

IMPLEMENTING NEAR ME VIDEO CONSULTING IN SOCIAL SERVICES

THIS DOCUMENT IS INTENDED FOR NEAR ME
IMPLEMENTATION TEAMS IN SOCIAL SERVICES

SECTION 1: INTRODUCTION

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 provide social work and social care support for individuals in both community and residential settings. The document contains; the set-up processes necessary to prepare a service for using Near Me; examples of pathways for using Near Me in different practice settings; signposting to further training, guidance 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 at scale within a Health and Social Care Partnership or within a single team or organisation.

About Near Me in Social Services

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. Professional judgement, the individual needs of people using services and statutory requirements should guide decision-making on the appropriate use of Near Me within a service.

Near Me is procured for use across Scotland by the Scottish Government's Technology Enabled Care (TEC) Programme and is available free of charge to public service organisations.

KEY REASONS FOR USING NEAR ME

Near Me offers Social Services a tool that can be integrated into service delivery where appropriate to do so. The graphic below shows how it can be placed alongside other methods of contact.

Place of Near Me



- **Telephone:** often used as a first point of contact and for referral.
- **Near Me:** provides additional information that cannot be ascertained by telephone (e.g. how someone is physically presenting, their home environment); can improve engagement/reassurance through visual contact; goes some way to support the preferences of people who access services who wish to see their worker face to face.
- **In person:** for when telephone or video consultations are insufficient.

BENEFITS OF USING NEAR ME:

- **Enable physical distancing:** Near Me enables services to continue to be provided without potential exposure to COVID-19 or footfall into premises. 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.
- **Supports integrated service delivery:** Near Me is established as a platform for video consulting within Scotland's health and care services, offering further scope to support integrated service delivery in Health and Social Care Partnerships through video consulting. In addition, people accessing services may already be familiar with Near Me from attending clinical appointments
- **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.

SECTION 2: PREPARATION FOR SETTING UP NEAR ME

Considerations for planning prior to implementing Near Me:

Place of Near Me in your service

What (if any) criteria should be established for determining if a client is suitable for a Near Me call.

Which services may be suitable for use of Near Me.

Near Me is a tool that has been available pre Covid-19 and will be available after the Covid-19 pandemic, and should be considered for long term use in services

Team members should be given opportunities to ask questions and discuss how Near Me can be used in their practice.

Digital Inclusion

People accessing services: Consider client group access to digital technology, data/WiFi and their digital skills base. How can people be supported to use Near Me?

Important to establish suitability for using Near Me on an individual basis with clients to avoid increasing any existing inequalities and creating new unintended service inequalities.

How team members will be supported to develop digital skills and confidence for using Near Me alongside the set-up of suitable digital tech and connections?

How will feedback be gathered (from team members and people accessing the service) and used to better understand digital inclusion needs and supports?

SECTION 3: PROCESSES FOR USING NEAR ME

DEVELOPING SERVICE PATHWAYS

- Decide in which services Near Me may be a useful tool.
- Focus initial activity with one pathway in one service
- Develop a service specific pathway for the use of Near Me. (Example pathways are described in Section 4.
- Review the service pathway at appropriate intervals. (The pathway is a tool for testing out the implementation of Near Me and it will evolve as you learn from introducing the process steps described in the remainder of Section 3.) Consider which service pathway to introduce Near Me to next.

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 staffing 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 and connectivity. If home working/remote working this should be considered within a home working assessment.

CREATING AND ADMINISTRATION OF A NEAR ME WAITING AREA

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.

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

They can also:

- Customise waiting area message - this is the information callers can see when they are in their own private waiting area waiting to be picked up.
- On entry, select which caller information from the following is mandatory:
 - First Name
 - Last Name
 - Date of Birth
 - Telephone Number
- You can set bespoke 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.)

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

SYSTEM MANAGEMENT OF NEAR ME APPOINTMENTS

Service Providers should decide how a Near Me call will be coded to identify a video consultation in recording systems (such as Swift, Liquid Logic, CAREFIRST) e.g. 'virtual call'.

Near Me consultations should be documented following usual documentation and recording processes. If working from home - providers should be satisfied that processes around records and reporting management are safe and secure.

Internal diary management or processes should be agreed, to ensure the provider is aware that the consultation is via Near Me. Processes should also provide contingency in the case of staff absences.

DEFINE HOW APPOINTMENTS ARE MADE

- Define how callers will be offered or request an appointment by Near Me: this should fit with the existing appointment booking process.
- Agree the information callers can be given on pre-booking an appointment.
- Information leaflets for callers on using Near Me are available directly from the service's waiting areas. Easy read and translated leaflets are available via the Attend Anywhere Resource Centre *
<https://nhs.attendanywhere.com/rc/Content/Home.htm>.
- Ensure any additional information normally given to a caller (and anyone supporting them, such as carers or family members) before an appointment is provided.
- Decide who will check the caller can use Near Me and what support can be offered to build digital skills and confidence in using Near Me for callers and anyone who will be supporting them to use video calling. Consider offering first-time users the option of making a test call to the service that their worker or admin staff answer, or open days when any caller can try it out.

*To note: Some resources on the Attend Anywhere Resource Centre require a login.

DECIDE HOW CALLERS ARE PROVIDED WITH THE NEAR ME LINK

It is strongly recommended that callers are given the URL to the Near Me system electronically. This can be by placing a link to the waiting area on the service website, by email (depending on local guidance on the use of email) or by SMS text message. While it is possible to share the link in an appointment letter, in a leaflet or via the phone, experience has shown that callers often mistype the link or the browser tries to auto-complete the link with the wrong waiting area.

USING YOUR SERVICE WEBSITE AS AN ENTRY POINT TO THE WAITING AREA

Placing a “Start video call” button on your service website allows you to direct callers, by letter or phone, to the waiting area entry point.

Simple Link

Place the start video call graphic in your website and add a hyperlink using the waiting area URL.



Link displaying open/close status

1. Log into your Near Me waiting area.
2. Go to the Cog button at the top, from the drop down menu select “Waiting Area Entry Points”.
3. Click on the “Send Me Instructions” icon for adding a waiting area entry point to your website.
4. You will receive an email containing the script for the button.

Website Recommendations

- Near Me information should be clearly visible on the website front page.
- Include a page or panel titled “Video calls using Near Me” with wording such as: “You can attend video calls from your home or wherever is convenient by clicking on the ‘Start video call’ button using a device that makes video calls (like a tablet, smartphone or laptop with camera).” Consider adding a screenshot of your website that shows the location of the “Start video call” button.
- Include a link to www.nearme.scot, to signpost callers to further information and training.
- Include details of the service opening hours near the “Start video call” button.
- Add any service-specific information such as the need to have an appointment.

PROCESS FOR ANSWERING NEAR ME CALLS AND MONITORING WAITING AREA

- Define how Near Me waiting areas will be monitored: either directly by the provider, or by admin staff who will greet/mark the caller as having arrived in the service's system to alert the worker.
- Define how callers will be informed if their worker is running late: there is a 'Notify' function within Near Me that enables those with appropriate permissions on the platform to send the caller a message on the Near Me screen. Using Notify will not start a Near Me consultation.
- Define how Near Me calls will be answered: directly by the worker, or by the admin staff who will then return the caller to the appropriate waiting area to wait for the worker. Admin staff answering calls in this way can identify any technical issues the caller may be having (e.g., microphone not switched on) so avoiding any delays for workers.

If admin staff are monitoring the waiting area and/or answering calls, ensure:

- Staff can be logged into Near Me all day at <https://nhs.attendanywhere.com/> selecting the "Keep me logged in" function. 'Keep me logged in' function, allows staff to be alerted of incoming calls. Follow data security protocols e.g. lock screen when away from desk.
- If answering Near Me calls, have video consulting equipment in place.

USE IN CONSULTATIONS

Consent

- For adults with capacity, consent guidelines are available at <https://tec.scot/nearme/near-me-resources/>
- For adults with incapacity, consent guidelines are available at <https://tec.scot/nearme/near-me-resources/>

Prior to Consultation

- Be logged into Near Me at <https://scot.attendanywhere.com/>
- Check equipment works before starting the call (using "test my equipment" button in the Waiting Area).
- Ensure that the room the worker/administrator is using for the call is set up to ensure privacy, (at home and in the workplace), with no identifiable landscapes/pictures or personal information present in the background or client or other inappropriate information displayed on notice boards.

During Consultation

- Open the service's waiting area.
- Identify caller with the Near Me consultation – either from service administration system/ electronic diary, or direct from the waiting area (depending on local process).
- Connect the call and consult as normal.

After Consultation

- Record the consultation in the service's system as normal. If working from home or working remotely agree locally the protocols for ensuring this is safe and secure.
- Arrange any follow up with caller as normal.
- Both provider and caller may be redirected to the end of call survey after each call.
- Follow up arrangements documented and recorded appropriately as per local systems and procedures.

CONTINGENCY PLANS

Contingency for Near Me calls not working

- 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.
- In the event that a Near Me call fails, ensure in advance the person accessing the service and the provider have the correct telephone number to call as a backup.
- 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 can also obtain support from the National VC team. (vc.support@nhs.scot or call on 01224 816666).

Contingency for 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.

Contingency for other 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.
- Ensure a process is in place for contacting callers if a planned Near Me call cannot go ahead for other reasons (e.g. a worker goes on sick leave and a colleague is covering their caseload).

INDIVIDUAL 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.
- To build confidence in using Near Me, and to help understanding of the caller experience, all providers should take turns to:
 - enter as a caller;

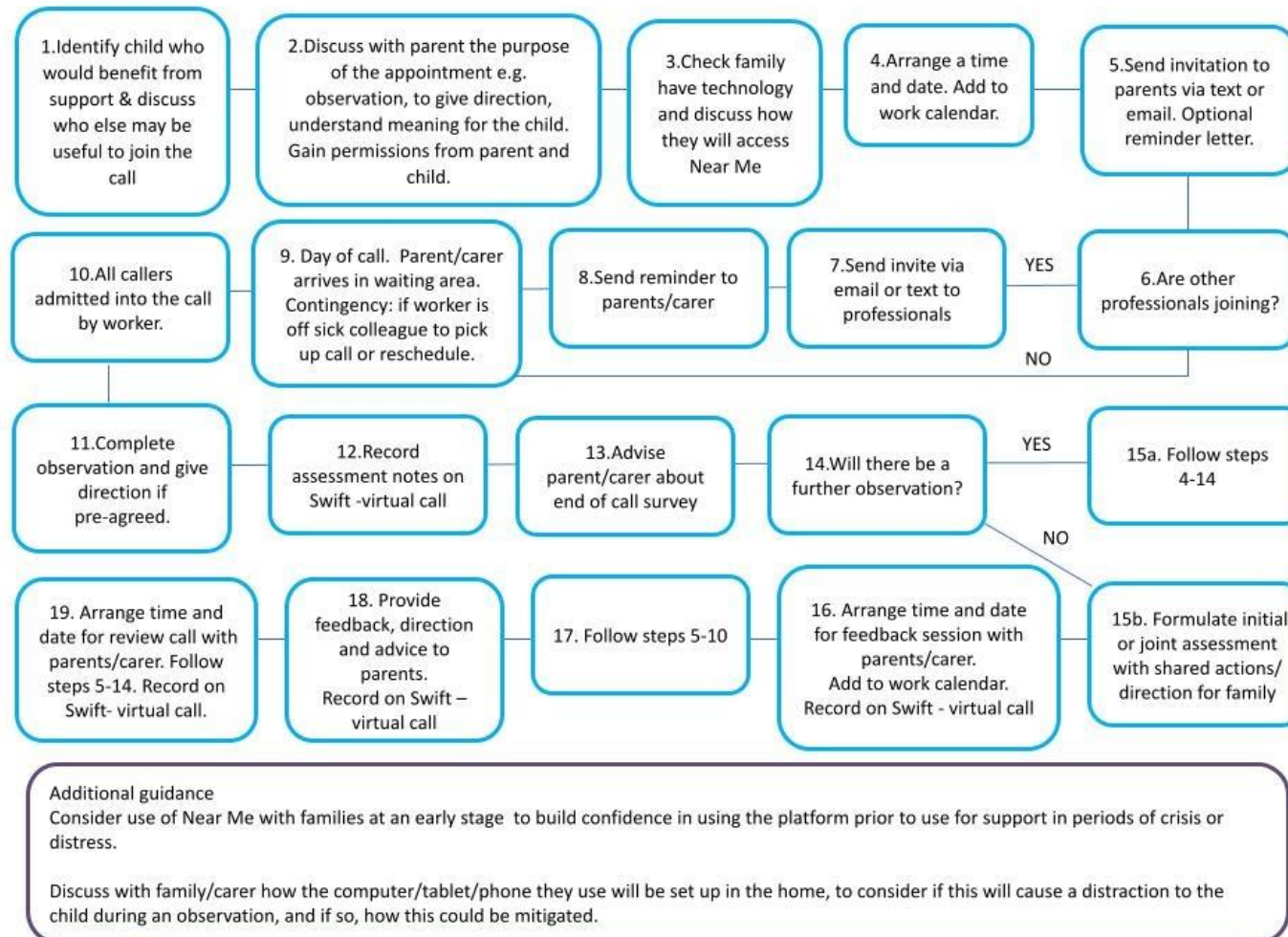
- set up an appointment;
 - pick up callers from the Waiting Area;
 - invite people into a call in real time;
 - and pick up an additional participant from the Waiting Area.
- Ensure any concerns have been discussed and addressed, and that all staff are comfortable with using Near Me. See Appendix 4 for further links to training and resources.

SECTION 4: EXAMPLE PATHWAYS OF USING NEAR ME IN SOCIAL SERVICES

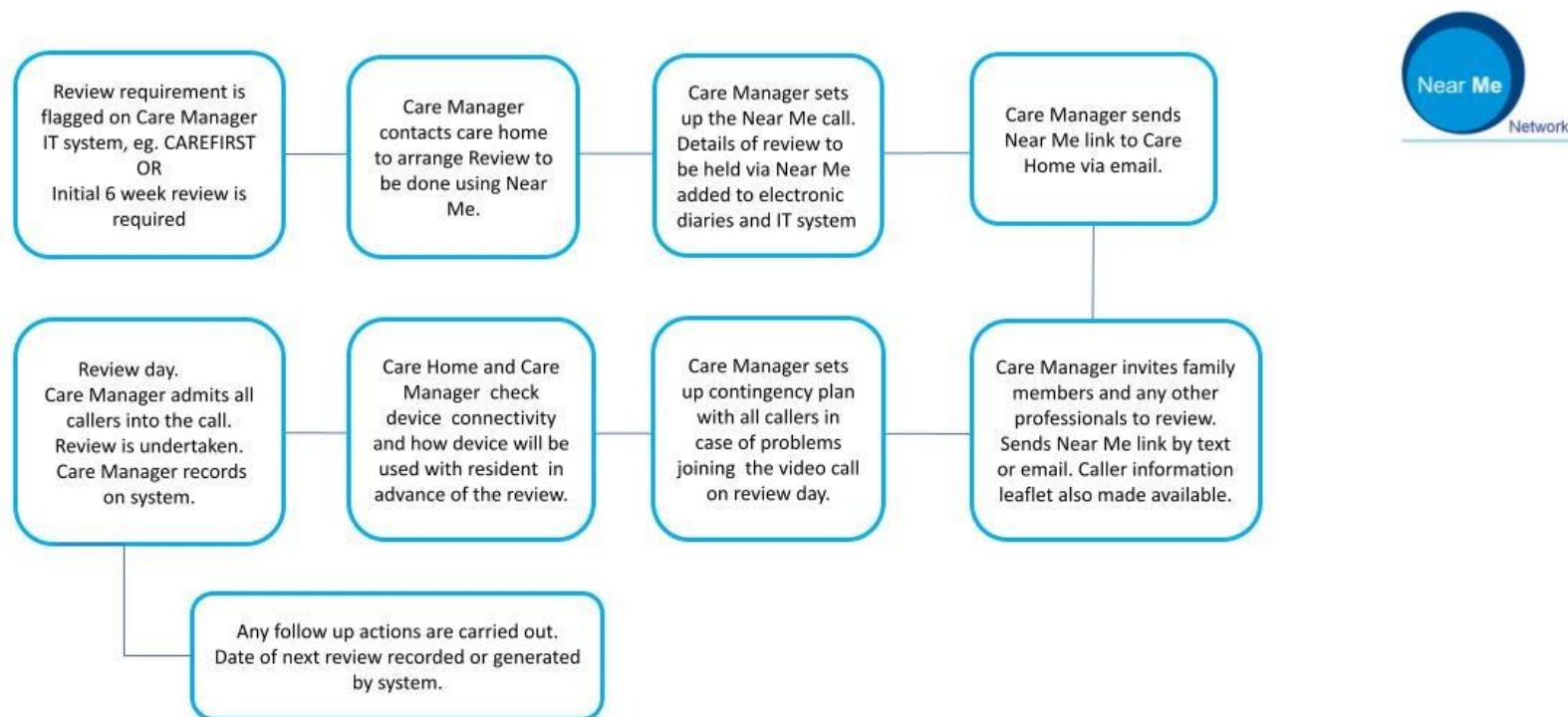
This section shows four pathways where Near Me is used in social services. These pathways are included here as a guide for the development of a pathway that is appropriate for your local service procedures, systems and client groups. The pathways for using Near Me set out below are:

- Children and Families Social Work: supporting families with children/young people showing distressed behaviours
- Residential Care Home setting: Care Plan Review
- Criminal and Youth Justice Social Work: Community Payback Orders
- Duty Social Work: initial contact and referral

CHILDREN & FAMILIES SOCIAL WORK: SUPPORTING CHILDREN AND YOUNG PEOPLE WITH DISTRESSED BEHAVIOURS



RESIDENTIAL CARE: CARE PLAN REVIEWS

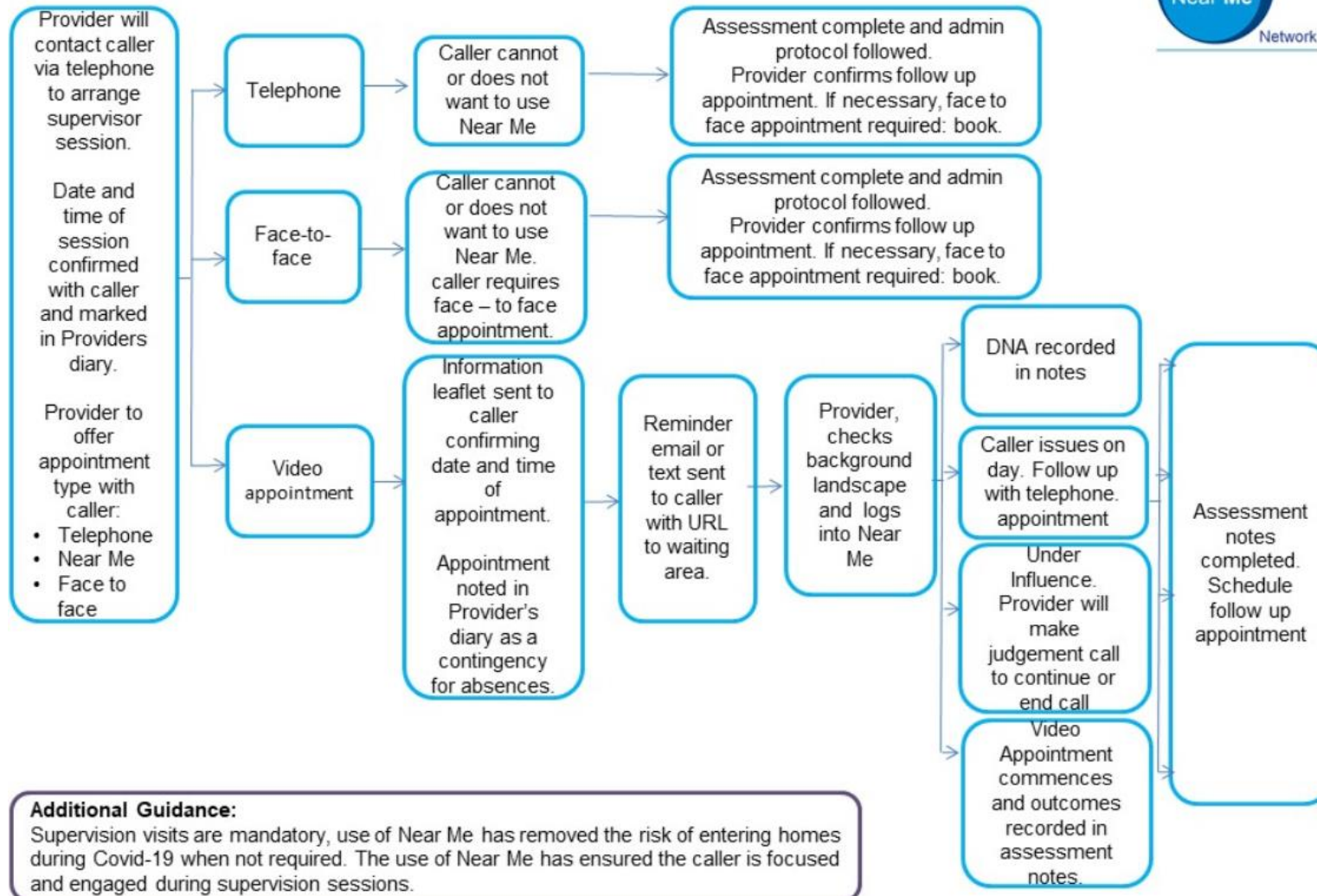


Additional guidance

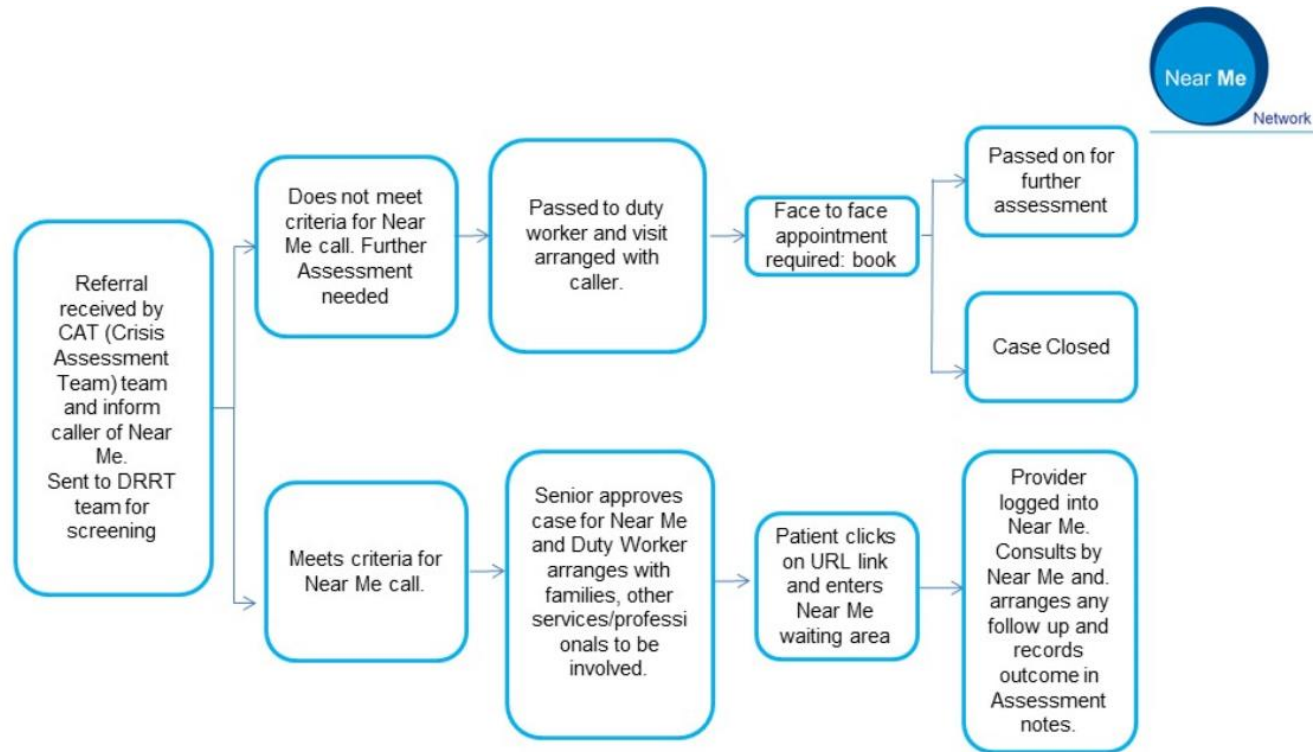
Consider the suitability of Near Me for Care Plan review based on individual resident capacities, needs and wishes as well as those of family/ carers who would usually attend a Care Plan review, and if any additional supports need to be put in place to ensure successful video calling, or if a combination of contact methods are needed.

Ensure private time and space is set aside for Near Me review, as is the case of in-person reviews. For example, no time clash with family visits to resident, and computer/device is available for use in a confidential setting. .

CRIMINAL AND YOUTH JUSTICE – COMMUNITY PAYBACK ORDERS



DUTY AND RESPONSE TEAM



Additional Guidance:

Some calls that are received are not suitable for Near Me and need further assessment prior face-to-face visit. Criteria for Near Me has been agreed locally within the service for example signposting and further information.

APPENDIX 1: 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 client 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.

Waiting Area Administrator: a local staff member who will manage the waiting area. They will be responsible for creating new users, assigning roles and other admin tasks.

APPENDIX 2: POLICY DRIVERS

Improving the use of Near Me within Social Services aligns with the Digital Health and Care Strategy (2018) to:

- Spread the use of video consultations direct from people's homes (including care homes).
- Empower citizens to better manage their health and wellbeing, support independent living and gain access to services through digital means.
- Put in place the underpinning architectural and information governance building blocks for the effective flow of information across the whole care system.

The use of Near Me can support the enacting of the Health and Social Care Standards (2017) Principles 'Be included' and 'Responsive care and support' by offering an additional means, where appropriate, for citizens and social services to interact.

Scaling up and improving use of Near Me within this sector is also underpinned by Protecting Scotland's Future: The Government's Programme for Scotland 2019-2020:

"Attend Anywhere (which powers Near Me)...will now rollout to primary care and social care services so more services can be delivered closer to people's homes."

APPENDIX 3: EXAMPLES OF SERVICES & PROCESSES WHERE VIDEO CONSULTING IS USED IN SOCIAL SERVICES

The following list give examples of services and processes where Near Me is used in Social Services. for use of Near Me. However, the need to make case-based judgements and adhere to statutory requirements remains.

- Care Plan reviews in residential care settings.
- Providing signposting and guidance.
- Children and Families crisis support work.
- Counselling services.
- Criminal Justice - Community Payback Orders.
- Mental health support services.
- Early stage engagement with Duty Social Work.
- Under appropriate circumstances risk assessments can be completed remotely.
- Supporting individuals in collaboration with other services.
- Social chats for wellbeing between workers and people they are supporting.
- Virtual inspections and contact with Care Inspectorate.
- Consultation between service provider, the person accessing the service and family members (3 way calling).

Decision making in a service about whether Near Me is an appropriate tool to use should be based on professional judgement informed by:

- the individual needs of people accessing services
- statutory requirements
- risk assessment
- access to reliable digital technology and connectivity

APPENDIX 4: FURTHER INFORMATION

Further information about setting up Near Me is available if required from the following sources:

1. Near Me implementation guidance in multiple care settings (via TEC):
<https://tec.scot/digital-health-and-care-in-scotland/video-enabled-health-and-care/covid-19-implementing-near-me/>
2. Equality and Diversity Impact Assessment (EQIA):
<https://www.gov.scot/publications/near-video-consulting-programme-national-equality-impact-assessment/>
3. Training on Near Me video consulting (via NHS Education for Scotland):
<https://learn.nes.nhs.scot/28943/coronavirus-covid-19/remote-consulting>
4. Training Videos on Near Me via National Video Conferencing Team
<https://www.vc.scot.nhs.uk/near-me/training/>
5. Caller information: <https://nearme.scot>
6. Resource Centre with information about the underpinning platform (Attend Anywhere):
<https://nhs.attendanywhere.com/resourcecentre/Content/Home.htm>
7. Further resources on video consulting, including links to published evidence:
<https://tec.scot/covid-19-video-enabled-services/> and <https://tec.scot/digital-health-and-care-in-scotland/video-enabled-health-and-care/>
8. Near Me user guide: <https://tec.scot/wp-content/uploads/2020/09/How-to-use-Near-Me-worker-guide.pdf>
9. Summary poster for worker walls: <https://tec.scot/wp-content/uploads/2020/09/Near-Me-Attend-Anywhere-call-screen-summary.pdf>
10. Iriss: ESSS Evidence Outline: Scoping the field: video consultations in social care
<https://www.iriss.org.uk/resources/esss-outlines/scoping-field-video-consultations-social-care>
11. Iriss Near Me in Social Services learning resources:
<https://www.iriss.org.uk/news/features/2020/12/11/near-me-social-services>

ACKNOWLEDGEMENTS AND CONTACT DETAILS

Specialty guidance produced by the Near Me Network

This guidance is the output of a Social Services improvement project led by the Near Me Network and IRISS. The Near Me Network is run by the Scottish Government's Technology Enabled Care (TEC) Programme.



With thanks to the five Social Services teams who participated in the improvement project:

East Lothian (HSCP) Duty and Response Team

West Lothian (HSCP) Criminal and Youth Justice Team

Angus Health and Social Care Partnership

Wheatley Group, Fullerton Service

Fife (HSCP) Children and Young Families Disability Team

Additional thanks to members of the Near Me Social Care Steering Group, for supporting the project and guidance development.

For any technical queries please contact The National Video Conferencing Team:
vc.support@nhs.scot

For all other queries, please contact:
nss.nearme@nhs.scot