Virtual care: A guide to a successful consultation

When delivering care virtually, it is important to consider your surroundings. Having a good set up and taking the time to plan your virtual consultations will help them run smoothly and can assist in building rapport with participants. This guide provides practical tips to set up a successful consultation.

Be aware of your surroundings

Background: Try to have a tidy and uncluttered environment. Ensure there is no clinical or personal information on display or distractions in the background (e.g. personal photos).

Lighting: Wherever practical, use artificial light rather than natural light. Close blinds and turn ceiling lights on.

Privacy: Wherever possible, choose a private space for the consult. If using an open plan office, try to minimise the number of people who will be passing through the room. Refer to the **Virtual care in practice guide** and **Virtual care in open plan offices guide** for additional privacy measures.

Check that the participant is also in a private space (e.g. not on public transport or in a store). Reschedule the consult if necessary.

Clinician presentation: Ensure you are dressed in the same professional way you would be for an in-person consultation. Clearly displaying your identification and wearing a uniform can help people to recognise you as a clinician. Wear block coloured clothing, as patterns can appear distorted over videoconference.

Recommended set up

**You can use the following to connect:**

- A desktop or laptop computer (PC or Mac) using Google Chrome

- A room-based video conferencing system at your facility

- A tablet or other technology-enabled device such, as a Workstation on Wheels (WoW).

Once you are happy with your technology, ensure that you:

- **test the equipment before connecting** to a participant. If experiencing an issue contact eHealth Conferencing Services on 1300 679 727

- **set up your camera** so you are positioned in the frame

| Not centred in the frame | Positioned in the centre of the frame and looking at the camera | Too close to camera |

- **are in a well-lit space.** You should be visible on the screen and not in an environment which is too dark or too bright

| Too dark | Ideal lighting | Too bright |
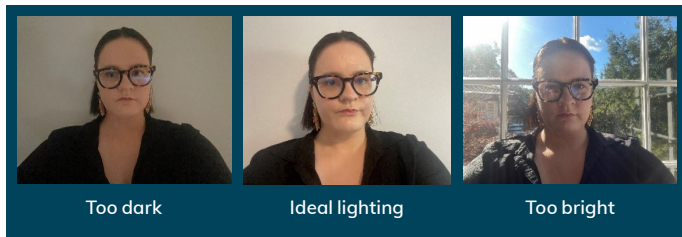
- **use a headset or speakerphone** to ensure clear audio

- **have a second screen** so you can see the person on one screen and relevant clinical documents on the other, e.g. eMR, diagnostic results or patient resources

- **have eMR and any images or results open** before connecting to the participant so you don't have to look for them during the call.

Before the consultation

Ensure that every participant has received:

- an appointment letter providing information about how to connect to the virtual appointment

- participant information. See **Virtual Care Central** for the latest patient information guides.

It is recommended that a test call is conducted with participants prior to the appointment to identify and resolve any connection issues. Ensure that you have a back up plan in the case of technology issues, this may include switching to a phone call or rescheduling the appointment.

Consider if the participants would benefit from a health or social care provider (such as a GP) being with them during the consultation. If so, information can be sent to the relevant service to support this.

You may also consider offering the option to invite additional people (such as family members and carers) to join the consultation. They can join using the options outlined in the participant information guide (computer or mobile app).

Alternatively, friends or family can call into the consultation using the telephone. This will allow them to hear (audio only) and provide support.

Beginning a virtual consultation

Always begin by introducing yourself to all the consultation participants. Tell the participants your name and role and then ask anyone else present (family member, carer, friend, other clinicians) to also introduce themselves.

Like an in-person consultation, conduct an identity check to ensure you are speaking to the correct person.

Explain the process of virtual care to the participant(s):

- Remind participants it is their choice to use virtual care – they should let you know if virtual care isn't meeting their needs or if they are uncomfortable at any time

- Check that their technology is working properly

- Explain that this is just like an in-person appointment

- Let them know they can ask any questions at any time and that they should ask to repeat something if unclear.

Communicating with participants during the consultation

- Speak clearly and slowly and be sure to pause to allow participants to process information and account for any communication delays.

- Consider repeating back what a participant has said to ensure there is a shared understanding.

- Use non-verbal cues to demonstrate engagement and active listening (nodding, leaning forward).

- Use visual aids to help explain a concept (if using drawings, these should be simple enough to display clearly over video or be scanned and shared as a PDF).

- If using an interpreter, they should also join by video so they can see the whole context of the conversation.

- Maintain eye contact by looking at the camera and be sure to tell participants when you are looking away from the camera. For example, consider saying 'I am just looking at your X-ray on another screen' or 'it might look like I am not looking at you, but I am just looking at your results'.

- Turn your phone off or place it on silent. If you are expecting an urgent call that must be answered, be sure to let the participants know at the beginning of the consultation. When taking the call ensure you mute yourself on the videoconference to respect the caller's privacy.

Virtual care tips

- Be familiar with the platform you are using, if you need training **contact your local virtual care/ telehealth manager or lead** (Note: this list is for NSW Health staff only, and is accessible on the NSW Health network).

- Practice, practice, practice. This will build your confidence and help you to being calm and focused on your patient. The consultation should feel 'natural' like an in-person consultation.

- Make sure that you inform the participant if there will be delays in the consultation occurring or have someone keep the person informed.

- Communicate with participants what to do if there are technical difficulties.

- Use video calls over phone calls where clinically appropriate.

Troubleshooting

- Check that you have entered the correct information to connect to the consultation.

- If the person can't see you, ensure you have given permission to use your camera and selected the correct camera from the settings.

- If the person can't hear you, ensure you have given permission to use your microphone, that it is enabled and not muted.

- If you can't hear the person, check that your device is not muted and that the volume is turned up.

Support

Support can be provided through your local **virtual care/ telehealth manager or lead** (Note: this list is for NSW Health staff only, and is accessible on the NSW Health network).

The dedicated eHealth Video Conferencing Support Team provides support to NSW Health employees (StaffLink ID is required). If you experience difficulties connecting, please contact:

Email: videoconf@health.nsw.gov.au

Phone: 1300 679 727

If patients are experiencing technical difficulties, encourage them to contact their clinic's administration staff or speak with your virtual care/ telehealth manager or lead about other support available.