

Outline competencies and capabilities for staff providing remote general practice services

Based on Greenhalgh et al: *British Journal of General Practice*, 2023; DOI: <https://doi.org/10.3399/BJGP.2023.0251>

STAFF GROUP	DOMAINS AND EXAMPLE CONTENT
<p>Clinical students and novice trainees</p> 	<p>Basic descriptive knowledge</p> <ul style="list-style-type: none"> > Describe the different kinds of remote consultation (e.g. telephone, video, electronic) > Describe the elements of a clinically adequate, appropriate and safe remote encounter <p>Technical knowledge and skills</p> <ul style="list-style-type: none"> > Make contact with a patient using remote technology including video, telephone and asynchronous electronic [e-]communication, including test calls where appropriate > Describe technical and logistical issues arising within these different modalities > Outline potential harmful impacts of a 'failed' digital encounter (e.g. due to loss of signal) <p>Triage skills</p> <ul style="list-style-type: none"> > Explain why triage to allocate patients to different kinds of encounter may be needed > Identify patients suitable (and unsuitable) for different kinds of remote encounter (telephone, video and e-consultation, SMS messaging, email, answerphone messages) <p>Knowledge of ethics and governance</p> <ul style="list-style-type: none"> > Describe the consent process for a video or telephone consultation > Discuss ethical issues (e.g. confidentiality, data handling and storage, safeguarding, digital exclusion) relevant to different kinds of remote encounter <p>Communication and clinical skills</p> <ul style="list-style-type: none"> > Explain why it is important to establish rapport in a remote encounter > Demonstrate attunement to the patient and their environment in a remote encounter, noticing and responding to cues within the limits of the modality > Demonstrate establishment of rapport in a remote encounter > Adapt method and style of communication appropriately to the remote modality > Take a detailed and careful history, given that clinical examination and non-verbal cues will be limited > Elicit symptoms and signs, including explaining concepts and giving instructions so as to gather information without being able to directly examine or fully observe the patient > Assess and interpret visual physical signs by video, or as described on the telephone, with appropriate caution > Explain the importance and principles of safety-netting in remote encounters > When undertaking remote or digital encounters, identify situations where there is a risk to patient safety and describe appropriate mitigative action (e.g. ask about relevant red flag symptoms, invite for face-to-face assessment, escalate to senior colleague) > Communicate appropriate safety-netting procedures in clinical cases in different remote modalities
<p>Established clinicians</p> 	<p>In addition to demonstrating a high level of competence in all the above:</p> <p>Advanced technical knowledge and skills</p> <ul style="list-style-type: none"> > Remain up to date on new and emerging technologies to support remote encounters > Adopt, select and use a range of technologies to support remote encounters, including traditional (e.g. telephone) and digital modalities > Demonstrate a sophisticated understanding of how particular remote and digital technologies fit with workflows and routines across their own organisation > Use remote and digital technologies to help achieve team-based multi-professional care in a multi-modal care environment (e.g. through continuity of record-keeping for episodes of illness) > Be aware of how informational and managerial continuity are achieved between organisations eg: pathways for electronic referrals, results and discharge or outpatient letters between primary and secondary care, and how breaches in continuity may occur > Know how to obtain technical help when troubleshooting fails <p>Advanced triage capability</p> <ul style="list-style-type: none"> > Work within the limits of remote technologies and care models, supporting patient choice as far as possible and knowing when to advise a patient that they need in-person assessment > Quickly and accurately identify patients who are sick and require physical assessment or more urgent care > In situations where in-person appointments are limited, prioritise patients for those slots > Make creative use of digital technologies to support the triage process and associated workflows consultation <p>Advanced communication and clinical capability</p> <ul style="list-style-type: none"> > Build and maintain therapeutic relationships through remote modalities, conveying attentiveness and compassion to the patient > Practice appropriate telehealth etiquette, adapting to different patients' communication preferences and styles > Cope with minor technical glitches such as lag or crackle using linguistic techniques such as repetition and repair > Negotiate with patients who request a particular modality that does not align with clinical need or capacity constraints > Use advanced history-taking, questioning and probing skills, and elicit and interpret patient self-assessment data appropriately, to compensate for lack of in-person clinical assessment > Ensure that the clinician's full duty of care is realised in terms of responsibility for assessment, investigation and treatment, onward referral, outcomes and documentation > Show awareness of, and sensitivity to, specific groups that may be more vulnerable to miscommunications or misinterpretations in remote encounters eg: older people, those with hearing impairments, those with learning disabilities, some neurodivergent people, some with emotionally unstable personality disorder, limited English speakers > Take action to mitigate inequities that arise from people's differential ability or willingness to use remote and digital modalities > When undertaking remote or digital encounters, consistently identify subtle clues that may indicate a risk to patient safety and take appropriate mitigative action <p>Advanced knowledge in ethical, legal and regulatory domains</p> <ul style="list-style-type: none"> > Ensure patient privacy and consent during remote assessments and data gathering, including where safeguarding issues are pertinent (such as possibly-coercive relationships, children and teenagers, cognitive impairment, limited English proficiency) > Demonstrate a good working knowledge of when and how to pursue safeguarding concerns through local processes and safeguarding leads > Demonstrate understanding of relevant security and information governance rules and regulations > Demonstrate understanding of the legal limits of care provided across jurisdictions (e.g. national borders), and the implications for indemnity <p>Digital implementation skills</p> <ul style="list-style-type: none"> > Contribute to selection and procurement decisions for technologies to support remote and digital care > Contribute to the on-going development and embedding of digital technologies in local settings, co-adapting technologies and workflows and identifying potential design improvements > Develop and adapt remote and digital workflows and practices to optimise safety <p>Supervisory, teaching and coordinating roles</p> <ul style="list-style-type: none"> > Ensure appropriate supervision and support is in place where needed when trainees and allied health staff are involved > Motivate patients to try remote technologies; explain the 'rules of engagement' for remote encounters to them; and assist them to use and troubleshoot technologies in this context > Support and motivate fellow staff members to learn to use remote technologies > Manage scenarios where team members may be in different locations (e.g. learner is with patient vs. learner is with supervisor vs none are co-located)
<p>Strategic role (e.g. senior manager, clinical director)</p> 	<p>System-level perspective on remote and digital service provision</p> <ul style="list-style-type: none"> > Ensure that the organisation adopts a variety of information and communication technologies to deliver high-quality, safe, patient-centred care to diverse populations in a variety of settings > Work within the health care team and setting to ensure that remote encounters function well within a system or programme of care that has continuity and follow-up as needed > Monitor, evaluate and continuously improve the organisation's digital maturity and success in delivering remote and digital services > Proactively address digital disparities and the needs of excluded and underserved groups by providing multiple access options and care navigation as appropriate > Assess and address the multiple training needs of individual staff members and teams, including but not limited to the introduction of new digital technologies > Put systems in place to proactively identify and address safety issues arising from the remote delivery of care, working with technology suppliers, patients, regulators and others
<p>Support staff</p> 	<p>Basic system knowledge</p> <ul style="list-style-type: none"> > Describe the different modalities of patient encounter (triage or consultation) available in the practice > Outline the key remote and digital workflows for which their role is relevant <p>Technical knowledge and skills</p> <ul style="list-style-type: none"> > Be familiar with the remote and digital technologies associated with their role, including supporting patients to use these technologies > [Where appropriate, show and support other staff members to use these technologies] <p>Triage skills</p> <ul style="list-style-type: none"> > Explain why triage to allocate patients to different kinds of encounter may be needed > Gather information appropriately from patients and identify those suitable (and unsuitable) for different kinds of remote encounter (telephone, video and e-consultation, SMS messaging, email, answerphone messages) > Be familiar with measures used in the practice to aid remote triage eg: asking patients to send a photo of a skin complaint > Outline the principles of safety netting <p>Communication skills</p> <ul style="list-style-type: none"> > Use professional and 'customer care' approaches to communicate with patients remotely, conveying attentiveness and compassion > Be aware of the kinds of patients who may require support or flexibility with communication > Recognise the need to mitigate digital disparities > Deal effectively and sensitively with patients who are upset or insistent in a triage encounter <p>Safety-critical clinical knowledge</p> <ul style="list-style-type: none"> > Be aware of 'red flag' priority symptoms (e.g. bleeding, difficulty breathing) and the process for escalating these > Be aware of practice protocols for particular scenarios (e.g. young children, abdominal pain) and apply these during triage encounters