



SPECIALITY GUIDANCE FOR USING NEAR ME TO ENABLE VIRTUAL CARE REVIEWS IN CARE HOMES

(PLEASE READ IN CONJUNCTION
WITH THE EXISTING SOCIAL CARE
GUIDANCE)



ABOUT THIS GUIDANCE

Near Me is transforming the way people are accessing public services across Scotland. This guidance describes the specific arrangements for using Near Me to enable virtual care reviews in both community and residential care settings. The document contains;

- the set-up processes necessary to prepare a service for using Near Me;
- considerations specific to the care review process as identified through the Social Work Near Me Pathfinders' testing; examples pathways-signposting to further training and resources.

More detailed information about Near Me is also available at <https://tec.scot/nearme>.

WHO SHOULD READ THIS GUIDANCE?

Anyone responsible for setting up and implementing the use of Near Me within a service, whether this is within a Local Authority, a Health and Social Care Partnership or within a single service or team.

The focus is on enabling reviews and their importance in supporting management and oversight arrangements in local partnerships in relation to quality of care. Consequently, the following definition was agreed in collaboration with the Near Me/OSCWA Steering Group & Social Work Scotland and this ties in with the bigger suite of intelligence gathering.

Agreed Definition of Care Review

To undertake a review of care needs and outcomes with the individual receiving care, ensuring that their physical, mental and emotional needs are currently being met by the provider. The review is supported by a virtual approach where appropriate and proportionate and with the agreement of all parties. A care review provides assurance that the individuals needs are being met by the provider or determines if a reassessment of need is required.

ABOUT NEAR ME IN SOCIAL WORK

Near Me may be used as a standalone method of meeting or as part of a blended approach that includes in-person and telephone contact. The individual needs of people involved, shared decision making with the care home, professional judgement and statutory & governance requirements should guide decision-making on the appropriateness of using Near Me to achieve the aims for the review and the wishes of the person. It is recognised that there may be varying levels of engagement by the person, its appropriateness will be viewed within the context of other governance intelligence (e.g. care assurance) and as such is dynamically risk assessed.

BENEFITS OF NEAR ME

- **Enable physical distancing:** Near Me enables services to continue to be provided without potential exposure to COVID-19 or footfall into premises and homes. It also enables social services workers to work remotely, reduces use of and time to put on PPE, supports multi-disciplinary consultations (i.e. via three-way calling), and enables cross-cover.
- **Deliver person centred and convenient delivery of service:** Near Me enables people to attend appointments from the location of their choice. This can reduce travel, minimise time taken off work or school, and make it easier for people who need carer support. Near Me can enable an interpreter, support worker or family member to join an appointment remotely. It also provides workers with insight into the home environments of the people accessing their service where this is appropriate or necessary.
- **Address environmental imperatives:** by reducing travel, Near Me improves the move towards net zero and the carbon footprint of services. Reduced staff travel can also increase service capacity.

GLOSSARY OF TERMS

Provider: the person or organisation that is delivering a service using the Near Me video consulting platform.

Caller: a person who is accessing a service via the Near Me waiting area. This may be the main person or family members, carers, support workers, or interpreter who joins the call from the waiting area.

Consultation: any meeting or appointment that takes place using Near Me video calls.

Waiting Area: the entry point to the service where callers are queued. Authorised providers can monitor, manage and join callers in a consultation.



TECHNICAL SET UP

EQUIPMENT SET UP AND CONNECTIVITY

If your organisation is not currently set up to use Near Me, arrange for your IT team to contact the National VC Team vc.support@nhs.scot.

Video consulting equipment should be available for all staff using Near Me:

- Internet connection (minimum requirement: download 1.1Mbps, upload 0.7 Mbps, ping under 150ms).
- Check connection at: <https://nhs.attendanywhere.com/webtctest>
- Window or MacOS computer with – webcam, headset or speakers/ microphone (essential), and second screen (optimal). Laptops, tablets or smartphones can also be used.
- Google Chrome, Safari or Microsoft Edge (Chromium only) browser.
- For technical specifications, click [here](#)
- If working remotely, arrange appropriate access to your service's documentation and recording systems.

Ensure all workers have access to video consulting equipment (webcam, headset/microphone) and connectivity. Access to a second screen is helpful when requiring access to diary, client management system or recording documentation during the call but is not necessary. If home working/remote working this should be considered within a home working assessment.

CREATING AND ADMINISTRATION OF A NEAR ME WAITING AREA

The Near Me Waiting Area is the virtual waiting room which a person enters via the waiting area URL (link). The waiting area link is unique to your service. Only the waiting area administrator and service colleagues (service providers) are able to see who is waiting.

If you do not already have a waiting area for your service, contact your local Near Me Lead or the National VC Team at vc.support@nhs.scot for support. There may be an existing process or procedures associated with your local health board or HSCP.

Identify an administrative lead in your service for Near Me. This person should be given “Service Administrator” rights within the Near Me waiting area. Their role is to:

- Add users (“Service Providers”) to the Near Me waiting area, e.g. new team members.
- Remove users. It is important to remove anyone who should no longer have access (e.g. due to leaving the team or service) to ensure confidentiality.

Wherever possible a second person with “service administrator” rights should be identified for back up in the event that the administrative lead is unavailable.

Administrator training and YouTube training videos is available via the National VC Team website <https://www.vc.scot.nhs.uk/near-me/training/>

Three key functions of the waiting area can be customised by your waiting area administrator:

- The information callers can see when waiting to be picked up from the waiting area can be customised (up to 500 characters) to suit your service. For example...*if you have not be seen within 30 mins please call XXX*; service specific message.
- Minimum mandatory information is required by the person to enter the waiting area. This to ensure correct identification of the person joining the call and is deleted when the call ends. There are 4 options, and it is for the service to agree which or all of the 4 need to be mandatory.
 - First Name
 - Last Name
 - Date of Birth
 - Telephone Number

The requirement to correctly identify the person needs to be balanced against enabling a specific client group to be able to follow the process.

- Opening times for the service waiting areas default setting is 9am-5pm Monday - Friday. No one will be able to enter the waiting area out with set opening hours. Training video to support waiting area administration: <https://www.vc.scot.nhs.uk/near-me/training/>

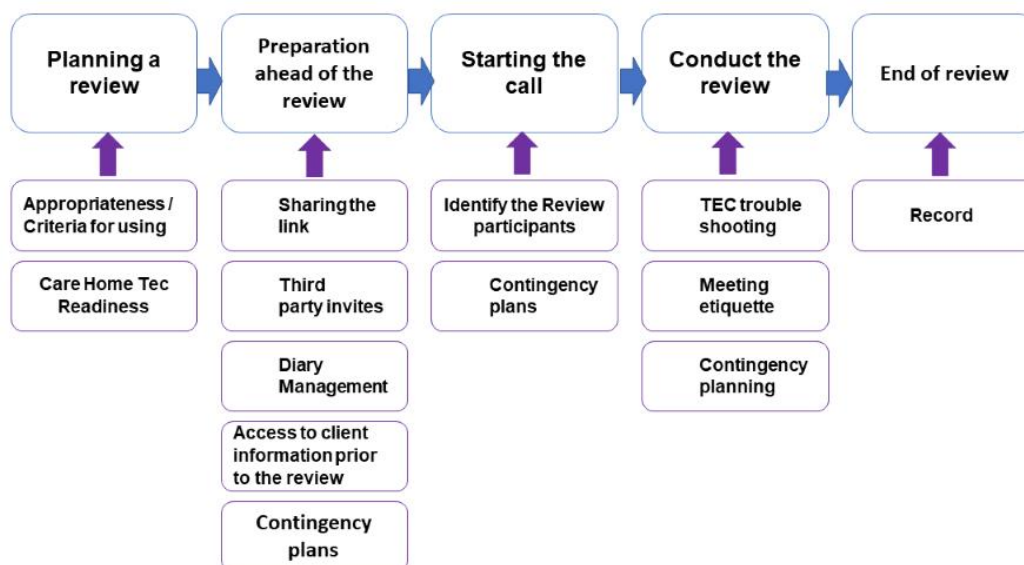
To note: A person in the waiting area can NOT see the name of any other callers within the waiting area.

TRAINING

TRAINING

- Service providers should be confident in their use of the Near Me platform before starting to use it with the people who access their service.
- A short video showing how the service is used is available [here](#).
- Live Training sessions are also available from the National VC team, for available dates click [here](#).
- Additional training material (primarily focused on clinical use of the platform) is available on the NES Turas platform, click [here](#).
- Providers are also encouraged to also undertake the [NES shared decision making training](#).
- Ensure all providers understand the need to consult from a confidential space with good lighting. If homeworking, take into consideration if any background pictures/landscapes will make the worker’s location identifiable. An option to able to blur the service provider’s background is available on Near Me.
- To build confidence in using Near Me, and to help understanding of the caller experience, all providers should take turns to:
 - enter as a person;
 - set up an appointment.
 - pick up person from the Waiting Area;
 - invite people into a call in real time;
 - pick up an additional participant from the Waiting Area (3 way calling)

The process steps, considerations, actions & points of note described below have all been informed through testing by the Pathfinder Group.



PLANNING A REVIEW

Appropriateness / Criteria for using

- Joint decisions made with Care Home and consideration of consent: <https://tec.scot/nearme/near-me-resources/>
- Consideration of background within the context of trauma informed practice. <https://transformingpsychologicaltrauma.scot/>
- Recognition of the varying levels of engagement by the resident.
- Recognition of the need for a person-centred blended approach – telephone, Near Me, Face to Face.
- Dynamic risk assessment.
- Appropriateness given other governance intelligence.
- Preparation tool (Glasgow City) – see page 8.

Care Home Tec Readiness

- Initial enquiry to use Near Me with the person is completed via telephone prior.
- Technical infrastructure at both Care Homes and working from home (WFH) – check connectivity. <https://nhs.attendanywhere.com/webtrctest>
- Share Near me information links: <https://www.nearme.scot/> (Please note information & videos are currently NHS focused. More generic (public service) aligned resources are being developed and will be available via the same link).

PREPARATION AHEAD OF THE REVIEW

Sharing the link

- The link can be sent directly from the Near Me platform via email or text, however, will not include the date/time.
- The link to the waiting area can be copied and pasted and sent as a diary invite if required.

- An information leaflet that can be downloaded directly from the Near Me platform, which includes url (link) to the waiting area.
- Plan a test call.
- Where generic iPads are used in the Care Homes they may not have an email account assigned to them. If these devices are going to be used for Near Me calls a solution is to either set up a generic email address on the iPad to allow diary management or save the link directly on the iPad. The user link for Care Home residents to join a Near Me call, stays the same for the waiting area, it does not change for each consultation.

3rd party invites

- Between 4 and 6 devices can join a call / consultation. The number of connections is dependent on the specification of the devices and available bandwidth. This allows family members, advocates, guardians, interpreters and other professionals to join the virtual review.
- There is value in using scripts or prompts when introducing Near Me to family members.
- Process for checking Tec readiness and what information will be shared (see sharing the link section above).
- Plan a test call.

Diary Management

- Near Me platform does not link with diary management, if using an electronic diary for the consultation, copy and paste link directly into your diary.
- Ensure its clear the person who will be facilitating the care review within the care home and have received the link/information leaflets.

Access to the person's information prior to the review

- Care Home files can be sent via secure email prior in preparation for Care Home Review.
- Where only paper records are held, discussion has to be held regarding what relevant information is required to be shared prior care review and how it will be shared. Where this does not currently exist explore the Glasgow city care home preparation tool (page 8) and local governance processes for encrypting emails.
- An example of support preparation: uses final year Students to help in collation of information prior to the review e.g. contact information, data quality, accuracy of information on Care First - collation of information prior care home review appointment. This is being supported by the Near Me NES student guidance: <https://tec.scot/nearme/covid-19-implementing-near-me/>

Contingency plans:

- Ensure a process is in place for contacting callers if a planned Near Me call cannot go ahead as planned, for example if a worker is on sick leave. Using an electronic diary for Near Me appointments can allow other colleagues to see the consultation is taking place via Near Me, if a member of staff is absent.

STARTING THE CALL

Identify the Review participants

- Remind other participants that they should enter the waiting area using their own name and not the name of the person being reviewed.
- Identify all participants expected for the call are within the waiting area e.g. family members, guardian etc.

Contingency plans

- Message function allow the service provider to message those in the waiting area e.g. running late, aware they are waiting etc.
- If the wrong person is brought into the call from the waiting area the service provider "ends call" which puts all callers back into the waiting area from where the correct callers can be called back into the review.

CONDUCT THE REVIEW

Technical trouble shooting

- Use refresh button when any issues occur i.e. blurred video, sound delay. This will not end your call.

- Near Me call failures can happen if a caller is not familiar with video calling technology and/ or does not have a reliable internet connection. Therefore, it is important to have a clear contingency plan in place. This would normally be the provider (e.g. the worker leading the call) telephoning the person accessing the service and moving to a telephone or in-person meeting. Workers should ensure as far as possible that they have access to the caller's up to date phone number.
- For first line support when you or your caller are experiencing technical difficulties with using Near Me, contact your local IT department/support team. Staff members, including those in the Care Home, can also obtain support from the National VC Team (vc.support@nhs.scot or call on 01224 816666).

Meeting etiquette

- Preparation & planning for the review should ensure that the virtual review lasts no longer than 30-40 minutes.
- If multiple people are on the call, it may be necessary to mute microphones when not speaking.
- If resident is hard of hearing, using Near Me with support worker, will allow the support worker to reiterate the message to resident and the resident can be seen/heard in their response.
- Use refresh button when any issues occur i.e. blurred video, sound delay. This will not end your call.
- All meeting participants should be on camera at all times. If social distancing measures make this impossible, ensure that all people present in the room are introduced.

Contingency planning

Crisis situations

- Ensure there is a process in place for workers to follow should a critical risk situation emerge during a Near Me call. This should be informed by existing protocols for Child and Adult Protection.

Emerging situations

- Ensure a process and criteria are in place for recording and following up missed appointments planned to take place via Near Me.
- Be aware of behaviours or other visual cues that indicate the caller is not comfortable with using Near Me video calling, and consider whether it would be more appropriate to switch to a telephone call or arrange in-person contact.
- Ensure criteria and process are in place for workers (informed by existing service protocols) to follow in the case that during a Near Me consultation a caller is abusive to the worker or is unable to engage with the worker due to drugs or alcohol.

END OF REVIEW

- Record activity as per usual process
- Capture in Client management system e.g. CareFirst/Swift that consultation took place via video call.

ENABLERS

- It would be beneficial to have a Near Me champion/ lead within the social work service to help support using Near Me and local scale up.
- Identify someone within the Care home who can help coordinate reviews e.g. linking key worker and social worker availability and enable shared decision making about appropriateness of using Near Me.
- Having a point of contact within the Care Home who can help test connection and equipment.
- A process of planning for reviews jointly within the care home for e.g. differentiating straight forward and complex reviews, see appendix 1.
- Linking in with the Connecting Scotland Programme to help Care Homes apply for devices, if required.
- Linking in with your Scottish Care representative to support and engage with Care Home staff in the use of Near Me.

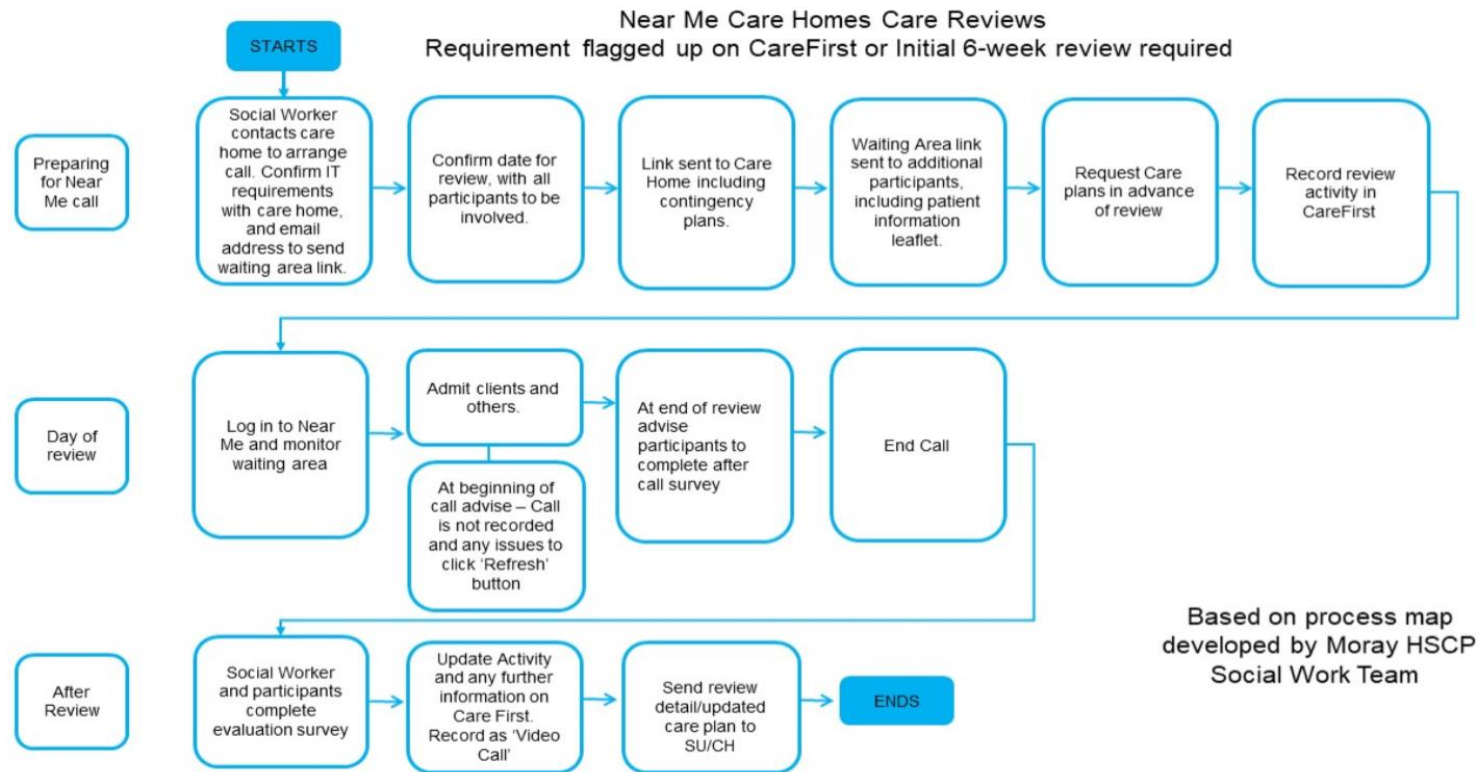
GOVERNANCE

- Care support staff will be in attendance at the Care Home review appointments therefore may be difficult for the resident to raise any issues about care support staff.

- Appropriateness of review should always be considered within the wider suite of intelligence for example care assurance, Adult Support Protection etc.

PROCESS MAPS EXAMPLES AND PREPARATION TEMPLATE

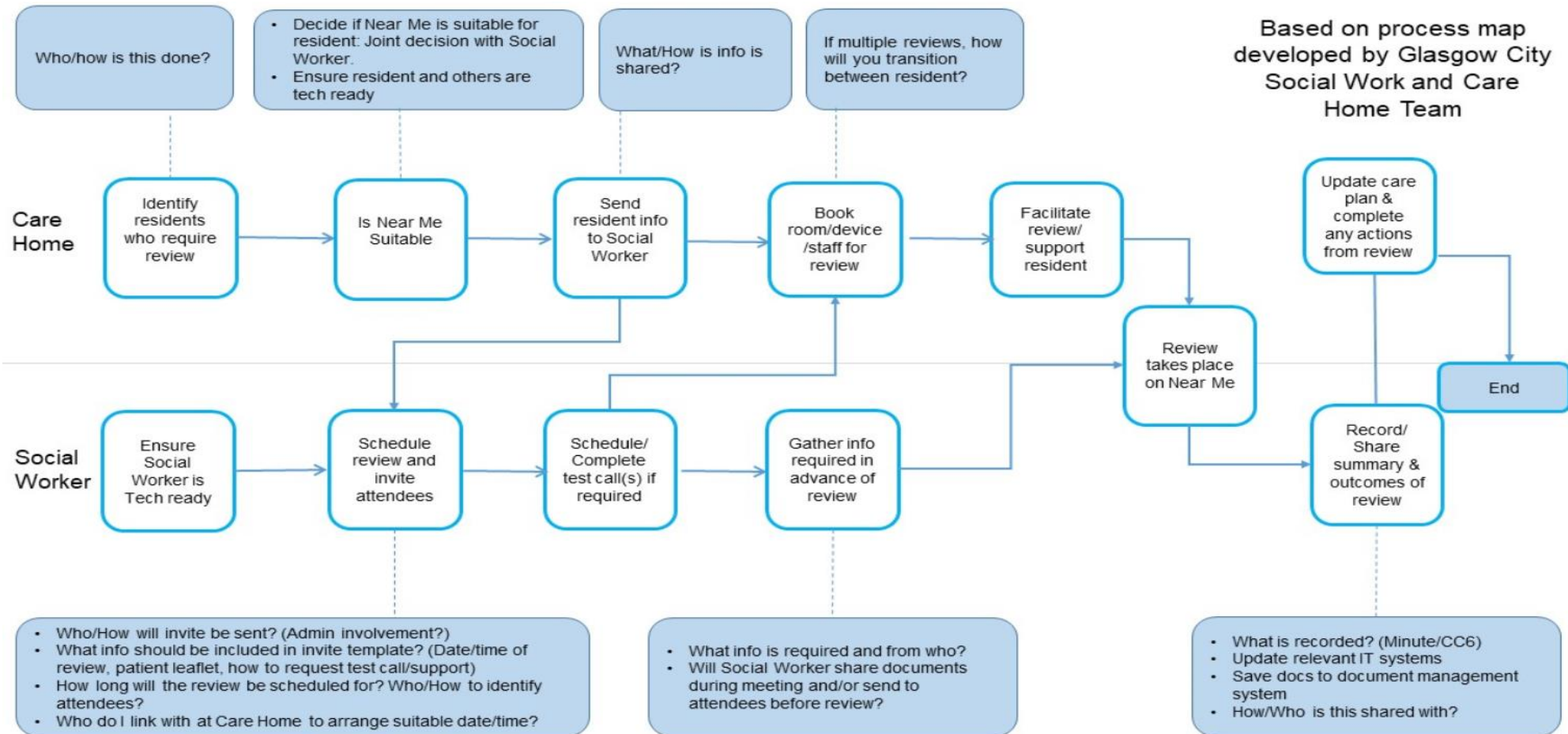
This section shows two pathways where Near Me is used for care home reviews. These pathways are included here as a guide for the development of a pathway that is appropriate for your local service procedures, systems and client groups.



Additional Guidance:

Consider the suitability of Near Me for care plan review based on individual resident capacities, needs and wishes as well as those of family members/carers who would usually attend a care plan review; and if any additional supports need to be put into place to ensure successful video-calling. It may be that a combination of contact methods are required – initial conversations by phone for example, when setting up review appointments. Ensure privacy and space to carry out a review via Near Me, just as you would in the physical world. For example, ensure no time clashes with usual visits to the resident and that a suitable computer/device is available for use in a confidential setting at all ends of the call. There is one waiting area for SW which means you may be able to see names of callers from teams/areas other than your own. The same rules of professional confidentiality apply as they would in the physical world. Ensure that suitable contingencies are agreed ahead of the review. Things to consider are technical difficulties on either side on the day, resident changing their mind, SW absence etc. You may wish to share a direct number to be reached for the purpose of reporting difficulties.

Based on process map developed by Glasgow City Social Work and Care Home Team



Additional Guidance:

- Who/How will consent be established?
- Agree process if connection fails or resident changes mind.
- Agree meeting etiquette/format.
- What is the process if Social Worker is absent from work?

Social Worker Tech readiness:

- Does Social Worker have suitable device?
- Does Social Worker have suitable web browser?
- Does Social Worker have suitable internet connection?
- Does Social Worker have correct access to Near me?
- After calls – Where will participants be directed to? (Survey etc.)

Waiting area set up:

Support contact info for staff
 Advice for callers – what to do if somethings not working?
 Video call access hours
 Before calls – The details of the person being reviewed (Name, DOB, Tel)
 Before calls – Please read text
 During calls – Message displayed to callers waiting in queue
 After calls – where will participants be directed to (survey etc.)

Speciality Guidance produced by the Near Me Network

This guidance is the output of a Social Care improvement project led by the Near Me Network, in collaboration with the Office of Chief Social Work Advisors and Scottish Care. The Near Me Network is run by the Scottish Government's Technology Enabled Care Programme.

This guidance complements earlier Social Services guidance.

Contact details for Near Me

For Process and set up queries:

In the first instance please contact the Near Me lead within your local health board/HSCP.

For all other queries, please contact:

nss.nearme@nhs.scot