

## Guidelines for Recorded Patient Consultations for Training Practices and CME (Continuing Medical Education) Groups

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## Recording of consultations

Recording of consultations in this document refers to all modes of recording consultations including but not restricted to audio, video, electronic, digital camera recording of consultations.

### Important:

- All recorded consultations must be accompanied by a valid consent form to be signed by Trainer/Programme director prior to viewing the consultation.
- Only patients who are competent to consent can have their consultations recorded. Consultations with children require signed parental consent.
- Recording of consultations should be handled with the same level of security as patient record files.
- For recorded telephone consultations, the attached standard consent sheet should be read out, and verbal consent should be recorded at the beginning and end of the consultation. In this situation the trainee should sign the consent stating that verbal consent is present in the recording.

### Documentation:

1. The Data Protection Officer/Trainer in each training practice will be required to maintain a log of patient recorded consultations which will be kept for the purpose of periodic audit (see Practice Record Log Form). This will include date of erasure of digital material and details of trainee responsible.
2. The ICGP patient consent form should be made available online for printing as a stand-alone form.
3. Individual patient consent forms to be scanned to patients file on completion of the consultation session.
4. The patient consent form must accompany any digital material to be used for teaching or examination purposes and to be countersigned by Trainer/Programme Director.

## Protocols in obtaining and recording patient consent

1. The role of the practice receptionist is to advise patients that the trainee is seeking to record some consultations in that clinical session. They should not be expected to have any role in obtaining patient consent. If the patient advises the practice secretary/receptionist that they do not wish to have their consultation recorded they must advise the trainee of this.
2. Individual trainees will take direct responsibility for obtaining patient consent both to initiate recording (signed before the consultation) and for its use for teaching purposes (signed after the consultation).

Informed consent means that the patient understands that:

- a. the recording may be held for a short period on file with the trainer
  - b. the recording will only be used for teaching doctors
  - c. The recording may be transported via a secure method for peer analysis but will auto d within 6 weeks
  - d. the patient can request the recording to be stopped at any stage during the consultation
  - e. the recording in the practice will be erased within 6 months of recording the consultation, unless written consent is obtained from the patient to extend the specified period.
3. Trainers/Programme Directors must view/counter sign consent form prior to its use for teaching or evaluation
  4. Individual patient consent forms to be scanned to patient's file on completion of the consultation session.
  5. Trainee on completion of the rotation to sign off the practice log of patient recorded consultations and maintain a copy in their own education file.
  6. Only patients who are competent to consent can have their consultations recorded. Consultations with children require signed parental consent.

### **Security of recorded consultations on recording equipment and digital media.**

1. Recordings of consultations should be handled with the same level of security as patient record files
2. Storage of Data must be in compliance with Data protection and Medical Council Guidelines. Data in transfer from the training practice to training scheme (day release) must be digitally encrypted
3. Training Practice must accept that there is an inherent risk of breach of confidentiality once any patient consultation is recorded and strategically implement procedures to minimize risk of breach of confidentiality.
4. Training practices to have a secure location for storage of camera/recoding equipment at all times when not in use.
5. The Trainer is responsible for the security of the camera while in use in the training practice.
6. Recording equipment to be used only for the recording of consultations and not for the continued storage of recorded consultations.
7. The Trainer is responsible for erasure of recorded consultations and the recording of same both in patients file and practice log.

## **The role of the GP Trainee**

1. Under no circumstances should there be any recording of intimate examinations or the camera be pointed towards the examination couch.
2. It is the professional responsibility of the GP trainee to obtain consent before and after the consultation.
3. Trainees must ensure that Individual patient consent forms are scanned to patient's file on completion of the consultation session.
4. The patient's consent, by the doctor, should be recorded during the consultation.
5. When a camera is not in use, it should either be removed or covered or alternatively point the lens towards the wall.
6. Trainees must ensure that the camera is used only for the recording of consultations and not for the continued storage of recorded consultations
7. Trainees must ensure that the recordings of consultations are handled with the same level of security as patient record files.
8. Trainees on completion of the rotation must sign off the practice log of patient recorded consultations and maintain a copy in their own education file.
9. Review of the recording for learning purposes is to be conducted in the face to face sessions using the Panopto video platform



## **Video analysis platform, Panopto**

Please follow the link below for detailed guides on using Panopto:

[User Guides for Panopto](#)

### **Please note the following:**

It is the professional responsibility of the GP Registrar to obtain consent. This should be recorded during the consultation. The consent form should be scanned to the patient's file on completion of the consultation.

Video recordings should not be taken or uploaded without prior signed consent by the Patient. There should under no circumstances be any recording of intimate examinations.

Videos uploaded to the Panopto platform will automatically delete from the site after six weeks. The Educators on your training scheme can review the uploaded video once submitted and shared with the relevant team member or trainer.

Recording of consultations must be handled with the same level of security as patient record files. Recordings in the practice should be stored securely and deleted within 6 months.

The Guidelines on Patient Consultations and Consent form should be read prior to recording consultations.

Queries or issues should be directed to **[supporthub@icgp.ie](mailto:supporthub@icgp.ie)**



## **The Role of the Trainer**

To ensure that the practice meets with all requirements as outlined in this protocol.

The Trainer is responsible for the security of the camera while in use in the training practice.

The Trainer is personally responsible for erasure of stored recorded consultations and the recording of same both in patients file and practice log.

It is the responsibility of the trainer to ensure the erasure of recordings of the consultations after 6 months or in line with any written consent extending the period of storage.

Prior to commencement of recording of consultations in the training practice, trainers must run an induction/ teaching session with the trainee on the recording of the consultations and responsibilities involved, including consent, storage and erasure and compliance with data regulations.

Practices must have data management guidelines in place, including systems to ensure compliance by the Trainees.

The erasure of recordings must be included in the appraisal documentation at the end of each rotation.



## **The Role of the Scheme Directing Team**

The scheme directing team has a responsibility to remind registrars at the end of each placement of their requirement to ensure consultations recorded by the registrars have been erased. Also to ensure that Trainees are not holding recorded materials beyond the consented time frames.

The scheme directing team should use the face to face protected time for review of and learning from recorded patient consultations, using the Panopto platform



## **Appendix I: PATIENT INFORMATION LEAFLET**

### RECORDING OF CONSULTATIONS IN GENERAL PRACTICE

Dr..... is recording some of his/her consultations with patients today. This will be used to help teach doctors how to improve their consultation skills and their ability to talk to patients.

We should be grateful if you would help us by agreeing to your consultation being recorded.

- If you would prefer your consultation not to be recorded all you have to do is to say so. This will not affect your consultation or further treatment in any way.
- The recording equipment will immediately be switched off should you request this at any time.
- No intimate examination will be recorded.
- If you agree to the consultation being recorded you will be asked to sign a consent form, or for a telephone consultation, to allow your verbal consent to be recorded.
- The recording will be used by doctors only for the purposes of teaching, assessing or learning about consultation techniques in general practice, which will be for the long-term benefit of patient care.
- The recording is subject to the same degree of confidentiality and security as patients' medical records. The doctor conducting the consultation or his/her supervisor will be responsible for ensuring confidentiality in the future use of the recording and its erasure.
- The recorded file may be transported via a secure mechanism to the doctor's peer education site for analysis with other doctors in training. If this occurs the file will be erased within six weeks.
- No recording of a consultation will be stored beyond a period of 6 months unless you give further written consent.

## **Appendix II: INFORMATION FOR PRACTICE SECRETARY/RECEPTIONIST**

This is for the purpose of learning and teaching about consultation in general practice, and to help doctors improve their consultation skills and their ability to talk to patients. For patients attending in person, the patients should be given an information sheet when they attend surgery. However, it is useful if receptionists booking patients in would inform the patients that their consultation may be recorded and that they might consider this, outlining the purpose, the voluntary nature and the consent requirements. Most patients are quite happy to help with this kind of activity, however, some will clearly feel uncomfortable at the thought of taking part and may have difficulty expressing this. It is very important that patients are not pressurised in any way to accept a recording of their consultation and they must be assured on this point.

Please note the following points:

- There recording is kept completely confidential and is only viewed by doctors.
- Aim for as normal a surgery as possible, whilst recognising that some patients will not want to be recorded.
- Patients who do not want to be recorded can be offered an appointment at another time or with another doctor, or can attend this session and be assured that the recording equipment will be switched off without this affecting their treatment in any way.
- Patients who agree at the time of making the appointment can change their minds when they later engage with their appointment.
- The secretary/receptionist has an important role in ensuring that patients have sufficient information to make a decision about being recorded without feeling unfairly pressurised.
- For patients who attend, upon arrival at the surgery, the patient should be given the information sheet about recording consultations to read. They should also be given a consent form to sign with the trainee.
- Inform the trainee if the patient advises you they do not wish to have to have their consultation recorded.

THANK YOU FOR YOUR HELP



## **Appendix III: NOTICE TO PATIENTS**

### REGARDING RECORDING OF CONSULTATIONS

This is a Training Practice attached to a Training Programme for General Practice. From time to time, we make recordings of consultations to help teach doctors how to improve their consultation skills and their ability to talk to patients.

Your consent will always be requested if a recording is being taken and the practice secretary will give you more information, including a consent form and information leaflet.

The recording will focus on the communication between the doctor and patient and will not record any intimate examinations.



## Appendix IV: CONSENT TO RECORD CONSULTATIONS

We appreciate your permission to record your consultations with the doctor today.

- The consultation may be seen/ heard by doctors who are in training, and their tutors, in a confidential setting. This is for teaching purposes
- No intimate examinations will be recorded
- You can request the recording to be switched off at any time during the consultation.
- You will be asked after the consultation if you want the recording erased.
- The recording will be securely protected by the recording doctor at all times.
- To facilitate assessment of the doctor on your consultation the encrypted media file may be uploaded to a secure web based site, Panopto.
- The recording will be erased by the recording doctor not later than six months from the date of recording.

I agree to my consultation with my doctor today being recorded for educational purposes. The recorded consultation will be erased on or before, **date**.....

Patients Name (print) : \_\_\_\_\_

Signed before consultation: \_\_\_\_\_

Signed after consultation: \_\_\_\_\_

Date of recording: \_\_\_\_\_

Registrar signature & MCRN: \_\_\_\_\_

Trainer/PD Signature & MCRN \_\_\_\_\_

Date of erasure	Date scanned to patient file	Registrar signature



**Appendix V: TRAINING PRACTICE PROTOCOL FOR RECORDING OF PATIENT CONSULTATIONS**

**Training Practice Name:**.....

**Trainer:** .....

**Data protection officer** .....

**Trainee:** .....

**Period of Training:** .....

No.	Agreed protocol to be returned to Training Programme Prior to commencing Patient Recording	Trainer Initials	Trainee Initials
1.	Trainer and Trainee have together reviewed the current protocol		
2.	Notice in Waiting Room		
3.	Reception staff advised of day of consultation recording		
4.	Log book for all recorded consultations established in practice		
5	Consent forms available in Trainee consulting room		
6.	Individual patient form to be scanned to patient's file on completion of the session.		
7.	Logbook to be updated and to include date or erasure.		

This form to be returned to Training Programme Office prior to commencing consultation recording.

