NHS Wales Video Consulting Service

Using Video Consultations in Optometry:
A Toolkit for Optometrists

The NHS Wales Video Consulting Service is brought to you by:

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Terminology Used in Toolkit:

- **VC Service** will be the named used throughout to refer to the National Video Consultation Service being offered by Welsh Government to optometrists and opticians in Wales.
- **Attend Anywhere** will be the name used throughout to refer to the communication platform to deliver the video appointment.
- **Optometry** will be the term used to refer to Optometric care in practice
- **Patients and the optometry team** will be the terms used to refer to all types of patients, and all types of optometry staff.

Section 1: Introduction

What is the NHS Wales Video Consulting (VC) Service?
The NHS Wales Video Consulting (VC) Service is being rolled out to offer healthcare services in a safe and secure way to see patients via a video appointment, rather than seeing them in-person. The VC Service is delivered via a communication platform called 'Attend Anywhere'.

What is Attend Anywhere?
- Attend Anywhere is a web-based communication platform that allows video appointments to take place between patients, families and optometrists/opticians.
- These appointments can take place anywhere convenient to the patient, such as at work, school or home.
- Attend Anywhere is accessible via any type of device that has Internet access e.g., smart phone, tablet, laptop or computer with a webcam running Chrome or Safari browsers.

What are the Key Features of Using Attend Anywhere in Optometry?
- No installation or downloads needed – the service is web-based, so easy to use.
- It is free for patients to use (except if using mobile data).
- No recording of the video appointment is possible.
- Safe and secure virtual 'Waiting Rooms' and 'Meeting Rooms'.
- Confidential and anonymised.
- Automatically tests the call for video and audio, to check the device is suitable.
- Automatically asks the patient to accept the camera and microphone for easy access.
- Ability to send the patient appointment directly from the waiting area
- Comparable treatment, care and support as an in-person appointment in many ways.

Using the VC Service in Optometry
The overarching goal of the VC Service in optometry is to mimic, as close as possible the way consultations, advice and prevention are delivered in practice, without the need to physically attend an in-person appointment. It will allow optometrists and opticians to respond effectively to urgent and emergency eye conditions so that they can be treated in the most appropriate setting. It is also useful in situations where an assessment in advance or a remote introduction to the optometry setting would ensure that the practice and patient are prepared in advance, reducing the need for additional visits or travel.

Video appointments are one type of healthcare delivery method used to connect optometrists and opticians with their patients, alongside a range of other methods such as in-person, telephone and other computer-based approaches. Compared to other healthcare delivery methods, video appointments enable patients to attend appointments without the need to attend in-person yet allow the patient and optometrists/opticians to communicate face-to-face (virtually). Video appointments are comparable to in-person appointments in that they can deliver safe, secure and patient-centred care, but are generally more superior to a simple phone call appointment or other computer-based methods. Video appointments can offer patients the convenience of a home, school or work appointment, but at the same

time offer virtual interaction, build rapport and can see visual cues which are all very important components of healthcare.

Video appointments are beneficial to the patient for a wide range of reasons. For example, they can:
- Improve accessibility,
- Improve patient choice,
- Reduce transport or travel difficulties,
- Produce savings on time, travel and carbon footprint,
- Reduce time off work, school and other responsibilities,
- Reduce additional harm or risk to physical or mental health e.g., by leaving home, or excessive travel.

Video appointments can also support the work of optometrists in many ways. For example, they can:
- Save optometrists and opticians time and travel attending clinics at different sites.
- Enable optometrists and opticians to work from their own home when needed, improving work-life balance
- Allow optometrists and opticians to link up with other professionals

Welsh Government Plan (COVID-19)
The Welsh Government strategic aim is that platforms like the National video consultation service will eventually be accessible across Social Care, Primary Care and Secondary Care settings across Wales. The platform will offer a consistent and agile solution for both professionals and patients.

TEC Cymru, a Welsh Government sponsored programme hosted within Aneurin Bevan University Health Board, has piloted the video consultation solution called Attend Anywhere. The pilot has received good feedback and the platform was identified as suitable to be scaled-up nationally. Welsh Government has asked TEC Cymru to start rapidly upscaling the project to deliver a national video consultation service for health care providers in Wales.

The NHS Wales Video Consulting Service is being implemented immediately to reduce exposure to coronavirus by enabling both patients and optometrists/opticians to consult flexibly and while in self-isolation. It can also increase organisational resilience by protecting the workforce and enabling support to be provided from different geographical locations. Scenarios where video consulting may be beneficial include:
- For patients with confirmed coronavirus or who are self-isolating, due to contact with an infected person to have consultations at home where appropriate
- To continue services while reducing the number of people visiting healthcare premises, who may be unknowingly carrying coronavirus.
- For staff self-isolating due to exposure but who are fit to be able to continue working.
- To enable additional health care support to be provided remotely to an area with a significant outbreak of coronavirus (including out of hours, acute and primary care).

Section 2: Using the NHS Wales Video Consulting (VC) Service

Each optometric service will have its own virtual waiting room. The VC service may be used in a number of different ways depending on operational and clinical needs. It should be adapted to fit each healthcare service existing systems

Options include:

1. Appointments for New Patients

Patients will have an appointment using their usual process, such as being referred to a service.
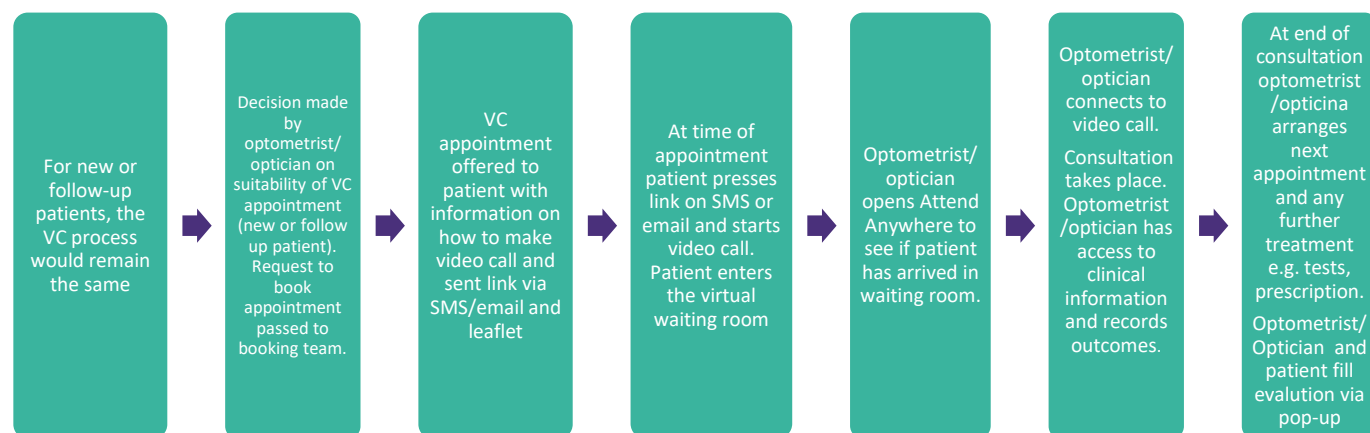
2. Appointments for Follow up Patients

Replacement for planned face to face appointments of patients may include review of tests, follow up after procedures etc. Patients will make and arrange appointments using their usual process.

Process for using video consultations

Video Consultation Process

If a video appointment is considered appropriate the patient will be given a VC appointment link sent by text, email or verbally along with a patient information sheet. Each service will have its own waiting room. The service will retain control over the number of appointment slots offered, and the times of appointments. Patients will enter the individual service virtual waiting room directly via the link sent to them. Patients will be held in the virtual waiting room until an optometrist or optician connects the video call. This means that if a patient did call into Attend Anywhere in the hope of being seen without an appointment, the call is not answered unless the optometrist or optician chooses to answer.

Process of Video Consultations in Optometry

| For new or follow-up patients, the VC process would remain the same | Decision made by optometrist/ optician on suitability of VC appointment (new or follow up patient). Request to book appointment passed to booking team. | VC appointment offered to patient with information on how to make video call and sent link via SMS/email and leaflet | At time of appointment patient presses link on SMS or email and starts video call. Patient enters the virtual waiting room | Optometrist/ optician opens Attend Anywhere to see if patient has arrived in waiting room. | Optometrist/ optician connects to video call. Consultation takes place. Optometrist /optician has access to clinical information and records outcomes. | At end of consultation optometrist /opticina arranges next appointment and any further treatment e.g. tests, prescription. Optometrist/ Optician and patient fill evalution via pop-up |

Multiple optometrists/opticians can consult simultaneously from the same Attend Anywhere waiting room at any one time: patients are listed by patient name and date of birth, so the optometrist/optician would select the correct patient from the list.

Examples of Attend Anywhere Consultations
Typically, optometry staff will be using Attend Anywhere in one of two ways:
(1) To work from their work base to consult with patients remotely or
(2) To enable remote working themselves.

If professionals are to consult remotely, arrangements will need to be made for appropriate access to clinical information.

Information Governance and Guidance

Attend Anywhere has been procured nationally by the Welsh Government.

NHS Wales has undertaken and signed off the Data Protection Impact Assessment (DPIA) documentation for Attend Anywhere. The Attend Anywhere platform does not record the content of a video consultation. The personal details (name, date of birth and phone number) entered into the login page by patients to gain access to the virtual waiting room are used by optometrists to select the correct patient for consultation, and these details are deleted from the Attend Anywhere platform following the consultation.

Indemnity cover needed with the activities associated with Attend Anywhere will be the responsibility of the individual practices and practitioners. The Association of Optometrists has confirmed that its members will be covered when providing advice to patients using 'Attend Anywhere'. Please check with your insurer (if using a different provider) that you will be covered in the same way.

College of Optometrists and the General Optical Council advice on remote consulting

The College of Optometrists and the General Optical Council provides guidance upon when remote consultations may be appropriate

- https://www.college-optometrists.org/the-college/media-hub/news-listing/remote-consultations-during-covid-19-pandemic.html
- https://www.optical.org/filemanager/root/site_assets/publications/covid_19/High-level-principles-for-remote-prescribing_.pdf

Section 3: Setting up the NHS Wales Video Consulting (VC) Service

Service Set up

Managing the VC Service
- Within your service you will need to identify a lead optometrist who will decide how best to set-up, use and manage the VC Service and this person will be the 'point of call' for your service and its use of video appointments.

Setting a Clinical Criteria
- Your service will need to define and agree to a set of clinical criteria for video appointments and the suitability of appointment types.
- Following this agreement, a template for triage/suitability would need to be developed and provided to the person(s) in charge of making video appointments e.g., a receptionist.

Making Appointments
- Your service will need to identify how video appointments will be made, and who will make and deliver these appointments?
- You will need to identify how appointment links and an information sheet will be sent to patients? e.g., verbally or via text or email.
- You will need to identify how appointment slots will be offered, documented and given to the delivering optometrist or optician.

Managing Appointments
- Your service will need to decide how the video appointments will be managed?
- Your service would need to have a contingency plan for possible scenarios such as, if appointments are running late, how will patients be notified? Or what is the process for patients who turn up in the waiting room without a scheduled appointment? and so on.

Clinical Space/Location
- Your service will need to identify how video appointments will be set-up. For example, you will need to think about factors such as the room lay-out (e.g., well-lit, well-positioned), confidentiality issues and its clinical appropriateness.
- Your service will need to consider how clinical information is later documented.

Additional considerations
- It is important that patients can receive patient information leaflets as they would in a standard consultation. Your service needs to decide the best mechanism for communicating this with them. For example, they could be emailed to the patient.

Technical Set up

**What is needed to use video appointments in optometry?**

For both optometrist/optician and patients, the following FOUR steps needed:

1. A reliable internet connection (broadband, WIFI or mobile data)
2. A device for making a video call (smartphone, tablet, laptop, computer with webcam/speaker)
3. A Chrome browser or a Safari browser on the device (depending on device type) which is updated to its most recent settings (see diagram below)
4. A private, and well-lit room or space.
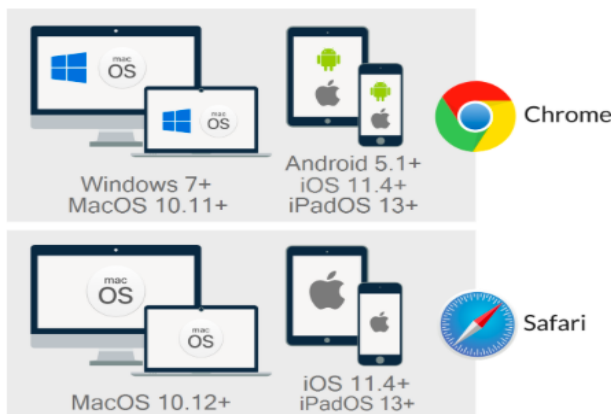
Test the Call

There is a 'video call set-up test' that checks your web browser, speed of internet connection and your device (to check your camera and microphone are working). To run this test, you will need to press the button 'test call' button from your Attend Anywhere Management page, or any web page. Depending on the device you are using, you may see this test conducted in 4-stages: connection, speakers, microphone and video. Some devices may be less.
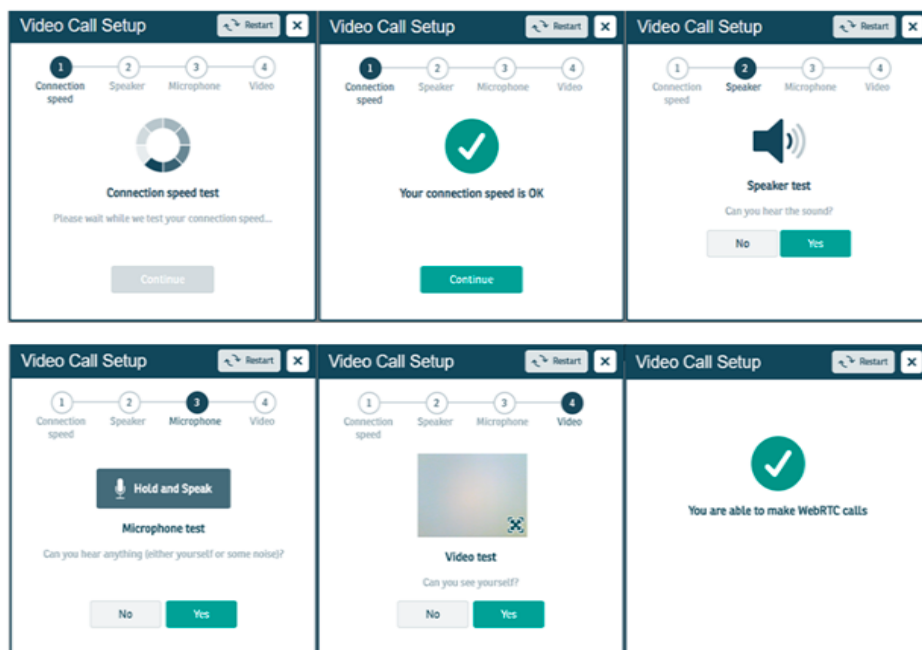
Once tested, and if successful, then you should be able to proceed to making a video call. If the test indicates any problems, please refer to the [Attend Anywhere troubleshoot document](#).

Optometry Set up

Setting up the Appointment: Signing in
The video appointment is a simple set-up, although this differs slightly for the optometrist/optician and for the patient.

For the Optometrist
The optometrist or optician will be issued their own log-in details when signing up to Attend Anywhere and will be asked to choose a password. These log-in details will be used every time the optometrist or optician conducts a video appointment. This will not change.

For the Patient
The patient will be sent a unique Internet browser link (URL) from their optometrist when they are offered a video appointment. This can only be used for a scheduled appointment.

The 'Joining the Call' Process
The patient link will allow the patient to enter a virtual waiting room on a scheduled date and time. When the patient enters the virtual waiting room (using the link) the optometrist or optician will be alerted to say they have a patient waiting. Once the optometrist or optician is ready, they can enter the waiting area and can join the call, and the appointment between the patient and optometrist/optician can begin.

Patient arrives...
Patient visits your website, clicks the **Attend Anywhere Button**, and enters the online Waiting Area

Waits in a private room...
While waiting, **patient** sees messages sent by the service, and current position in the queue

Clinician joins them
Patient and **clinician** meet in the patient's video room
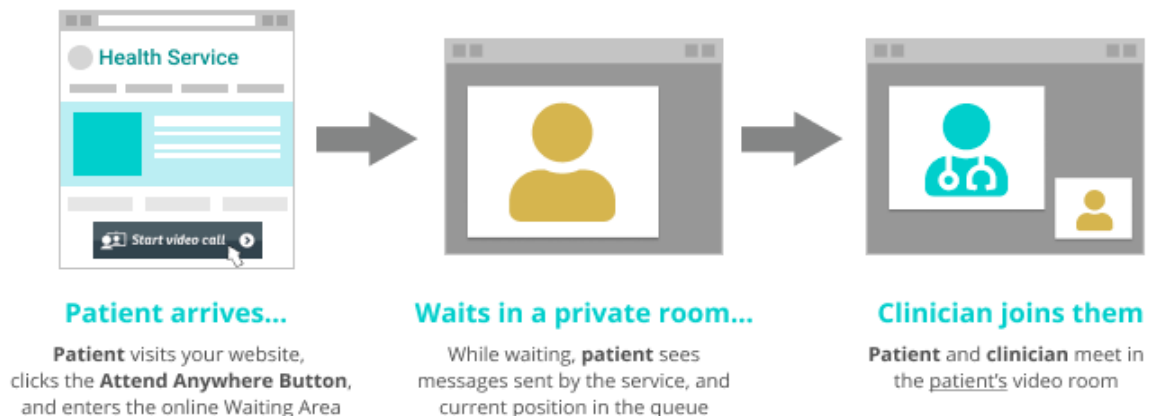
The Video Appointment Interaction
- The optometrist or optician is to introduce themselves to the patient.
- To ask the patient if they can adequately see and hear.
- Ask the patient to confirm their name, date of birth and address.
- The optometrist or optician is to explain what is going to happen during the video appointment.
- Start the video appointment, conduct the appointment as usual.
- Confirm patient's left and right side on VC to support physical assessment *
- Document the appointment details and outcomes in the patient record as usual

*Prior to starting the consultation make sure of the correct identification of left and right on the person. You can do this by asking the patient to hold up anything with writing on that you can read. If you can read the writing normally they are orientated to you as if facing you in real life. If not their camera may have reversed them.

Appendices

PATIENT USER GUIDE

Follow this link to a video on [How to use Attend Anywhere for patients (Welsh subtitles)](#)
Follow this link to a video on [How to Use the NHS Wales Video Consulting Service – for Patients](#)

You will be asked to enter a few details (name, date of birth and a contact telephone number) before you can join the call. These details are only used to allow the optometrist or optician to identify the right person is joining the call. After the video call, these details will be deleted.
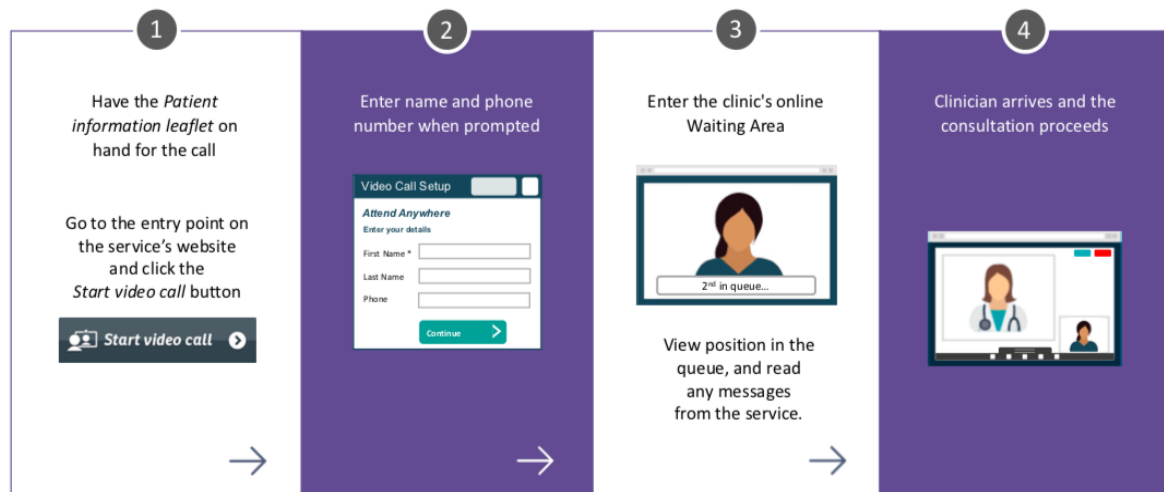
Before the call begins, you will see information similar to the list below, however, this may alter depending on optometry practice.

Example of information presented to callers before they enter a call to the Waiting Rooms:

ONLY PROCEED WITH YOUR VIDEO CONSULTATION IF IT HAS BEEN ARRANGED WITH YOUR OPTOMETRIST.
- This is NOT an emergency service. In an emergency phone 999.
- This call is not being recorded.
- Everyone attending the consultation with you will be introduced.
- Your video will open in a new window
- If you experience any issues, click the Refresh button.

During your call:
- If you experience any issues, click the green Refresh button (top right-hand corner).
- Avoid pointing the camera towards a window or bright light.

- To select a different camera or microphone, click the camera icon in the top-right of the browser window select the relevant devices, and then click the Refresh button.

OPTOMETRY USER GUIDE

Follow this link to a video on How to use Attend Anywhere for Clinicians (Welsh subtitles)
Follow this link to a video on How to Use the NHS Wales Video Consulting Service for Clinicians
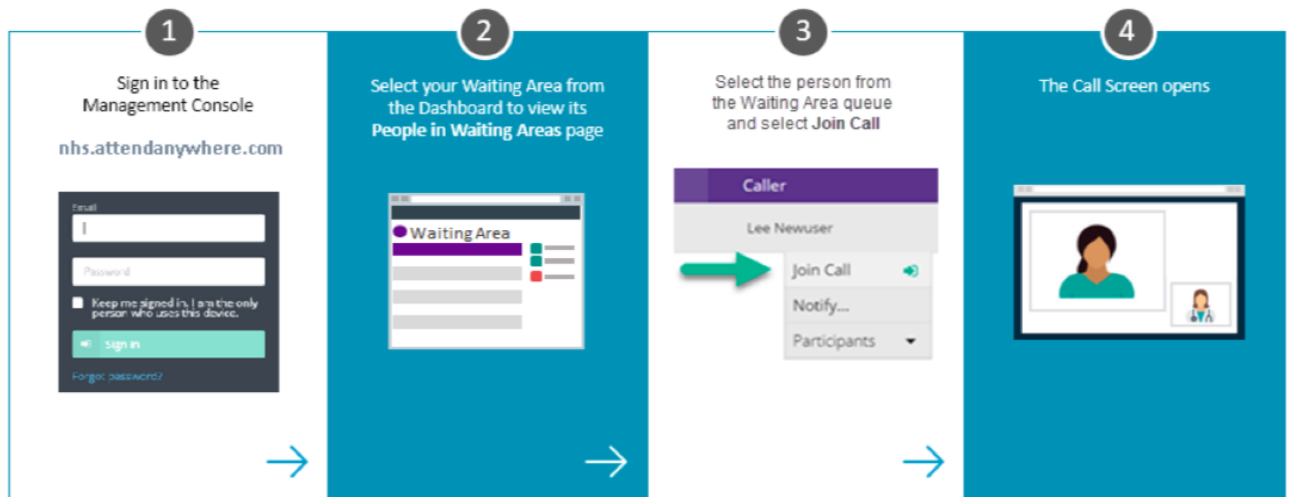
Step 1: Open the web browser Chrome (Attend Anywhere only works in Chrome)
Please sign in to Attend Anywhere at: https://wales. nhs.attendanywhere.com/login

If you are using two screens (one for the clinical screen, and one for video call), move the video call or the clinical system window into the second screen.

The optometrist or optician can use the same computer to conduct a video appointment and look at patient notes.

During your call:
- If you experience any issues, click the Refresh button.
- Avoid pointing the camera towards a window or bright light.

To select a different camera or microphone, click the camera icon in the top-right of the browser window select the relevant devices, and then click the 'Refresh' button.
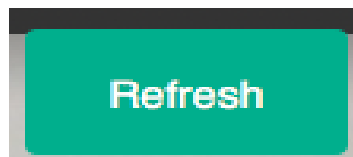
Step 2: This takes you into your waiting area where you will see a list of patients waiting. It shows the name of the patient, their date of birth, and how long they have been waiting for:

Status		Caller	Telephone	👤
Waiting (0 min)	⌄	04/06/1989	07376065076	1
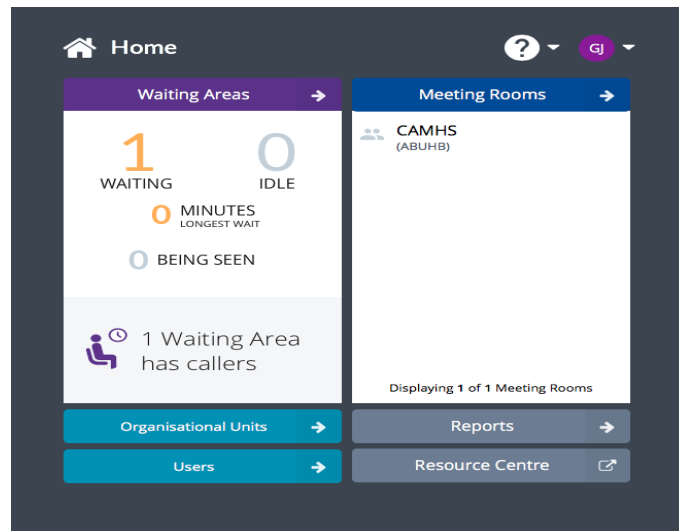
Step 3: Click on the line of the patient you want to connect a call with. This brings up options to join the call or notify (send a message) to the patient. Click on the "**Join Call**" button
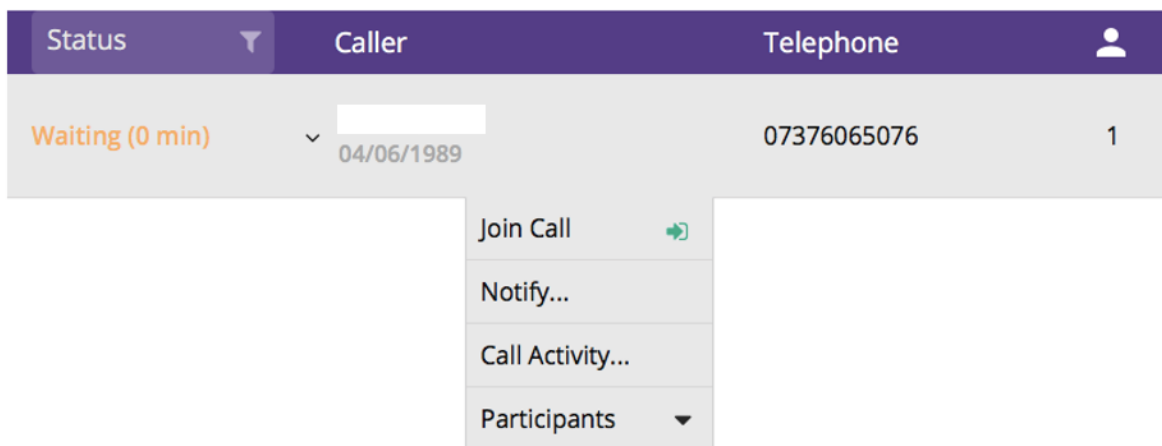
Step 4: It then takes up to 10 seconds to connect the video call between you and the patient. A video screen is automatically loaded; the patient will be displayed in the main screen and you in the bottom right corner. You can now consult with the patient.

Additional functions: During the call, hover over the bottom of the screen to bring up the menu shown below.
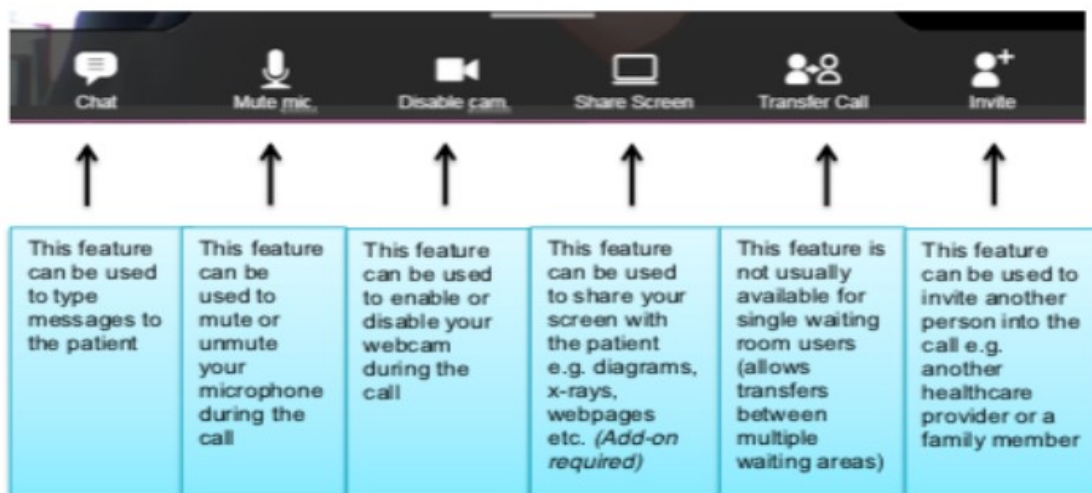
After clicking '**Share Screen'** you will see the following pop up where you can decide whether to show your entire screen or just one application. The easiest way to use this is to open the document/website you want to share, then click on "share screen" then click on the application window you want to share (so it becomes highlighted) and click "share". The patient will then see the application that you have selected to share, plus a small image of you
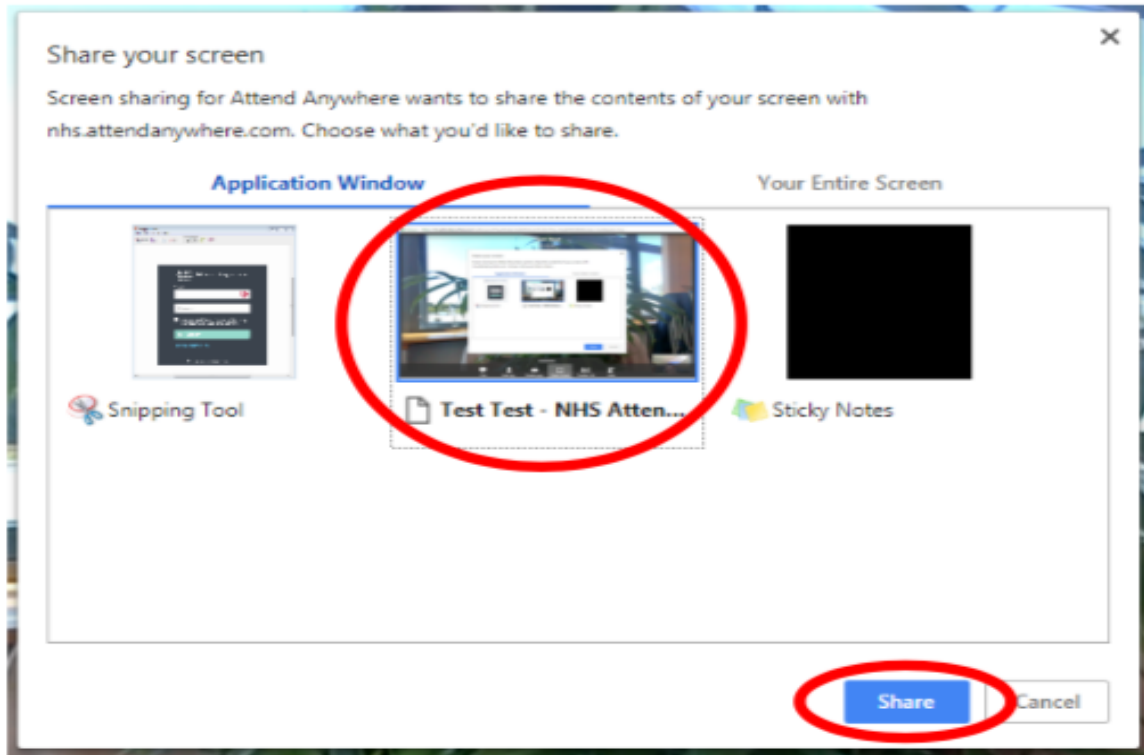
Three-way calls: This can be used for a remote family member, interpreter or another optometrist/clinician to join the call. There are two ways to add third participants to a call:

(1) Inviting other participants while in a call with a patient

Select the Invite button on the menu on the bottom of the screen (see above)
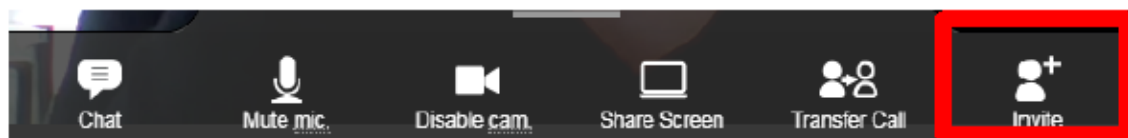
Select the Invite button on the menu on the bottom of the screen (see above)
This enables the optometrist or optician to send a link to the consultation via email or text message
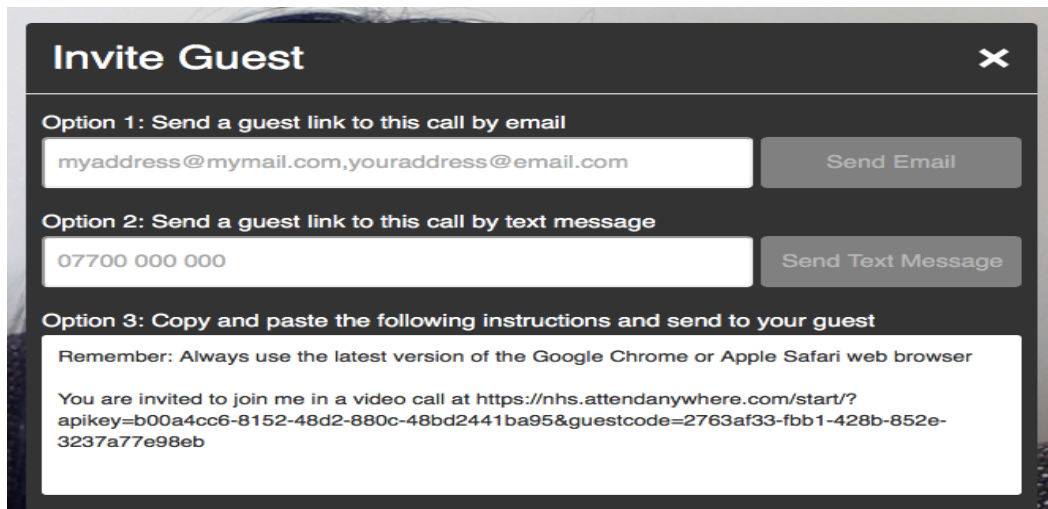
(2) <u>Adding multiple participants from a waiting room to the same call.</u>

This is for when all participants have been provided the link for the waiting room in advance and asked to enter as a patient.

Select the initial patient from the waiting room and join the video call. Then return to the waiting room and select the additional participant, from the action menu that opens, select "Add to call", a confirmation message displays, click Yes, the selected caller is moved from the waiting area into the consulting room.
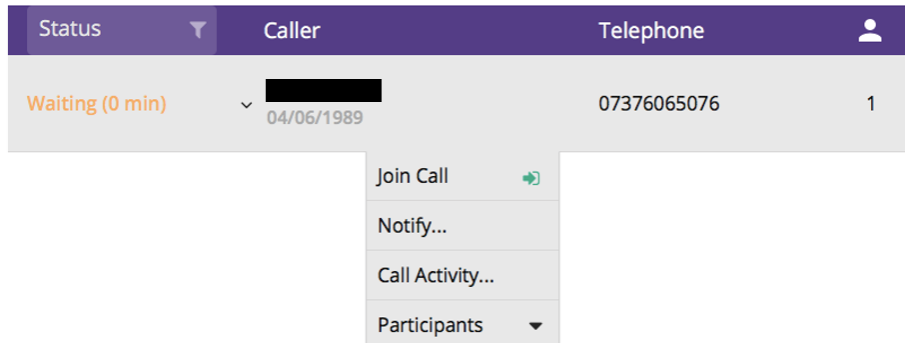
Optometrists/opticians should consider which option works best: option 1 is more flexible during an appointment, but option 2 may be easier for scheduled appointments with planned multiple participants.

Ending the call: When you are finished with the call and would like to end it, hover on the screen and in the top right corner click "**end**".
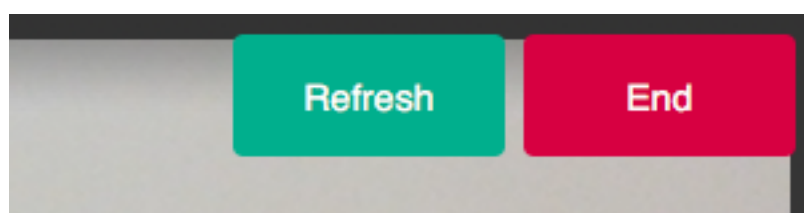
You will then be given three options. If you are in a three-way call and want to leave the patient with the other participant click "**Disconnect only me**" (middle option). If you want to end the call completely, click "**Disconnect me and end video call**".
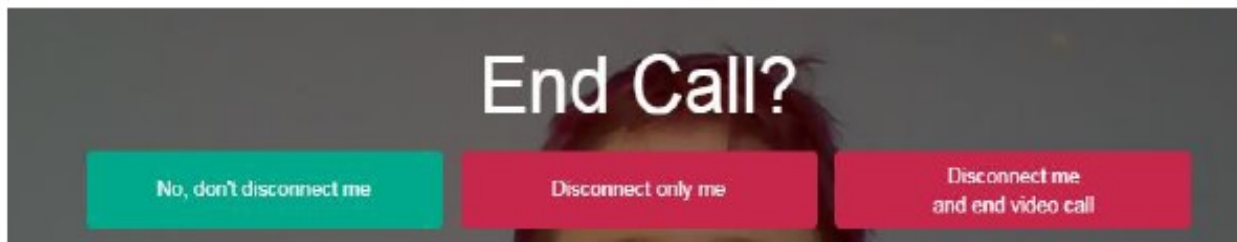
Evaluation Surveys

At the end of your call you will be presented with a short survey. We would appreciate you taking the time to feedback your experience to help us improve the service.

Additional Resource

Guides, training material and information leaflets and webinars can be found on the [TEC Cymru NHS Wales Video Consulting Service resources page](#).

You can now send a text or email with the URL address of your waiting area direct to a patient or client from Attend Anywhere without revealing your own mobile number or email.

Simply click the Share Entry Point URL button within the waiting area.
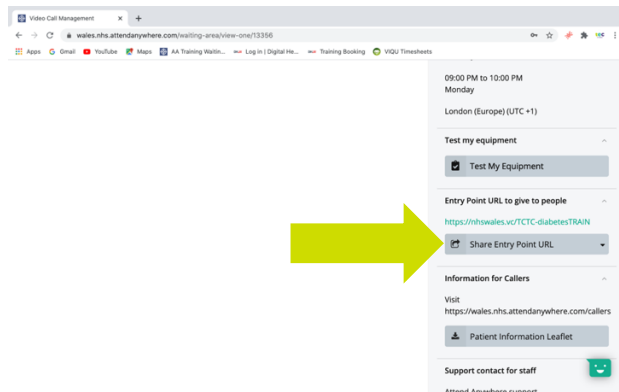
Then select either share by text message or share by email
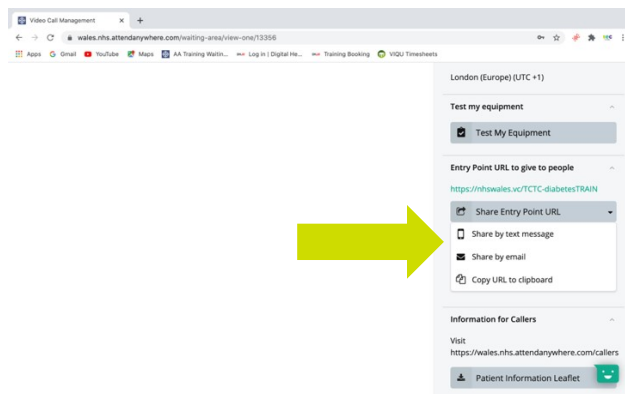
Then add the mobile number or email address and send (please note these messages cannot be edited by you)
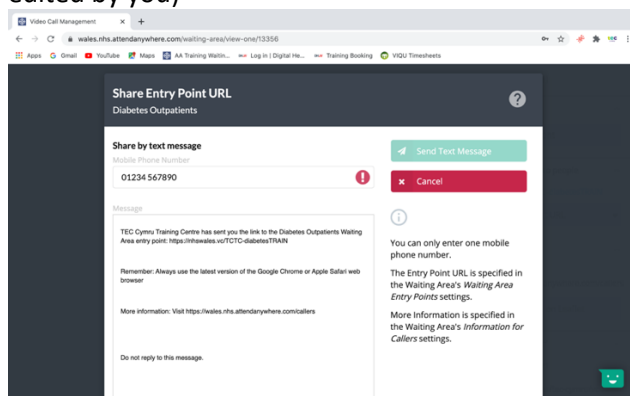
Remember though these are sent from anonymised no-reply accounts. Patients or clients may be wary of opening these links. It's usually better to use this option when they are expecting to receive it, for example when converting a telephone consultation to video. Otherwise, you can still copy the URL and send it from a recognised source.

Adding another person

There are two ways to add another person or persons to the call.

1) Via the invite button

This is a good option when you are requested to do this last minute.
Start the call with your patient or client as usual

Once the call has commenced click the invite button seen here below

Add either a mobile number or email address and click send.
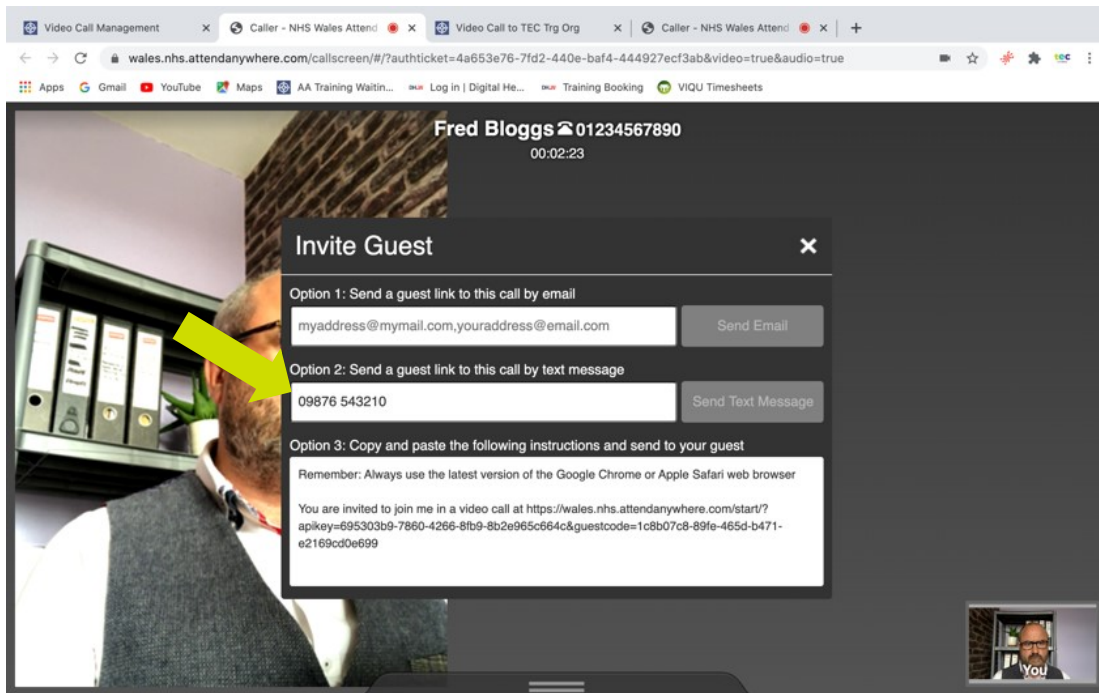
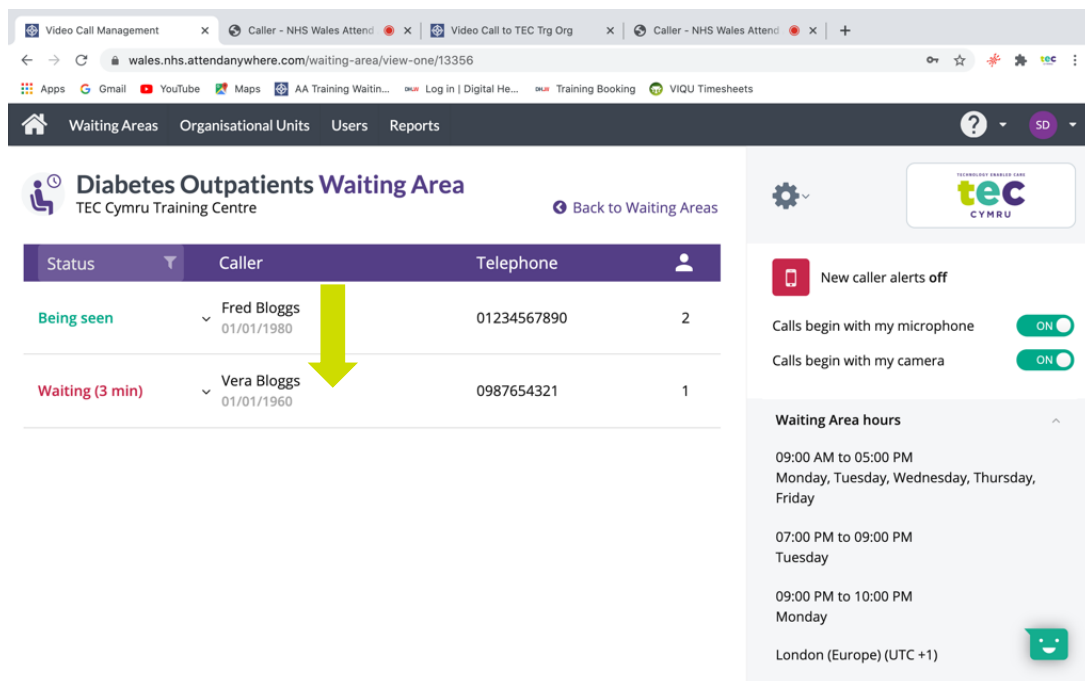The other person will receive a unique code to join straight into the patient consultation. They will not be able to join any other consultations.
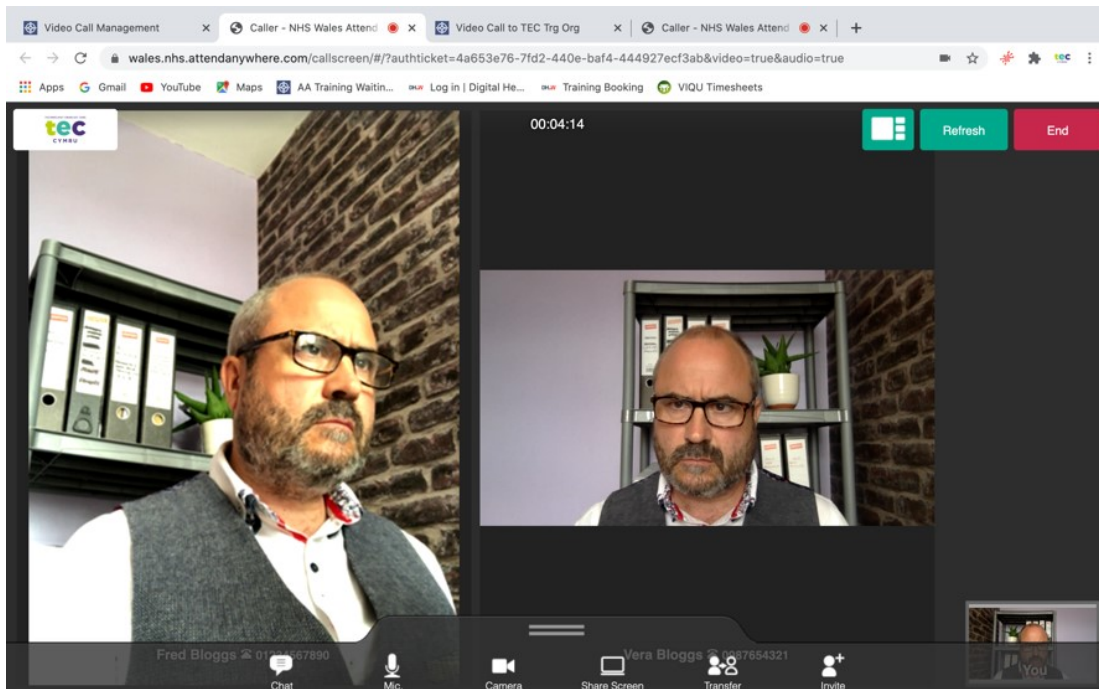
If you know in advance someone will be joining the call i.e. a friend or relative or another professional like a translator. Simply ask them to log into the waiting area at the same time as your patient or client. Then when you have answered the call to the patient in the usual way, without ending the call, click on the chrome tab labelled "Video Call Management", see below.
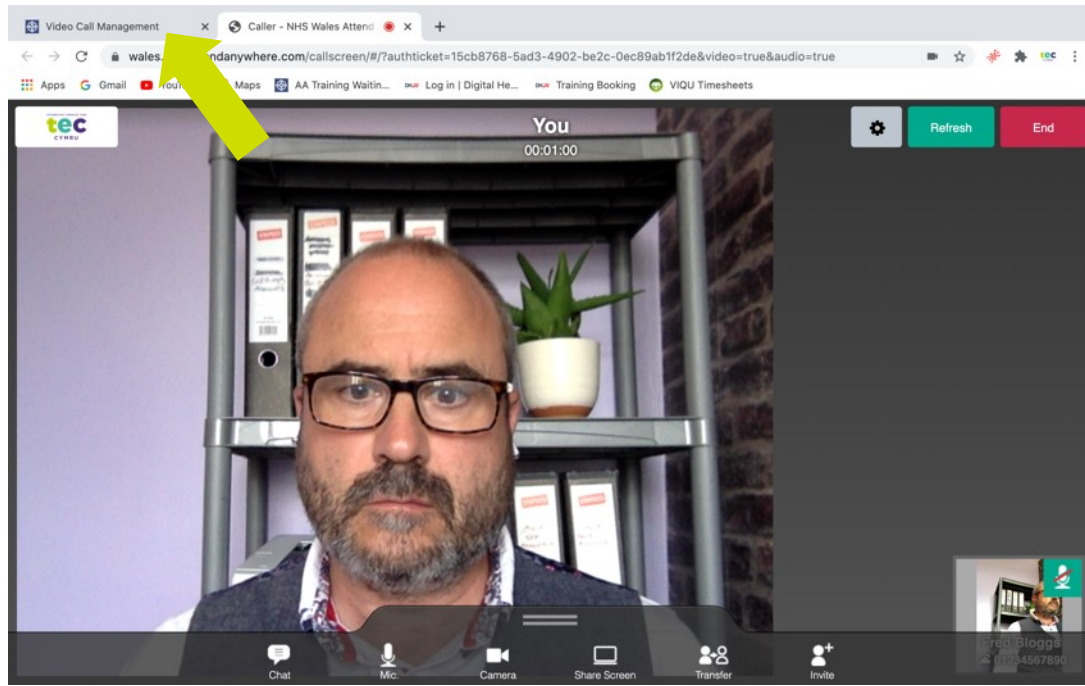
This will take you back to the waiting area leaving the call open in another tab. When you answer the call to the second person….contd

Contd....it will say "add to call" click on this.

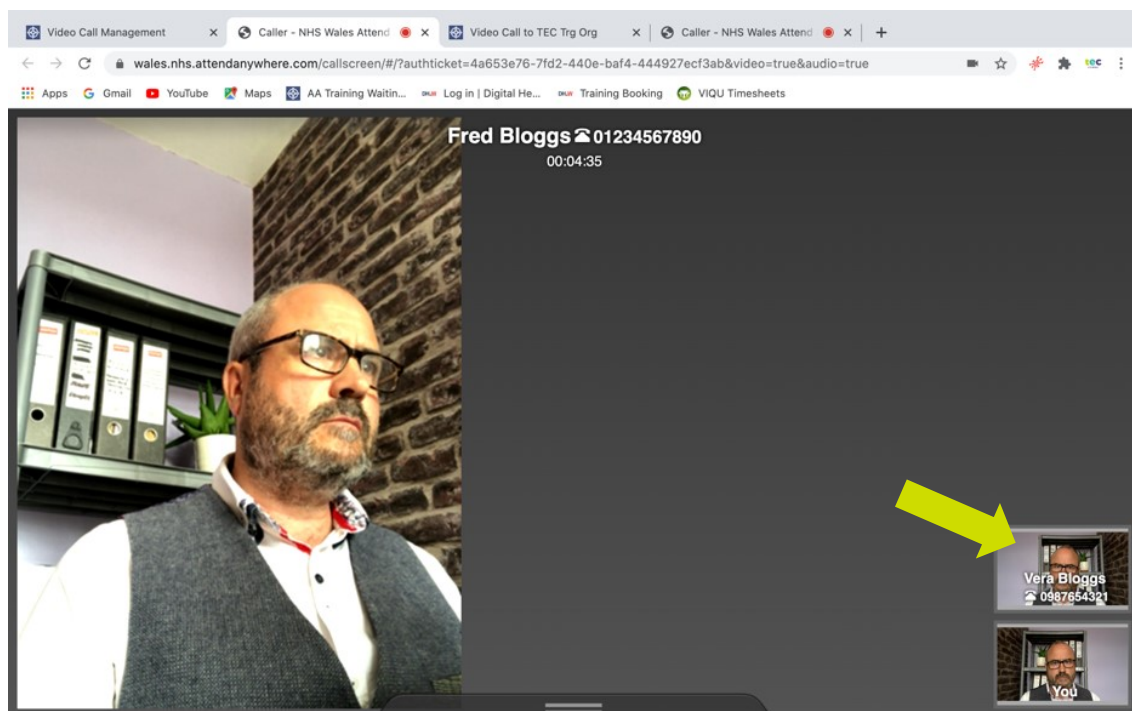Confirm that you wish to add this person to the current open call.

They will enter the open call.

When more than one person is in a call a new button will appear, see below.
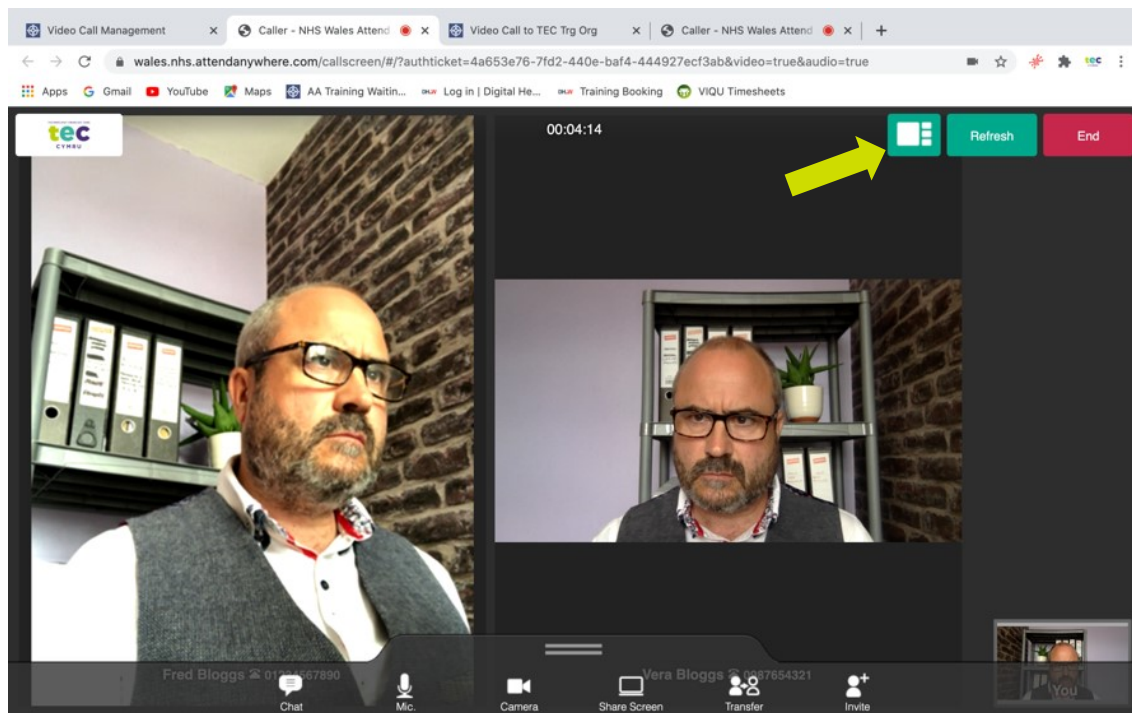
This will switch between equal view (see above) or one person view (see below)

In the one person view the person in main view can be changed by clicking on the small tab of the person you wish to see.


Whenever a single person is in the call or multiple people are in the call if you click end and then leave the call (just me) you will leave the call and they will be left in a call either together having their own discussion or on their own.

They will be found listed in the waiting area where they can be joined again either by you or any other clinician with service provider status.
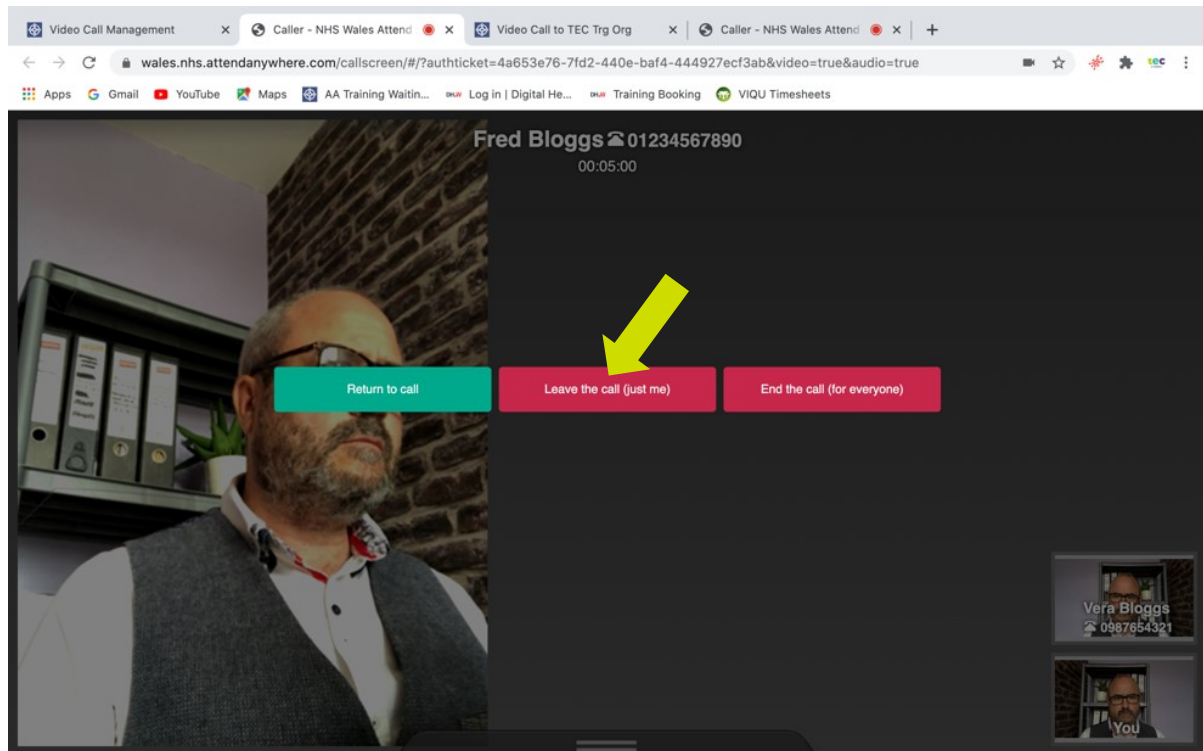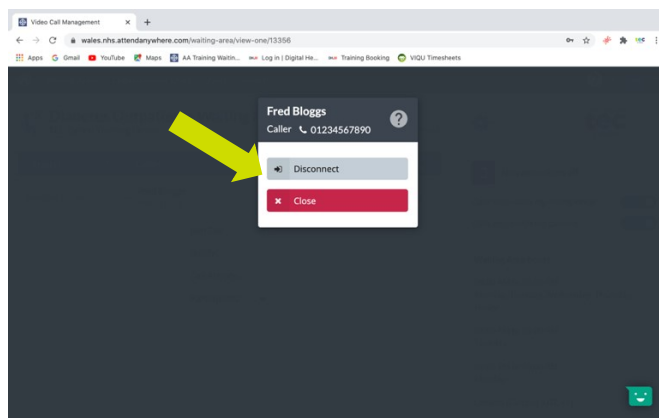
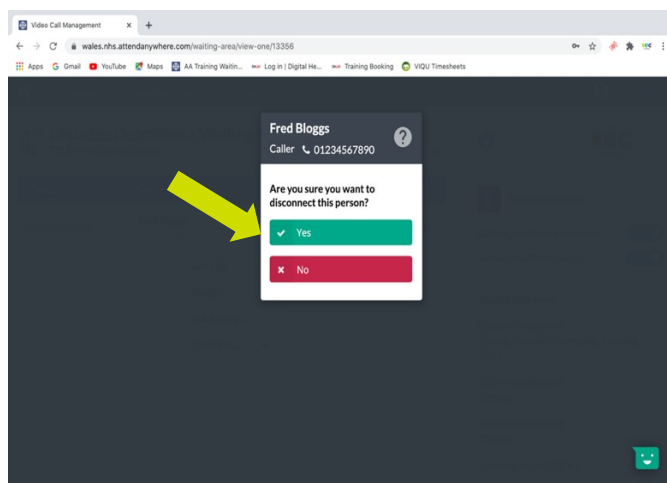<u>Disconnecting an Unwanted Caller</u>

To disconnect a caller who shouldn't be in a waiting area simply click on the patient and then click on participants and then click on the name (see below)
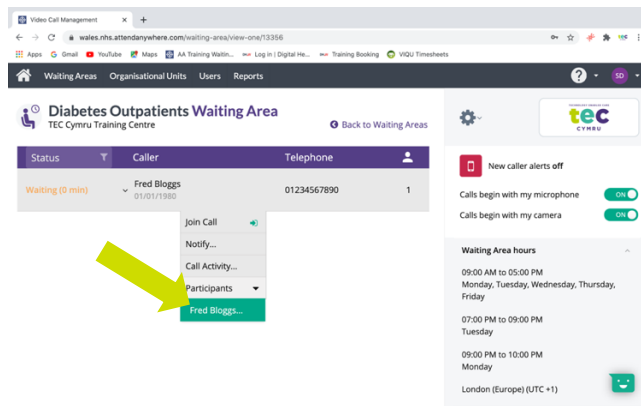
Then click disconnect (it may be worth messaging them first in "notify")

Finally click yes to confirm "see below" and then their call will end.

Confirming Left and Right

Important safety advice

If your consultation with the patient or client relies on the correct identification on the body of left or right, please be aware that some clients' devices may (rarely) reverse the picture! This is not done by the Attend Anywhere platform but rarely by the patient's device. Patients cannot totally be relied on to know left and right so the safest way to confirm this is to ask them to hold up some writing which you can read. If you can read it you are looking at them orientated as if in real life. (See below)
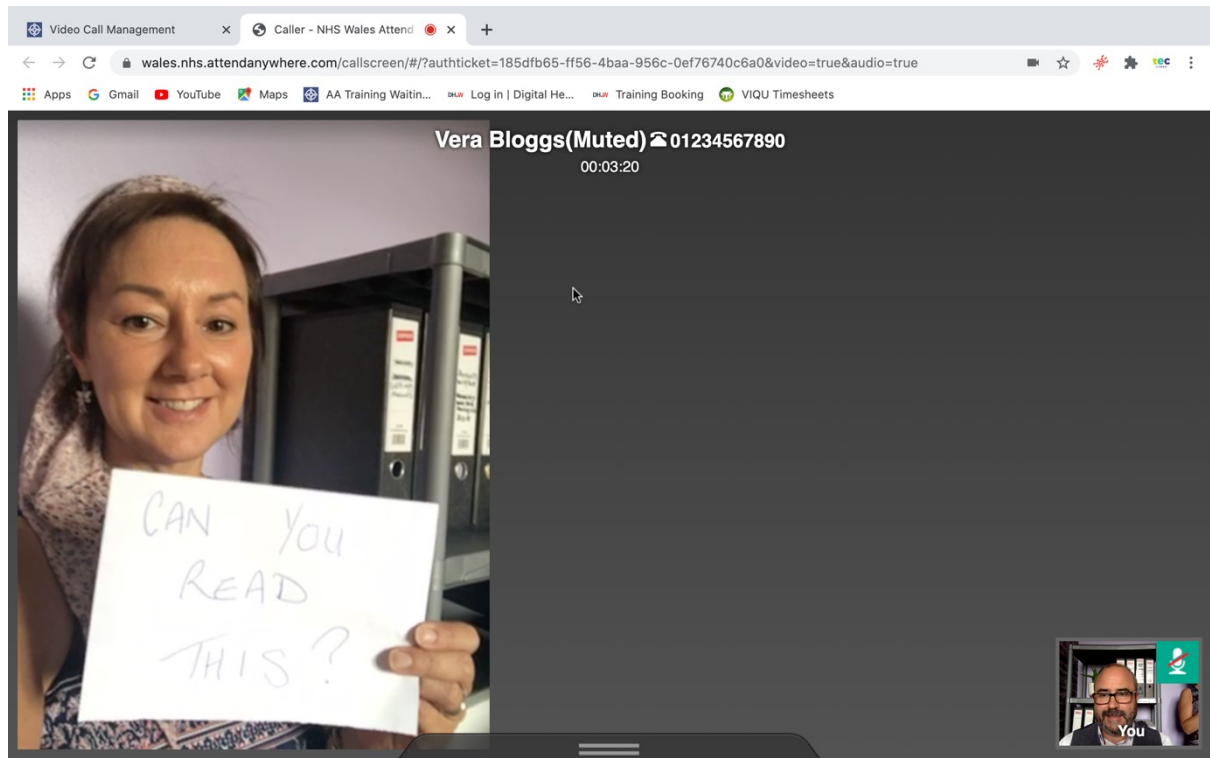
Types of Appointments and Clinics

Dedicated Clinics

Some services may take an incremental approach, starting with dedicated Attend Anywhere clinics (e.g., every Tuesday, Wednesday, and Thursday 13.00 – 14.00). This may be influenced by available resources, for example where only some of the clinical rooms have the equipment necessary for video consultation (optometrists/opticians may share these rooms), or where only some optometrists/opticians offer video consultations.

The advantages of this model include: making it easier for optometrists and opticians to work remotely for a session (subject to access to clinical records) and building confidence for optometrists/opticians and practices new to Attend Anywhere. The downside of the dedicated clinic approach is the lack of flexibility: either appointment slots may go unused if there are insufficient requests/suitable presentations or there is limited availability if all dedicated Attend Anywhere slots are filled. Therefore, careful management would be required to ensure optimisation of appointment slots.

Integrated Attend Anywhere Appointments

Having blocks of video appointments integrated in existing clinics (e.g., the first/last five appointments set aside for video consultations) allows for a wider spread of optometrists and opticians to offer video consultations, and potentially more ready access for patients to a video consultation with their dedicated or preferred optometrist/optician, though perhaps not at a preferred time.

This model also supports optometrists and opticians to build confidence in use of Attend Anywhere and is helpful for those who prefer their workflow to have clear demarcation between different appointment types. As with the dedicated Attend Anywhere clinic model, the downside is the potential for ring fenced Attend Anywhere appointment slots to go unfilled. Therefore, good practice for services adopting this model would be to incorporate a protocol whereby unfilled Attend Anywhere appointments are opened up/can be changed to other uses within a certain timeframe before the appointment date/time.

Ad-Hoc Use

The third option, where Attend Anywhere slots are booked in an ad hoc way into existing clinical sessions, allows both optometrists/opticians and patients the greatest flexibility to accommodate video appointments. It would involve booking staff changing the slot type of appointments to a video appointment.

For some services this may represent a mature model, once staff are confident with the Attend Anywhere concept. This model could be applied across a whole service, but could also be applied on an individual optometrist basis, e.g., for an optometrist or optician who has video consulting equipment in the clinic room and is happy to switch between appointment types.

Single/dual device considerations

If Attend Anywhere is operated on a single device with dual screens, the clinical system and video call can be open in separate screens.

Optometry Resources to Support your Service

Attend Anywhere – Call Screen Guide
English and *Welsh*

Attend Anywhere – Troubleshooting Guide
English and *Welsh*

Example of the Patient Information Sheet
Download and customise for your service – *English* and *Welsh*

Poster - What is NHS Wales Video Consulting Service
English and *Welsh*

Poster - How do Optometry Video Appointments Work for Patients?
English

Poster - How do Video Appointments Work in Optometry?
English

Suggested Scripting for Optometrists Using Video Consultations
English

Frequently Asked Questions and Answers
English

Optometry Care Video Consultation Process
English

Authors and Additional Resources

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Please go to www.digitalhealth.wales/teccymru for additional resources and evidence.