Best Clinical Practices in Telephonic Counselling

Questions from Best Clinical Practices in Telephonic Counselling Webinar:

Administrative (Prior to Counselling) Questions

1. Consent and forms
   a. Can you use verbal consent (for changing modalities, interventions, etc.)?
   b. My Consent to therapy is long and I also bring forth the Privacy Commitment. Reading these might seem long during a phone session. Any tips?
   c. Would you send documents (consent forms, information forms) for the client to sign and return?
   d. Do you email clients for signing consent forms?
   e. Do you send forms (intake, consent, privacy policy) in advance so you have some preliminary information and consent?

   Answer: the same processes that you use in-person should be replicated in telecounselling

2. Phone number
   a. Private phone number or have a separate phone line?
   b. Choosing between showing my-caller-ID/not showing my caller ID, is a matter of my privacy vs. taking risk on the therapeutic alliance! I mean with no caller ID (when we use our private phone) we are telling the client "You're not trustable!" What could be the best solution?

   Answer: talk with your client in advance that you will be calling from a blocked number and talk about why (i.e. your business is separate from your personal life); ask your client if they have any issues/questions/concerns about this (i.e. concern they won’t answer a blocked number).

3. Payment
   a. When clients book with you, do they pay at booking or after the session?
   b. How do you bring up the payment issues?
   c. Do you have a different fee schedule for telecounselling versus seeing clients face to face?

   Answer: see standards of practice around e-counselling - all this needs to be clear to the client in advance of the first session

4. Picture
   a. What if they want a picture? Should we have a page to refer to?
Answer: describe yourself to the client in any way that is comfortable to you (what are your boundaries around self-disclosure), thinking about what they would “know” about you if they saw you; do you already have an online profile?

5. Technology Issues
   a. Tips for navigating a poor connection where the therapist is repeatedly having a difficult time hearing the client?
   b. How do you handle the potential barrier of technology (ex. Poor volume)?
   c. Is there a headset or type of phone you prefer to use?

Answer: if you are doing anything that will make a noise (shuffling papers, drinking water, opening drawers), address it – let them know what you are doing and why.

6. Setting up
   a. How we go about setting up telecounselling?
   b. Do you usually have an agenda for a typical session? Are you intentional about that as well?

Answer: “how do I set myself up to be fully present for my clients” think about what your processes are for in-person sessions and how you will make that work virtually; it could be very helpful to create a work space and environment that is different from your home space and environment – it doesn’t have to be huge, but your space that is for making your calls; initial chit-chat for in-person sessions is set up to create a safe space – still need to do that with telecounselling; make sure you set the stage with the client.

7. Video chat
   a. Is Zoom okay? Or another video chat service?
   b. Is there a particular type of phone or communication device that is or isn’t recommended?

Answer: this webinar did not address video counselling

Calling Procedures

1. Calling etiquette
   a. What is the best practice about who will call in for the session?

Answer: This needs to be established with the client – what works best for both of you

   b. What if they hang up?
      i. In those cases, in which a client suddenly hangs up (although it is rare), would you try to reach out?
      ii. I have not personally had a client hang up. How would you handle that scenario?
   c. If a client does not answer the phone, what is your preference/procedure for calling them back?
Interpretation from Q&A responses: when in contact with them again, provide an empathetic conjecture to build rapport and show you understand the difficulty they experienced (e.g. “it sounds like it was really hard for you to call in today”)

Answer: Call back and say “oops, it seems we got cut off. Want to continue our session?”

2. Do you wait for clients who are late?

Answer: Clients are always late; phone meetings are not seen as important as in person meetings (in general); call and leave a message about missing them and say you will call them back to check in about their session

3. How do you end the appointment?

Answer: 10 minutes before the end of the session, let client know that there is 10 minutes left and ask what they want to make sure is covered in the last 10 minutes

4. How do we address concerns about being recorded?

Answer: have it in your confidentiality statement, but shouldn’t be recording sessions unless there is a reason (I.e. for your supervision)

Specific to Counselling

1. Is telecounselling only for returning clients or also for new clients?

Answer: telecounselling works for both returning and new clients. With new clients it is especially important to build rapport through verbal cues as they are not in-person to see your reactions/facial expressions

2. Can you give an example of what microadjustment would look like in telecounselling?

Answer: taking pauses, and explaining that to the client (Let’s take a pause; how is this session working for you? Is there anything you want to work on?)

3. Telecounselling with children/teen
   a. What are some suggestions for working with teens online? What if you need to use visuals, etc?
   b. How we can engage youth in telephonic counselling?
   c. I would love some tips or best practices if working with kiddos/teens?
   d. Are there any special considerations for calls with youth or children as the identified client?

Answer: think about what it is you are using the visuals for (I.e. art therapy) and how you can achieve that same result in a creative way in an audio format (music? Poetry?)

4. Physical aids
   a. When giving CBT – how to deliver psychoeducation (boards, handouts) over the phone?
   b. What about therapeutic homework, in absence of visual feedback?
**Answer:** think about what it is you are using the psychoeducational tools for and how you can achieve that same result in an audio way

5. **Numerous people**
   a. Best practice for setting up a call with numerous people?
   b. Can you do telecounselling with couples or families in different locations?

   **Answer:** make sure everyone has easy answer to phone, not crowded around one; set up boundaries and enforce around behaviour; discuss in advance what is going on in their location

6. **Psychometrics**
   a. How to use psychometrics with these clients?

   **Answer:** Add more time to ensure clients/you have time to process what is happening; use more verbal check ins; make sure you have previously unpacked what in your psychometrics/assessment is normally visual