

Technical Leadership Team Inclusive Eye Health

Protocol for Virtual Project Visits¹

Modern technology offers new possibilities when it comes to visiting CBM partner eye health projects. While visiting and monitoring a project remotely surely has its disadvantages and limitations compared to a physical visit, it also can be very beneficial especially in times of the global COVID-19 pandemic. Besides being independent of travel restrictions, virtual project visits could also help in reducing cost, travel time and carbon footprint. This protocol aims to give guidance on how to visit a project virtually.

Sequence of the visit

1. Preparation

CBM and the eye health partner agree on topics that need to be discussed (e.g. partner assessment, quality management visit, environmental snapshot, assessment of inclusive eye health services etc.), technology to be used for the virtual visit, responsibilities and preparations necessary before the visit, people who need to be available for the visit, timeframe and schedule. All of this should be recorded in the TOR.

2. Virtual Visit (suggested duration: approx. 10 hours over 2 days)

- a. **Introductory meeting** (1 hour): The visit starts with a meeting of all relevant participants both from CBM and senior staff from the implementing eye health partner who are in charge of the project. The aim is to introduce everybody involved, discuss the agenda for the meeting as well as general topics, such as benefits/limitations of a virtual visit, patient confidentiality, etc.
- b. **Working sessions** (rest of day 1 or 3-4 hours): Afterwards separate sessions could run, depending on feasibility even in parallel, on different topics with a smaller number of people who are involved with each topic that needs to be discussed. These sessions should be based on CBM documents created for physical partner visits as far as applicable for a virtual visit, such as partner assessment documents and the quality management monitoring tool, and could also include shorter online training sessions.
- c. **Virtual hospital tour** (most of day 2 or 2-3 hours): Next a virtual tour of the partner eye unit follows. This could be divided into two parts. First an observational part which focuses on different areas of interest such as equipment, medical storage, patient files, accessibility features and solar power/water collection. The second part of the virtual tour is more interactive, and includes e.g. observation of how patients are examined, how biometry is done, how hand scrubbing is performed etc. Depending on the type of visit the virtual tour could also focus on specific areas of the services provided, e.g. a remote video auditing of surgeries.

¹ This IEH virtual visit protocol aims to give guidance on how to visit a project virtually and can be applied to all CBM supported projects, not just IEH projects.

- d. **Virtual Coaching/Teaching** (optional): An additional possibility is to use a time-slot during the visit for a real-time virtual coaching or training session, e.g. on surgical techniques. A additional day might need to be added for this purpose.
- e. **Debrief** (1-2 hours): To conclude the visit everybody involved meets again to discuss open questions and the way forward, including the identification of (online) training needs. Action points should be formulated with clearly defined responsibilities and timelines.

Information and communication technologies

1. **Internet connection:** Conducting a virtual project visit requires a relatively fast and stable internet connection for all participants.
2. **Laptop, tablet or mobile phone:** To connect to the internet, participants also need to be equipped either with a laptop, tablet or mobile phone with a webcam, microphone and speaker. The hospital tour should be done with the help of a mobile phone camera or with a portable digital video camera allowing sharing of real-time online videos in good quality
3. **Application:** the platform for online videoconferencing that should be used is MS Teams. If there are technical issues with MS Teams, other platforms such as Zoom should only be used if the partner acts as the host and invites the CBM participants to the meeting. The use of WhatsApp is not recommended.
4. **Photography:** Photos can be taken using a mobile phone camera or digital camera and can be used for monitoring physical infrastructure projects and progress over time.
5. **Recordings:** It should not be necessary to record any of the sessions of the virtual visit, and a regular project visit report should be compiled by the IEH Advisor after the visit. If, however, it is decided to record part or all of the visit, the person in charge of recording has to ensure that CBM guidance is closely followed (see below). Every video or picture will be stored on the CBM Media server. This ensures that pictures and videos can only be shared with CBM's permission. CBM is responsible for ensuring compliance with the valid data protection law with regard to any video or picture taken in a CBM Partner project. CBM is also liable for inadvertent distribution of pictures and videos. Therefore, pictures or videos must not be shared outside the control of CBM. If pictures or videos are taken of staff and/or patients, it is necessary to sign the relevant consent forms, including by CBM colleagues and independent of the device/medium used to take pictures or record videos.

Extract from: CBM Guidance on Recordings in Teams

The functionality to record meetings in Teams is available for internal users only, it is not possible for external users. Recordings are only to be used for internal purposes.

- Normally, the organizer of the meeting is the person who records the session. Therefore, the organizer owns the recording.
- It is as well possible that other CBM participants of the meeting start the recording but not recommended.
- **You must ensure**, that all participants are informed verbally about the start of the recording. The automatically displayed message in MS Teams about the start of the recording is not sufficient.

- In case you do not want to participate a recorded session then you can leave it without fear of repercussion.
- All persons participating in recordings/video conferences -also when working from home- **must ensure** the confidentiality of images and sound, especially in personnel discussions.
- Teams recordings are automatically stored in the MS Stream app which, for the time being, is made available only for that purpose.

All recordings are stored automatically in the Microsoft Stream App after the recording has been stopped.

- The recording person owns the recording and receives an email including a link to access the recording. Normally, the organizer of the meeting is the recording person.
- CBM participants of the meeting can access the recording via a link provided in the meeting chat in Teams or directly in MS Stream.
- CBM participants of the meeting can only view the recording but do not have the option to share it.
- Non CBM participants (includes external users with CBM account) of the meeting cannot access the recording in MS Stream and are not able to access the link to the recording in the meeting chat in Teams.
- Non CBM participants of the meeting can be provided with the recording if required. The owner of the recording shall carefully assess with whom the recording is shared and must inform all other participants of that intended use in advance.