

Recommendations for healthcare professionals for a safe telephone consultation



Check your agenda at the beginning of the day

Look over your agenda daily and prioritise attention to health problems over administrative tasks and bureaucratic procedures.



Consult the patient's medical history

Look for possible health and medication problems, allergies or intolerances, last visits, recent test results, appointments with other healthcare professionals...



Write down the most relevant information

Briefly outline the most relevant information that the patient explains, paying attention to the details you need from them.



Identify yourself and the patient

At the beginning of the call, identify yourself (name, professional category and workplace) and verify the identity of the patient (name, surname and ID) or caregiver.



Do not leave confidential information on the answering machine

If the patient does not answer the phone, do not say anything confidential on their answering machine; see if there is another phone number or call later.



Ask the patient what they need and listen to them

Practise active listening and let the patient explain the reason for the consultation and their doubts, without interrupting.



Help the patient understand the information

Explain everything you consider necessary and clarify any doubts that may arise before making any decisions.



Agree on the treatment plan with the patient

Inform the patient about the steps to follow, what progress to expect and what to do if there is no improvement. Check that the important information has been understood.



Record all information

Do not leave any details up in the air: write down all the details of what was discussed with the patient in their medical history.



Attend to the patient in person if necessary

If you need to examine the patient, the patient is uneasy or there are any other reasons, make an in-person appointment to avoid mistakes.

Reference:

Rosa Añel. *Recomendaciones para una consulta telefónica segura: hojas informativas/infografías para el paciente y para el profesional*. Sano y salvo (2020). <https://sano-y-salvo.blogspot.com/2020/11/recomendaciones-para-una-consulta.html?m=1&s=09>