

## A Guide to Video and Telephone Consultations

This short guide has been put together to provide clinical staff who are new to undertaking video consultations some tips. Many of the principles in this guide and the resources links at the end are also helpful for undertaking telephone consultations.

The first section covers the practical aspects of using the Attend Anywhere technology.

Section two offers some tips on how to conduct an effective remote consultation with section three offering links to further guidance and resources.

- If you have further questions about using Attend Anywhere please contact: [mswabey@nhs.net](mailto:mswabey@nhs.net)
- If you have further questions about this guidance please contact: [jonathan.cope@nhs.net](mailto:jonathan.cope@nhs.net) or [amandanash@nhs.net](mailto:amandanash@nhs.net)
- If you have experience/tips you would like to add to this resource contact [amandanash@nhs.net](mailto:amandanash@nhs.net)

### 1. Using Attend Anywhere – practical tips

#### How you appear

When consulting by video it is important that:

- Whether at home or in your office, you follow the same principles as you would in a clinic room e.g. that you maintain confidentiality and ensure the patient feels safe wherever they are to discuss their personal health
- You are aware of what is in your background – a plain background works best so there is less visual distraction for the patient and they can concentrate on you. Ensure there is nothing confidential in view
- It's best to put the camera at eye height, just above/to one side of your screen. If you're using a camera built into a laptop, raise the laptop to your eye height
- Try and position any light source in front of you rather than behind e.g don't have your back to a window as it may be difficult for patients to see you due to the glare
- The patient can see your head and shoulders as a minimum to try and preserve as much non-verbal communication as you can
- Try not to sit too close to the camera as it can be difficult for patients to see your facial expressions and body language if they can only see the centre of your face
- If you are demonstrating anything practically, the patient will need to be able to see your arms and hands clearly
- In terms of dress code, wear clothes you would feel comfortable seeing patients in, were you conducting a face-to-face consultation

#### Sound

- Ensure you are somewhere quiet where you can concentrate
- We recommend you use a headset for consulting, as this cuts down on any keyboard and other environmental noise that can be amplified by the microphone and affect the patient's ability to hear you fully

## 2. A good remote consultation – telephone and video

Whilst face-to-face consultation and video / telephone consultations have much in common, there are some subtle differences. These tips have been compiled using a combination of the resources identified below, paying particular reference to BMA and NHS England guidance.

### Introductions

- Initiate the consultation by saying something: e.g "Can you hear me?" "Can you see me?" to prompt the patient to optimise their technical set-up and ensure they are free of background noise
- Introduce yourself and any other members of the clinical team with you
- Ask the patient to do the same – introducing anyone who is with them or confirming that they are alone and feel comfortable to talk
- Verify patient ID: checking date of birth, address, etc
- Explain how the remote appointment will work and the time they have
- Reassure the patient that the consultation is confidential/secure
- Some patients require reassurance they are receiving the same level of care and consideration; older and vulnerable patients may need longer or more support
- Take and record verbal consent for a virtual consultation
- Ensure you can assess a patient's capacity. If a patient lacks capacity to make a decision, consider whether remote consultation is appropriate, including whether you can meet the requirements of mental capacity law

### Beginning

- Clarify what the patient is expecting from the appointment. If the patient wants to talk about something you have not considered, you can add this to your agenda, making the appointment more satisfying for the patient
- Take the usual thorough history, covering symptoms etc
- Try to make sure only one person is talking at a time
- If you need to interrupt the patient during a video consultation, try a visual signal such as raising your hand
- Use active listening and slow down the pace of consultation, if needed
- Make eye contact to establish trust and rapport – you can make eye contact in a video consultation by glancing directly into the camera every so often. Don't feel you need to stare into the camera the whole time, just a quick glance every now and then.
- Inform the patient when you're otherwise occupied (taking notes/ reading another screen)
- Use observation – e.g. How do they move? How comfortable do they appear? Is the patient able to go about their normal activities? Have they stopped doing anything they usually do? Or are they well enough to do most of their usual daily activities?

- Take care to pick up on verbal and visual cues
- Summarise and repeat back
- Use regular check points to ensure everything has been understood
- Offer the patient opportunities to ask questions
- Advise on next steps
- Make written records as you would in a standard consultation
- If the patient needs to show you wounds etc on sensitive parts of their body it would be recommended that a chaperone is present. It isn't expected that examination of intimate body parts should be expected to take place during video consultations

### Closing

- End the consultation well by being particularly careful to summarise key points and agreed actions, ensuring the patient understands these and any timescale - since it's possible something could have been missed due to technical interference.
- Ask the patient if they need anything clarified and remember to give the patient a chance to ask any final questions.
- Medication: ask if they have sufficient medication
- To end, tell the patient you're going to close the call now, and say goodbye (before actually closing the connection).

### After the consultation

- Ensure patient records are updated
- Ensure any referrals, follow up appointments, prescription or treatments are actioned before the next patient call or activity
- A prompt follow-up letter or email to the patient or the GP copied to the patient afterwards summarising the call and the plan is important
- Anyone who needs to be seen should then have access to a face-to-face appointment
- If your clinic is over-running your patients won't know this. Please tell a member of the admin team so they can contact the patients to let them know there is a delay
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### And finally

Virtual consulting, especially from home, can be tiring and lonely. Make sure you take a break and have the opportunity for a regular 'debrief' with a colleague, where you can discuss clinical matters and also any feelings of concern you may be experiencing.

### 3. Further guidance and resources

#### **How to undertake telephone consultations with patients (2020)**

Video from the British Association of Urological Surgeons with 'Case of the Week' learning on telephone consultation

[Link here](#)

#### **NHS England – 29 May**

Principles of safe video consulting in general practice during COVID-19

[Link here](#)

#### **BMA Advice – 13 May 2020**

Don't be afraid of using video – see it as an extension of a phone call

[Link here](#)

#### **GMC Flowchart**

Includes a flowchart on when it may and may not be suitable and guidance on consent:

[Link here](#)

#### **NHS England Clinical guide for the management of remote consultations and remote working in secondary care during the coronavirus pandemic (2020)**

[Link here](#)

#### **RCGP Guidance including 'pacing cues'**

[Link here](#)

#### **The Dr Will Zoom You Now: getting the most out of the virtual health and care experience**

Report by National Voices patients group (July 2020)

[Link here](#)

#### **Video consultation. The art of the possible - Royal College of Surgeons of Edinburgh (June 2020)**

This webinar explores how healthcare professionals can use the medium effectively

[Link here](#)

#### **Further reading**

Consulting during COVID – one GP's take on the clumsiness of remote consultations.

Available on his personal blog at: <https://abetternhs.net/2020/04/24/consulting-during-covid/>

Acceptability, benefits, and challenges of video consulting: a qualitative study in primary care. British Journal of General Practice (2019) Available at: <https://bjgp.org/content/69/686/e586>

Exploring patients' and clinicians' experiences of video consultations in primary care: a systematic scoping review. British Journal of General Practice (2020)

Available at: <https://bjgpopen.org/content/4/1/bjgpopen20X101020>