Telehealth Protocol

Prior to every session:

- Retrieve client record either on EHR or paper file.
- Have client contact information readily at hand, including address and emergency contact.
- Ensure good lighting and a distraction-free environment.
- Clear distracting items from the background.
- Ensure your camera angle is at or slightly above eye-level. Avoid lower camera angles that make it appear that you are looking down at your client, or that they are staring up your nose. You may wish to place your device on a box or stack of books to raise the angle.
- Test your headphones, camera, and sound.
- Secure your environment for privacy. Hang or place "Do Not Disturb" signs. Instruct household members or officemates that you are not to be disturbed except in the case of a <u>life-threatening</u> emergency. (e.g., running out of milk, not being able to find shoes, dog needs walking – are not emergencies.)

Conducting Telehealth Sessions

- Connect to your virtual meeting space.
- Confirm client can see and hear you; confirm you can see and hear client. Adjust as necesssasry.

First telehealth session orientation:

- **First, ask the client if they have privacy**. Encourage them to use headphones if available. Ask the client, "If you didn't have privacy, or needed to end the session due to a breach in privacy, let's have a codeword." The APA encourages the use of a phrase such as "Blue Toyota." Agree that if the client uses the phrase, you'll say something like, "I'm so sorry, something has come up and I need to end early today. I'll be in touch," and then terminate the session. Agree to follow up via your preferred means later.
  Advise the client that although teletherapy is a lot like meeting in-person, there are some differences that you want to briefly address. Let them know that at the start of every session, you'll ask a couple of questions, about their location and emergency contact person.

- **Confirm Client Location.** Ask the client to confirm their current location address. Make a notation in your progress note that this was confirmed or updated, as necessary.

- **Review the client's emergency contact person.** Review the emergency contact on file for the client. Ask if this information has changed. Update if necessary. Request the client update you if they wish to change their emergency contact.

- **Ask client the location of their nearest emergency facility.** Clients often know the closest hospital emergency room. If necessary, Google emergency facilities closest to the client location and share this information with the client.

- **Advise the client what to do if (and when) technology fails.** Advise the client that the connection could be disrupted; e.g., audio or video could drop or could lag, and that this is expected. Request the client to wait for 30 seconds if this occurs as it may often self-correct. Advise if the problem occurs more than three times or is severely disrupting the session, you will terminate the connection and call them via telephone to complete the rest of the session.

- **Normalize the client experience.** Advise the client that research shows that for those not well-experienced with video conferencing, research shows it may take 3-4 sessions for deeper work to occur. Assure your client this is normal.

- **Request open communication.** Encourage your client to share any frustrations or feedback about the telehealth experience. Process this information just as you would any other clinical issue.

Every telehealth session protocol:
Perform the following checks and *document* each:

- **Ask client if they are in a private and confidential space.**

- **Confirm client address and location.** If location has changed since last session, re-determine closest emergency facility.

- **Inquire if emergency contact has changed.**

- **Remind client of code word client can use to terminate session if they no longer have confidentiality.** (e.g., “Blue Toyota”).

- **Begin session.**