# 

# Virtual visits

Things to consider when planning virtual visits



# Introduction

Since March 2020 local Healthwatch have followed government guidance and have stopped face to face engagement with the public, including Enter and View visits. Many have started to consider other ways to observe health and care services and developed the term ‘virtual visits’.

These cannot be referred to as Enter and View but are a useful engagement tool at this time.

Working with Healthwatch Doncaster and Healthwatch Newham and considering examples that have been shared on Workplace, we have produced this list of things you may want to consider when planning your own virtual visits.

**Find out more**  
Take a look at our [guidance on meeting face-to-face](https://network.healthwatch.co.uk/guidance/2020-08-18/meeting-face-to-face-protecting-our-staff-volunteers-and-public) for more information.

# Things to consider when planning virtual visits

## Key lines of enquiry

* It will help to agree topics that you think you can realistically observe and acknowledge the limitations of the virtual visit. You may be able to observe cleanliness, safety, information and signposting, for example, but not staff and patient interactions.

## Planning

* As with any activity, planning is key. Decide the purpose of the visit, what you want to achieve and the best ways to achieve it first. For example, do you need to speak to patients and service users, or will observation show you what you want to find out?
* Working with the provider to plan a visit will be essential. Establish what you both want to get out of the visit, mutual expectations and roles and responsibilities as well as logistics about the technology you can use and where you will have access to on the day.
* Talk to the provider about how consent will be gained from anyone who does speak to you. Agree how to communicate and record this. Signed consent forms are usual but will these be possible, or can you develop an online consent form?   
  You may find our [guidance helpful on gaining consent helpful.](https://network.healthwatch.co.uk/guidance/2020-09-28/guide-to-gaining-consent)
* Agree with the provider, and inform any participants, how any data they share will be stored and used.
* Ask the provider if they have a floor plan of the premises you want to observe. If not, can they give you details of the facilities? This will help you plan where you would like to observe, rather than being the passive recipients of a virtual tour.
* Consider preparing an information sheet in advance. This could be given out by staff to prepare residents, patients and family members for your visit and give them the chance to ‘opt-in’ for a video call, phone call or survey or ‘opt-out’ and not be disturbed.
* Create a plan for the day e.g., what you’d like to observe, who you’d like to speak with, what questions you will ask patients/family/providers etc. and follow it on the day.

## Accessibility and technology

* It will be important to agree what tools and platforms you want to use and to test them as well as your internet connection -and the provider’s - beforehand. Consider if a mobile phone will give an adequate view or if the provider has access to Zoom or Teams that you could use
* If you are going to have phone and video calls with patients and service users, consider if people will need any support to take part such as translators, easy read information sheets or consent forms or help using a device

## Volunteers

* This may be a very different activity to what many of your volunteers are used to. Host a virtual planning meeting before the visit to make sure everyone understands the process, agrees to a role they are comfortable with and can ask any questions. This is also a chance to test the technology you plan to use.
* You may want to separate the visit into stages with some volunteers acting as observers or note-takers on the virtual tour and others carrying out conversations with people who are happy to have a phone or video call
* If it is a large building, you may need to divide facilities between the volunteers as it is a different experience looking at a screen for a period of time rather than walking around a building.

## On the day

* Dial in as agreed and introduce your volunteers to the staff members who will be conducting your virtual visit. Discuss logistics e.g. a staff member may provide a mobile number which can be used to make a video call. You can then ask the staff to reverse the camera on the devise so that they can show you around.
* Don’t be afraid to ask them to pause and return to something you would like to observe.
* Follow your virtual visit plan so you don’t miss anything.
* Hold a debrief with the provider at the end of the visit.

## After the visit

* Hold a virtual debrief meeting as a team to gather your feedback and key observations, either at the end of the visit or the day after.
* Collate your observations and any recommendations to share with the provider, in whatever format you agreed, making sure to acknowledge the limitations of the process.
* Discuss any learning and share this with Healthwatch England and other local Healthwatch as this is new for everyone.

# Case Study: Using virtual visits to improve maternity services

Healthwatch Northamptonshire used virtual visits ensure maternity services were running smoothly.

They arranged for a senior member of the midwifery team in each hospital trust to carry out the visit using Microsoft Teams on a phone or tablet, whilst volunteers watched from home.

As a result of their work, they have been asked to arrange a follow up virtual visit, highlighting the success of this approach.

[Find out more about their work.](https://network.healthwatch.co.uk/blog/2020-10-20/using-virtual-visits-to-improve-maternity-services)

If you have a case study you would like to share, please send to hub@healthwatch.co.uk

# Useful resources

The network has developed resources to support their programme of virtual visits. These include:

* [East Riding of Yorkshire Managers’ questionnaire](https://network.healthwatch.co.uk/file/20210513-eroy-managers-questionnaire-paper-versiondocx)
* [East Riding of Yorkshire Relatives’ / Friends’ questionnaire](https://network.healthwatch.co.uk/file/20210513-eroy-relatives-friends-questionnaire-paper-versiondocx)
* [East Riding of Yorkshire Residents’ questionnaire](https://network.healthwatch.co.uk/file/20210513-eroy-relatives-questionnaire-paper-versiondocx)
* [East Riding of Yorkshire Staff questionnaire](https://network.healthwatch.co.uk/file/20210513-eroy-staff-questionnaire-paper-versiondocx)
* [Cheshire Pilot Discharge questionnaire](https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/Care%20Home%20Pilot%20-%20Discharge%20Questionnaire.docx)
* [Cheshire Pilot Friends and Family questionnaire](https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/Care%20Home%20Pilot%20-%20Family%20and%20Friends%20Questionnaire.docx)
* [Cheshire Pilot Residents’ questionnaire](https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/Care%20Home%20Pilot%20-%20Resident%20Questionnaire.docx)
* [Cheshire Pilot Staff questionnaire](https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/Care%20Home%20Pilot%20-%20Staff%20Questionnaire.docx)
* [Cheshire Pilot Managers’ questionnaire](https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/Care%20Home%20Pilot%20RMS%20qs%20revised.docx)
* [Cheshire Relatives’ survey](https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/Healthwatch%20Cheshire%20Care%20Home%20Relatives%20Survey%20FINAL.pdf)
* [Cheshire Residents’ survey](https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/Healthwatch%20Cheshire%20Care%20Home%20Residents%20Survey%20FINAL.pdf)
* [Waltham Forest checklist to help in planning](https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/20210609%20Waltham%20Forest%20Virtual%20Visit%20checklist.docx)

# Thanks

This checklist was developed in conjunction with the network. Thanks to everybody who contributed, and special thanks to those that shared their resources and led the webinars.

* Leonard Greco Healthwatch Newham
* Sandie Hodson Healthwatch Doncaster
* David Crosthwaite Healthwatch Cheshire
* Caroline Frost Healthwatch East Riding of Yorkshire
* Joyce Osei Healthwatch Waltham Forest