

Template for telephone assessment

This is a template for a telephone assessment. The lists of questions are exhaustive and so you may want to pick the relevant questions and adapt to any of your existing templates.

If you have had motivational interviewing training, do remember to adapt your skills for the phone.

Top tips:

- Use active listening skills
- Be calm
- Be mindful of your tone and pace of speech
- ‘Check in’ with the patients that they understand what you are asking or saying

Introduce yourself (ROLE and NAME, and how you will support).

Hi there, my name is Anna and I am a link worker to help you access practical support and other non-medical needs you may need help with. Your GP/Healthcare professional referred you to me. Do you have some time to discuss how and what I might be able to help with?

We have 1 hour, 45/ 30, 20 mins (insert how long you be taking the call for) today so we will be ending the call at...

I will explain a little more about the service and what I can help with, and answer any questions you have. I will also take a few notes, and will be asking you a few questions for me to understand your needs, how I can support you and link you to the right support service. At the end of the call, we will complete a short survey (PAM/ONS4/MyCaW).

Everything that is discussed is confidential unless I am concerned that you or another person is in danger of harm. We use the same computer system as the doctors so I will record some brief notes about our session for myself and the doctor. (Cover consent if needed).

All of your data is kept securely.

Collating information for the summary plan of their needs

Relevant Assessment questions

- How are you managing during this difficult time?
- It might be helpful for me to understand your current routine?
- What are your biggest concerns you have right now?
- Is there anybody at home that can also help?
- Are you receiving any support from local organisations
- If they are the extremely vulnerable (shielding group) – have they signed up to the gov.uk support (food parcels) etc
- What support do you need from us and / or your local community?
 - Advice on healthy eating, staying physically and mentally active in the home
 - Advice on future GP / Hospital appointments where appropriate
 - What family / community support do you have in place?
 - Picking up shopping / medication / supplies (connect to local community group)
 - A friendly phone call
 - Posting mail (connect to local community group)
 - Any caring responsibilities?

- Housing / Employment Support Allowance / Benefits etc
- Online resources, online libraries, educational activities etc
- Is there any other support you need?

Assessment Questions to ask that may help understand their needs

Medical History – Keep this brief, but it may be helpful to identify or confirm any Long Term Conditions at this stage to either support further in some way such as access to an online support group or feeding back to the GP if they feel they are not managing the condition well.

If relevant it may be worth exploring the below questions:

- Do they need medication and are they able to access medication?
- Do they need support from any other Healthcare Professionals in the wider Primary care or community teams (Dietitians, District Nursing, Incontinency service etc.?)
- Do they have any symptoms of COVID-19?
 - Reiterate self-isolation guidance
 - Reiterate the signs or symptoms associated
 - Where to go for help / further information
 - What to do if your health condition deteriorates
- Are they self-isolating due to COVID-19 symptoms?
- Are they aware of the latest COVID-19 guidance?
 - Reiterate latest COVID-19 guidance

Social History

- Live alone?
- Any dependants? Any other vulnerable adults/dependants in the property?
- Do neighbours/family/friends support in any way? Housing situation?
- Risk of homelessness?
 - Explore what the risk is
 - Private tenant or on Housing Benefit/Universal Credit

Financial

- Any arrears or debt?
- Eligible for Financial support? (Are they new applicants of Universal Credit? If so they could benefit from welfare support)
- If on Universal Credit or legacy benefits:
 - Has Household income reduced?
 - May need to notify any reduction in household income either in Universal Credit Journal (online) or submit a form usually found on Local Authority website
 - Notifications of household income ideally 2-3 weeks before assessment/payment dates
- Are they receiving all welfare payments?
- Do they have access to online or telephone banking?
- Do they have access to food supplies?
 - If they are classed as **extremely vulnerable (Shielding group)**, are they receiving food parcels?
- Have they recently been furloughed?
- Are they able to keep up payments of mortgage, rent, utility bills?
 - Refer to welfare support for repayment plan support

General

- Do they have access to WiFi?
- Do they have a phone that supports WhatsApp and other Apps?
- Do they need digital support?

Any safeguarding issues (if relevant) – This can be picked up in conversation and may need some probing questions. Have they revealed any suicidal thoughts or harmful behaviours to themselves or others living with them?

Ending the consultation

We have about 5-10 mins left of our call and want to thank you for taking the time in speaking with me. I will...(provide a brief summary of what you have discussed and list the action points here, slowly and clearly. These may include a referral to a food bank, a call from a welfare advisor etc).

Check to confirm they understand what you will be doing.

Before we end the call, do you have any questions for me?

Can they contact you outside of the sessions and if so how, when and in what circumstances?

A follow up will be ideal, here you can suggest a date and time or alternatively give a work number they can call. Have a separate spreadsheet of your 'appointment list' to hand so you can book them in directly for a call.

Be sure to record all relevant information (name of patient, unique ID number/NHS number, brief summary of discussion, action points) and store as per PCN guidance ensuring they meet GDPR requirements.



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