BEFORE THE SESSION

☐ Restart your computer. Close background programs.

☐ Test your internet connection speed. Speeds of 10mbps will provide the best experience. To check your speed, search Google speed test and click the blue button.

☐ Confirm that the webcam, microphone, and speakers are working.

☐ Make sure the audio is not on mute.

☐ Remove clutter and tidy office.

☐ To prevent interruptions during the session, set your cell phone to silent and consider hanging a “Do not disturb” sign.

☐ If necessary, contact a client’s insurance to obtain payment coverage authorization.

START OF SESSION

☐ Verify client’s identity, if needed. Document full name.

☐ Confirm client is in a safe, private place to talk.

☐ Review the safety plan with client.

☐ Review the back-up plan in case the connection fails. Confirm their phone number on file.

☐ Inform the client of the potential risks and limitations of receiving treatment via Telehealth.

☐ Remind client that there are alternative, non-video therapy options.

☐ Obtain verbal or written consent, if necessary, from the client for the use of Telehealth.

☐ Emphasize the importance of consistent therapy attendance and homework completion.

☐ Review the protocol of the Telehealth visit and explain what the client can expect.

☐ Emphasize the importance of speaking clearly.

☐ Mention that you may briefly look away or down when taking notes, but that doesn’t mean you aren’t listening.

☐ Give client opportunity to ask questions about the session.

Disclaimer: This sample document is provided only as a reference for practices developing their own materials and should be adapted to local needs. You should consult an attorney who is knowledgeable about the laws of your state.