

Note: *The term patient used through this document is intended to represent patient, resident and/or clients.*

HPC Consultation Services Waterloo, Wellington is committed to ensuring the highest level of ethical and legal standard in support of maintaining the confidentiality and privacy of the individuals they serve. This document outlines the guidelines and processes we follow as a team of palliative nurse consultants (PNC) to meet the requirements outlined by our professional regulatory body, the College of Nurses of Ontario (CNO) and provincial legislation.

The principles areas we concentrate our documentation processes around include our educational events (formal courses and just in time sessions) and case-based consultation. The sections that follow will outline the steps we take to safeguard confidential information in both areas.

Educational Events (foundational palliative care courses and just-in-time presentations)

We demonstrate due diligence through creating and maintaining timely attendance records with tracking of completed course components.

If learners are identified as unable to meet the course requirements, and additional support is accepted, the PNC will create an independent learning plan (ILP).

Details about the ILP:

- Each ILP will be tailored to meet the specific needs of the learner and will outline the agreed-upon steps to support them to successfully complete the course requirements.
- In the event the ILP was unable to accommodate the learner's successful completion of the course, a detailed note regarding the outcome will be kept on file for 10 years as per HWR organizational Privacy Policy.

Case-based Consultation

We demonstrate due diligence through creating and maintaining time-sensitive documentation through the consultation process from the point of referral to sharing of our Coaching follow-up note (CFU) using the CNO practice standards and provincial legislation as our guides.

General Guiding Principles about the Consultation Process

- This service is an in-direct and collaborative consultation exclusively with, and for, healthcare professionals.
- The PNC will bring the perspective of a palliative approach to care.
- The consultation process is a combination of discussions, review of the primary healthcare provider (HCP) assessment findings, critical thinking, and best practice.
- The PNCs utilize, and rely on, the patient-specific medical information presented or accessible to them at the time of the consultation.
- Every effort to connect in a time-sensitive manner, on a priority needs basis, is made.

Criteria to determine Patient Appropriateness for Consultation includes

- Patient is living with a life limiting illness (i.e., Dementia, CHF, COPD, Cancer etc.)
- Patient is suffering with unmet palliative pain and symptom management (PPSM) needs.
- Patient is living within Waterloo Wellington.
- Patient/ Substitute Decision Maker(s) and healthcare team are willing to accept support.

Additional Guiding Assumptions

- HCPs who request a consultation understand their own organizational policies and professional standards and follow them.
- The PNC consultation process is one of capacity building and collaboration which will always involve:
 - Aspects of education; mentoring; coaching
 - Facilitating linkages with the interdisciplinary team and best practice approaches
 - Modeling communication
 - A wholistic perspective focused on the priority presenting issue.
- Follow up and next steps once the consultation is completed is at the discretion and initiation of the HCPs involved.

Process Flow for the PNC Consultation Process

1. Any HCP working in Waterloo Wellington can request a consultation with a PNC through completing a PPSM pre-consultation workup form (PCW)
2. Upon determining a patient has unmet PPSM needs, HCPs complete sections S (situation), B (background) and A (assessment) of the Pre-consultation workup form.
 - Note: The R [recommendation(s)] will emerge through an active dialogue between the PNC and healthcare team members.
 - HCPs can connect with a PNC if you would like support in completing the form.
 - The HCP may elect to use the PCW as a tool to gather symptom assessment findings and relevant clinical information.

Note: In our experience, healthcare providers have found it useful to connect with interdisciplinary team members when completing the form.

3. The referring HCP sends the completed PCW to the PNC via email.
4. Upon receiving the PCW, the PNC will send confirmation of the request for consultation and work collaboratively to determine if the patient meets the criteria (see above) and if so, determine a time to connect virtually or in-person.
5. After the consultation process is completed, the PNC will complete a coaching follow up note (CFU) as soon as possible and send it using a password protected PDF. The PNC will have instructed the HCP on how to open the encrypted note during the consultation process.
 - Generally, you will receive the CFU note within one week from the date the consultation took place unless otherwise discussed.
 - The PNC will request confirmation of receipt of the CFU note.
 - The PNC will securely destroy any documentation related to the consultation process in accordance with the Personal Health Information and Protection of Privacy Act (PHIPA).
6. Ongoing consultation, and/or follow-up, will be determined collaboratively by the PNC and the HCP(s) involved.

Important Facts about the Coaching Follow Up Note

- The note is intended as an educational resource to the HCP(s) involved in the patient's care.
- We recommend the note be shared with the interdisciplinary team and becomes part of the patient's medical record.
- The note does not constitute treatment orders from a registered prescriber and should not be used as such.

- Once the PNC gets confirmation the CFU note has been received by the healthcare provider, our copy of the CFU note will be securely destroyed in accordance with the Personal Health Information and Protection of Privacy Act (PHIPA).
- The PNC will create a corresponding consultation summary note which will include concise details of the reason for the referral, date and time of the consultation meeting(s) and be kept on file for 10 years as per HWR organizational Privacy Policy.

Guiding Resources

College of Nurses of Ontario. (2019). Practice Standard: Documentation, Revised 2008. Retrieved on December 13, 2023, from: <https://www.cno.org/en/learn-about-standards-guidelines/list-of-all-publications/>

College of Nurses of Ontario. (2022). Practice Standard: Confidentiality and Privacy – Personal Health Information. Retrieved on December 13, 2023, from: <https://www.cno.org/en/learn-about-standards-guidelines/list-of-all-publications/>

Government of Ontario. (2004). Personal Health Information Protection Act. Retrieved on December 13, 2023, from: <https://www.ontario.ca/laws/statute/04p03>