

PREPARING TO MEET WITH CLIENTS REMOTELY: A CHECKLIST

Review and use the checklist below to prepare to meet with a client remotely.

1 REVIEW AGENCY PROTOCOLS

- ✓ I have reviewed my agency's protocols to determine:
 - Appropriate devices to use with clients
 - Appropriate space to meet with clients remotely
 - Confidentiality practices
 - Boundaries with clients (and what to do if things go wrong)
 - Protocol for scheduling meetings and sending documents

2 SELECT THE COMMUNICATION METHOD

- ✓ I have confirmed with my client:
 - How we will meet (e.g., phone, Zoom, WhatsApp, etc.)
 - That we both have the required equipment (e.g., smartphone, headset with microphone, computer, webcam, internet connection)
 - How we will connect the day/time of the session:
 - If phone, phone number to reach them on
 - If Zoom, where/how they can access the link to join the meeting (e.g. it will be sent 5 minutes before the session to a confirmed email address)
 - Back up communication method

3 CONFIDENTIALITY

- ✓ I have shared the following set of recommendations with my client to keep the session private. I shared:
 - If you're using someone else's device:
 - Please let me know so I don't send confidential information to the device
 - Delete any history of communication from the device
 - Prepare your surroundings:
 - Use headphones and find a quiet, private space
 - Make sure your roommates, friends, or family can't overhear you
 - Select a "safe word" (e.g. I'm tired) to alert me if someone has entered your private space so that no private information is shared in their presence
 - If a group session, think of others' privacy. Be aware that other sin your surrounding may overhear other patients so take steps to protect their confidentiality
 - Protect your device:
 - Make sure your device is password protected
 - If others may know your password and you want to keep the session history or information shared private, consider changing your password
- ✓ I shared [this video](#) and [this fact sheet](#) (we can customize and rebrand for AI that they can share with their clients)

4 PREPARE TO MEET REMOTELY

- ✓ I created the invite (if required)
- ✓ I have a quiet place with no distractions where I can close a door
- ✓ I have a solid internet connection (if required)
- ✓ I checked the audio/video of my device
- ✓ I selected an appropriate background for the video call (if required)
- ✓ I am wearing professional clothes (even if not a video call, it can put you in a professional mindset)
- ✓ I have all materials on hand (e.g. client file, materials, contact information for referrals, etc.)
- ✓ I have sent the invite (if required)

5 GROUP SESSIONS

- ✓ If this is a group session I have:
 - Asked all clients to ensure they have a quiet, private space and headphones in order to keep anything shared in the group confidential
 - Encouraged the use of video (to prevent others from walking into the room and possibly breaching confidentiality)
 - Conducted a practice ahead of the first session to ensure that all clients can join the call
 - Outlined group rules ahead of time or am planning to at the start of the first session