

Remote Consultations: new ways of practicing during and beyond the Covid-19 Pandemic

Learning Resources

As a consequence of the Covid-19 pandemic and the effects on our clinical services, many more are undertaking remote consultations. Whilst this can be effective, this is a new modality for many especially in secondary care. This resource has been compiled to provide collated learning resources in this area. You may wish to access any or all of this material as part of your learning and CPD.

NES has compiled guidance on remote consulting, stating that:

'There are two key types of remote consulting: telephone and video. Telephone consulting is widespread and is the first-line remote consulting method. However, there are some situations where video calling can offer additional clinical information and a greater presence in a call. In NHS Scotland, video consultations should be offered by Near Me, which can be accessed by all NHS clinicians.' **(NES, 2020)**

The full guidance can be accessed here: <https://learn.nes.nhs.scot/28943/coronavirus-covid-19/remote-consulting>.

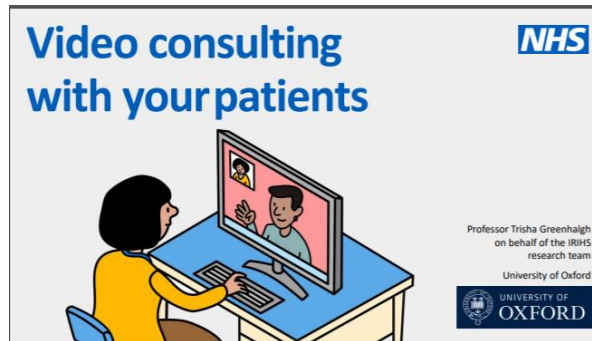
Professor Trisha Greenhalgh, writing in the **BMJ**, reminds us to keep perspective of these new ways of working:

*'The general literature on spread and scale-up of innovations has some important lessons for those seeking to mainstream video consultations quickly. **18** We must be clear that the change is not merely installing or using new technology but introducing and sustaining major changes to a complex system. The implementation process is likely to be difficult and resource intensive. It will need both national and local strategic leads.'* **(Greenhalgh, 2020)**

Read the full article entitled: **'Video consultations for covid-19'** at: <https://www.bmj.com/content/368/bmj.m998>.

How to guides

- **Professor Trisha Greenhalgh, University of Oxford. Video consulting with your patients.**
Powerpoint presentation on conducting video consultations during the pandemic:
<https://s20056.pcdn.co/wp-content/uploads/2020/03/GREENHALGH-Video-consulting-in-the-NHS.pdf>



- More in depth resources available in the form of a webinar with Professor Greenhalgh entitled **'Video consultations: how to set them up well and fast'** (<https://www.health.org.uk/about-the-health-foundation/get-involved/events/video-consultations-how-to-set-them-up-well-fast>)



- **Effective Remote Consultations.** 13 minute video giving guidance on when and how to conduct remote consultations effectively: <https://www.rcplondon.ac.uk/education-practice/courses/effective-remote-consultations>

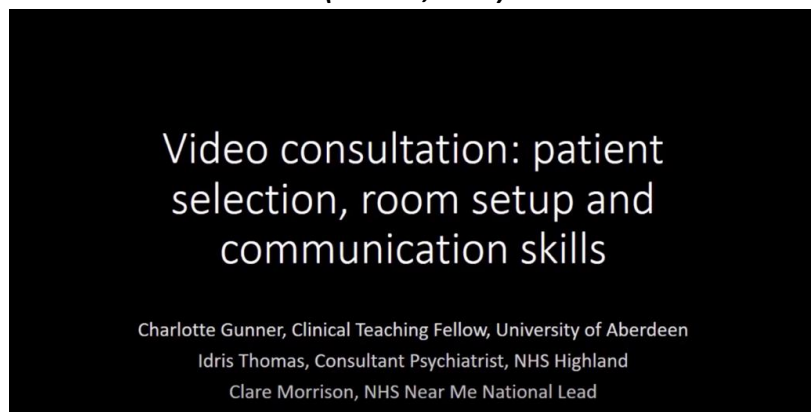


- **RCP London. Recommended by NES: ‘Video consultation skills: an overview for clinicians’.** 11 minute video: <https://www.youtube.com/watch?v=QQ5V1-OoY1g&feature=youtu.be>

‘With the recent advent of video consultations due to the COVID-19 pandemic it is essential that all clinician users of this new mode of communicating with patients receive adequate training.

This video highlights some of the important aspects of video consultation including patient selection, consulting room setup, how to login to NHS Near Me and specific communication skills required for video consulting, including example videos of both good and bad consultations’.

(Gunner, 2020)



- **BMJ: Covid-19: a remote assessment in primary care.** Professor Trisha Greenhalgh’s guide to remote consultations during the pandemic (targeted at primary care but aspects transferrable to a secondary care setting): <https://www.bmj.com/content/368/bmj.m1182>

‘This article will present some guiding principles on how to choose between telephone and video appointments, how to conduct a “query covid” consultation remotely, and considerations when arranging follow-up and next steps. It does not cover remote triage or how to set up video consulting in your practice. This article is intended as a broad orientation to a COVID-19 consultation.’ (Greenhalgh, 2020)

What you need to know

- Most patients with covid-19 can be managed remotely with advice on symptomatic management and self isolation
- Although such consultations can be done by telephone in many cases, video provides additional visual cues and therapeutic presence
- Breathlessness is a concerning symptom, though there is currently no validated tool for assessing it remotely
- Safety-netting advice is crucial because some patients deteriorate in week 2, most commonly with pneumonia

Covid-19: remote consultations

A quick guide to assessing patients by video or voice call

Version 1.3
25 Mar 2020

This graphic, intended for use in a primary care setting, is based on data available in March 2020, much of which is from hospital settings in China. It will be revised as more relevant data emerges.



Clinical characteristics

Based on 1099 hospitalised patients in Wuhan, China

- 69% Cough
- 22% Temperature 37.5-38°C
- 22% Temperature >38°C
- 38% Fatigue
- 34% Sputum
- 19% Shortness of breath
- 15% Muscle aches
- 14% Sore throat
- 14% Headache
- 12% Chills
- 5% Nasal congestion
- 5% Nausea or vomiting
- 4% Diarrhoea
- 24% Any comorbidity

1 Set up
Prepare yourself and decide how to connect

Have current 'stay at home' covid-19 guidance on hand

UK government advice: <http://bit.ly/ukgovisol>

Video is useful for

- Severe illness
- Anxious patients
- Comorbidities
- Hard of hearing

Scan medical record for risk factors such as:

- Diabetes
- Pregnancy
- Smoking
- Chronic kidney or liver disease
- COPD
- Steroids or other immunosuppressants
- Cardiovascular disease
- Asthma

2 Connect
Make video link if possible, otherwise call on the phone

Check video and audio

Can you hear/see me?

Confirm the patient's identity

Name

Date of birth

Check where patient is

Where are you right now?

Note patient's phone number in case connection fails

If possible, ensure the patient has privacy

3 Get started
Quickly assess whether sick or less sick

Rapid assessment

If they sound or look very sick, such as too breathless to talk, go direct to key clinical questions

Establish what the patient wants out of the consultation, such as:

Clinical assessment Referral Certificate

Reassurance Advice on self isolation

4 History
Adapt questions to patient's own medical history

Contacts

- Close contact with known covid-19 case
- Immediate family member unwell
- Occupational risk group

History of current illness

Date of first symptoms

Most common presentation

Cough Fatigue Fever Short of breath

Cough is usually dry but sputum is not uncommon

Up to 50% of patients do not have fever at presentation

5 Examination
Assess physical and mental function as best as you can

Over phone, ask carer or patient to describe:

State of breathing

Colour of face and lips

Over video, look for:

General demeanour

Skin colour

Check respiratory function - inability to talk in full sentences is common in severe illness

How is your breathing?

Is it worse today than yesterday?

What does your breathlessness prevent you doing?

Patient may be able to take their own measurements if they have instruments at home

Temperature Pulse Peak flow Blood pressure Oxygen saturation

Interpret self monitoring results with caution and in the context of your wider assessment

6 Decision and action
Advise and arrange follow-up, taking account of local capacity

Likely covid-19 but well, with mild symptoms

Self management: fluids, paracetamol

Likely covid-19, unwell, deteriorating

Arrange follow up by video. Monitor closely if you suspect pneumonia

Relevant comorbidities

Proactive, whole patient care

Unwell and needs admission

Ambulance protocol (999)

Which pneumonia patients to send to hospital?

Clinical concern, such as:

- Temperature > 38°C
- Respiratory rate > 20*
- Heart rate > 100† with new confusion
- Oxygen saturation ≤ 94%‡

Reduce spread of virus - follow current government 'stay at home' advice

Safety netting

- If living alone, someone to check on them
- Maintain fluid intake - 6 to 8 glasses per day
- Seek immediate medical help for red flag symptoms

Red flags

Covid-19:

- Severe shortness of breath at rest
- Difficulty breathing
- Pain or pressure in the chest
- Cold, clammy, or pale and mottled skin
- New confusion
- Becoming difficult to rouse
- Blue lips or face
- Little or no urine output
- Coughing up blood

Other conditions, such as:

- Neck stiffness
- Non-blanching rash

* Breaths per minute † Beats per minute ‡ If oximetry available for self monitoring

thebmj Read the full article online <https://bit.ly/BMJremcon>

© 2020 BMJ Publishing Group Ltd. This infographic is not a substitute for clinical judgement and this information is provided without any representations, conditions, or warranties that it is accurate or up to date. BMJ and its licensors assume no responsibility for any aspect of treatment administered with the aid of this information. Any reliance placed on this information is solely at the user's own risk. For the full disclaimer wording see BMJ's terms and conditions: <http://www.bmj.com/company/legal-information/>

See more visual summaries <http://www.bmj.com/infographics>

- **BMJ: Telephone consultations.** Not a COVID-19 specific resource.
https://www.bmj.com/content/360/bmj.k1047?ijkey=6256d9ed4e42dbd86dcc5dc6b3e48b69aafc47e&keytype=tf_ipsecsha.

'Phone consultations tend to narrowly focus on presenting symptoms, and patients are often not comprehensively assessed.⁸ A recent Cochrane review underlines the lack of training in phone consulting competencies, and audits suggest unwarranted variation in physicians' behaviour on the phone.⁸⁹ Based on best available evidence (sometimes expert opinion), we present an approach to telephone consultations in primary care that is largely applicable to other settings such as outpatient clinics.' (S van Galen and Car, 2018)

What you need to know

- Check that the patient can hear and understand you, and is in a suitable place to talk
- In the absence of other cues, the tone and content of speech is important
- Gain information from an indirect physical examination by asking the patient to describe signs such as breathing and vital signs and rashes
- Provide strong safety-netting and remember that a face-to-face consultation or home visit may be needed

- **NHS England: Specialty guides for patient management during the coronavirus pandemic.** Clinical guide to remote consultations in secondary care during the pandemic from NHS England: <https://www.england.nhs.uk/coronavirus/wp-content/uploads/sites/52/2020/03/C0044-Specialty-Guide-Virtual-Working-and-Coronavirus-27-March-20.pdf>

Publications approval reference: 001589



Specialty guides for patient management during the coronavirus pandemic

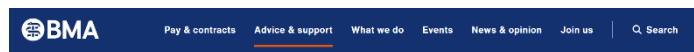
Clinical guide for the management of remote consultations and remote working in secondary care during the coronavirus pandemic

27 March 2020 Version 1

Overview

This guidance for clinicians and managers outlines practical information about delivering remote consultations and other ways of remote working in secondary care. The coronavirus pandemic creates an urgent need to increase remote working across the health and care system to prevent the spread of the virus.

- **BMA: COVID-19: video consultations and homeworking.** This guidance supports doctors in any healthcare setting to conduct remote consultations during the pandemic:
<https://www.bma.org.uk/advice-and-support/covid-19/practical-guidance/covid-19-video-consultations-and-homeworking>

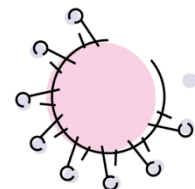


Home > Advice and support > COVID-19 >

COVID-19: video consultations and homeworking

This guidance supports doctors in any healthcare setting to conduct remote consultations during the pandemic.

📍 Location: UK 🗣️ Audience: All doctors 📅 Updated: Monday 27 April 2020



- **RCGP: Top 10 tips for COVID-19 telephone consultations:** <https://www.rcgp.org.uk/about-us/rcgp-blog/top-10-tips-for-covid-19-telephone-consultations.aspx>

Video consultations with 'Near Me'

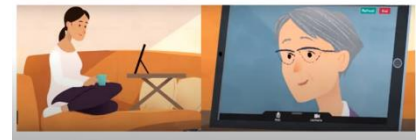
'Near Me is a video consulting service that enables people to have health and social care appointments from home or wherever is convenient. All you need is a device for making video calls like a smartphone and an internet connection. Near Me is a secure form of video consulting approved for use by the Scottish Government and NHS Scotland.' (Near Me, 2020)

<https://www.attendanywhere.org.uk/>

- 5 minute video. **'Near Me Overview March 2020'**. An overview of Near Me video consulting during the pandemic:

<https://www.youtube.com/watch?v=NNt-m45dQGI&feature=youtu.be>

Near Me:
enabling patients to attend appointments by video



- 3 minute video. **'Using 'Near Me' in clinic'**. Instruction on how to use Attend Anywhere in your clinic:

<https://www.youtube.com/watch?v=6IzAg0SHKFo&feature=youtu.be>



- **Implementing 'Near Me'**. Guides for different settings: <https://tec.scot/digital-health-and-care-in-scotland/video-enabled-health-and-care/covid-19-implementing-near-me/>

- Near me video consultation checklist:



Video consultation checklist for clinicians

Planning a video consultation		Done
	Check patient is suitable for video consultation	
	Check patient has access to necessary technology (at home or in local clinic room)	
	Ensure patient has received a link to the online patient information at https://nearme.scot or been sent a video consultation information leaflet	
	Confirm suitable date and time for appointment	
Arrange a private room for clinician with access to the necessary IT equipment		

Before the video consultation		Done
	Check environment appropriate: remove sensitive documentation from view, clutter-free background, ensure face well-lit, no back lighting	
	Test technology – camera and microphone, internet connection	
	Ensure access to patient records – paper or electronic	
Check suitable mode of documenting consultation accessible – paper or electronic		

During the video consultation		Done
	Welcome patient to consultation and check name and DOB	
	Check patient can see and hear you adequately	
	Introduce anyone else in room at both ends, ensure all participants clearly visible at both ends	
	Check patient's prior understanding of video consultation, describe the consultation process	
	Explain eye contact with camera above screen (may seem unnatural); clinician may look off screen to review results or write in notes	
	Inform patient the video consultation is not recorded	
	Contingency plan what to do if consultation fails - usually continue by telephone	
	Gain verbal consent to continue	
Continue with consultation proper		

At the end of the consultation		Done
	Check patient understanding and no further questions	
	Clarify follow up plan, if further appointment needed confirm whether video/telephone/face to face	
Tell the patient you are ending the consultation, leave the call		

GMC advice

- **GMC good practice remote consultations:** <https://www.gmc-uk.org/ethical-guidance/ethical-hub/remote-consultations>
- **GMC: Remote consultations FAQ's specific to the coronavirus pandemic:** <https://www.gmc-uk.org/ethical-guidance/ethical-hub/covid-19-questions-and-answers#Remote-consultations>

Medico-legal advice

- **MPS guidance on remote consultations during the pandemic.**
<https://www.medicalprotection.org/uk/articles/covid-19-and-remote-consultations-how-we-can-help>

'The current situation surrounding the COVID-19 coronavirus has created a number of challenges, many of which relate to self-isolation and social distancing. For doctors, this has raised the question of whether they should limit patient interactions to remote consultations. Medical Protection has received calls from members regarding the safety and suitability of remote consulting – also known as telemedicine – and this article outlines our advice and guidance...'

(MPS, 2020)

- **MDDUS advice on remote consulting in the coronavirus pandemic:**
<https://www.mddus.com/advice-and-support/advice-library/remote-consulting-in-the-coronavirus-outbreak>

'Government advice is under constant review but MDDUS would like to reassure members about the overall safety of using remote consulting at this challenging time. It is a sensible approach that allows patients access to new or ongoing medical advice while protecting other patients, staff and clinicians from possible exposure to the virus – but healthcare staff must be made aware of the risks and take practical steps to mitigate these and avoid patient safety issues. Each practice will have their own particular approach to remote consultations but here we offer some general advice...'

(MDDUS, 2020)

- **Conducting remote consultations.** MDU guidance. <https://www.themdu.com/guidance-and-advice/guides/conducting-remote-consultations>

- **MDU Webinar: 14 minutes. Practical advice on consulting with patients remotely.**
<https://www.themdu.com/guidance-and-advice/podcasts-and-videos/practical-advice-on-consulting-with-patients-remotely>

'Remote consultations are not new, but the coronavirus pandemic has meant many doctors have had to rapidly move much of their normal work to telephone or video consultations.'

(MDU, 2020)

Technical support

General:

- **Guide to setting up video consultations.** Targeted mainly at use of Skype.
<https://www.bartshealth.nhs.uk/download.cfm?doc=docm93ijm4n7611.pdf&ver=12217>

Near me:

- **'Near Me service provider/clinician training'**. 3 minute video:
<https://www.youtube.com/watch?v=aCuveNRC86Y&feature=youtu.be>
- **'Near Me /Attend Anywhere Training Videos'**. Series of short videos on 'the basics':
<https://www.vc.scot.nhs.uk/attendanywhere/aa-resources/aa-training-vids/>

Further recommended reading and resources:

Articles

- Reisman, A.B. and Brown, K.E., 2005. Preventing communication errors in telephone medicine. *Journal of general internal medicine*, 20(10), pp.959-963. A case-based walk-through. <https://onlinelibrary.wiley.com/doi/pdf/10.1111/j.1525-1497.2005.0199.x>
- Rimmer, A. I don't feel confident providing remote consultations. What do I need to know? *BMJ* 2020; 369 :m1746. <https://www.bmj.com/content/bmj/369/bmj.m1746.full.pdf>

Guides

- **Coronavirus resilience planning: use of near me video consulting in GP practices.** Practical guide including technical support. [https://www.sehd.scot.nhs.uk/pca/PCA2020\(M\)03.pdf](https://www.sehd.scot.nhs.uk/pca/PCA2020(M)03.pdf)

Webinars

- 1 hour: **'Video consultations: how to set them up well and fast'**. With Professor Trisha Greenhalgh. <https://www.health.org.uk/about-the-health-foundation/get-involved/events/video-consultations-how-to-set-them-up-well-fast>
- 1 hour: **'Digital responses to covid-19'** from NHSX. With Professor Trisha Greenhalgh. <https://www.digitalhealth.net/events/digital-responses-to-covid19-briefing-and-q-and-a-with-nhsx-video-consultations/>
- 1 hour: **'Remote consulting during the COVID-19 outbreak'**. From the MPS. <https://www.medicalprotection.org/uk/articles/webinar-recording-remote-consulting-during-the-covid-19-outbreak>

'Learning objectives: By the end of this webinar you will:

- *Explore the uses and advantages of remote consulting for doctors and patients.*
 - *Increase awareness of how to practise in this way safely.*
 - *Understand indemnity considerations' (MPS, 2020)*

- 52 minutes: **‘Supporting people in the management of long term conditions (LTC)’**. From NES. <https://learn.nes.nhs.scot/28943/coronavirus-covid-19/remote-consulting>.

‘This webinar will explain how remote consultations may be used as an approach for managing Long Term Condition (LTC) reviews and includes the provision of support on how these reviews can be managed during the COVID-19 pandemic. It also comprises utilising consultation and communication skills to check understanding, engage in shared decision-making, ensuring what matters to you conversations and person centred care planning.’ (NES, 2020)

- 48 minutes: **‘Telephone consultation skills, establishing a telephone triage system in practice and utilising telephone triage effectively’**. From NES. <https://learn.nes.nhs.scot/28943/coronavirus-covid-19/remote-consulting>

‘This webinar will explain how telephone consultations may be used as an approach for handling requests for same-day primary care appointments and an effective way of engaging large numbers of people, prioritising need as required and often can also provide an appropriate alternative to face to face consultations. It will also include discussion around red flags and the importance of safety netting.’ (NES, 2020)

Resources for patients

- Video consultations FAQs for patients: <https://www.bartshealth.nhs.uk/video-consultations-faqs>
- 2 minute YouTube video explaining ‘Near Me’ to patients: https://www.youtube.com/watch?v=36FC_0XGINg&feature=youtu.be
- ‘Near Me’ website for patients: <https://www.nearme.scot/>
- FAQs for patients about remote consultations. **RCPSYCH. COVID-19 remote consultations.** <https://www.rcpsych.ac.uk/mental-health/treatments-and-wellbeing/remote-consultations-and-covid-19>