

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 application to be used with this patient e.g. Healthdirect, Skype, Zoom, Facetime, WhatsApp etc.
- Take the patient's phone number, provide the patient with information on the consultation.
- Inform the patient of any additional costs for a remote consult.
- Send the patient a link to connect to the appointment.
- Know how you will access the patient's notes before, during and after the consult.
- Have your equipment in place and tested
- Have your 'plan B' in place such as rescheduling, using the phone or if the patient is seriously ill.
- Remind (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 opening the application or virtual video room or calling the patient by phone.
- 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

- Introduce yourself, confirm the patient's identity, and clarify your role in their care, ensuring your name is visible on the screen
- Remind the patient what the 'plan B' is should the technology fail and they are not to record the consultation.
- Provide instructions on how to capture visual information – come close to the camera or take a photo and send.
- Let the patient know when you are taking notes or reading something – silence is OK.
- Ensure adequate clinical notes for Telehealth are in the patient medical record.
- Be aware that remote consults are a new experience 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 and 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.