

Outline competencies and capabilities for staff providing remote general practice services

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STAFF GROUP	DOMAINS AND EXAMPLE CONTENT
<div>Clinical students and novice trainees</div> <div></div>	<div><div>Basic descriptive knowledge</div><div><div>> Describe the different kinds of remote consultation (e.g. telephone, video, electronic)</div><div>> Describe the elements of a clinically adequate, appropriate and safe remote encounter</div></div></div>
	<div><div>Technical knowledge and skills</div><div><div>> Make contact with a patient using remote technology including video, telephone and asynchronous electronic [e-]communication, including test calls where appropriate</div><div>> Describe technical and logistical issues arising within these different modalities</div><div>> Outline potential harmful impacts of a ‘failed’ digital encounter (e.g. due to loss of signal)</div></div></div>
	<div><div>Triage skills</div><div><div>> Explain why triage to allocate patients to different kinds of encounter may be needed</div><div>> Identify patients suitable (and unsuitable) for different kinds of remote encounter (telephone, video and e-consultation, SMS messaging, email, answerphone messages)</div></div></div>
	<div><div>Knowledge of ethics and governance</div><div><div>> Describe the consent process for a video or telephone consultation</div><div>> Discuss ethical issues (e.g. confidentiality, data handling and storage, safeguarding, digital exclusion) relevant to different kinds of remote encounter</div></div></div>
	<div><div>Communication and clinical skills</div><div><div>> Explain why it is important to establish rapport in a remote encounter</div><div>> Demonstrate attunement to the patient and their environment in a remote encounter, noticing and responding to cues within the limits of the modality</div><div>> Demonstrate establishment of rapport in a remote encounter</div><div>> Adapt method and style of communication appropriately to the remote modality</div><div>> Take a detailed and careful history, given that clinical examination and non-verbal cues will be limited</div><div>> 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</div><div>> Assess and interpret visual physical signs by video, or as described on the telephone, with appropriate caution</div><div>> Explain the importance and principles of safety-netting in remote encounters</div><div>> 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)</div><div>> Communicate appropriate safety-netting procedures in clinical cases in different remote modalities</div></div></div>
<div>Established clinicians</div> <div></div>	<div>In addition to demonstrating a high level of competence in all the above:</div>
	<div><div>Advanced technical knowledge and skills</div><div><div>> Remain up to date on new and emerging technologies to support remote encounters</div><div>> Adopt, select and use a range of technologies to support remote encounters, including traditional (e.g. telephone) and digital modalities</div><div>> Demonstrate a sophisticated understanding of how particular remote and digital technologies fit with workflows and routines across their own organisation</div><div>> 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)</div><div>> 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</div><div>> Know how to obtain technical help when troubleshooting fails</div></div></div>
	<div><div>Advanced triage capability</div><div><div>> 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</div><div>> Quickly and accurately identify patients who are sick and require physical assessment or more urgent care</div><div>> In situations where in-person appointments are limited, prioritise patients for those slots</div><div>> Make creative use of digital technologies to support the triage process and associated workflows consultation</div></div></div>
	<div><div>Advanced communication and clinical capability</div><div><div>> Build and maintain therapeutic relationships through remote modalities, conveying attentiveness and compassion to the patient</div><div>> Practice appropriate telehealth etiquette, adapting to different patients’ communication preferences and styles</div><div>> Cope with minor technical glitches such as lag or crackle using linguistic techniques such as repetition and repair</div><div>> Negotiate with patients who request a particular modality that does not align with clinical need or capacity constraints</div><div>> 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</div><div>> 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</div><div>> 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</div><div>> Take action to mitigate inequities that arise from people’s differential ability or willingness to use remote and digital modalities</div><div>> When undertaking remote or digital encounters, consistently identify subtle clues that may indicate a risk to patient safety and take appropriate mitigative action</div></div></div>
	<div><div>Advanced knowledge in ethical, legal and regulatory domains</div><div><div>> 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)</div><div>> Demonstrate a good working knowledge of when and how to pursue safeguarding concerns through local processes and safeguarding leads</div><div>> Demonstrate understanding of relevant security and information governance rules and regulations</div><div>> Demonstrate understanding of the legal limits of care provided across jurisdictions (e.g. national borders), and the implications for indemnity</div></div></div>
	<div><div>Digital implementation skills</div><div><div>> Contribute to selection and procurement decisions for technologies to support remote and digital care</div><div>> Contribute to the on-going development and embedding of digital technologies in local settings, co-adapting technologies and workflows and identifying potential design improvements</div><div>> Develop and adapt remote and digital workflows and practices to optimise safety</div></div></div>
	<div><div>Supervisory, teaching and coordinating roles</div><div><div>> Ensure appropriate supervision and support is in place where needed when trainees and allied health staff are involved</div><div>> 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</div><div>> Support and motivate fellow staff members to learn to use remote technologies</div><div>> 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)</div></div></div>
<div>Strategic role (e.g. senior manager, clinical director)</div> <div></div>	<div><div>System-level perspective on remote and digital service provision</div><div><div>> 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</div><div>> 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</div><div>> Monitor, evaluate and continuously improve the organisation’s digital maturity and success in delivering remote and digital services</div><div>> Proactively address digital disparities and the needs of excluded and underserved groups by providing multiple access options and care navigation as appropriate</div><div>> Assess and address the multiple training needs of individual staff members and teams, including but not limited to the introduction of new digital technologies</div><div>> 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</div></div></div>
<div>Support staff</div> <div></div>	<div><div>Basic system knowledge</div><div><div>> Describe the different modalities of patient encounter (triage or consultation) available in the practice</div><div>> Outline the key remote and digital workflows for which their role is relevant</div></div></div>
	<div><div>Technical knowledge and skills</div><div><div>> Be familiar with the remote and digital technologies associated with their role, including supporting patients to use these technologies</div><div>> [Where appropriate, show and support other staff members to use these technologies]</div></div></div>
	<div><div>Triage skills</div><div><div>> Explain why triage to allocate patients to different kinds of encounter may be needed</div><div>> 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)</div><div>> Be familiar with measures used in the practice to aid remote triage eg: asking patients to send a photo of a skin complaint</div><div>> Outline the principles of safety netting</div></div></div>
	<div><div>Communication skills</div><div><div>> Use professional and ‘customer care’ approaches to communicate with patients remotely, conveying attentiveness and compassion</div><div>> Be aware of the kinds of patients who may require support or flexibility with communication</div><div>> Recognise the need to mitigate digital disparities</div><div>> Deal effectively and sensitively with patients who are upset or insistent in a triage encounter</div></div></div>
	<div><div>Safety-critical clinical knowledge</div><div><div>> Be aware of ‘red flag’ priority symptoms (e.g. bleeding, difficulty breathing) and the process for escalating these</div><div>> Be aware of practice protocols for particular scenarios (e.g. young children, abdominal pain) and apply these during triage encounters</div></div></div>