

## Working remotely with service users – general principles and guidance

This guidance has been developed to support students who will be involved in working remotely with clients and patients as part of their placement learning activity. This may include working in the normal workplace setting, or working off-site in a call centre managed by the placement provider, or working from the student's own home, contacting clients/patients by telephone or digital devices for interacting with service users e.g. teleconferencing.

Please also refer to the following [Student Guidance](#) in the Policy Library on the Health and Social Care Placement Information website.

- **Data Protection**
- **Staying Safe**
- **Working Hours**
- **Travel**
- **Concerns**
- **Reporting Incidents, Accidents or Concerns**

### General Advice

Please remember that wherever and whenever you are on placement, you represent the university, your future profession and yourself. Respect the people you work with and yourself at all times.

You must adhere to the university's [Placement Learning Expectations \(Roles and responsibilities\)](#).

- ✓ Be safe.
- ✓ Be polite.
- ✓ Be confidential.

### Be Safe

- Risk management – has the visit been risk-assessed, whether the visit is happening online/by telephone or face-to-face? Check with your supervisor; know the risks and know how to manage the risks for your own safety and the safety of the client/service user and placement colleagues. If in any doubt, ask – **never agree to do anything that you have not been fully prepared for and/or you do not feel safe and confident to do.**
- Risk management – if you are meeting clients/service users face-to-face, ensure that you are following the provider's guidance on social distancing, use of personal hygiene measures, and use of personal protective equipment (PPE). **Ensure that your supervisor knows where you are, that you have discussed and agreed your workplan with your supervisor and that any changes to arrangements have been agreed with your supervisor; inform your supervisor/placement colleagues when you go on /return from a visit.**
- **Follow your placement provider's policies and procedures while you are on placement – if in doubt, ask your supervisor for advice and/or contact the link tutor.**

## Be Polite

- **ask to speak with the service user or patient directly**
- **introduce yourself clearly:** tell the person answering the phone your name, that you are a student (social worker; occupational therapist; etc.) from Sheffield Hallam University on placement with (name of the placement provider organisation).
- **check:** are you speaking with the correct person (service user/carer with permission of service user or carer for service user who does not have capacity)? Is it convenient to keep appointment? If relevant – explain why the call is being made at this time, if this is a call that is not announced.
- **conduct:** if available/applicable, use the placement provider's documentation to guide the conversation to ensure that the required information is shared appropriately with and by the service user/client. Use the communication skills you have studied in the university - listen carefully to the service user/client, allow the service user/client time to speak, repeat back (paraphrase) what the service user/client says to check that you have understood what they are telling you, seek clarification if you are unsure, summarise the key points with the service user/client to be sure that you have not missed any key information; give the service user/client an opportunity to add any key points that have been missed during the 'visit'.
- **conclusion:** thank the service user/client for their time, explain what will happen next (follow up actions or referrals that have been requested etc with supervisor, further contact or 'visit' arrangements), and provide the service user/client with the appropriate contact number and email address for your placement provider organisation in case the service user/client wishes to ask for further advice or raise any concerns following your 'visit'.
- **If in doubt** – remember to Be Safe and Be Confidential: end the call politely and inform your supervisor of why the 'visit' had to be terminated.

## Be Confidential

- Follow the university's guidance on **Data Protection; Communication by Students; and Consent and Confidentiality** [\[Link\]](#)
- Students **must not** use their own personal mobile telephones or laptops/personal computers/tablets when working with service users/patients/clients.
- **In exceptional circumstances, where the placement provider requires you to use your own IT equipment and/or mobile telephone, you must follow rigorously the provider's policy and guidelines on use of IT equipment and mobile telephones.**
- Use the work telephone/laptop provided by the placement provider to interact with service users/patients/clients in strict adherence to the placement provider's policies and guidelines on using these devices in accordance with the law (GDPR).
- Seek advice at your pre-placement meeting and induction events if your placement provider is not able to loan work telephone/laptop to you.
- Assess your home space if you are working remotely for some or all the placement time – if you cannot guarantee confidentiality, inform the university and placement provider at your earliest opportunity. This will optimise the chances of finding suitable, alternative placement learning experiences.
- Do **not** keep notes or records in your own home / out of the placement provider's office space as these are at high risk of data breach.
- Do **not** record meetings / 'visits' that you conduct online via zoom/WebEx/MS teams/WhatsApp/facetime or other similar platform.
- **In exceptional circumstances, where the placement provider requires you to make notes, you must follow rigorously the provider's policy and guidelines on this. This includes how and where the notes are made, stored and deleted.**