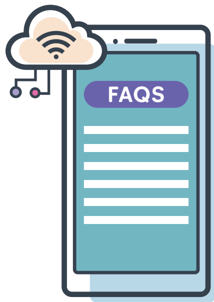
HOW-TO GUIDE TO VIDEO APPOINTMENTS FOR PRACTITIONERS

UNIVERSITY OF PLYMOUTH
Faculty of Health

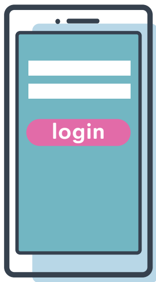
Before the consultation

1.
Ensure the patient has been sent details of the appointment including clear written instructions on using the technology and the resources they will need **(see our patients' checklist)**. Consider sending information such as advice leaflets, exercise sheets or web links in advance. If possible, speak to the patient about this before the consultation.

2.
Check that you have the necessary technology and resources **(see our practitioners' checklist)**.

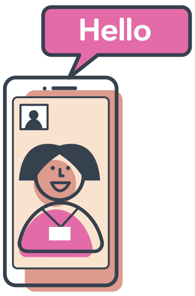


3.
Log in to the platform you will be using (e.g. **Attend Anywhere**) and check the settings.



During the consultation

4.
Accept the call from the patient and check their identity. Introduce yourself and any other practitioners including their name and discipline.



5.
Check that the technology is working as expected – if not, you may need to telephone instead.

6.
Record consent for the virtual consultation in the patient record (electronic or paper-based) – your organisation may have a consent form that needs to be completed.

7.
Ask the patient if they have anyone present to support them (e.g. to move the camera), and check that they are happy for them to be involved. Provide clear, simple instructions to the supporter, with demonstration if necessary.

8.
Check the safety and privacy of the surroundings visually and verbally.

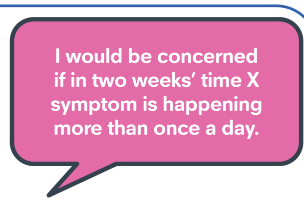
9.
Explain the purpose, structure and expected length of the consultation. Establish the patient's expectations and what they hope to achieve.

10.
Make use of screen sharing and chat/message boxes to share information and resources (such as links to exercises). If you plan to send any follow-up information by e-mail or post, confirm the contact details for confidentiality purposes.

At the end of the consultation

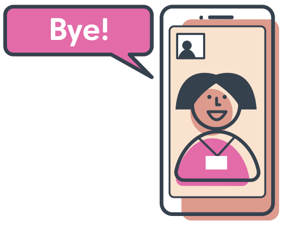
11.
Verbally summarise the consultation and next steps.

12.
Don't simply say, *"Come back if things are worse"* – instead clarify what worse looks like and be specific and time-framed.

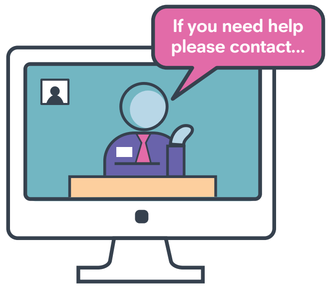


13.
Offer the patient the opportunity to clarify anything and ask questions.

14.
Tell the patient what to do/who to contact if they need help.



15.
Inform them you are going to end the consultation before signing out.

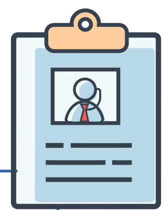


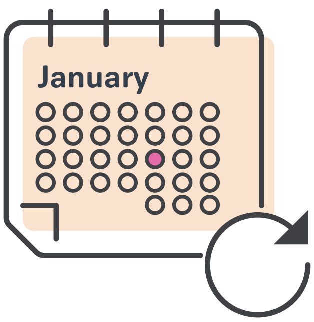
After the consultation

16.
Record the appointment outcome as 'Video consultation' (e.g. in Attend Anywhere)

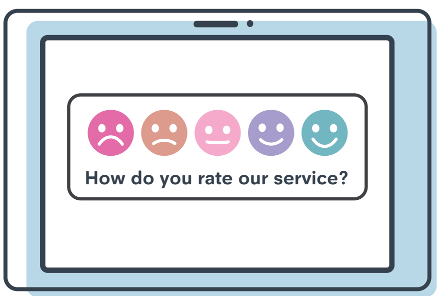
17.
Record the consultation in the patient's record, adhering to your organisational guidelines.

18.
Send any follow-up resources to the patient – this could include an e-mail summary of what was discussed, but take care to maintain confidentiality (check your local information governance policy).





19.
Book a follow-up consultation (video or alternative format) if relevant and record this in the patient record.



20.
Consider capturing patient feedback on the video consultation to improve your service.