Telehealth outpatient clinic – remote site support staff

Guideline Responsibilities and Authorisation

Department Responsible for Guideline	Virtual Health
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Target Audience	Patients living in remote, rural or community who find it difficult to travel to the Waikato DHB for outpatient appointments.

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Guideline Review History

Version	Updated by	Date Updated	Summary of Changes
V1.0	Gary Nelson	2015	
V2.0	Denise Irvine	2019	Add registered midwife to clinical management section

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Facilitator Title:	Denise Irvine			Department:	Virtual Health		

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1 Overview

- Purpose: To detail the process of supporting an outpatient clinic using Telehealth (video conferencing technology) which allows patients to be seen in one location by a health professional who is in a different location.
- Scope: All Waikato District Health Board staff involved in the delivery of patient care using telehealth technology.
- Exclusion: this guideline does not apply where patients are at home, unless there is a clinical staff member present.
- Patient / client group: Patients/Clients consenting to an outpatient appointment using video conferencing technology.
- Definitions

Telehealth	Telehealth is the use of information and communication technologies to deliver health care when patients and providers are not in the same physical location. This includes site to site videoconferencing, telephone, and other devices. Included in this service are community outreach, primary care settings, marae, home, schools and other
Video-Conferencing (VC)	is live, two way audio and two way video transmission across distances.
Hub	is the site at which the clinical staff member who is "seeing" the patient/client is located.
Spoke Site	is the site, usually a remote, rural or provincial centre, where the patient/client/whanau/caregivers and key worker/staff support person is situated.
Tele-ambulatory care	Telehealth services in an outpatient community and day stay setting.
IS	the Waikato DHB Information Services department
FA	First Assessment

2 Clinical Management

The competency level of the support staff will be determined by the service providing the outpatient care. This will depend upon a number of factors including: level of clinical expertise and experience preferred, physical assessment skills requirements, communication requirements, support needs of the patient etc. Staff type options include, but are not limited to:

- Medical staff
- Registered nurse
- Enrolled nurse
- Key worker
- Allied health professional
- Allied health therapy assistant
- Health care assistant
- Clerical/administration staff
- Registered Midwife

The remote support staff member acts as a patient advocate to optimize the exchange of clinical information between the provider and patient as required. Training on the use of Telehealth equipment and etiquette is required before filling the support role. The standard of treatment provided to patients/clients is to be maintained when using Telehealth. Further training/up skilling may be required by a service so the support staff member can effectively fill the role they require.

3   Equipment

Telehealth equipment can include a range of devices and peripherals, including dedicated Video Conference equipment, monitors, projectors, cameras, AV trolleys, cables, or add-ons for a PC such as a webcam, headset or microphone and speakers.

- Please contact the IS Service Desk to get assistance in determining what is required for your telehealth equipment needs.
- Software: **Cisco Jabber** is used for patient/client consultations with a health professional, meeting room to meeting room when a patient/client is physically involved or patients/clients are being discussed in a MDT meeting.

The spoke site may require different equipment to successfully facilitate a clinic depending on the specialty and should be set out by the service prior to commencing the contact. For example the clinic rooms may need, in addition to the VC equipment, a desk phone, a referral pad, access to scales and height measure, blood pressure machine, reflex hammer, patient hand-outs, service specific resources etc.

Guideline

Traditional delivery of health care involves patient and provider communication and interaction in a real time, "in-person" encounter. The use of telehealth has extended the reach of the provider, but also may create situations in which assistance is needed in facilitating clinical data transfer from the remote patient setting. A support staff member is frequently used, although not always required, to address the challenges that the consulting provider faces when conducting a physical examination using telehealth and to ensure efficient information exchange. The remote site staff member provides support to the patient and the telehealth consulting provider, in completing the physical examination and/or other specified activity. The service should determine the expertise required from a support staff member to achieve an adequate portrayal of the patient's mental and physical condition. Requirements can vary widely, based upon the specific patient care settings, the clinical specialty, and expertise of the telehealth providers.

Support staff must be aware of Waikato DHB policies and procedures and how these apply to clinical and professional practise. The service area should decide on the level of skills required to fill the support role for different telehealth settings. The staff member should ideally be based at the spoke site or not far from it, and have expertise and interest in the speciality utilising telehealth. At a minimum, any person functioning in the role shall ensure that all aspects of technical performance are considered, including issues of patient safety and confidentiality. The staff member should be assisted to work at the top of their scope of practice but not beyond it. Further training/education/up-skilling may be valuable to enhance existing skills and overall success of telehealth.

Action: Preparation of the environment

- Confirm that all necessary equipment including peripheral devices and supplies for the tele-encounter are accessible in the exam room

- Remove personal identifiable health information from the area of the encounter that is not specific to the patient
- Assess and implement an appropriate plan for cultural, language, and/or disability issues
- Provide the provider with any available and necessary information regarding the patient (e.g., history and physical, radiographs, lab work, etc.), prior to the tele-encounter
- Have contingency plans in place for loss of connectivity and be prepared to implement these plans. Ensure you have the correct contact phone number for the provider should this be required to contact them.

Rationale: Adequate preparation prior to a Telehealth clinic will enhance the success of this type of encounter for patient/client, family/caregiver and staff involved.

Action: Follow up

- Review any instructions or information conveyed during the tele-encounter by the provider after the session has concluded, as appropriate, based on your level of professional practice
- Provide patient/family with the provider's contact information if required for follow-up
- Encourage the patient/family to complete an experience survey after their appointment and before they leave to assist in improving the service for all patients
- Schedule/request follow-up appointments, treatments, referrals etc., as required
- Provide primary care and/or other appropriate individuals involved in the patient's care coordination with necessary documentation from tele-encounter and as requested by the patient

Rationale: Clinic facilitation at the spoke site will assist the patient/client's experience as well as the efficiency of the providers input.

Action: Equipment maintenance

- Perform routine system tests to ensure that equipment is in safe and working order
- Document and maintain a log of all technical problems or issues
- Follow up with technical support immediately following encounter, if any problems occur

Rationale: Telehealth is reliant on excellent equipment performance to facilitate a positive experience for patient/client, family/caregiver and health care professionals involved.

4   Associated Waikato DHB documents

- Health and Disability Commissioner's Act 1994

- Code of Health and Disability Services Consumer Rights 1996

- 0182 - Waikato DHB Clinical Records Management Policy
- 0104 - Waikato DHB Incident Management Policy
- 2191- Waikato DHB Information Systems Acceptable Use
- 1969 - Waikato DHB Informed Consent
- 3153 - Waikato DHB Information Security Policy
- 0100 - Waikato DHB Ethnicity Data Collection
- 2715 - Waikato DHB Telehealth Policy

5   References

- Waikato DHB Telehealth Strategy (version 1, February 2013)
- West Coast District Health Board Telemedicine Procedure (version 5, 27/02/14)
- Telehealth Guidelines and Practical Tips, The Royal Australian College of Physicians (RACP)

- Expert Consensus Recommendations for Videoconferencing-Based Telepresenting November 2011. American Telemedicine Association
- Midland Telehealth Strategy April 2018