

Virtual Appointment Checklist Client Discussion

Yes/No	Topic	Description
Virtual appointment fit for client		
<input type="checkbox"/>	Is a virtual appointment appropriate for this client?	<i>Need to determine if a virtual appointment is a fit for the client given information known about client, environment, and context. If No is selected for this question-do not complete this checklist.</i>
Describe a virtual appointment		
<input type="checkbox"/>	Was a virtual appointment, rationale and benefit described to the client*?	<i>Describe a virtual appointment to the client, including the rationale and potential client benefits if appropriate. *If the client is a child this discussion would be with the parent or guardian.</i>
<input type="checkbox"/>	Was the client informed that the virtual appointment technology (Zoom) is safe, secure and private?	<i>This technology is safe, secure and complies with the Personal Health Information Privacy and Access Act (PHIPAA). PHIPPA outlines a set of rules that protects the confidentiality of personal health information and the privacy of the individual to whom that information relates.</i>
Explore technology requirements		
<i>Note: The client requires access to internet, camera and audio to take part in a virtual appointment. To conduct a virtual appointment at least one of the two options below must be "Yes".</i>		
<input type="checkbox"/>	Option 1 <input type="checkbox"/> 1. Does client have a smartphone or tablet with a functioning camera and audio? <input type="checkbox"/> 2. Does the client have an internet/WIFI connection?	<i>If the client is a child, the parent will need to provide approval for the child to use the child's or parent's smartphone or tablet. When Options 1 and 2 are both Yes, the client may select their preferred option to use for the virtual appointment. Note: If the client does not have access to a smartphone or tablet, mark No and go to the next question.</i>
<input type="checkbox"/>	Option 2 <input type="checkbox"/> 1. Does the client have a laptop or desktop with a camera or webcam and microphone? <input type="checkbox"/> 2. Does the client have an internet/WIFI connection? <input type="checkbox"/> 3. Does the client have an internet browser? <input type="checkbox"/> 4. Does the client have an email address?	<i>If the client is a child, the parent will need to provide approval for the child to use the child's or parent's laptop or desktop with camera and microphone. If the response to any of these three questions is No, then the client does not have the necessary technology to participate in a virtual appointment. An alternate approach such as phone call or face to face may be used for the appointment. Note: Zoom works with all internet browsers such as: Chrome, Internet Explorer, Edge.</i>
Obtain consent for virtual appointment		
<input type="checkbox"/>	Does the client agree to a virtual appointment?	<i>If the appropriate technology is available, verbal consent for the virtual appointment must be obtained from the client and/or the parent when the client is a child or youth. At this point you will need to obtain the clients email address, phone/cell number and agreed upon appointment date and time. If the client is a child, the parent will need to provide the email address and agreed upon appointment date and time. Verbal consent (for the virtual appointment) must be documented as per clinical documentation standards.</i>
<input type="checkbox"/>	Were the steps in scheduling a virtual appointment explained to the client?	<i>An invitation will be sent to the client via email (for a child it would be sent to the parent) with a short instruction sheet. On the appointment date and time the client will go into their device and click on the link provided in the email invitation to start the virtual session. Note: You may wish to obtain the client's phone/cell number in the event you need to coach them through "connecting to Zoom for the first time".</i>