

ACT Online & Phone Counselling - Counsellor Checklist

March 2020



Before counselling can begin with a new service user, complete a phone consultation to ensure they understand the process and procedures related to online and phone counselling.

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| <input type="checkbox"/> | <p>Ensure that an initial Phone Intake has been completed:</p> <ul style="list-style-type: none">• The service user has provided their legal name, year of birth, and Toronto postal code.• The service user has gone through the OCASE consent process.• The service user has received and responded to ACT's Intake confirmation email.• Their intake information and service details recorded into OCASE. <p>If any of these steps have not been carried out, they can be completed as part of your phone consultation with them.</p> |
| <input type="checkbox"/> | <p>Assess suitability for online or phone counselling, including:</p> <ul style="list-style-type: none">• Service user's comfort with technology and internet use.• Ability to read, comprehend, and express thoughts and feelings through text.• Consistency with counselling goals.• If barriers to counselling would be removed or minimized.• The service user is not experiencing immediate crisis. |
| <input type="checkbox"/> | <p>Review available platforms and determined/confirm which to move forward with:</p> <ul style="list-style-type: none">• Asynchronous Email Counselling (Private Conversations-PrivacEmail)• Synchronous Text-based Counselling (Live Chat-PrivacEmail)• Video Counselling (Zoom Telehealth)• Phone Counselling |
| <input type="checkbox"/> | <p>Review informed consent, highlighting:</p> <ul style="list-style-type: none">• That we use a third-party platform to provide online counselling (PrivacEmail and Zoom Telehealth).• Differences and limitations of online counselling depending on platform (i.e. loss of visual/non-verbal cues for email, chat or phone; slower process in text-based methods; potential for technical challenges).• Risks to confidentiality/online security and subsequent protection measures.• Service user's responsibility to maintain their own privacy online.• What to do in crisis/emergency situations. |
| <input type="checkbox"/> | <p>Provide an overview of standard procedures for online and phone counselling, including:</p> <ul style="list-style-type: none">• Appointment structure/frequency of contact.• How to cancel/reschedule an appointment (highlighting not to use PrivacEmail or Zoom to do so, but to use their counsellor's ACT email). |

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| | <ul style="list-style-type: none"> • Clarify that ACT has harm reduction policies and does not require abstinence to use our programs and services. However, we ask that service users refrain from using substances during or immediately before a session as it can impede the therapeutic process. • Establish a back-up method of communication to be used in case of emergency or technology failure, for the purposes of scheduling/canceling appointments. |
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For PrivacEmail

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| <input type="checkbox"/> | <p>Overview of and registration on PrivacEmail system:</p> <ul style="list-style-type: none"> • Service User must indicate if they will be using Private Conversations feature (asynchronous email) or the Live Chat feature to communicate (the service user must choose one or the other, however they can change mode if they want to in the future). • Communicating online (emotional bracketing, descriptive immediacy, etc.) • Treating online sessions like in-person sessions (i.e. privacy, adequate time allotted). |
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| | <p>Provided an overview of PrivacEmail system and features, including:</p> <ul style="list-style-type: none"> • Informed service user of resources available on the site (Crisis lines, video tutorial, chat FAQ, privacy tips, etc.). • There is a maximum 5 attempts for username/password entry before being locked out of your account, which then has to be reset by admin. • Auto-save and time-out features. • <i>Live chat only:</i> Service user cannot start a chat session; the counsellor must start and end the session. Service users can leave and return to the chat so long as the counsellor has not ended the conversation. • Send confirmation email of appointment details, including the PrivacEmail link (www.actoronto.privacemail.com), their username, and details on how to register their account online, clarifying that they need to indicate who their counsellor is when they register. <ul style="list-style-type: none"> ○ Provide OCASE pseudonym formula to service users who have not consent to have their personal information recorded into OCASE |
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Zoom Telehealth

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| <input type="checkbox"/> | <p>Provided an overview of Zoom for Telehealth system, features and procedures, including:</p> <ul style="list-style-type: none"> • Highlight strategies for enhancing privacy and audio and visual quality: <ul style="list-style-type: none"> ○ Are they able to access Zoom in a private space? ○ Do they have earphones with a microphone? ○ Is their wifi connection sometime unstable? Can they call in? • Explain that they can access Zoom for Telehealth on their computer desktop or phone but will need to download the Zoom app in order to use the platform. |
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| | <ul style="list-style-type: none"> • Clarify that they will receive a separate follow-up email from you (an ACT email) with instructions to test Zoom, the link to the Zoom Meeting and the meeting details (Meeting ID, password, date/time, etc.) • Confirm that they will download and test Zoom before their counselling appointment and will let you know if they run into any challenges. • Confirm time of next appointment. • Confirm back-up method of communication. • Send confirmation email of appointment details and video counselling procedures (scheduling appointments, late/missed appointments, back up communication, etc.) |
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Phone Counselling

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| <input type="checkbox"/> | <p>Overview of Telephone Counselling Process:</p> <ul style="list-style-type: none"> • Confirm current phone number and valid email address. • Highlight methods for managing confidentiality and quality of session: <ul style="list-style-type: none"> ○ Do they have a private space for their telephone counselling appointment? ○ Is their phone number shared? Can you leave a message? ○ Are they able to use earphones with a mic to ensure sound quality? ○ Are they able to set aside time for their session (can they avoid multitasking or interruptions?) • Clarify if the service user is calling the counsellor or vice versa. • Clarify missed appointment policy. • Establish date and time of next appointment. • Send confirmation email of appointment details and basic telephone counselling procedures (phone number to use, late/missed appointment, etc.) |
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