Slide 1

Community Action Partnership of Utah

Considerations for Agencies when Working with Clients Remotely

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Slide 2

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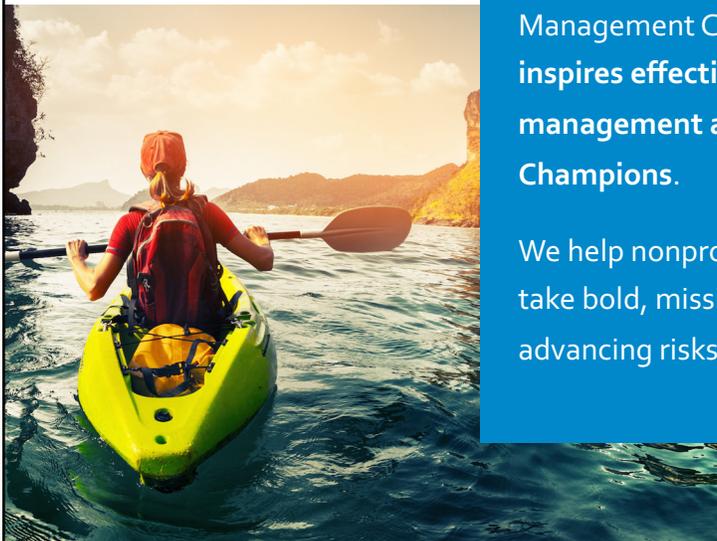
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We help nonprofit teams take bold, mission-advancing risks.

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Workshop Overview

ℹ️ **Resources and warm-up questions**

💡 **Remote Service Delivery: what's the risk?**

🚨 **Risk Strategies**

🧠 **3 Final Tips and Takeaways**

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Resources

- "The National Consortium of Telehealth Resource Centers." Tools and Resources. (2020) Health Resources and Services Administration (HRSA)/HHS.
  https://www.telehealthresourcecenter.org/
- American Telemedicine Association. (2020) "Practice Guidelines and Resources."
  https://thesource.americantelemed.org/resources/telemedicine-practice-guidelines/
- "Best Practices in Telephonic Case Management." (2008) *Professional Case Management* (Vol. 13/#4).
  https://www.nursingcenter.com/wkhlrp/Handlers/articleContent.pdf?key=pdf_01269241-200807000-00002
- "Technology Initiatives That Support Employment Outcomes: Colorado: Web-based Technology for Coaching TANF Participants." (2018). Administration for Children and Families/HHS.
  https://peerta.acf.hhs.gov/sites/default/files/public/uploaded_files/IIEESS%20Emerging%20Practice_Colorado_Final_508_updated.pdf
- "Treading Through Teletherapy Treatment Topics -
  https://naswassurance.org/malpractice/malpractice-tips/treading-through-teletherapy-treatment-topics/
- "Frequently Asked Questions About Teletherapy" - https://naswassurance.org/questions-and-answers/

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What types of services are you providing remotely?

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What are your biggest worries about remote service delivery?

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What are the unexpected *upsides* of remote service delivery?

Think positive

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Remote service delivery: what's the risk?

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#1 - Service Quality

Perceived (or actual) quality and value of the service provided

- May be offset by convenience
- Quality can be negatively impacted by a range of factors: trust, technology
- Demand: if demand has increased but your capacity hasn't, clients may be frustrated by wait times

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#2 - Comfort

A client who is less experienced with tech tools may not be comfortable using your preferred platform

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#3 - Social Isolation

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#4 – Breach of Privacy

- In a remote delivery environment, you're not in complete control
- Clients may be concerned about privacy risk

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#5 – Technology choice

Key considerations include:

- IT infrastructure of your agency
- Privacy restrictions
- Complexity of information to be communicated
- Caseworker experience
- Technological limitations of clients (e.g., access to the Internet)

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Which is best?

Telephone:
- Familiar
- Privacy
- Low-tech equipment works


Video Conference:
- Ability to gauge a client's safety or well being
- Opportunity to read interpersonal cues, body language
- High-speed broadband connection
- 27 percent of older clients and 20 percent of lower income Americans do not use the Internet

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Risk Strategies for Remote Service Delivery

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1. Establish and Build Trust
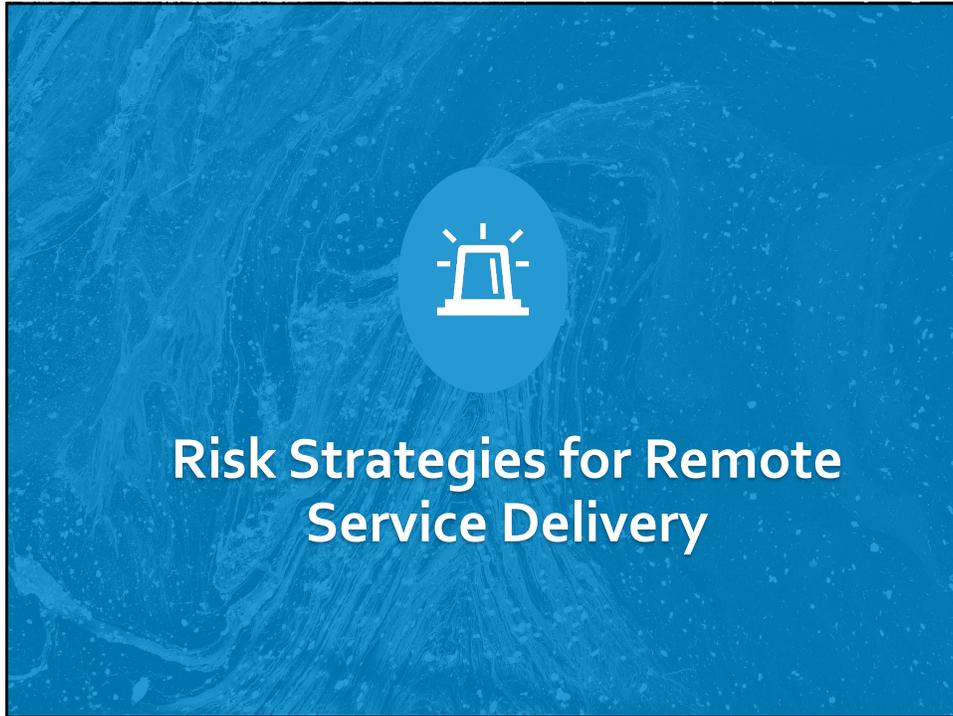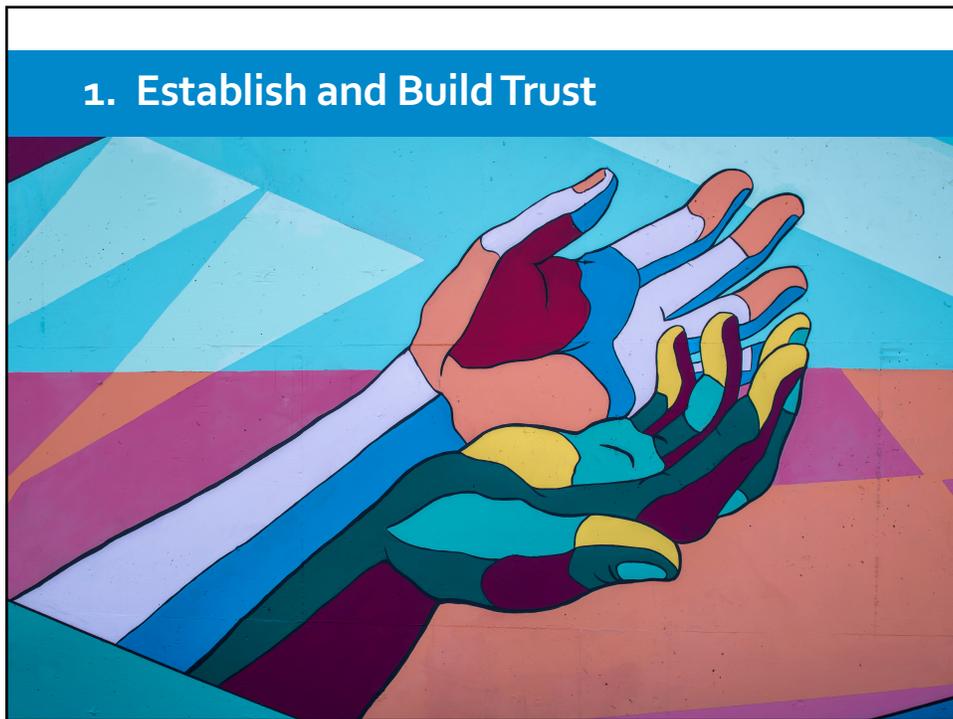
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Telemental Health Informed Consent

I, _____, hereby consent to participate in telemental health with,

_____ , as part of my psychotherapy. I understand that

telemental health is the practice of delivering clinical health care services via technology assisted media or

other electronic means between a practitioner and a client who are located in two different locations.

I understand the following with respect to telemental health:

1) I understand that I have the right to withdraw consent at any time without affecting my right to future care, services, or program benefits to which I would otherwise be entitled.

2) I understand that there are risks, benefits, and consequences associated with telemental health, including but not limited to, disruption of transmission by technology failures, interruption and/or breaches of confidentiality by unauthorized persons, and/or limited ability to respond to emergencies.

3) I understand that there will be no recording of any of the online sessions by either party. All information disclosed within sessions and written records pertaining to those sessions are confidential and may not be disclosed to anyone without written authorization, except where the disclosure is permitted and/or required by law.

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4) I understand that the privacy laws that protect the confidentiality of my protected health information (PHI) also apply to telemental health unless an exception to confidentiality applies (i.e. mandatory reporting of child, elder, or vulnerable adult abuse; danger to self or others; I raise mental/emotional health as an issue in a legal proceeding).

5) I understand that if I am having suicidal or homicidal thoughts, actively experiencing psychotic symptoms or experiencing a mental health crisis that cannot be resolved remotely, it may be determined that telemental health services are not appropriate and a higher level of care is required.

6) I understand that during a telemental health session, we could encounter technical difficulties resulting in service interruptions. If this occurs, end and restart the session. If we are unable to reconnect within ten minutes, please call me at_____ to discuss since we may have to re-schedule.

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7) I understand that my therapist may need to contact my emergency contact and/or appropriate authorities in case of an emergency.

Emergency Protocols

I need to know your location in case of an emergency. You agree to inform me of the address where you are at the beginning of each session. I also need a contact person who I may contact on your behalf in a life- threatening emergency only. This person will only be contacted to go to your location or take you to the hospital in the event of an emergency.

In case of an emergency, my location is: _____

and my emergency contact person's name, address, phone: _____

_____

I have read the information provided above and discussed it with my therapist. I understand the information contained in this form and all of my questions have been answered to my satisfaction.

_____   _____
Signature of client/parent/legal guardian   Date

_____   _____
Signature of therapist   Date

2. Develop a Communications Plan

- Update your communications plan to reflect remote service delivery

- Schedule regular check-in conversations; increase the frequency of check-ins!

- Let clients know the best way to contact you and your typical hours; learn about your client's habits and preferences

3. Establish milestones

- Milestones create shared expectations and accountability

- Create a 'roadmap'

- Use an agenda for group meetings

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Virtual Group Expectations:
- Assume good intentions for yourself, each other and your families.
- If not talking, keep the microphone muted.
- Maintain confidentiality-no names or identifying information.
- Monitor air time. We will start on time and end on time.
- Use chat features for questions.
- Unmute when you want to contribute to the conversation.

Purpose of Group: I want to support all of you through this difficult time. We are not the experts in how to deal with this as we are all learning alongside each other on how to best handle this situation. This space is intended to provide support, ideas and collaboration to students around the topic of school closure and how we can support each other during this time.

Time	Topic	Notes
5 Minutes	· Welcome and Icebreaker · Purpose · Expectations	
20 Minutes	What are you and your family doing to support each other during school closure?	
15 Minutes	How are you communicating with people outside your home?	
15 Minutes	How can I best support you and your family during this time?	
15 Minutes	How have you been dealing with intense emotions? Anger, depression, anxiety?	
10 Minutes	Final questions or requests?	

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4. Test and re-test Tech Tools

- Systems issues will erode confidence!

- Providers should be using agency-provided devices, not personal devices
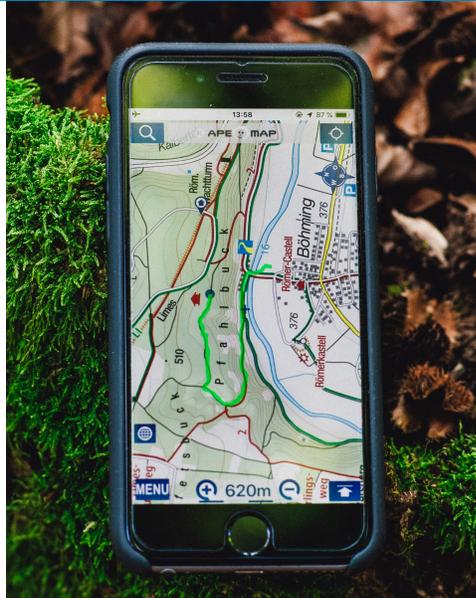
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Choosing a tech platform

- How secure?
- How to get rid of unwanted guests?
- How to establish secure connections?
- If you have a VPN, does that interfere with your virtual communications platform?
- How to control/share links? Through email? Is it a webpage?
- What are the differences between platforms (cost per user, etc.)?
- How does the platform handle screen sharing? Muting participants? Video?

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Manage screen sharing

The first rule of Zoom Club: Don't give up control of your screen.

You *do not* want random people in your public event taking control of the screen and sharing unwanted content with the group. You can restrict this — before the meeting and during the meeting in the host control bar — so that you're the only one who can screen-share.

To prevent participants from screen sharing during a call, using the host controls at the bottom, click the arrow next to Share Screen and then Advanced Sharing Options.
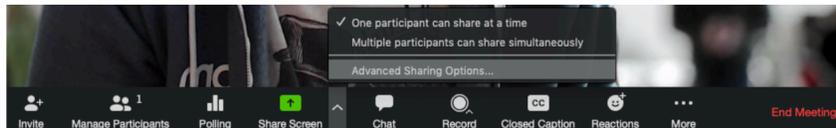
Under "Who can share?" choose "Only Host" and close the window. You can also lock the Screen Share by default for all your meetings in your web settings.

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5. Don't assume your clients know how to engage using digital tools

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6. Review the rules!

- Make sure you are fully dressed

- Wear what you would wear to an in-person meeting

- Choose a quiet, private location in your home

- Purpose and focus: clinical appointment, professional interaction

STAY SAFE & FOLLOW GUIDELINES
DO YOUR PART TO REDUCE
THE SPREAD OF COVID-19

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7. Be flexible!

Ex: shorter, more frequent meetings if childcare is a challenge

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8. Remember ethical considerations

Service delivery should be consistent with your profession's code of ethics and values
- Respecting the dignity and worth of all persons, the importance of human relationships, and the importance of trustworthiness

- Respect clients' self-determination; some clients may never feel comfortable with video sessions

- The Standard of Care is the same!

- Documentation should note that services were provided via telephone/video rather than in person

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9. Prepare YOUR environment

- Dress for the office

- Arrange your physical environment; test the angle of your camera; minimal or no personal information shared, or use a virtual background

- Always conduct meetings in a place and at a time where your client is assured privacy
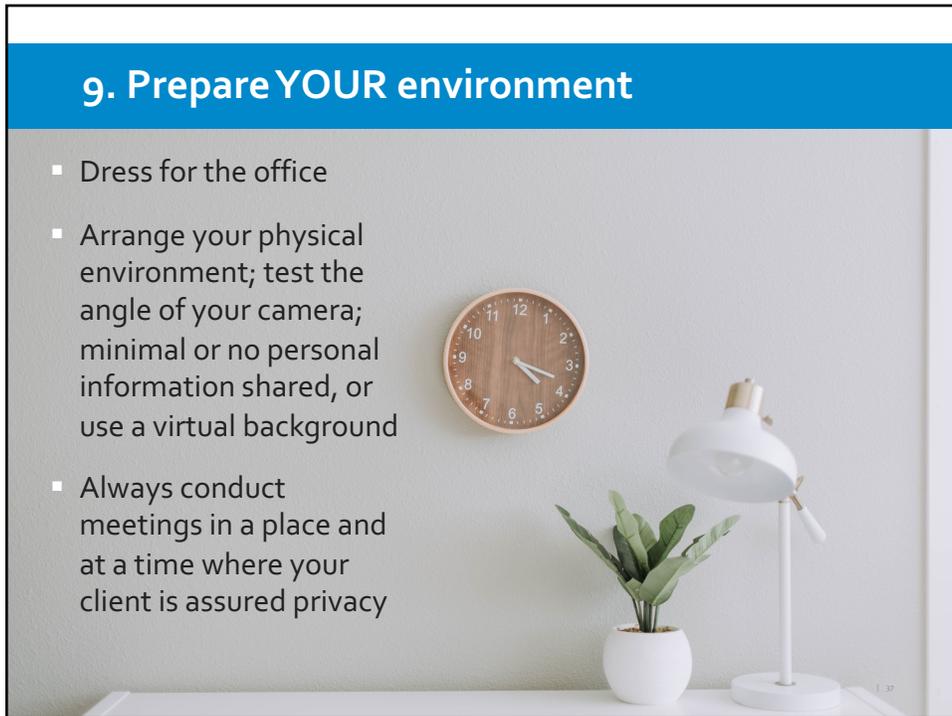
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10. Be patient
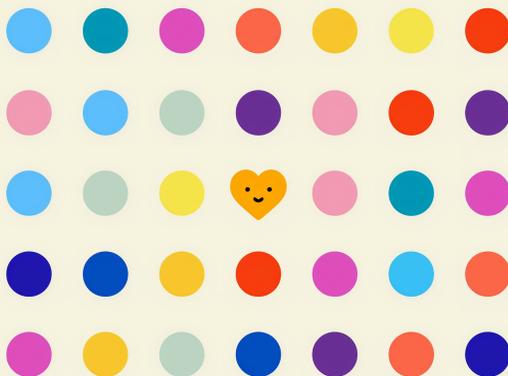
YOUR **K I N D N E S S** IS CONTAGIOUS.

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3 Final Tips and Takeaways

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Seize the day!

- How can you leverage the *upsides* of remote service delivery?

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Lead like an introvert

- Ask more questions: spend your prep time developing better questions

"Introverts lead people to their own solutions, whereas extroverts are more likely to ask leading questions that push people toward the solutions they want them to enact." – Krister Ungerbock, "Why introvert leaders excel during a crisis," *Fast Company*, May 2020

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Resolve to learn!

"Experience is inevitable; learning is not."

– Paul Schoemaker

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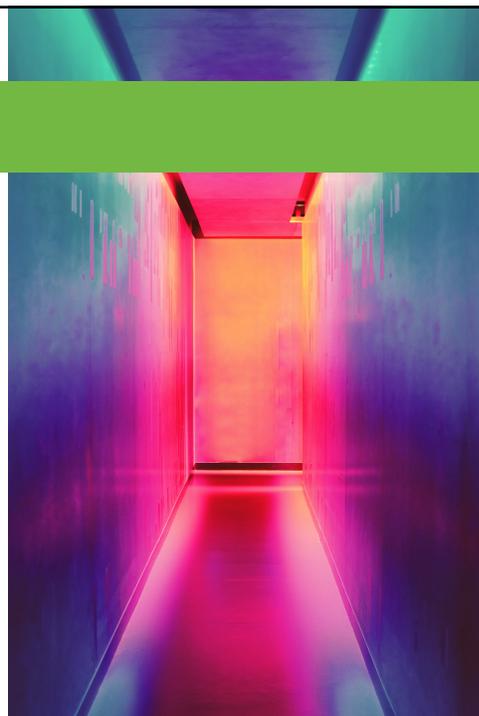
Thank you!

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