





Telemental Health Tip Sheets

Holding Virtual Appointments: Setting Up Your Technology

Using technology to deliver mental health services may be new to you. Below are some helpful tips to consider as you adapt to new telemental health technology solutions for service delivery. For additional resources and updates on how the COVID-19 public health emergency affects the delivery of behavioral health services in New York State, please visit <https://ctacny.org/covid-19-resources>.

1. If possible, assign a **point-person** on your team to become familiar with the telehealth technology your team is using so they can answer questions and troubleshoot with team members that encounter issues.¹
2. All team members using the new technology should know who to reach out to for **help**, whether it be someone on the team or a customer support person affiliated with the technology vendor.²
3. Discuss with your team how virtual appointments might affect your response to **crises and emergency situations** and have a plan in place for how to respond in these situations.³
4. Try to choose a room with a **strong internet connection**, so be mindful of the location of your router if you're using a wireless network. If you're using a cell phone, make sure you have a strong cell signal.⁴ 
5. Before using the technology with clients, do a **test run** with a team member, and make sure you feel comfortable using the technology yourself.⁵
6. Will you be sharing your account with a colleague? Ensure you have a system in place to avoid **overlapping** appointments.
7. When setting up your appointment with your client, ask them about their **concerns** using new technology. Offer to schedule a "test run" to reduce anxiety.⁶
8. Set up a **contingency plan** with your client just in case you lose connection. For example, if you are meeting through a video connection, ask them for a phone number you can call if the video connection is poor or lost.⁷ 
9. **Practice** launching the software so that you are comfortable and prepared to deliver high-quality services.⁸
10. Breathe. Using new technology can be overwhelming. Be patient with yourself. **You got this!**

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- ¹ TeleBehavioral Health Center of Excellence. (n.d.) *Step-By-Step Guide for Setting Up Telebehavioral Health Services*. Retrieved March 26, 2019, from https://www.ihs.gov/sites/telebehavioral/themes/responsive2017/display_objects/documents/TBHCEtoolkit2019.pdf
- ² TeleBehavioral Health Center of Excellence
- ³ TeleBehavioral Health Center of Excellence
- ⁴ TeleBehavioral Health Center of Excellence
- ⁵ TeleBehavioral Health Center of Excellence
- ⁶ The Office of the National Coordinator for Health Information Technology. (2019, April 17). Patient Engagement Playbook. *Improve appointments with health IT*. Retrieved March 26, 2020, from <https://www.healthit.gov/playbook/pe/chapter-7/>
- ⁷ Ralston, A. L. (2020, March 23). *Best Practices for Telehealth*. [PowerPoint Slides]. Community Technical Assistance Center of New York. <https://ctacny.org/sites/default/files/CTAC%20Telehealth%20Ralston.pdf>
- ⁸ Ralston (2020)