

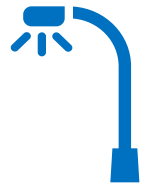


Telemental Health Tip Sheets

Tips for Interacting with Clients During Virtual Appointments

Using technology to deliver mental health services may be new to you. Below are some helpful tips to consider as you adapt to new telemental health technology solutions for service delivery. For additional resources and updates on how the COVID-19 public health emergency affects the delivery of behavioral health services in New York State, please visit <https://ctacny.org/covid-19-resources>.

1. If possible, opt for **video** appointments rather than phone appointments. We know that interpersonal communication involves more than words. Body language, facial expressions, and vocal intonation are communicated more effectively via video appointment. Limit texting to appointment reminders only. All virtual appointments should take place by phone or via video appointment.¹
2. Minimize distractions during video appointments. Take note of what's in the **video frame** and choose a simple background, and avoid sitting in front of doors, windows, or bright lights. Adjust your camera angle and lighting before you get started.²
3. Ensure you have adequate **privacy** and that you won't be interrupted during the appointment. If possible (and taking into consideration your need to be reachable for emergencies), silence other phone lines during appointments so that the phone does not ring during the appointment.³
4. During the first video or phone appointment, take time to **explain** the new technology to your client. Give them the opportunity to ask questions about the technology.⁴
5. If you and the client are transitioning from in-person appointments to video or phone appointments, take time to explain the ways appointments or services might be different with the new setup, and let them know what has *not* changed with the new setup and what steps you are taking to ensure that their treatment remains consistent and person-centered. Give them the opportunity to ask questions about how the new setup will affect services and **discuss concerns** they may have about the new setup.⁵
6. During a video appointment, if you look away from the camera to use your computer for something such as referencing or typing up client notes, **let the client know what you're doing**. Do the same during a phone appointment so that the sound of typing or a pause in conversation doesn't lead the client to feel that you're distracted.⁶



7. Be mindful of distracting noises like typing or shuffling papers when your microphone is on. Locate your **mute** button so you can quickly mute yourself if necessary.⁷
8. Every so often, take a moment to look directly into your camera instead of at your screen so you can make “**eye contact**” with your client.⁸
9. If you’re on video, think about how you’re engaging the client through your **body language**. Nodding and using occasional hand gestures is good. Avoid fidgeting, slouching, or gesticulating too much.⁹
10. Consider **sharing notes** or materials (via email or client portal) with client before the appointment so that you can review together during the appointment, or share your screen or an application during the appointment if you want to review something together. (If you plan to share your screen, make sure any confidential information is not open in case you accidentally click on the wrong window while the client is viewing it.) If you’re comfortable sharing your notes with the client, consider sharing your screen with them during the appointment so they can see what you’re typing.¹⁰
11. If you lose your video or phone connection during the appointment, immediately reach out to the client through the backup mode of communication that you previously agreed upon so they know you are working on fixing it. (It’s easy to focus on immediately fixing the issue, thinking you will have it resolved in 30 seconds, and then 10 minutes go by and the client still doesn’t know what’s going on.) If you are unable to re-establish a connection with the client, make sure there is **immediate communication** about what happened and when you can reschedule. Remember that experiencing occasional technological challenges is normal and expected. When experiencing technical difficulties during a virtual appointment, continue to focus on the needs of the client and their experience of the appointment.¹¹



¹ McConnochie, K. M. (2019). Webside Manner: A Key to High-Quality Primary Care Telemedicine for All [Abstract]. *Telemedicine and E-Health*, 25(11), 1007-1011. <https://www.ncbi.nlm.nih.gov/pubmed/30648924>

² The Office of the National Coordinator for Health Information Technology. (2019, April 17). Patient Engagement Playbook. *Improve appointments with health IT*. Retrieved March 26, 2020, from <https://www.healthit.gov/playbook/pe/chapter-7/>

³ TeleBehavioral Health Center of Excellence. (n.d.) *Step-By-Step Guide for Setting Up Telebehavioral Health Services*. Retrieved March 26, 2019, from https://www.ihs.gov/sites/telebehavioral/themes/responsive2017/display_objects/documents/TBHCEtoolkit2019.pdf

⁴ Office of the National Coordinator for Health Information Technology

⁵ Office of the National Coordinator for Health Information Technology

⁶ Office of the National Coordinator for Health Information Technology

⁷ Office of the National Coordinator for Health Information Technology

⁸ ¹¹ *11 Ways to Improve Your Telehealth Webside Manner*. (2018, November 30). Wheel. Retrieved March 26, 2019, from <https://www.wheel.com/blog/ways-to-improve-your-telehealth-webside-manner/>

⁹ *11 Ways to Improve Your Telehealth Webside Manner*

¹⁰ Office of the National Coordinator for Health Information Technology

¹¹ TeleBehavioral Health Center of Excellence