simplepractice

Telehealth Checklist

BEFORE THE SESSION

- [ ] Restart your computer. Close background programs.
- [ ] Test your internet connection speed. Speeds of 10mpbs 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.

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.*

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.