

Recording your Report of Findings for Review

Congratulations on taking the first step to better results! The following information will help you not only get the most out of this process, but make recording an example Report of Findings a breeze. So make sure to read it in its entirety before diving in.

Got any questions? Just drop me an email: chris@patientcentred.co.uk

Real or Roleplay?

When it comes to assessing your RoF, recording a real conversation with a live patient is significantly more effective than an example roleplay you recorded. We'll get a more accurate picture of what happens "in the room", and it also gives me the opportunity to assess the degree of rapport and emotional synchronicity between you both. It will take you further out of your comfort zone, but you'll reap significantly more rewards from the process!

That said, if you just can't bring yourself to do that, I will review a roleplay recording instead. Just be aware that it will miss many of the more subtle nuances, and your feedback may not be as precise. In this situation I would strongly recommend role-playing with another person as the patient, vs just recording it solo / to the camera.

Getting Patient Consent

If you're like most DC's, this is probably the major first hurdle you're concerned with. Fortunately, it's also the easiest one to overcome once you know how.

Asking the Patient

If possible, inform patients in advance of the RoF. If the RoF is during their second visit, you may want to let them know that it's a possibility at the first visit. See the Appendix for both a brief consent form template, and a longer information sheet you can give to patients to read before this visit.

Whether your RoF takes place on the first or second visit, I'd strongly recommend your reception team notifying the patient when they arrive, instead of potentially surprising them by asking at the start of the visit itself.

When asking patients, you should use a specific way of phrasing the question to help avoid patients feeling pressured:

*"As part of our continued learning and development, we occasionally record certain appointments to review for training purposes. Any recordings are kept secure and only shared with colleagues for training and educational purposes. Would you prefer your visit today **not** to be recorded?"*

This achieves two things. Number 1, it shows your commitment to continued excellence. The second point is more subtle - by asking if they would prefer not to be included, you're avoiding the patient feeling like they're turning you down. Some people find it difficult to say "no" to others, and may go along with things despite feeling uncomfortable. Obviously we want to avoid that at all costs. This specific phrase allows patients to either:

- 1) Say no in a positive way: "No, that's fine!", or
- 2) Decline by agreeing with you: "Yes, I'd prefer not to"

Note that this kind of language is a very useful approach to making requests in general - if you want to learn more I highly recommend the book ["Never Split the Difference"](#) by Chris Voss.

Getting Written Consent

You'll want to obtain written consent to record from your patient before the RoF. See the Appendix for 2 different versions. The first is a brief form you can use if someone is going to explain the process to the patient at the time of the appointment. The second is a longer one that includes more details, which you may wish to send to them in advance of the appointment.

Note that I only recommend the later approach if the RoF takes place on the second visit. If you're going to record at the end of the initial consultation, I suggest having it explained verbally in reception. They can then either be offered the longer information sheet to read and sign whilst they wait, or the shorter one to sign straight away.

Lastly, You can only use recordings where the patient has consented to **all sections** for your review. If they consent to it being recorded but not shared, this is still valuable - I highly recommend listening back to this after and reflecting on how you felt you did.

Example Procedures

Here's an example procedure you and your team could follow when asking:

- 1) Front desk ask the patient in reception, using the above phrasing
- 2) Patient verbally consents, and is asked to sign the brief consent form
- 3) DC greets the patient, taken them through, and checks they're comfortable being recorded
- 4) RoF appointment continues as normal
- 5) DC let's the patient know they'll be sharing it confidentially with a colleague to review. Also reminds them that they can ask for all copies to be deleted anytime they wish.

Recording Requirements

To ensure your review is as accurate and valuable as possible, there are a few criteria you'll need to fulfill:

1. Recordings over 15 minutes in length will not be accepted for review. If your RoF is longer than this, then your first bit of feedback is to make it shorter!
2. Audio Quality is far more important than video quality. A smartphone is generally more than sufficient for both, but you must be clearly audible on the recording. You may wish to test this in the room first, in case the acoustics or any background noise interfere with the audio. Recordings with poor quality audio may be rejected.
3. The patient doesn't need to be on screen, but you do. The camera doesn't need to capture you head on, but your face should be visible.
4. Photo's of any handouts or posters that you refer to in the RoF should be submitted via email to chris@patientcentred.co.uk alongside your recording. These will be deleted after you've received your feedback.

Submitting your Review

I recommend using www.wetransfer.com to send me your recorded RoF. It's free to use for a single file, and will be securely encrypted and then deleted after 7 days. The address to send it to is chris@patientcentred.co.uk.

Once you've submitted it, you'll get your video analysis, RoF scorecard and customisable handout templates - all within 48 hours!

Bonus: Self-Reflection

Once you've received your feedback, you'll want to take some time to review it. Because of the level of detail included in the analysis, you'll likely need to go over it several times. As well as this, it's very unlikely you'll implement most of it successfully the first few times!

One of the most valuable tools you can use when improving your RoF is "self-reflection". This involves recording subsequent sessions, and reviewing them yourself. Of course, you can repeat the process in this guide if you like. However you can also use a much more streamlined version - and that's to use audio recordings. Of course, they won't capture as much detail, but they work brilliantly when you're working on the structure, tone and phrasing of your RoF. Plus they are much simpler to do - you don't even need a consent form in most countries (but please check).

Here's how to go about it:

1. Open either the Voice Memo or Sound Recorder app on your phone, or Voice Recorder / Voice Memo on your PC / Mac. These are all free apps that come pre-installed on your device

2. Once you have brought your patient into the room and let them know what's going to happen for that visit, just before you begin ask them "Do you mind if I take audio notes?"
3. ... That's it!

The key here is phrasing the question as if it's a routine one - the same way you would ask "would you like some water?" Your tone should convey that you expect the answer to be an obvious yes. If it seems like a routine question, your patients will generally accept it without thinking twice.

You can then listen back and reflect on those four key areas for your RoF, and compare it to previous versions to assess your progress.

Video Reflective Practice Consent Form

I, _____, do hereby consent to my appointment on _____:

Being recorded for training purposes Yes / No

Being shared via email with colleagues Yes / No

Being shared in a closed group for educational purposes Yes / No

I also acknowledge that whilst all identifying information will be removed, my face, body and voice may be captured in the recording, and consent to this.

I have been made aware that any recordings of my appointment will be stored securely at all times, on as few devices as necessary. I am also aware that I can request any recordings of my appointment to be destroyed with immediate effect Yes / No

Signed: _____

Date: _____

Video Reflective Practice - Information and Consent Form

At [clinic name], we are committed to continually developing our skills and patient experience - both for ourselves and to help colleagues outside of the practice. One of the methods we use is "Video Reflective Practice". This involves recording sections of appointments with our patients, which are then reviewed later and used for teaching purposes.

Your involvement in this aspect of our practice is entirely optional, and your decision to accept or decline this will have no impact on your subsequent care. As well as this, you are free to change your mind at any time afterwards, and any recordings you have been involved in will be destroyed with immediate effect. It's very important to us that your privacy is respected at all times, and you feel comfortable with every aspect of your care.

If you are happy to be involved, it's important you review this form thoroughly and understand the following key points:

- Any recordings of your session form part of your medical records, and will be treated with the same level of care and confidentiality.
- With your permission, videos may occasionally be shared with colleagues for teaching purposes. In such circumstances, any colleagues will be bound by the same confidentiality standard as the rest of your records.
- Whilst your anonymity will be respected as much as possible, at times it may not be possible to do so. Details that may be shared include video images of yourself, and details of your presenting complaint and treatment plan. Your name, personal information and contact information are never shared without your expressed permission in writing.
- Neither we nor our colleagues will ever share your information publicly. When shared for teaching purposes, this is limited to private seminars or within password protected materials.
- Any recordings of your sessions will only be stored on as few devices as possible - all of which must be securely password-protected or encrypted.

If you have any questions about this, please don't hesitate to ask your practitioner for more information.

- I have read and understood this form.
- I consent to my appointment on (date) being recorded.
- I consent to this information being shared with other healthcare professionals for educational purposes only.

Patient Name:

Signature:

Date: