

# Video Consultation Guidance

To reduce risk of Covid-19 transmission we are pleased to be able to offer you a new video consultation platform named Microsoft Teams. We've been using Teams within Nuffield Health for a while now and we feel that it is the most suitable option for video consultations.

This guidance document covers five questions you may have regarding video consultations:

1. When are video consultations appropriate?
2. How will I be set up to use Teams?
3. How can a clinician conduct a high-quality video consultation?
4. How should my patients prepare for, and participate in, video consultations?

The guidance in this document is based on research carried out by the IRIHS research group at the University of Oxford and published in March 2020.

## 1. When are video consultations appropriate?

The decision to offer a video consultation should be part of your wider system of triage. Video can be used instead of, or in addition to, phone calls. However, video can add value by providing additional diagnostic clues and therapeutic presence.

### Good to know

There's no need to use video consultations when you feel a telephone call will do.

Below are some 'rules of thumb', which should be combined with clinical and situational judgement:

- The clinician is self-isolating (or to protect the clinical workforce)
- The patient is a known Covid-19 case or is self-isolating (e.g. a contact of a known case)
- The patient has symptoms that could be due to Covid-19
- The patient is well but anxious and requires additional reassurance
- There is a need for remote support to meet increased demand in a particular locality (e.g. during a local outbreak when staff are off sick)
- Any condition in which the trade-off between attending in person and staying at home favours the latter (e.g. in some frail older patients with multi-morbidity or in terminally ill patients, the advantages of video may outweigh its limitations)
- Routine follow ups where it is difficult to justify a patient attending a hospital site during the pandemic

On the basis of current evidence, we suggest that **video should not generally be used for:**

- Assessing patients with potentially serious, high-risk conditions likely to need a physical examination and / or intervention
- When an internal examination (e.g. gynaecological) cannot be deferred

- Co-morbidities affecting the patient's ability to use the technology (e.g. confusion), or serious anxieties about the technology (unless another person is on hand to help)
- Some deaf and hard-of-hearing patients may find video difficult, but if the patient can lip-read and/or use the chat function, video may be better than telephone

## 2. How will I be set up to use Teams?

Our Contact Centre and hospital teams have been trained on how to book in video consultations and will send the required appointment details to the patient via email and to you in either the form of an email, or as a Nuffield Health Outlook calendar invitation.

### Good to know

All consultations will continue to be booked by the team in the Contact Centre or hospital.

If you do not have access to a Nuffield Health Outlook calendar you will be able to access the appointment using the 'Join Teams Meeting' link found in the email.

Your hospital Bookings team will be able to explain the detail of the process being used.

## 3. How can a clinician conduct a high-quality video consultation?

Below are some top tips to help ensure your video consultation are a success.

### **Before the consultation:**

- Confirm that (as far as you can assess in advance) a video consultation is clinically appropriate for this patient at this time
- Use a private, well-lit room and ask the patient to do the same
- Take the patient's phone number in case the video link fails and you need to call them
- Ensure you have access to the patient's clinical record. At the start of each day, check that the technology is working

### **How to join a Teams meeting:**

Once an appointment has been created, a link will be sent to the patient via email and to you in either the form of an email or as a Nuffield Health Outlook calendar invitation.

You can join the meeting simply by clicking on the 'Join Teams Meeting' link found in the email or calendar invitation.

Your patient can join the meeting by clicking on the 'Join Teams Meeting' link that is in the email invite sent to them.

### Good to know

You can join the meeting simply by clicking on the link found in the email or calendar invitation.

### Further detail on joining a Teams meeting

- **PC (Laptop or desktop)** You can join using your internet browser. Both Microsoft Edge and Google Chrome are supported, so if one of these is your default browser, when you click on the link in the e-mail confirmation, the consultation will open in a browser window.

<ul style="list-style-type: none"><li>• A desktop version of Microsoft Teams is available to Nuffield Health staff with Nuffield Health IT credentials.</li></ul>
<ul style="list-style-type: none"><li>• <b>Apple (MacBook or iMac)</b> You can join using Google Chrome. Safari (default browser on most Apple devices) is not currently supported - this is coming soon. If Google Chrome your default browser, when you click on the link in the e-mail confirmation, the consultation will open in a browser window.</li></ul>
<ul style="list-style-type: none"><li>• <b>Apple (iPad or iPhone)</b> You can join using the Teams app, which you can download from the App Store. You do not need to create an account if you do not wish to use Teams for other purposes – simply download the app, then click on link in the e-mail confirmation, and the consultation will open in Teams. Click “join as a guest” and your consultation will begin.</li></ul>
<ul style="list-style-type: none"><li>• <b>Android-based device (tablet or phone)</b> You can join using the Teams app, which you can download from the Google Play Store. You do not need to create an account if you do not wish to use Teams for other purposes – simply download the app, then click on link in the e-mail confirmation, and the consultation will open in Teams. Click “join as a guest” and your consultation will begin.</li></ul>

#### Starting the consultation:

- To begin the consultation, you’ll need to ensure they can hear and see you. Simply say "can you hear me?" and "can you see me?". This will prompt the patient to optimise the technical set-up their end if needed
- Take and record verbal consent for a video consultation
- Tell the patient that you will not record the consultation (neither you nor your patient will be able to record)
- Introduce everyone in the room (even those off camera if there is anyone else there), and ask patient to do the same or confirm that they’re alone
- Reassure the patient that the consultation is likely to be very similar to a standard one, and that the video is confidential / secure

#### During the consultation:

- Video communication works the same as face to face, but it may feel less fluent and there may be glitches (e.g. blurry picture)
- You don't need to look at the camera to demonstrate that you are engaged. Looking at the screen is fine if it feels more natural to you
- Inform the patient when you are otherwise occupied (e.g. taking notes or reading something on another screen)
- Make written records as you would in a standard consultation
- Be aware that video communication may be a bit harder for the patient

### Ending the consultation:

- Be particularly careful to summarise key points, since it's possible something could have been missed due to technical interference
- Ask the patient if they'd like anything clarified
- Confirm and document if the patient is happy to use video again
- To end, tell the patient you're going to close the video now, and say goodbye (before actually closing the connection)

## 4. How should my patients prepare for, and participate in, video consultations?

### Patient Information

#### Decide if video is right for you

- You don't need a video consultation if a phone call will do
- Video consultations provide more visual information and can be more reassuring if you're anxious
- Your consultant may be self-isolating and working by video

#### Get set up technically

- A good internet connection
- A quiet place where you won't be disturbed
- A computer, tablet or smartphone with a built-in camera and microphone
- Test your audio and video connection and adjust the settings so you can see and hear well (or get someone to do this for you)

#### Booking and connecting

- When you book your consultation, you will have the option of a video consultation. If you choose this option, you will be sent an email with the date and time of your appointment, and a link to join
- Just before your appointment time, click the 'Join Teams Meeting' link
- Say hello or wave when you see the doctor or nurse (you may both have to fiddle a bit to get the sound and picture working well)
- Make sure the doctor or nurse knows your phone number so they can call you back if the connection fails

#### Having your consultation

- Look at the screen (there's no need to look directly at the camera)
- If all goes well, the call will feel like a face to face appointment
- If you get cut off and can't reconnect, wait for a phone call
- Write down any advice or instructions, and make sure you understand the next steps
- When you've both said goodbye, disconnect