NHS Wales Video Consulting Service

Using Virtual Groups (VG) for Education or Therapy: A Toolkit for Clinicians

Contents

Terminology Used in Toolkit:

- **Virtual Groups (VG)** will be the name of any group where a clinician decides to assemble a group of patients or client together online for the purpose of education or group therapy.
- **Microsoft Teams (Teams)** is the name of the virtual platform currently advocated by NHS Wales for group of larger than five clients or patients.
- Secondary care will be the term used to refer to all types of secondary care
- **Patients and clinicians** will be the terms used to refer to all types of patients, and all types of secondary care practice staff.

Delivering virtual groups

Introduction

The success of groups depends upon a high degree of trust between the patient, group facilitator, and fellow group members. It helps to develop skills to assist one in reaching their goals and can provide a sense of support from other group members.

Virtual groups are a great way of connecting with others who have similar experiences or needs in a safe and relaxed environment. We know that before COVID 19 many of us took comfort from meeting others living with similar needs and experiences through some formal and informal groups e.g. coffee and chat groups.

Virtual group runs in a similar way to existing face-to-face groups. People join the group and meet others in a confidential online setting. The difference between our face-to-face groups and the online group is that it will be delivered using a virtual call. The clinical team sends some helpful instructions on using the online platform when you register for an online group. You don't need any special equipment – just a tablet, laptop or mobile phone with a camera and an internet connection!

Participating in virtual groups can result in a number of benefits to the patient and carers, including a better understanding of their personal goals and resolution of specific problems they are facing. There can sometimes be discomfort involved in participating in groups if these distressful emotions arise please talk with your patients and if you believe that group is not the most appropriate setting for the patients, please consider other possible options.

This resource provides a step by step guide to delivering virtual groups.

Step by Step Guide to setting up and running virtual groups

1. Virtual Group decided upon
2. Objectives and ground rules of group agreed including use of the chat feature
3. Confidentiality agreements created if needed
4. Patient and staff Group members email list compiled **(held confidentially)**
5. Patients emailed confidentiality agreement and asked to return **(BCC emails used)**
6. **Create a meeting in Microsoft Teams and one other member of staff emailed and asked to attend only. Provided all other parties join as guests these emails will not be disclosed. The other member of staff does not have to attend.**
7. **Whoever creates the meeting must be at the meeting to control from that account. Otherwise some features will be lost.**

An invite and instruction email is created with a large JOIN word included. This must include the instructions to click on the link at the appropriate time and choose the option to join as a guest only (Continue on this browser)! Names can then be entered without emails showing. This will only occur when the attendee chooses the option to join on the browser and not open any existing team's apps. If someone joins on an app or when signed in, emails and names are visible to other participants.

8. Copy meeting link from Teams
9. Hyperlink to the JOIN word in the email
10. Put all email address into the **BCC box only**
11. Send invite email
12. Technical facilitator to join meeting early and admit all the guests
13. Meeting Held
14. Technical facilitator to remain in meeting until all guests have disconnected and remove anyone who has not left.
15. Post Group Email with survey attached (if needed)

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Key Roles

There are three key roles in setting up a virtual group. One person can perform all three task but this does increase the workload especially during the session. Their key tasks are outlined here:

The Co-ordinator:

The co-ordinator is critical in setting up the group sessions and making sure everything runs smoothly. He or she:

- Schedules the virtual group in the **organisation diary** and ensures the clinician and technical facilitators' time is booked out to deliver the virtual group.
- Sends out **confirmation letters or emails**, including links to patient agreement to patients attending the clinic and manages responses.
- Sends out the invitation email with the link to join (this must be an email)
  1. Prepares a fresh **patient registration** form for every virtual group. This always includes registers of people who are accompanying patients and patients themselves. The clinic co-ordinator may join the virtual group clinic at the start of the session to make sure this template is completed as some companions may turn up unexpectedly on the day to accompany participants, and this can cause a lot of work. The registration form should be sent to the technical facilitators and clinicians in advance, and they should always have their copy to hand from the start to the end of the virtual group. This will give easy access to an agreed phone number and details of the person's location so that either the clinician or technical facilitator can reach the patient if they need to

The co-ordinator may join the session initially to support the technical facilitator with registration and consent.

He or she may also call patients or do a dummy run with them, helping them to join a 'mock' virtual group.

The technical facilitator:

The technical facilitator's role is key to a successful virtual group. He or she does not need to be a clinician.

Specifically, he or she:

- Assists in the technical running of the virtual group to handle any technical queries and alert the clinician to any questions arising.
- Creates the link to the teams meeting (this can also be the clinician)
- Briefs any translators who are attending the session
- Sets up a messaging system / group with the clinician to ensure that they can communicate privately during the session
- Agrees a signal that the clinician and facilitator will use if time is running over e.g. post * in the CHAT
- Joins early and checks that the technology is working

- Greets patients; ensures their IT is working and they can fully participate
- Checks identity and location is as the patient submitted in advance. To preserve privacy and confidentiality, the technical facilitator asks the patient or client to confirm elements of the address and phone number they are using during the virtual group in front of the group e.g.

'Please confirm the first and last letter/number of the postcode you are at right now. Please can I confirm that this is the place you expected to be when you registered for the session?' and
'Please can you provide me with the first and last digit of the phone number we can reach you on today if we need to? Please can I confirm that is the number you gave us before the session?'

- Notes any changes in location or contact number, and consent on the Patient Registration Form
- Sets up the session and gains informed consent, using the slide set provided
- Works with the clinician to manage group dynamics positively so everyone feels safe and included
- Collects feedback to support continuous improvement; asks patients to post in CHAT or verbalise what worked well about the virtual group and what can be improved
- With clinician, makes necessary changes to assure safety and continuous quality improvement of the virtual group.

He or she may also call patients or do a dummy run with them, helping them to join a 'mock' virtual group.

The clinician:

The clinician's task are:

- To run through the session planner for each virtual group in advance with the technical facilitator
- Creates the link to the teams meeting (this can also be the technical facilitator)
- To prepare for the virtual group; have personal prompts on issues of concern that he or she wants to raise with the group.
- To have access to patient records during the virtual group as required
- To have a way of recording what is discussed with each patient and with the group to facilitate documentation after the session
- To document the virtual group and update participants medical records
- With the technical facilitator, make necessary changes to assure safety and continuous quality improvement
- To evaluate virtual group impact as appropriate.

Planning virtual groups

Best practice shows that it is best to keep the communication with patients very simple.

Virtual Group agreement

All patients must be sent a copy of the Virtual Group agreement. The Virtual Group agreement is a behavioural contract between the patient and anybody accompanying them and the clinical team plus the other people attending the group. (Template in appendix)
This assures that patients are aware of the ground rules, confidentiality, consent and need for privacy. Patients are sent an information sheet and consent form. **They should return the signed agreement and consent form prior to the group. As you will see in the joining instructions, when they join the virtual group session by clicking the link, they are confirming they have read it.**

Patient details- including identity, location and contact information in advance

This information must be collected and provided to the team in advance of the virtual group so it can be checked and confirmed on the day of the group. On receipt of the identity, location and contact information, the clinic Co-ordinator notes these along with other relevant patient or participant information on the Patient Registration. (Template in appendix)

Joining instructions for the group

The clinic Co-ordinator ensures that all participants (whether patients or people accompanying them) receive joining instructions and supporting information (Template in appendix)

Patient information

Setting: It is preferable to use a device with a big screen (e.g. laptop, tablet) and make sure it is charged or plug in your device to charge. Also ensure that it is a well-lit room and there is unlikely that you will be interrupted during the session. Make sure there is adequate room if there is a physical activity session. Be on your own unless you have invited someone to attend with you. You may be joining from home and if there is anyone from your household in the room and they can hear, they either need to leave or sign the group's agreement.

Privacy: To keep your personal information private, you might want to change the privacy settings on your device. Read about how to keep safe whilst using on-line systems here:

https://www.ncsc.gov.uk/guidance/virtual-conferencing-services-using-them-securely

https://www.ncsc.gov.uk/collection/top-tips-for-staying-secure-online

Online Platform: If you already use or have an account for "Microsoft Teams" it is important that you 'Log Out' before you join the group clinic this is especially important if a member of your household has a TEAMs account and you will be using the same device. When you sign in for the session, use your first name and the first letter of your surname e.g. "Bob T" only to preserve your privacy.

Consent: Before the group, read the group agreement, information sheet and consent In the session, you will be asked to confirm that you are happy to participate on this basis, and that you agree to keep all information that group members share confidential

Joining the group: Click on the group clinic link 10 minutes before the start time. This provides time for facilitator to help with your technology if you need it; especially the first time you are joining.

- Join the session as a guest. When clicking on the link if you already have TEAMs installed you will be offered the option of "downloading the app" "continue on this browser" or "open your Teams app" you need to select the option of "continue on this browser"

- Use your first name and initial only e.g. John S

- If you have a family member, carer or friend with you, enter their first name and initial as well as yours

  When you join, the facilitator will greet you and ask you a few questions to confirm your identity, location and contact details.

Follow-up: If you have any private concerns or the clinician feels you needs some further one to one time or follow up, then you can be booked in for a follow-up one to one appointment as usual. We expect you will have a positive experience and will book in to further virtual group clinics.

Making the Virtual group safe

Identity: Checking patient identity before or as they enter the group (as mentioned above) if there is a full name and email address visible you may want to consider not allowing the patient to enter.

Location: If a patient was to become ill or disclose intent to harm themselves or others in a VG, you may need to get medical help to them. In such rare instances, you need to know where they are during the virtual group. Checking individuals' location and contact details on the day mitigates this risk. If you feel it is appropriate or needed and they are alone you may ask them to keep their front door unlocked for ease of access for the emergency services.

Medical indemnity: The Scheme for General Medical Practice Indemnity (GMPI) is in place in Wales. The scheme for GMPI is operated by NWSSP Legal and Risk Services (General Medical Practice Indemnity (GMPI) - NHS Wales Shared Services Partnership). From a GMPI perspective virtual consultations, including virtual group clinics are captured by the scheme for GMPI provided that the General Medical Practice staff are undertaking NHS 'primary medical services' as defined in The National Health Service (Clinical Negligence Scheme) (Wales) Regulations 2019. Locum GPs need to apply to NWSSP to be included in the All Wales Locum Register (AWLR) if they want to access the scheme for GMPI. The Welsh Risk Pool provides vicarious liability for clinical work undertaken in Virtual Groups for those working in other parts of the NHS. It is recommended that all clinicians notify their medical defence organisation that they are consulting in VGs.

Record keeping: records of what was discussed in the virtual group need to be kept so that the clinical team is aware of patient care plans. The virtual group should be appropriately documented in the patient's notes

Confidentiality and clinicians: patients attending a group sometimes consent to share specific and limited, relevant information. The clinician needs to avoid sharing any further personal information other than that. Patients often disclose further information about themselves in a group. When that happens, the clinician can ask if it is ok to continue this discussion and proceed if consent is given.

Confidentiality and group participants: In contrast to clinicians, patients attending groups are not bound by law to respect confidentiality and could disclose confidential information to third parties. It is in everyone's mutual interest to maintain confidentiality. This may explain why across decades of face to face groups, there have been no reported significant breaches of confidentiality. To mitigate this risk, all participants review and agree to the patient "agreement". This covers their respecting and maintaining confidentiality outside of the virtual group. Alongside their consenting, this mitigates this risk. Patients should be provided with a copy of the "agreement" before every virtual group, and the verbal confirmation of consent and sign up to this agreement checked at the start of every virtual group if appropriate - even if it is a follow-up group.

Privacy: Virtual groups should take place in a dedicated room that maintains privacy to the same standard applied to face to face consultations. Because patients and the Virtual group delivery team are joining from their home or work space, discussions in virtual group about other people or

about themselves could be over-heard by others close by, and confidential information could be disclosed by an eavesdropper. To mitigate this risk, patients should be advised to join from a private space, accompanied only by invited companions. If there is anyone in the background, patients will be asked to disclose this and that person will either have to leave or consent to maintain confidentiality. Clinicians, facilitators and/or clinic co-ordinators (should they join at the start to support the facilitator with registration) need to join from a private space. It is recommended each puts a 'do not disturb' sign on the door, warning that a group is in progress. When clinicians or other members of the virtual group delivery team are working from home, this may need extra planning and consideration to preserve privacy. Patients need to make sure they adjust their own privacy settings on their virtual platform to hide personal email address for example. Advising patients of this risk and providing them with guidance on how to adjust their settings on the platform being used for virtual groups mitigates this risk.

Data protection: If the virtual platform used is not secure, third parties can get hold of data about patients. TEC Cymru has undertaken a Data Protection Impact Assessment (DPIA) for Microsoft Teams. If you plan to use any other platform, you must undertake your own DPIA for that system before you start. Always use a virtual group platform that is encrypted, approved and supported by NHS wales. It is the patient's responsibility to ensure that they have adequate anti-spyware and anti-virus protection. Patients also need to be made aware that some personal information is stored locally on the computer they are using, particularly if they are using a public or shared computer. If patients are participating in a virtual group on a mobile phone, they need to understand that this is only as secure as any other phone call on that mobile network.

How can I book Training?

Training can be booked here

Virtual Groups | Digital Health Wales

Appendix 1 - Patient Frequently Asked Questions

Q: Why am I being asked to attend this group via a virtual link?
A: Because of the current Covid 19 pandemic it currently deemed unsafe for lots of educational groups and therapy groups to meet face to face. In order to continue with this much needed work we have taken groups online and can now meet via a virtual call.

Q: How do I join a virtual group?
A: You will need an email account or mobile phone with internet access. You will need to join the virtual group via the internet in a private room. You don't need any special programme or phone applications, but you will need a camera and microphone in order to join in. The group co-ordinator will send you a link. You click on it and access a virtual platform "Microsoft Teams". Then the virtual group begins.

Q: What happens in a virtual group?
A: Once you've clicked the link and joined, a member of the team who is running the virtual group will greet you. The facilitator's job is to keep the group together and make sure the session stays on track. They will ask you to confirm your identity and check you are happy to take part. Then they will start the session by reminding everyone in the group to keep information confidential and to follow some simple group rules or understandings.

Q: What happens if I change my mind when I'm in a virtual group?
A: If you feel a group isn't working for you, let the facilitator know. You can leave at any time. The team asks for feedback at the end of every virtual group so let your facilitator know if you think things could be improved.

Q: Can patients get together and form their own groups after a virtual group?
A: This is entirely down to the discretion of the team running the group. Please discuss with them if you think this is appropriate.

Q: Have virtual group clinics been tried before and what do patients think about them?
A: Yes, virtual groups are up and running all over the UK. They have proved popular with patients. Teams report that patients find them as helpful as face to face groups and patients who attend them see their health improving and need to go to hospital less. It is still early days to know exactly how successful virtual groups are.

Q: Can my partner, friend or carer join me in my virtual group clinic?
A: Yes provided the team running the group agree this will suitable (sometimes it may not be) and with your agreement. It is often very useful for family members, carers or friends who support you to join. The beauty with virtual groups is they can join from their home or workplace and you can join from yours. If you're relative lives at a different address or even in a different town or abroad, they can still join in to support you. They need to consent to take part and agree to respect confidentiality, and confirm their identity just like other participants. Ideally you should just invite one person to join you; otherwise groups can get too large.

Q: Can I record my virtual group session?
A: No. To ensure all information shared in the session is kept confidential and your privacy is fully respected, you will be asked to sign up to the virtual groups patient agreement. This means you must not record, share or post any aspect of the session. It's in everyone's interest to respect this.

Q: Can I share my virtual group link with someone else who wants to join in?
A: You should only share the link with a relative or carer that you wish to join you in the group. You shouldn't share the link with anyone else. You should let the team know that your relative or carer will be joining and that you have shared the link. They will tell you how to do that.

Q: What happens if I don't want to say anything in a virtual group?
A: Let your facilitator know if you are feeling worried about being in a group. It is OK to join a group to just listen. You will still learn a lot and many people who do this and end up joining in once they feel comfortable.

Q: What happens if I am late joining my group?
A: Your team will tell you their policy. Most likely if you are more than a few minutes late, you will not be allowed to join the group and will have to rebook. This is because it is important that everyone has the chance to confirm their identity, consent and sign up to confidentiality at the start. It also disrupts the group for others when people join late. If you are late, ask to book into another virtual group or remote consultation.

Q: How is my health information kept confidential during a group?
A: Before the group, all participants sign an agreement to not to share any information discussed within the group. Unlike the confidentiality regulations surrounding a doctor's obligation to keep all information confidential, this is not enforceable by law. However, as all participants will be sharing personal information, it is in everyone's interests to respect this. It is also up to you to not divulge any personal information that you are not happy to share.

The teams running your group get training and support in preserving confidentiality and safe information sharing. The virtual platforms being used to host virtual groups meet NHS cyber security quality requirements.

Q: Is my personal information stored on the computer after a virtual group?
A: The type of information stored on remote consultation or virtual conferencing platforms differs from system to system. Information is stored before, during and after sessions and normally controlled through the privacy settings of the particular platform. Most platforms provide information on privacy settings, the information they store and how to maintain confidentiality. **The general rule is to 'log out' of any accounts you have including and most especially if a family member has a team's account and enter your virtual group sessions as a 'Guest'. This helps you to avoid sharing personal information like your full name and email.**

Q: Are under 18s allowed to join or be in the background of a virtual group and do they need to consent?
A: As with face to face consultations, young people below the age of 13 years must be accompanied by a parent or guardian. Young people between the ages of 13-15 years may attend alone if a clinician has assessed their competence to participate prior to the group and ideally, the young person should be advised to have a parent or guardian present.

If a young person is involved in a virtual group, they must confirm identity and location, consent and agree to adhere to the confidentiality agreement as an adult would do.

Patients must alert the facilitator to people of any age in the background and within earshot of the group. Once alerted, the facilitator will get agreement from the group to progress. Clinicians make the overall decision on the appropriateness of the information being discussed with young people present.

Any other questions?
If you have other questions, please get in touch with your clinical team. Thank you.

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Appendix 2 – Template virtual agreements, patient details collection

Please either use the template Microsoft forms survey to collect this data or copy and paste the suggested text into an email to obtain information from your participants.

Template Microsoft Form - virtual agreements & patient details collection

Use can customise this template Microsoft form for your group by following the link and duplicating it

Virtual Group Patient Agreement - Template

Link to guidance   Share a form or quiz as a template - Office Support (microsoft.com)

Template Virtual Group agreement

By participating in this virtual group I agree that:

- All information I learn about group members is confidential. I agree that I will NOT record nor share any information about other members of the group in conversations or communications outside the group, or on social media such as Facebook, Twitter etc. or in any other public forum.

- The group may involve attendees sharing information about their condition that relates to the group's topic. Other members of the group will listen in order that all benefit from hearing and understanding common problems and solutions.

- However, I am under no obligation to share any other personal information with the group unless I choose to do so and that if I have health concerns I don't want to discuss in the group setting, I may ask to discuss them privately in a 1:1 consultation.

At any time, I can withdraw my consent to participate in the virtual group and book a 1:1 consultation.

If you have any questions about virtual groups please read our frequently asked questions (provide link or attach), visit our website (provide link) or ask our co-ordinator (add name clinic co-ordinator) to explain more before the session (add contact details for co-ordinator here).

Template for collecting patient details including identity, location and contact information in advance.

You are booked into a Virtual group session. To keep you safe during the session and so we can contact you if we need to, we need some information in advance.

We will use some of this information at the start of the session to confirm your identity and make sure that if you do need help during the session, we know where you are and can reach you.

Please reply to this text/email/other communication channel with the following information:

1. Your location during virtual Group (including post code)
2. The telephone number/s we can reach you on during the Virtual Group
3. The Name and telephone number of a friend or relative who lives nearby and could come to you in the event of an emergency
4. Your email address

If you want a family member, carer or friend to accompany you to the Virtual Group, please provide the same information as above for them and an e-mail address so we can send them an invite and further information. When we receive this information, we will send you a link to join and further details about the session

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Appendix 3 – Template for the joining instructions.

This can be provided to patients prior to the Virtual group agreement or the Virtual group agreement may be sent at the same time:

Dear XXXX

We are looking forward to seeing you in our virtual group session.

Start Time: XXXX
End Time: XXXXX
Run by: XXXX
Topic: XXXX

Click on the link below 10 minutes before the start time to join your virtual group. This provides us with time to make sure your technology is working.

By clicking on this link, you are agreeing to participate in the group and abide by the agreement we sent you:
CUT AND PASTE LINK HERE

NOTE: you can also make the Virtual group agreement more explicit in your invitation. To do this, include the following text before the link.
In either case, provide a copy of or link to the virtual group agreement as directed in section 1:

By clicking the link below, you and anyone with you, agree that:

- It is your choice whether to share any medical information with the group
- You are in control of what information you share
- You must keep confidential all information shared in the group

This means you must not record nor repeat any information shared in the group. For example, you must not talk to others about or share on social media sites any information from a group.

If you want to discuss private things or decide you want to leave the group, you can have a one-to-one appointment at a later date"

How do I join?
This is how we recommend you join:

1. Check your privacy settings

To keep your personal information private, you might want to change the privacy settings on your device. Read about how to keep safe whilst using on-line systems here:

https://www.ncsc.gov.uk/guidance/video-conferencing-services-using-them-securely

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and here https://www.ncsc.gov.uk/collection/top-tips-for-staying-secure-online

If you already use or have an account for "Microsoft Teams" it is important that you 'Log Out' before you join the group clinic this is especially important if a member of your household has a TEAMs account and you will be using the same device.

When you sign in for the session, use your first name and the first letter of your surname e.g. "Bob T" only to preserve your privacy.

2. Consent

Before the group, read the group agreement (see Section 1; you can send this as an attachment OR send a link to where the patient can read it). In the session, you will be asked to confirm that you are happy to participate on this basis, and that you agree to keep all information that group members share confidential

3. Join from a comfortable and private space

Remember, the session lasts (insert here) minutes. Please make sure you are comfortable and have battery power to last this time - or even better, plug your device in.

Be on your own unless you have invited someone to attend with you. We understand you may be joining from home. If there is anyone from your household in the room and they can hear, they either need to leave or sign the group's agreement.

4. Join the group early

Click on the group link 10 minutes before the start time. This provides time for us to help with your technology if you need it; especially the first time you are joining.

- Please ensure you have the latest version of either Google Chrome or Microsoft edge browsers and that this is set as your "default" browser.

- Please log out of any Microsoft Teams that either you or another family member may have been using on the computer or device you are joining with.

- Join the session as a guest. When clicking on the link if you already have TEAMs installed you will be offered the option of "downloading the app" "continue on this browser" or "open your Teams app" you need to select the option of "continue on this browser"
- Use your first name and initial only e.g. John S

- If you have a family member, carer or friend with you, enter their first name and initial as well as yours

  When you join, the facilitator will greet you and ask you a few questions to confirm your identity, location and contact details.

5. Follow-up

If you have any private concerns or the clinician feels you needs some further one to one time or follow up, then you can be booked in for a follow-up one to one appointment as usual. We expect you will have a positive experience and will book in to further virtual groups.

Yours sincerely,

Add first and surname of the consulting clinician

Appendix 4 - Post Group Follow up Survey

Groups should always be followed up with a post group survey. TEC Cymru have developed a full service to carry this out on your behalf.

TEC Cymru follow up service

[TEC Cymru Role in Virtual Groups.pdf (digitalhealth.wales)](#)

Authors and Additional Resources

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For additional resources please visit our website [Video Groups Resources | Digital Health Wales](#)