**Checklist for remote provision of psychological services (e.g. using videoconferencing and telephone**)

Adapted from APA checklist by Brian Dixon (Director, Scientific Issues, New Zealand Psychological Society)

*Source: https://www.apa.org/practice/programs/dmhi/research-information/telepsychological-services-checklist*

**Check that remote services are appropriate for your client**

* Consider the client’s clinical & cognitive status – can the client effectively participate?
* Does the client have technology resources for this – e.g. webcam or smartphone?
* Consider client’s comfort in using technology – can they log in and effectively use the technology? What assistance do they have available?
* Does the client have a suitable space for a private telepsychology session?
* Is parent/guardian permission required? If so, obtain That in advance.
* Consider client safety (e.g., suicidality) and health concerns (e.g. viral risk; mobility; immune function), community risk, and psychologist health when deciding to do tele-sessions instead of in-person.
* What particular needs does your client have? Are there language and communication considerations (e.g. is Te Reo their preference? Does an interpreter need to be arranged?)
* What cultural factors need to be considered? Can you proceed respectfully provide for those? Do you need advice or assistance with that?
* Should someone else provide the service instead of you?

**Technology**

* Are your technology platform and software consistent with requirements of HPCA Act, of insurers and 3rd party agencies (e.g. ACC)?
* Select (and preferably purchase) effective software for videoconferencing with satisfactory reviews of its quality and suitability for the purpose. Do NOT use common social media platforms for ANY sensitive communications with clients; these are not secure nor private.
* Does the software vendor offer a secure agreement that adequately covers data privacy and security?
* Do you and the client have adequate internet connectivity for videoconferencing?
* Are you using a password-protected, secure internet connection, not public or unsecured WiFi? What about your client? (If not, it increases the risk of privacy breaches)
* Ensure that your antivirus/antimalware protection is up-to-date to prevent being hacked. What about your client’s system?
* Discuss with the client how to log in and use the technology – address any concerns they may have about the technology.
* Make sure that your communication software provides for discrete personal sessions at appointed times (so your session with a client is not interrupted by another arriving for theirs).

**Set-up**

* Is your location private? Is it reasonably quiet? Consider using a headphone and mic to reduce extraneous noise from your side and ask client to mute if background noise is affecting quality of sound (or use mute control if available).
* Make sure the room is well lit. Light can cast a shadow or create low visibility if behind you.
* To improve eye contact, position your camera so that it’s easy to look at the camera and the client on screen.
* Minimise views of your personal items and other distractions in the background.
* Check the picture and audio quality. Can you see and hear each other? Manage mute and video controls if possible with your software. Audio may be improved by turning video off (this reduces demand on bandwidth).
* As much as possible, both people should maintain good eye contact and speak clearly. It may be necessary to speak more slowly than in face-to-face sessions.

**Before the session - preparation**

* Discuss the potential risks/benefits of telehealth sessions with the client(s).
* Get a signed informed consent from your client(s) or client’s legal representative. If the psychologist or client is quarantined, informed consent can be signed electronically; consider DocHub or DocuSign. Clients can scan a consent form or respond by email or test signifying their agreement to conduct sessions via this format.
* Have a back-up plan in case of technical difficulties or in case a crisis situation arises. What contact information do you have? Do you know the local resources (e.g. emergency services) in the client’s area?
* Where necessary, discuss how this session will be billed. What is your policy on charges for clients being late or not attending? How can clients pay for online services?
* In the case of minors, determine where the adult will be at that location.

**Beginning of virtual session**

* Verify the client’s identity, if needed.
* Confirm client’s location and a phone number where the client can be reached.
* Review importance of privacy at your location and client’s location.
* All individuals present for the virtual visit must be identified and within view of the camera so the psychologist is aware of who is participating.
* Confirm that nobody will record the session without permission.
* Turn off intrusive apps and notifications on your computer or smartphone. Ask client to do the same.
* Conduct the session mostly like you would an in-person session. Be yourself.

*NOTE: This checklist is for information purposes only. It may not encompass all legal requirements or those of third parties. It is not intended or required for use in clinical records but might provide a guide for what you record in the client’s notes. NZPsS would welcome feedback and suggested amendments to the Checklist.*