

Tips for Distance Interactions

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This is a basic outline for supporting people by telephone and video conference. Many of the tips in this document are also applicable to in-person interactions. The suggestions are appropriate for new connections and for existing relationships. Feel free to adjust this based on your needs and the needs of the people you work with. The goals are to connect in a meaningful way, build a trusting partnership, and support well-being.

Remember the spirit of MI (compassion, acceptance, partnership and evocation) before, during and after the call. Recognize that it's their choice about having the conversation and what is discussed

Before the Call	
Making an appointment	<ul style="list-style-type: none"> ☎ 📺 If possible, schedule a day and time for the call. If that is not possible, providing an approximate day and time can be helpful. If we say we are going to call, we must do everything we can to call the person as scheduled. This builds trust and relationship.
Coming prepared	<ul style="list-style-type: none"> ☎ 📺 Gather any information necessary for the interaction. Open any electronic medical records, paper charts, assessments, and have any other necessary information handy.
	<ul style="list-style-type: none"> ☎ 📺 Find a quiet location where you won't be interrupted. If you are in an open concept office, have a signal that indicates you are busy, like a sign on the back of your chair advising that you are in a visit.
	<ul style="list-style-type: none"> ☎ 📺 Check your equipment before your interaction.
	<ul style="list-style-type: none"> ☎ 📺 Have technical support numbers handy.
	<ul style="list-style-type: none"> 📺 Set up your video camera at eye level and test your microphone or headset.
	<ul style="list-style-type: none"> 📺 Pay attention to the background and lighting. Displays of personal space may create disparities between you and the person you are interacting with. Bright lights behind you make it difficult to see your face.
	<ul style="list-style-type: none"> 📺 Consider how professionally you will need to dress
During the Call	
Creating a welcoming environment	<ul style="list-style-type: none"> ☎ 📺 Use a warm, welcoming tone of voice and pace the call to suit the person. For example, a person with difficulty hearing might require a slower pace.
	<ul style="list-style-type: none"> ☎ 📺 Be present. Give the person your full attention.
	<ul style="list-style-type: none"> ☎ 📺 Acknowledge unfamiliarity with video or phone interactions if it is new to the person.
	<ul style="list-style-type: none"> ☎ 📺 Let them know you will conduct the visit like an in-person visit as much as possible.
	<ul style="list-style-type: none"> ☎ 📺 Reassure people about privacy.
	<ul style="list-style-type: none"> 📺 Share your screen when appropriate.
Introducing yourself	<ul style="list-style-type: none"> ☎ 📺 State your full name, where you are from, your designation, and the purpose of call. Example: "Hello my name is Jane Doe, I work with Home Health, I am a nurse and I am calling to see how you are doing."
	<ul style="list-style-type: none"> ☎ 📺 Describe the length of the interaction.
	<ul style="list-style-type: none"> ☎ 📺 Orient them to the system you are using as needed.

	📞 🎥 Ask permission to talk to the person at this moment. “Is now a good time to talk?”
Agenda setting	📞 🎥 “We have ___ minutes together today. What would you like to discuss? “Anything else? “Anything else? (until no more new topics) If necessary: “And I’d like to make sure we discuss ___.” “Where shall we begin?” Listen and reflect. Avoid jumping to give advice.
Navigating the Visit	📞 🎥 Complete any necessary assessments or check-ins.
	📞 🎥 Pay attention to technical issues and quality of the call.
	🎥 Pause as needed to match the connection speed.
	🎥 Avoid talking over the person or using short interjections that can interrupt the connection. For example, saying “uh huh” while someone else is speaking may cause the system to return to focusing on you and introduce a delay. Nod your head to show you are following what they are saying.
Giving Information and Advice	📞 🎥 If you need to give information or advice, use Ask-Tell-Ask. ASK: Permission to share information or what they already know. TELL: Information clearly. Give information in chunks, then check to see if it’s okay to proceed with more information. ASK: What they thought of the information or use teach-back to check for understanding.
	📞 🎥 TEACH-BACK: Examples: “I want to make sure I did a good job explaining. Can you say back to me how you are going to ___ so I know I was clear?” “I’d like to make sure we are on the same page about what’s next. Can you tell me back what you are going to do so I know I was clear?”
Closing	📞 🎥 Be specific about next steps. Use teach-back to check for understanding including verifying upcoming appointments.
	📞 🎥 Close the call by asking if they would like a follow up. Get specific information about when, with whom and how.
	📞 🎥 End with a thank you.
After the Call	
Documenting the call	📞 🎥 Chart or make any notes regarding the call
	📞 🎥 Document and schedule the next call into a calendar, electronic medical record, or other method used by your organization.