sexual trauma, and re-traumatization of individuals belonging to racialized communities that have been harmed and discriminated against by Western medicine.
- A trauma-informed approach to conducting sensitive exams must be attuned to cultural, historical, and gender issues, and take into account the patient voice in order to promote safety, trustworthiness, and transparency. In the absence of provincial or national guidelines, this new workflow has been informed by the literature and overarching ethos of our governing bodies, and is designed to prioritize patient comfort and safety.

Thank you all for your commitment to safe virtual care!



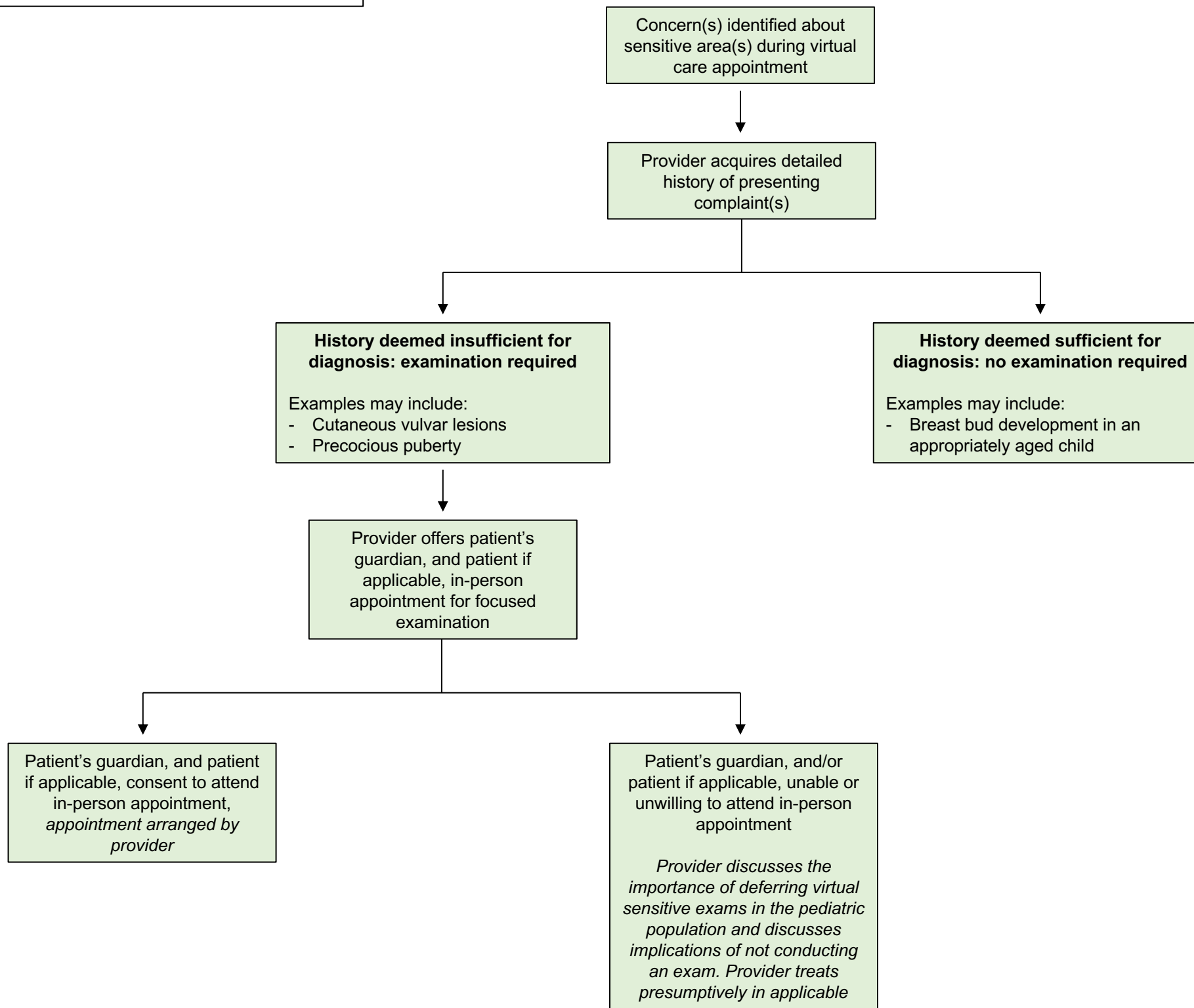
Summary of Workflow

If a sensitive physical exam is required, your options in preferred order are:

First: Offer an in-person sensitive exam. *Given the potential harms of a virtual sensitive exam, conducting a sensitive exam in person is the safest and most trauma-informed approach for our patients at this time. However, in children aged 0-15 months there may be instances when common skin conditions can safely be diagnosed using video without harm to the patient.*

Second: Offer a virtual sensitive exam using Zoom or your provincial telehealth network. Insert stamp 'Virtual Sensitive Exam' and follow the prompts to facilitate the visit. *Virtual sensitive exams may cause harm, particularly for individuals with a trauma history. Always obtain informed consent and prepare for the visit.*

***Providers should not offer or accept sensitive photos as privacy and confidentiality risks are too high using our current systems.**

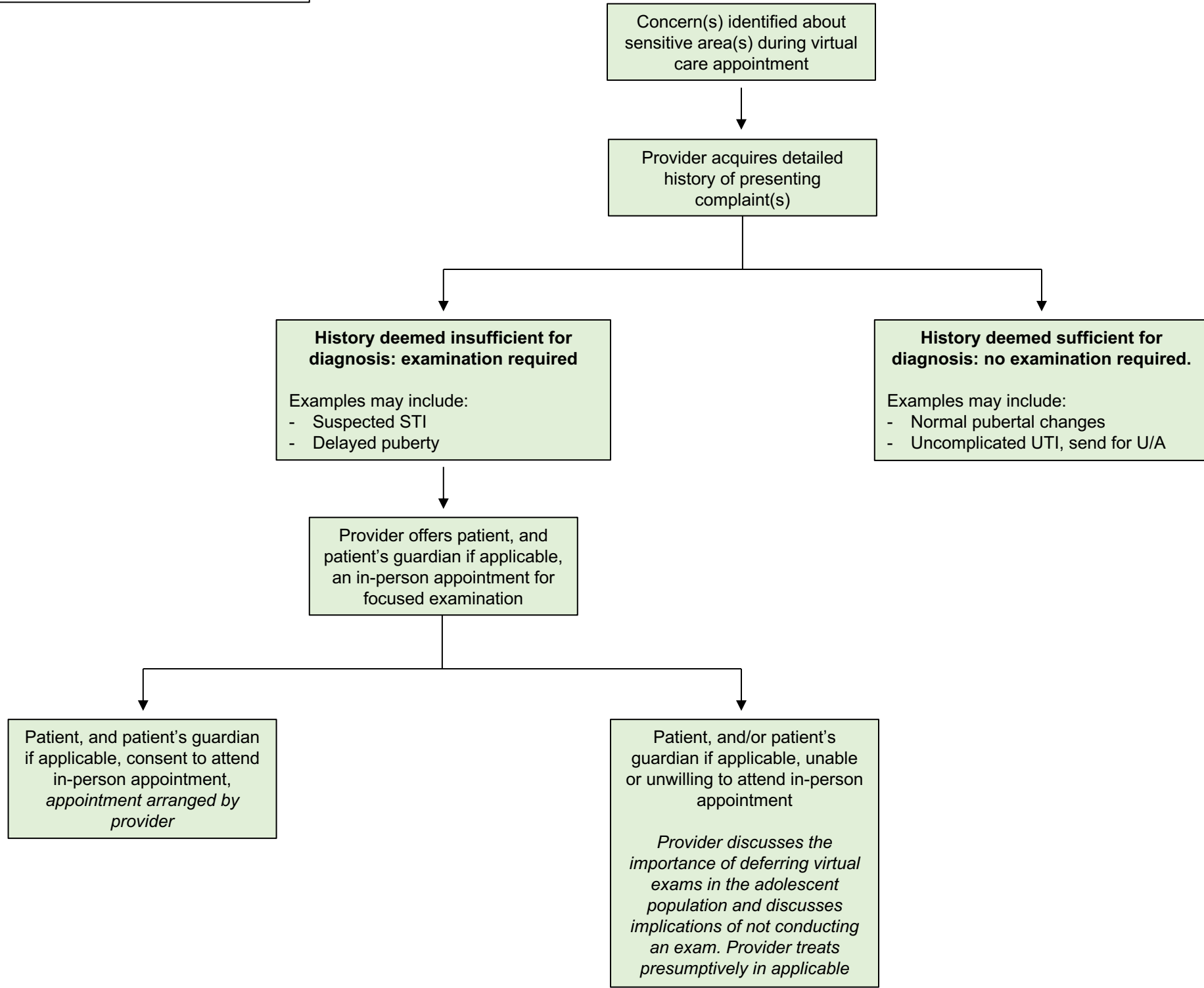


Summary of Workflow

If a sensitive physical exam is required, your options in preferred order are:

First: Offer an in-person sensitive exam. *Given the potential harms of a virtual sensitive exam, conducting a sensitive exam in person is the safest and most trauma-informed approach for our patients at this time. This is particularly important in the pediatric population beginning at 15 months of age when self-referential behaviour and self-conscious emotions develop.*

Never conduct a virtual sensitive exam using Zoom or your provincial telehealth network in pediatric patients ages 15 months – 11 years. Providers should not offer or accept sensitive photos as privacy and confidentiality risks are too high using our current systems.

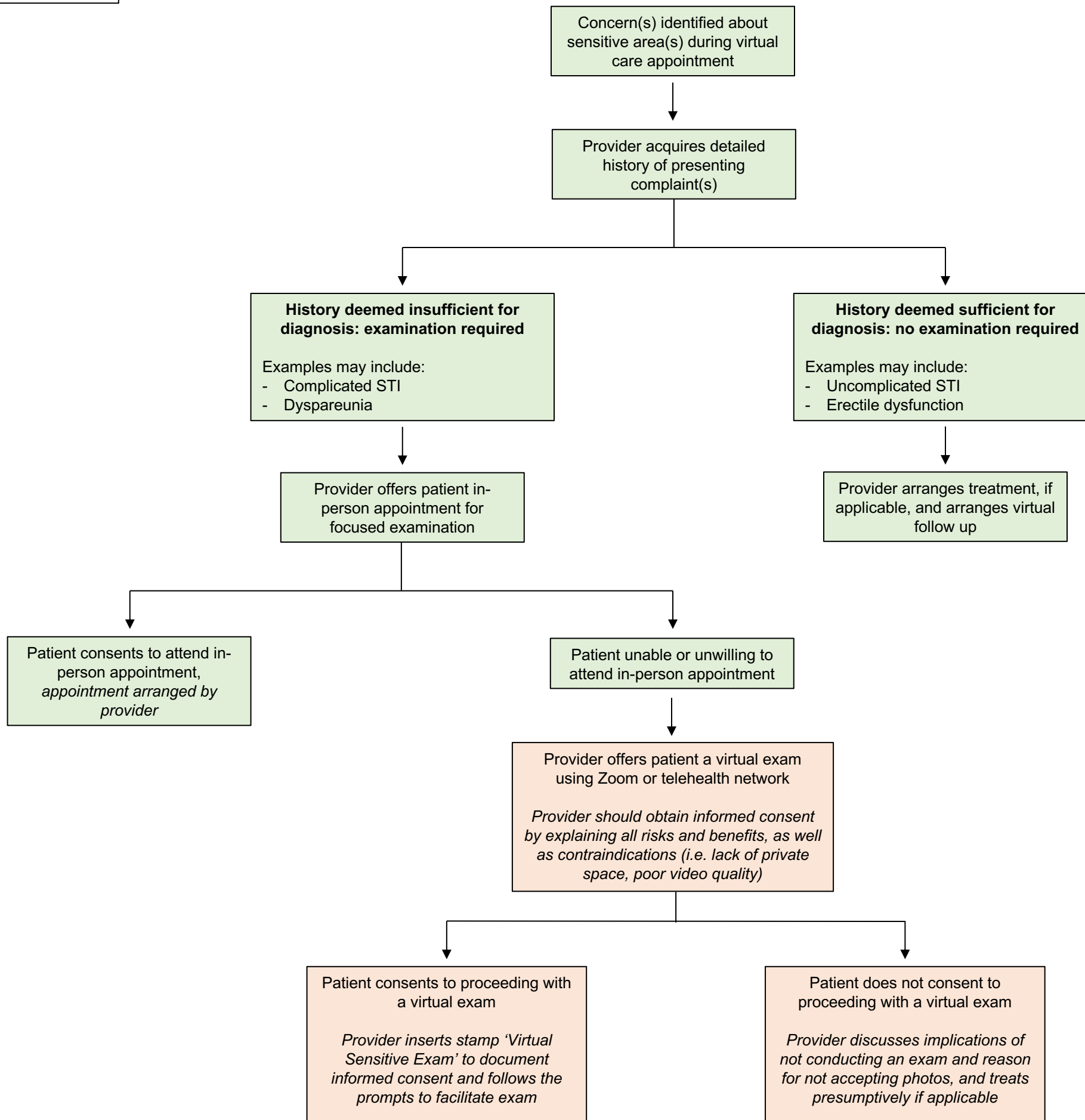


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If a sensitive physical exam is required, your options in preferred order are:

First: Offer an in-person sensitive exam. *Given the potential harms of a virtual sensitive exam, conducting a sensitive exam in person is the safest and most trauma-informed approach for our patients at this time. This is particularly important in the pediatric population beginning at 15 months of age when self-referential behaviour and self-conscious emotions develop.*

Never conduct a virtual sensitive exam using Zoom or your provincial telehealth network in pediatric patients ages 12 – 17 years. Providers should not offer or accept sensitive photos as privacy and confidentiality risks are too high using our current systems.



Summary of Workflow

If a sensitive physical exam is required, your options in preferred order are:

First: Offer an in-person sensitive exam. *Given the potential harms of a virtual sensitive exam, conducting a sensitive exam in person is the safest and most trauma-informed approach for our patients at this time.*

Second: Offer a virtual sensitive exam using Zoom or your provincial telehealth network. Insert stamp 'Virtual Sensitive Exam' and follow the prompts to facilitate the visit. *Virtual sensitive exams may cause harm, particularly for individuals with a trauma history. Always obtain informed consent and prepare for the visit.*

***Providers should not offer or accept sensitive photos as privacy and confidentiality risks are too high using our current systems.**

Patients Requiring Sensitive Examinations

Workflow by Age Group

