Recap of the Establishing Online Clinical Practice Workshop, April 7th, 2020
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What virtual counselling platform should I choose? This question came up multiple times during the April 7 webinar.

Unfortunately, there is no right answer. Selection of software is an individual choice, which depends on your budget, level of technical skill, your clients' comfort level, and your practice needs.

In this article, we follow up on certain issues discussed regarding choice of an online software platform.

- Ensure that the software is compliant with privacy regulations. In Canada, the Personal Health Information Protection Act (PHIPA) governs the manner in which personal health information may be collected, used and disclosed within the health sector. In the United States, privacy is covered by the Health Insurance Portability and Accountability Act (HIPAA).

Regarding the use of online platforms that store their data “in the cloud” (in other words, servers that may exist in other countries) PHIPA does not require that personal information be retained or stored in Ontario or Canada. The PHIPA also does not list any technical requirements that software companies must follow.

However, both CRPO and Lawrence Murphy have advised that due to jurisdictional and legislative issues surrounding privacy in other countries, practitioners should choose a platform with servers that reside in Canada.

Should you choose a platform whose company stores data outside of Canada, please note that RPs are still required to conduct their due diligence when it comes to choosing software to use in their practices.

PHIPA Section 12 (1): A health information custodian shall take steps that are reasonable in the circumstances to ensure that personal health information in the custodian’s custody or control is protected against theft, loss and unauthorized use or disclosure and to ensure that the records containing the information are protected against unauthorized copying, modification or disposal. 2004, c. 3, Sched. A, s. 12 (1).

Source: https://www.ontario.ca/laws/statute/04p03#BK48

- Become familiar with CRPO’s guidelines
  The CRPO’s Standard on Electronic Practice (Standard 3.4), covers issues of consent, confidentiality and professional liability insurance.
The CRPO has also provided a new comprehensive checklist of how to choose a platform for electronic practice, as well as a security checklist on how to secure your clients’ information:

CRPO’s Practice Advisory: Selecting a Communications Platform for Electronic Practice: https://www.crpo.ca/selecting-communications-platform/


- **Consider your clients’ needs when selecting technology.** For instance, clients who live in rural communities may not have reliable internet access. Some clients may not be comfortable with appearing on video. For some clients, depending on the issue, telephone counselling might work best.

- **View a demo before you make a final purchase.** This will help you assess how easy the software is to use, or if its features are suitable for your practice.

**Ethical considerations of online practice**
- Obtain insurance that includes electronic practice
- Get trained, and keep informed of new developments
- Get your clients’ consent; include electronic practice in your consent form
- Set client expectations ahead of time
- During a virtual session, the practitioner is entering the client’s home.
- Find ways to emphasize non verbal and facial cues
- Ask your clients to ensure their sessions are held in a private area.

**How to promote your online practice**
- Let your current clients know that you are providing online practice.
- Determine who will be your target market, as it helps to fix your service in clients’ minds. Practitioners are more likely to get clients if they specialize on certain issues or target markets.
- Think of secondary targets who can serve as referral sources. For example, for a practitioner whose target market is recently bereaved pet owners, it would be logical to seek referrals from secondary targets such as veterinarians, pet stores, pet insurance or other pet adjacent businesses.

**Additional sources of information**


Providing Ethical Telepsychology: What are the rules, and is what the news is saying true?

Resources mentioned during the workshop