**Personalised Care and Support Planning Using the Telephone**

On occasion it may be appropriate to use the telephone for personalised care and support planning reviews. In general this should be a preference of, and a decision made by, the patient.

**Limitations of telephone reviews**

Research has shown that telephone reviews tend to be more directive, are usually shorter and more focussed and as such driven by the professional agenda; because of this they’re more likely to be incomplete.

Some individuals who are hearing impaired or who find telephone communication difficult will find this type of review difficult to engage with.

Ideally this type of review should be reserved for the least complex patients or as a means of providing follow on support following initial face to face reviews.

**General skills to be used more throughout the telephone conversation**

The absence of ‘non-verbal’ communication (nods, posture and facial expression) means the clinician needs to compensate with an increased use of ‘verbal’ skills.

To make up for the deficit of non-verbal skills try to:

* Clarify with the person how the conversation may feel different
* Alter your tone of voice in response to what you are hearing, for example to express empathy or appear curious, to encourage the person to share their story
* Try not to rush the person or put words in their mouth/finish their sentences
* Be comfortable with some silence and try not to fill all the ‘silences’ with your voice – the person may be thinking or trying to formulate a question
* Use open questions and prompts to ensure you adequately encourage the person to speak - *“tell me a little bit more about that”*
* Use reflections to demonstrate understanding and check what is being said - *“it sounds as though…”, “so it seems to me there are…”*
* Use repetition and summaries to reinforce messages and the final plan

**See further tips for telephone-based personalised care and support planning below.**

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| **Tips for telephone personalised care and support planning** | |
| **Preparation** | * Ideally the person doing the review should already know the person - this may help with rapport and ease of communication * Ensure the patient receives preparation materials and ask them to have these ready to review during the conversation * Ask the patient to have a pen and paper to make a note of plans and actions * Give the person an idea of the timing of the call so they can be ready to have a conversation * Ask if there is anybody else they would like to have with them * Where possible encourage people to share results (such as BP or capillary glucose results) electronically with professionals |
| **Setting the scene** | * Check who you are talking to and if anyone else is present * Explain the focus and time allocated to the appointment * Ask the patient to have their preparation material and pen and paper ready – also any home monitoring results and their medication list * Ensure the person is sitting and is comfortable * Highlight that on occasion you may be silent (this could be that you are accessing the computer or simply thinking about something) * Encourage the patient to interrupt if they feel you have something wrong |
| **Patient story** | * Spend enough time on this stage of the conversation * Use open questions (*“what other things were you thinking about?”*) and reflections to encourage the person to tell their story and list their concerns * Summarise the issues at the end of this section of conversation * Check if there is anything else before moving on |
| **Professional story** | * Give short explanations, with opportunities for the patient to clarify and ask questions – be prepared for some silence * Ensure you adequately discuss the patient’s concerns referring to the preparation material where necessary * If you need to raise new ‘professional’ concerns give a warning shot *“so there is something new I need to discuss with you”* |
| **Exploring and discussing** | * Use open questions to elicit the patient’s ideas, questions and concerns * Actively ask the person what they think or feel about the issues raised * Offer a range of suggestions rather than single solutions * Ask what preferences they have and issues they would like to prioritise or focus on |
| **Goal setting** | * Gain a good understanding of the person’s goal and why it’s important to them – ask them to write it down in their own words * Use open questions to encourage them to be specific about what exactly they would like to achieve |
| **Action planning** | * Support the individual to generate and arrive at their own solutions *“so what ideas do you have?”*, *“what do you think you will do about that”* * Ask the person to walk you through their plan, do not interrupt, ask questions to gain clarification of the plan * Use repetition - repeat and summarise the overall plan |
| **Review** | * Give clear instructions on next steps or any further tests needed |