



Technology checklists for video calling an adult or carer

Introduction

This checklist covers the necessary steps a social worker or practitioner should take to ensure that technology for video calling is ready and appropriate.

The decision about whether to carry out the intervention online or whether the adult/carer has capacity and is able to understand and use online contact should have been made before using this checklist.

Please note that not all of the below points are applicable for all cases, and that the points within each header may not always apply in the same order.

For the purpose of this checklist, a **video call** is a visual communication between two people using technology.

Key considerations

- Is a video call either the best option or needed? What other options have you considered?
- What is the reason for this video call? Would you do one video call or several?
- Would you need to record the video call? Why? Consult with your legal department if necessary and ensure you request and record consent.

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Preparing a video call with an adult or carer

Not everybody will feel comfortable with a video call, and not everybody will feel uncomfortable with it either – don't make assumptions.

Ensure the adult/carer is comfortable and able to engage and participate in the video call. Have a pre-call on the phone to agree what will happen when, and ensure the adult/carer is clear about what will happen. You may also consider a trial video call.

Supporting the adult/carer to prepare

Have a conversation with the adult/carer and agree the below checklist items. Ensure at the end of the conversation that they are comfortable with the video call and have understood what will happen.

Equipment

- Does the adult/carer have access to a device that can be used for a video call? They will need a smartphone, laptop, tablet, iPad, etc., an internet connection, and the necessary app installed.
- Does the camera work?
- Does the audio work?
- What applications does the adult/carer have and/or is familiar with?
- Has the adult/carer ever made a video call? If not, what knowledge/help do they need? For example, printed checklist, tips, links to videos or further information, or somebody helping (if this is needed, who can help?)
- If they aren't familiar with the platform, suggest the adult/carer tests the platform and equipment before the actual video call takes place.
- Advise the adult/carer to be ready 5–10 minutes before the video call.
- Ask the adult/carer to ensure the devices are properly plugged in/fully charged before the video call.
- Suggest the adult/carer decides whether they will be using headphones or speakers, and ask them to test them.

Communication needs

- Are there any communication needs that may prevent the video call from being a suitable option? Is there a need for an interpreter? Can sensory impairment needs be accommodated for? Is any extra software needed (i.e. symbols, images, etc.)?
- Agree the right duration of the video call. Agree if a break during the call should be factored in.
- Explain to the adult/care that you may be taking notes and what will happen to these.

Privacy and setting

- Does the adult/carer live alone? Is there anybody else in the household who should not be present?
- Is there a private space that the adult/carer can use for the video call?
- Advise the adult/carer to try to reduce noise disturbances and interruptions as much as possible.

- Does anybody else need to be present? If yes, ensure they are able to make the date and time agreed.
- Advise the adult/carer to try and find a place where there isn't a bright light or window behind them.
- Ask the adult/carer to ensure all their other devices are silent and, if possible, that there are no noise disturbances in the room.

Supporting other professionals to prepare

- Are there any other professionals who need to be part of the video call?
- If not, do you need to arrange a meeting with them before or after?

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Helping you (the practitioner) to prepare

Equipment and platform

- Check your equipment before the video call and ensure it is compatible with the adult/carer equipment.
- Does the camera work? Try to position your camera at eye-level, if you can move your camera to show your hands, that would be better.
- Does the audio work?
- Are you familiar with the application/platform you will be using? If not, consider doing a test call with a colleague.
- Be ready for the call at least 10 minutes before the video call. If you are late, text the adult/carer to let them know what is happening.
- Ensure your devices are properly plugged in/fully charged before the video call.
- Consider whether you will be using headphones or speakers, and test them.
- Close other non-required applications during the video call.

Communication needs

- Is there need for any extra software based on the adult/carer communication needs? Are you familiar with the software? Have you tested it?
- Try to look at the adult/carer when not writing notes.

Privacy and setting

- Find a suitable place for the video call.
- Ensure you can reduce the interruptions or appearances of other people on camera during the video call as much as possible. (Consider using a 'do not disturb' sign.)
- Ensure your background is as plain as possible to protect your personal space and privacy and that no personal details are on sight.
- Ensure there is enough light, and that the main source doesn't come from behind you so that the adult/carer can see you properly.
- Ensure all your other devices are silent and that there are no noise disturbances in the room.
- Move other devices away from the device to be used for the video call to avoid interference.
- Keep alert to security breaches and ensure you report them if they occur.

Invitation

- Check the invitation or link has been sent to the correct addresses
- Check all parties have confirmed the time and meeting place, and that you follow the General Data Protection Regulation (GDPR).
- Put some time in your diary to plan the video call or virtual assessment.

Other things to consider

- Ensure you can sit comfortably and have a table and opportunities to make notes, should this be needed.
- Get a glass of water on hand if you think you may need it during the video call.

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During the video call (intervention)

- Introduce yourself, and ensure the adult/carer understands the reason and purpose of the video call.
- If the agreement has been to record the video call, inform the adult/carer that this will happen and ensure you have their consent. In any case, ask the adult/carer not to record it at their end.
- Confirm that they can hear and see you OK and that you can also hear and see them.
- Agree whether people will mute their microphones when not speaking. This may vary depending on how many people are on the call and the adult/carer familiarity with technology.
- Inform the adult/carer that you may take notes during the video call.
- Emphasise to the adult/carer that they can speak at any time and that if they want or need to stop the video call, they only have to tell you.
- Reassure them you will call them back if there are any technical difficulties.
- Regularly check with the adult/carer that the video call is working for them and if they need a break.
- Keep an eye on the chat box in case they are trying to contact you using it.
- Don't move around too much – get comfortable with silence to give time for the adult/carer to participate.
- Before ending the call, inform the adult/carer that the video call is going to end.

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