



## **ASSOCIATION OF MASTER HERBALISTS**

### **A GUIDE TO TELEPHONE AND ONLINE VIDEO CONSULTATIONS**

Current technology offers practitioners another option to provide support and a service of care to their patients.

Consultations via telephone or video are ways to interact with patients where face to face appointments are not possible. These types of consultations are not intended to replace in-person care. It is preferable, where possible, that a face to face consultation has taken place initially.

It is up to the individual practitioner's professional judgement how and when a telephone or video consultation should be best used to support the patient.

These types of consultations should be conducted in the same manner as in-clinic consultations with some additional considerations as outlined below.

#### **Technology**

- Use a platform that offers secure and private one to one communication. Certain technologies such as social media messaging are not secure platforms.
- Consider using encrypted or password protected services such as Whatsapp, Skype or Zoom
- Only record the session if you have the patient's consent.
- Ensure that the connection, sound quality and camera are clear and working effectively. If not, then it may be necessary to re-schedule the session.

#### **Patient Notes**

- Make a record in the patient notes that the session was conducted by telephone or video.
- Ensure detailed and accurate records are made within the patient notes – record your observations, clinical reasoning, advice that was provided and any herbs and supplements that were prescribed.
- Make a note of any limitations that were experienced.

#### **Prior to Consultation**

- Confirm the date, time, format (telephone or video) including any links by email to your patient.
- Let them know about your fees and your payment methods.
- Ask the patient to send any notes, photographs or test results well in advance of the consultation via post or email.
- Hold the consultation in a well-lit private room ensuring you have good connection.
- Make sure you will not be disturbed during the session by children, pets or phones.



### **During the Consultation**

- Identify yourself and ensure you are speaking to the right patient.
- If you are recording the session obtain the patients consent.
- You may want to manage the patient's expectations of what is possible and what is not possible during the consultation and within the time allocated.
- Document your discussion and go through symptoms and questioning as you would do in an in-clinic session.
- If using video then check and take note of any visual symptoms.
- Speak clearly and look directly at the camera when talking.
- Provide any clinical advice and guidance during the consultation. If it is difficult to establish an accurate assessment then tell the patient, record it in your notes and refer them to a face to face consultation when possible.
- Be aware of any red flag symptoms and refer to their doctor.
- Summarise your findings and advice and check with the patient that they have fully understood everything.
- Ask the patient if they have any further questions or require any clarification.
- Arrange the next appointment and round off the call.

### **After the Consultation**

- Make notes of the consultation and record it within the patient's file.
- You may wish to send a summary of the call, any actions or anything prescribed in an email to the patient.
- Confirm their next appointment by email.

### **Children and Vulnerable Individuals**

- If conducting an online consultation for a child or a vulnerable person you will need the parent/guardian to be present.
- Where there is no guardian present then a written consent and recording of the session is recommended.

### **Additional**

- Update your literature – emails, website, answerphone, etc to mention online help is available.
- You may wish to show your products or your dispensary to the patient during an online video consultation so they can see where they will be getting their herbs.
- Insurance companies allow for online consultations within your policy except for USA & Canada (which has to be referred to underwriters). However, you are still required to inform your insurance company of your intent and you will be sent a written confirmation.
- Consider incorporating recommendations within the guidance document put together by the various UK healthcare regulators on [good practice in remote consultations and prescribing](#).