MODULE 9 - CONSULTATION PROCESS

ROLE PLAY ASSESSMENT TASK

A role play exercise has been designed as the final part of the assessment for this module. This exercise is designed to show you understand and are comfortable with all aspects of the Consultation Process for both yourself and the person/people you are consulting with. Your assessor will guide the process throughout the task by asking you questions if necessary and listening to your interaction with the "client". You will need to arrange a suitable person to be your "client" for this exercise or we can arrange someone for you.

What you will need prior to the assessment taking place:

- A copy of the person's Intake form / questionnaire
- Clear guidelines and understanding on the Consultation process for both yourself as the Consultant and the Client
- Establish a suitable time for all parties to participate in the exercise, clarifying where or how the assessment task will take place ie: in person or on-line

Pre- Consultation - Practitioner

- Ensure you have arranged and confirmed time, date and method of consultation (online or in person)
- Ensure you have read and fully understood the Clients intake form and make a list of any missing information you may require or list any information that requires clarification.
- Confirm if client is a child, disabled or doesn't speak English and therefore a carer, support person or interpreter will be your main contact prior, during and post consultation
- Ensure you have taken steps for your own personal and professional preparation

Pre- Consultation - Client

- Be aware of the instructions the client has received in relation to preparing for the consultation (*Consultation Preparation Email Document – supplied in the Module information*).
- Once you have connected with the client by phone, on-line or in person, enquire as to whether the client has any questions or concerns in relation to the consultation.
- If the client is accompanied by a support person or team, how would you address this at the outset?

Consultation Checklist

- Clarify missing or unclear information provided by the client in their intake form and any other communication prior to the consultation
- Double check medications or any diagnostic information you feel is relevant for establishing the right protocol for the client (please note this assessment DOES NOT include the actual protocol, more in the preparation and understanding of it only)
- Be clear on the clients' achievable goals and using their own terminology, read them back to the client
- Explain to the Client what steps are to be taken post consult ie:
    - They will receive an email outlining the main points of the conversation including goals, recommended initial protocol, instructions on dosage, how to order online and how to care for their products.
- Once client reads through recommended protocol, they can either return with questions and/or changes or proceed directly to placing their order on-line through ThePortal.Life
- Book an appropriate date and time for a follow-up call ie: 2 weeks after order has been sent out. This is a good time to discuss the Levels of Care option for those needing ongoing support.

Post Consultation

- Draft and send email of recommendations to the client that includes:
    - Agreed goals for client or person in their care
    - Basic outline of protocol and dosages
    - Any other information to be supplied such as recipes, specific links to data or product knowledge
    - Documentation: How to order your products online, How to care for your products
    - Confirmation of next appointment
    - Costs involved
    - Any other relevant information specific to this client or any further information that may have been missed in the consultation
- Do you need to contact any other person involved or an appropriate colleague for the clients' on-going care?
- Confirm follow-up or future contact dates in diary
- Analysis.
- Add consultation notes in the client's file in ThePortal.Life
- Is there anything different you could have asked or discussed?
- Did you notice any triggers within yourself or aspects of the consult that created tension or discomfort for you and/or the client? What steps could be taken next time to avoid this?
- What aspects were done well and what could be enhanced?
- Was there any learning that needs to be noted to be included or implemented for future consults or to be shared with colleagues?

NB: This consultation process and the information collected about the client can be used as **Case Study Number 1 for Module 10 Assessment task – Protocol Criteria**