

HOW TO DO A HIGH QUALITY REMOTE CONSULTATION¹

1. BEFORE THE CONSULTATION

- Confirm that a remote consultation is clinically appropriate for this patient, at this time.
- Plan to use a private, well-lit room and ask the patient to do the same, do not sit in front of a bright window (draw curtains).
- For video decide on the platform to be used e.g. Healthdirect, Skype, Zoom, Facetime, WhatsApp etc.
- Take the patient's phone number and provide the patient with information on video or phone consults.
- Inform the patient of any additional charges for a remote consult.
- Know how you will access the patient's notes before, during and after the consult.
- Have your equipment in place and tested – ideally dual screen and a speed test.
- Have your plan B in place such as rescheduling, using the phone or if the patient is seriously ill.
- On the day check the technology is working.
- Contact (call, SMS) the patient an hour before the consult to confirm it's still appropriate to wait until the appointment time.

2. STARTING THE CONSULTATION

- Initiate the consultation by connecting online or calling the patient.
- Say something e.g. 'can you hear/see me?' use the chat or phone to troubleshoot with the patient and position screens so you can both be seen clearly.
- Revert to your plan B if the technology isn't working.
- Confirm the identity of the patient and anyone else on the call with either you or the patient or that they are alone.
- Take and record verbal consent for the video or phone consult.
- Explain what can or cannot be done on a remote consult.

3. DURING THE CONSULTATION

- Remind the patient what the plan B is should the technology fail and they are not to record the consultation or put health information in the chat.
- Provide instructions on how to capture visual information – come close to the camera or take a photo.
- Let the patient know when you are taking notes or reading something – silence is OK.
- Ensure adequate clinical notes are in the patient medical record.
- Be aware that remote consults are new for patients and communication may be harder for you and them.

4. FINISHING THE CONSULTATION

- Summarise key points and what happens next – who will do what & when.
- Ask the patient if they need anything clarified.
- Confirm and record if the patient is happy to have a remote consult again.
- Tell the patient you are going to close the call.
- Send a patient evaluation form to get their feedback on having a remote consultation.

¹A remote consultation is one where the Doctor and Patient are not in the same room. This could be by phone or video.
Version 1.0

