Telecounseling Checklist

Deciding if telecounseling is right for you

Resources you'll need

- [ ] Private space with a door
- [ ] Sound machine
- [ ] Ability to keep records secure and confidential

Technology requirements

- [ ] Computer, laptop
- [ ] Reliable internet access
- [ ] Microphone, speakers (or headset), and camera
- [ ] HIPPA- and VAWA-compliant platform

Competence

- [ ] Knowledge about providing remote services (For example: best practices, challenges, benefits)
- [ ] Comfort with providing remote services, including technology
- [ ] Understanding of technology
- [ ] Ability to do basic troubleshooting for technology and platform

Deciding if telecounseling is right for your clients

Conduct an intake assessment with potential telecounseling clients before you use technology to deliver counseling services. Ideally, this assessment should be done in-person to evaluate the client's needs. Conduct the assessment virtually during a separate appointment prior to your first virtual counseling session if an in-person assessment is not possible. Make referrals as appropriate if you feel the client's needs are beyond your scope of practice.

Resources clients will need

- [ ] Private space, ideally with a door
- [ ] Ability to minimize distractions

Technology requirements for clients and counselors

- ☐ Computer, laptop, tablet, or smartphone
- ☐ Reliable internet access
- ☐ Microphone, speakers (or headset), and camera

Comfort-level of client

- ☐ Feels comfortable (or is willing to try) receiving services remotely
- ☐ Use of technology does not cause prohibitive amount of stress or anxiety (If so, can practice sessions be scheduled to build skills and feelings of competence?)
- ☐ Understands benefits and challenges of telecounseling

Before the session begins

Obtain informed consent

- ☐ Clients, ages 14 and older, can provide informed consent. For clients 13 and younger, a parent or legal guardian must provide consent.
- ☐ Fully explain the services you/your agency provides, confidentiality and its limitations, and any relevant policies around service provision (for example, missed appointment policies, boundaries and expectations) as you would for in-person appointments. You must also explain the benefits and challenges of receiving these services through virtual means, so that clients can decide what is best for them.
- ☐ Clients must: a) consent to receiving services, b) consent to receiving them virtually, c) understand limitations of confidentiality, including mandated reporting and release of information (such as survivor's name and location) that may be necessary in cases of emergency prior to providing services online. Make every effort to obtain signed, written consent. Options to consider may include the use of mail to send forms between the counselor and survivor or parent/guardian, or in cases when the need is emergent, electronic signatures, email verification, or pictures of the signed consent may fulfill the requirement. For more information, review this document from the National Network to End Domestic Violence (NNEDV, 2020), Digital Written Consent to Share Information.

Preparing yourself

- ☐ Be creative and think of ways to adapt your methods and activities to online delivery. Use features of the platform to increase engagement and interactivity, such as chat, screen sharing, or emoticons.
- ☐ Dress as you would for appointments held in your office. Avoid eating or chewing gum during sessions.
- ☐ Prepare your space. Make sure your space is private and quiet. Adjust your lighting to ensure the video of you is as clear as possible. Set up your camera to be at eye-level so that you can easily make eye contact with your client. Be mindful of what can be seen in your camera's view, and adjust as necessary.

- ☐ Close and lock your door, as needed, to avoid interruptions by people and pets.
- ☐ Test your equipment. Make sure your audio and video are working well.
- ☐ Make sure your device is fully-charged or plugged in.
- ☐ Use a wired internet connection if it's an option. You will be less likely to lose your connection.
- ☐ Close all unnecessary browser or document windows to improve quality of your audio/visual transmission.
- ☐ Set up your virtual office so that the client's sound and video is muted when they enter, if possible. That way, they can choose to turn on their microphone and video camera when they are ready.
- ☐ Have the contact information for tech support close by.
- ☐ Be sure to read and have access to the client's file, so that you are familiar with the most recent updates.
- ☐ If your client will need any worksheets, handouts, or supplies for the session, make sure to provide them in advance or during the session.
- ☐ Review this document from the Victims Rights Law Center (VRLC, 2020): Protecting Survivor Privacy When Working From Home: A Guide for OVW-Funded Victim Service Providers.

Preparing your client

- ☐ Be sure to explain you/your agencies expectations for the use of telecounseling and remote services. For example, review your policies for missed appointments and how to seek support between telecounseling appointments.
- ☐ Explain to the client the importance of maintaining a private, quiet space for counseling appointments, and how their confidentiality can be compromised if others are able to overhear or are present during their sessions.
- ☐ Teach your client how to use the features of the platform. Consider scheduling a practice session.
- ☐ Describe how virtual sessions will go, and plan in advance for how you will address technology issues or emergency situations. For example, explain that at the beginning of each session you will need to confirm their identity, obtain an alternate means of contacting them (via phone or text), and their geographical location, in case of emergency.
- ☐ Arrange for an adult caregiver to be "on call" during the session in case of emergency or crisis for clients ages 13 and under. This person does not need to be in the room, but should be on site. Obtain this person's phone number so that you can call them or text them, if needed, during the session. While this may be a good practice in some cases with other clients, as well, it is important to consider and explain the impact to the client's confidentiality.
- ☐ Explain the limitations of confidentiality when receiving services remotely so the survivor can provide informed consent.

At the beginning of each session

- ☐ Make sure that your client can see and hear you.

- ☐ Confirm the identity of your client. Use two-factor identification process, such as asking their name and birthdate, especially if this is your first session.
- ☐ Reiterate the importance of ensuring privacy and confidentiality during the session.
- ☐ Obtain/confirm an alternate means of contacting the client if connection is lost, such as a cell phone number or email address.
- ☐ Confirm/obtain the client's geographical location, in case of emergency, so that you can provide an address to first responders.
- ☐ Review your technology back-up plan for if there are technological issues or connectivity is lost during the session. For example: Should you try to log back on? How much time will be spent trying to reconnect before using the alternate means of making contact? Will you call them or should they call you?
- ☐ Go over the emergency plan. For example, if they suffer a crisis or medical emergency, let them know you will call 911. For clients under the age of 14, let them know that you will call their adult caregiver to help them, and if necessary, you will call 911.

During the session

- ☐ As you would during in-person sessions, use body language to show that you are listening and that you care. Make eye contact, nod along, and use facial expressions to show that you are "with them," even if you're not in the same space.
- ☐ Use reflective listening to ensure that you are in tune with what your client is expressing to you.
- ☐ Use different platform features to offer alternative ways for clients to express themselves. Some clients may prefer to type their thoughts into a chat box, for example.
- ☐ Inform the client if you are doing something outside of camera view. For example, if you are taking notes during the session, let the client know what you are doing because they may not be able to see you writing. Even something as simple as going off-camera and muting to blow your nose could cause a client to wonder what is happening and cause them concern.

Concluding the session

- ☐ At the end of the session, check in with your client about their experience of using telecounseling. Is it working for them? Are there things you can do to improve their experience? (It's okay to let them know if this is a new venture for you, as well! Authenticity builds connection.)
- ☐ Review with your client how they can reach you between appointments, and what they should do in case they have an immediate or emergent need.
- ☐ Schedule your next appointment with them, if appropriate.

After the session is over

- ☐ Be sure to document the appointment.
- ☐ Reflect on your experience – How did it go? What went well? What could be done to improve the experience for you and your client? What new skills do you need/want to learn to improve your telecounseling practice?
- ☐ Seek supervision. Telecounseling can open the door to many new experiences and opportunities, and it is important to both practice self-reflection, and to talk through your successes and challenges with your supervisor.

References

National Network to End Domestic Violence. (2020). Digital written consent to share information [Webpage]. https://www.techsafety.org/digital-written-consent

Victim Rights Law Center. (2020). Protecting survivor privacy when working from home: A guide for OVW-funded victim service providers. https://mcasa.org/assets/files/Privacy_When_Working_at_Home_VRLC.pdf