

## Considerations for Mental Health Appointments via Telephone

### Before the Session

- When you book the telephone appointment, let the individual know that they will need a private space for the duration of the session.
- Have a plan in place for emergency situations (e.g., witnessing of violence in the home) and know the local emergency numbers to call (typically 911).

### Informed Consent

- Briefly review the risks (e.g. someone nearby may hear the information they are sharing) and benefits (e.g. ability to access support during the COVID-19 pandemic) of participating in therapy over the phone and document the individual's informed consent.
- Informed consent must still be obtained from legal guardians for children younger than 16 years old not deemed mature minors.

### During the First Telephone Session

- At the beginning of the first phone session with a new individual, ask for their name and two other identifiers (e.g. date of birth and PHIN). Document that their identity was verified.
- Normalize that it can be awkward to conduct appointments on the phone.
- Agree on how the individual will let you know if they need to end the call abruptly due to lack of confidentiality in their space, such as using a safe word. Document the plan.
- Make a plan for how to proceed if the call is dropped and you cannot reconnect. Know the local emergency services available and obtain the contact details of at least two other individuals that could be contacted in an emergency. Record the plan in your note.

### At Every Telephone Session, Including the First Session

- Do not identify the fact that you are a mental health professional until you are sure that you are speaking to the correct individual.
- Ask the individual where they are and if they have sufficient privacy to proceed. Record the individual's location (e.g. their home) in your progress note.
- Create or review the individual's safety plan and adapt it for current circumstances.
- Set an agenda for the session to assist in maintaining typical client-therapist boundaries. Remain focused on clinical work, rather than social conversation.
- Make an agreement with the individual that neither of you will multi-task.
- Use summary statements and reflections more often to make sure you have understood the individual and to remind them that you are listening. Allow silence as you normally do.
- Discuss technical difficulties as they arise (e.g. if there is a lag in the audio and you keep speaking over one another, talk about adding a pause at the end of each sentence).
- Adjust your expectations for the length of telephone sessions, especially with children, since it is more difficult to engage individuals with this format.
- Give a 10-minute warning before the session ends. Discuss what the individual may do after the session to transition back into their life gradually, such as taking an extra few minutes to sit and reflect.