

Clinician Telehealth Checklist: Best Practices

Administrative Practices



- Document** verbal consent in the medical record at the first telehealth session.
- Every** session please confirm and document the client's current address/location as well as who is around. This will be used for billing and if crisis management is needed.
- Every** session please assess the appropriateness of providing services via telehealth (e.g., low level of functioning, safety concerns) and document this in the medical record.

Planning for Successful Sessions

- Establish expectations/ground rules with clients:
 - Position (e.g., Sitting up)
 - Dress appropriately (e.g., shirt on)
 - Use a room with a closed door or other private location if possible
 - Use a screen bigger than a cell phone if available
 - Do sessions from home whenever possible
- Clinician environment
 - Sit at a desk
 - Use a neutral background
 - Identify a private location
 - Zoom the camera in on the clinician's face

To Be Completed on or Before the First Telehealth Session



- Confirm who will attend sessions (child, parent, combination, etc.).
- Determine what technology the client has available for teletherapy (Phones/Computers/Tablets).
- Ensure they have enough minutes/data on their phone plans to do teletherapy (if applicable).
- Discuss a back-up plan with the client (e.g., give the client a phone number to call) if the video connection does not work.
- Practice connecting with caregivers before the session to work out any technology issues.
- If using video, discuss whether you need to see the space where the child will be talking and/or playing.
- Length of session: Discuss a reasonable time the client can be engaged in session considering attention, availability, and privacy.
- Obtain a list of the client's favorite activities/toys. What toys/supplies do they have available for session?
- Discuss privacy with caregiver:
 - Who can support the child?
 - How can you minimize distractions in the home?
 - Are there headphones available, sound machines (free apps available), etc.?
 - Location of telehealth sessions (e.g., not in car, store).
 - Is there a room with a door they can use or a safe outdoor space for teletherapy sessions?

