

Outline competencies and capabilities for staff providing remote general practice services

Synthesised from primary data (interviews, ethnography) and various secondary sources (listed in table 1)

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>Supervisory, teaching and coordinating roles</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><i>Note: a future paper will cover training needs of support staff in more detail</i></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