

Conducting the EP Initial Consultation and Home Visit – Step-by-Step Guide

You will need to conduct an initial online consultation (via Zoom) with each participant prior to them starting the TeleFFIT intervention. Local (Melbourne-Victoria based) participants will also have an in-person home visit where you will visit their home to assess their home environment. For remote clients (those unable to attend Deakin or living interstate), you will assess their home environment during the Zoom-based consultation. Below we have provided a checklist to assist you when planning and conducting the initial consultations / home visits.

Preparing for your client's initial consultation / home visit

1. Schedule your client's initial consultation +/- home visit appointment

Prior to each participant's scheduled initial consultation / home visit, it is recommended that you login to the REDCap platform (via a web browser) and familiarise yourself with the **Pre-Home Visit Health and Medical Review** and the **Case Report Form (CRF)** that you will complete on your tablet/laptop during the consultation / home visit. Your participants' contact information will be available in REDCap. Please call or email them to schedule their appointment/s and record the date/s and time/s in the online form in REDCap so that the research team is aware of your clients' appointments. Please try to schedule your appointments during daylight hours if possible, e.g., 8am to 6pm to align with the availability of the research team if they need to be contacted.

2. Send your client an appointment email

It is good practice to follow up each scheduled appointment with an email to your clients, confirming the appointment date/time and any tasks/preparation required to be done by the clients. We have included a sample email at the end of the Appendix that we suggest you follow, particularly with regards to the COVID-19 guidelines for the home visit.

3. Familiarize yourself with Zoom and TeleHab.

Your clients may need some assistance with setting up and using Zoom and/or TeleHab during the initial consultation / home visit. Ensure you are aware of both the download and set up procedures for each which you may need to talk them through over the phone. We have provided you with a step-by-step guide on how to set up TeleHab in Appendix 2.

4. Review your client's Pre-Home Visit Review form.

The **Pre-Home Visit Health and Medical Review form** provides important background information about your client's medical history, bone density, falls risk, muscle strength and functional ability. It also provides you with key information on their motivators and barriers to physical activity and their goals for the program so that you can plan ahead for your initial consultation with them.

5. Design your client's exercise program

Based on the information from the **Pre-Home Visit Health and Medical Review form**, you must design an appropriate exercise program for your client following the principles outlined in TeleFFIT Resource manual. You will need to create the program and assign it to your client within the TeleHab app, which is explained in Appendix 2.

TeleFFIT Home Visit Checklist – Local Clients

It is important to refresh your memory with regards to your client's health and medical history and other relevant information prior to their home visit.

Below is a checklist of items you need to take with you to each home visit:

- A laptop/smart device with internet to access and complete the Home Visit Case Report Form (CRF) on REDCap.
NB. If you do not have such a device and/or prefer to complete the CRF on paper, make sure you print the form before the home visit, and enter in the data collected onto REDCap at your earliest convenience.
- Instruct client to view **Video 1: How to exercise safely at home** and **Video 2: Tips of safely using the exercise equipment** which are available on the TeleFFIT website
- Print-out of TeleFFIT Activity Agreement Form
- Clipboard and pen to complete the TeleFFIT Activity Agreement
- Mobile phone/camera to take a photo of the completed/signed Activity Agreement
- Your diary/calendar in order to schedule future consultations with your client

Make sure you complete the **Home Visit CRF** in REDCap as you proceed through the home visit appointment and be sure to enter in the time the appointment ends and click "save record" as soon as you have concluded the appointment.

6. Ensure all relevant REDCap forms are complete

For **local clients** (those in Melbourne-Victoria), you will need to complete 2 CRFs in REDCap:

- EP Initial Consultation CRF_Part 1
- EP Home Visit CRF_Part 2

For **remote clients** (outside of Victoria or unable to have a home visit), you will conduct one Zoom-based consultation following the CRF in REDCap:

- EP Initial Consultation Remote Home visit_Part 1 & 2.

The research team will be monitoring your completion of the REDCap CRFs to ensure you have completed each appointment. If a CRF has not been registered as complete within 24 hours of the predicted appointment end time, a member of the research team will contact you by telephone to follow up.

Other Considerations

Depending on their experience, some clients may need to be shown how to use email to communicate with you throughout the study, in addition to requiring assistance with setting up Zoom or TeleHab. For local clients, it is important that you demonstrate the above using the client's smart device or computer, not your own. All participants will have such a device as it is a requirement to be able to take part in the study.

TeleFFIT Sample Email

Initial consultation appointment email for your clients

<< PLEASE FEEL FREE TO EDIT LETTER BELOW AND ADAPT IF LOCAL OR REMOTE CLIENT >>

Dear << enter client name >>,

I am looking forward to meeting you at your initial TeleFFIT online consultation and home visit to help you get set up and started. As discussed over the phone, below are the details of your upcoming TeleFFIT appointments.

Initial online Consultation Appointment date: << enter day and date >>

Initial online Consultation Appointment time: << enter time >>

Home visit Appointment date: << enter day and date >> e.g., Monday, 20th June, 2022

Home visit Appointment time: << enter time >>

We anticipate that the appointments will take about 90 minutes in total (~45 min for the initial online consultation and ~45 min for the home visit).

Prior to your home visit, please have a think about where in your home you might be able to set up your exercise space. Ideally it should be approximately 3 square metres in size and somewhere that will provide you with support (e.g., near a wall or table) if needed. We will run through this together with you during your home visit appointment.

In keeping with Australian Government COVID guidelines, please inform me prior to your scheduled home visit if, within the week prior your appointment:

- You experience symptoms such as fever, cough, runny nose, shortness of breath or other flu-like symptoms,
- You or a close contact test positive to COVID-19,
- You have returned home from overseas travel in the past 14 days.

In the above circumstances we will reschedule your appointment to a later date.

Please do not hesitate to contact me if you have any questions about your appointment, either by email: xxx or phone: xxx.

I look forward to meeting you soon.

Kind regards,

<< enter name >>

Exercise Practitioner

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