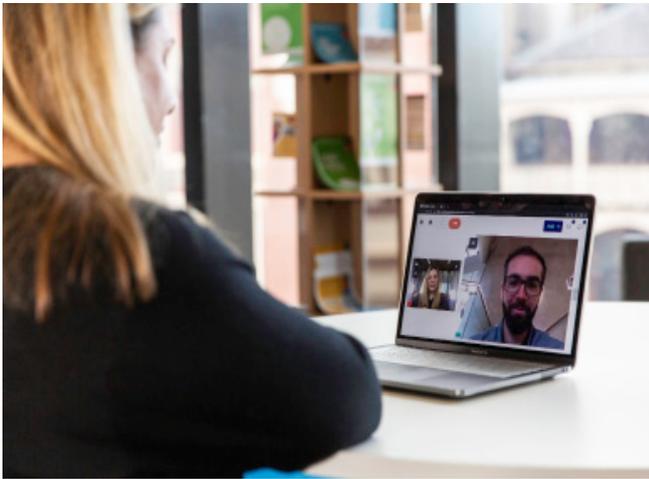


# A Practical Guide to Video Mental Health Consultation



Video conferencing is a useful and effective tool for remote mental health consultation<sup>1</sup>.

Research has shown that there is high satisfaction with video counselling services among clients and that it may be as effective as counselling delivered in-person<sup>2</sup>.

This guide aims to help you to deliver your services as effectively as you would in-person.

This guide assumes your service has a video counselling platform selected and implemented. If you need guidance on implementing video counselling in your service, see the suggestions and resources at the end.

We will cover the following elements of video consultation practice, **each of which is detailed further in a tipsheet**:



## Setting up your workspace

First, consider how to set up your workspace. There are a few things you can do, including:

- “Editing” your environment to create a private and comforting space that the client will see behind you
- Adjusting the lighting in your workspace
- Minimising background noise
- Checking how your attire will work on screen

[Jump to our tip sheet on workspace setup](#)



## Setting up your digital space

Next, consider your digital environment:

- Familiarise yourself with your software
- “Edit” your screen to reduce distractions
- Organise resources you may use
- Set up your screen and camera to promote “eye contact”
- Frame your face at a comfortable distance

[Jump to our tip sheet on digital space setup](#)



## Preparing the client

In advance of the session, check off things to prepare the client for the session:

- Let them know what to expect
- Guide them in what they need to do
- Identify a back-up means of communication
- Obtain contact details for risk management

[Jump to our tip sheet on preparing the client](#)



## Adapting your therapeutic skills

During the call, you can enhance rapport by adapting your therapeutic skills:

- Check your positioning on the screen
- Make eye contact with the camera
- Emphasise your active listening skills
- Checking how the session is going

[Jump to our tip sheet on therapeutic skills](#)



## Navigating common challenges

Finally, familiar processes may not work as intuitively online. Be prepared for common challenges to navigate including:

- Managing clinical risk
- Maintaining boundaries
- Dealing with lag in a video feed to keep a conversation flowing

[Jump to our tip sheet on challenges](#)



## Setting Up Your Workspace

### 1. Your environment

Make sure that the workspace where you conduct your video consultation is private which includes taking steps to ensure that other people are not able to overhear your session and make sure that you are not going to be interrupted in this space (e.g. signage on doors).

“Edit” your workspace before you video conference. Consider the types of objects that are visible in the background. You may like to include plants and artwork but remove any personal photographs or belongings or things that are distracting.



PRO-TIP

*Keep windows and doors in mind. You are trying to create a private space for your client. You might like to consider not having windows or doors in your image to reduce the chance of some passing by or unexpectedly dropping in.*

### 2. Your lighting

Lighting can have a big impact on the quality of the experience for your client. Poor lighting conditions can make it difficult for clients to see you or be a source of distraction. You might like to experiment with the positioning of your setup to achieve the best lighting conditions. Some useful things to consider are avoiding backlighting (this happens when the source of light is positioned behind you – like natural light coming in from a window) and positioning yourself in a way that reduces shadowing of your face.



PRO-TIP

*You might like to consider professional lighting, like a ring light, if you notice the lighting in your workspace is suboptimal.*

### 3. Background noise

Ideally your workspace is away from major sources of noise, especially other people talking. Other background noise like traffic can also make it more difficult for you and your client to hear each other and can also be distracting. Minimising sources of noise will improve the quality of the call for both you and the client.

If background noise is an issue for you, consider using a lapel microphone or headphones with inbuilt microphone to pick up your voice more directly



PRO-TIP

*Don't forget to turn off your phone ringtone and other alerts!*

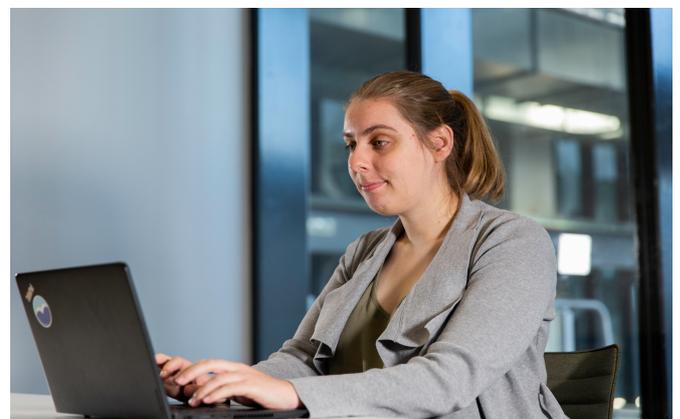
### 4. Attire

As well as dressing professionally, bear in mind that some cameras can have difficulty with striped or patterned clothing that can create some optical illusions.



PRO-TIP

*Consider dressing in colours that contrast with your background.*





## Setting Up Your Digitalspace

### 1. Your video conferencing platform

Before starting, make sure you are familiar with how the video platform you are using operates. Do some practice calls in advance so you are confident when seeing your client.

### 2. Your screen

“Edit” what is visible on your computer, by exiting, or at least minimising, programs that aren’t needed during your session.

This is particularly important if you plan to screen share, both to aid your navigation in-session, and to protect privacy. However even if not screen sharing this helps to minimise distractions.



*We easily get distracted by emails coming in. Consider disabling your email alerts and other notifications while you are in your session to give your full attention to your client.*

### 2. Your resources

Prepare resources you may use during the session in advance. Video conferencing software often has integrated document-sharing or screen sharing functions to capitalise upon.

Upload your resources before your session. We recommend making an easy to access folder with all of your resources ready to go.



*If you are sharing online materials consider bookmarking your frequently used resources in advance.*

### 4. Your camera position

Think about your camera as if it is your clients eyes. Position your camera so that it can become natural for you to look at the lens while your client is speaking. Align it with the mid-line of your body to face your client squarely.

Having your camera sitting at or slightly above your eye line is recommended. You don’t have to maintain eye contact 100% of the time, but maintaining eye contact can help demonstrate that you are engaged and listening.



*Maintaining “eye contact” can be really challenging in video counselling as we are drawn to look at our clients face. Consider minimising and dragging your video conferencing window so that it is positioned near your camera.*

### 5. Framing your face

This is all about creating a comfortable image for your client to look at. You should be the main object of focus in the foreground.

If you think about the screen being split into thirds, your shoulders should line up with the bottom third and your eyes should line up with the top third. This gives you about 10cm between the top of your head and the top of the screen.



*Consider seating yourself about half a meter from your camera. This will give you enough space to lean slightly forward to demonstrate you are listening to your client.*



## Preparing The Client

### 1. Be open about strengths and limitations of video consultation

It is useful to discuss the advantages of communicating by video whilst also acknowledging that challenges can arise for both the client and the clinician.

Advantages include that:

- it can overcome access difficulties based on distance, time, mobility and ill health
- Self-help resources, screen share and file sharing can help collaborative working

Normalise that it can seem unnatural at first and that technical difficulties do sometimes arise.

Model a patient and accepting approach, with an attitude that if problems arise they can be navigated.

### 2. Guide the client in setting-up

Guide the client in thinking through the things that they will need to do to connect.

It is useful to prepare some written material to send with details of how to set up and log on.

Things to consider include:

- Finding a quiet and private location for the consultation
- Internet connection and bandwidth requirements (see specifications for software used)
- Identifying a device to use
- Software to download if required
- Likely data usage for the consultation
- What the client should do if they cannot connect
- Billing or other administrative procedures
- Security of the platform and implications for privacy
- Use of recording functions on the platform

It can be a good idea to enquire about the client's confidence and experience with using video conferencing software, and technology in general, so they can be given more guidance if needed. Consider whether they may need additional help (e.g., by telephone, or from a carer or family member) when getting started.

### 3. Identify a back-up communication modality

In advance of the first session, we recommend establishing a back-up plan to use in the event of connectivity issues.

This may be needed for when a connection just can't be established with the client or when a video call has had a lot of interruption.

It might involve a mobile or landline number to call, or a secure online chat-based alternative. By communicating this plan with your client in advance you will be able to minimise any disruption to the session.

### 4. Obtain key details for risk management

When clients have been engaged remotely, consider what information would be needed in the event of a clinical risk issue.

Consider in particular the scenario of a risk issue arising, but being unable to continue the consultation due to the client disengaging or a connectivity problem.

The following are key details to obtain:

- Phone number or other means of contacting the client
- Their home address (to identify local services, or to send help in the event of imminent risk)
- Existing mental health practitioner/s and/or GP details
- Other contacts such as informal carers if relevant



## Adapting Your Therapeutic Skills

Whilst clients rate as strong a therapeutic alliance in video counselling as in face-to-face therapy, practitioners can report finding it less intuitive to build engagement and rapport when using video. In this tip sheet we consider the things you can do to show the client you are listening and engaged.

### 1. Positioning and posture

Use your image as a form of real-time feedback to adjust your posture and position.

Check the framing of your face, and aim to face the client square-on throughout the session.

Sitting far enough away from the camera to give yourself space to lean in from time to time is also useful way of showing you are really engaging with what your client is saying.

### 2. Make eye contact with the camera

Getting eye contact right over video can be challenging. Looking at the client's image on screen will often not be experienced as eye contact by the client, because really you would need to be looking into the camera to seem to be connecting with their eyes.

When possible, move windows around on your screen to position their image closer to the camera.

Treating the camera lens as if it is your client's eyes is ideal: placing something eye-catching as a focal point near your camera lens can help develop this habit.

### 3. Emphasise active listening skills

The nonverbal signals we use to build rapport may be less noticeable to the client over a video conferencing feed, so to ensure these signals get through it can be helpful to make these more explicit.

Demonstrate connectedness with the client via nodding, engaged facial expressions, gestures, paraphrasing, making empathic statements, and so on.

Note also that sometimes we can become more still than usual when in front of a camera. Relax to avoid settling in to a closed tense posture, and feel free to use hand gestures and body movement

### 4. Check how the session is going

Checking in with your client periodically about the session can also be helpful, not just to ensure things like signal quality are okay, but also demonstrate thoughtfulness about the client's experience of the interaction.

The beginning of the session, and transitions in conversation are good places to check in on how the client is finding the session and whether everything is going okay.

### 5. Take care when taking notes

If taking notes electronically during the session, be aware that this will be quite obvious on the screen.

Mentioning that you are taking notes on the session can help the client understand what you are doing. Remember to resume eye contact and active listening.

Keyboard noise can also be very prominent when using a computer microphone, so using a separate headset microphone may be needed if taking notes electronically during the session.



PRO-TIP

*Screen sharing or whiteboard functions can be used for making notes together with the client, such as a session agenda or key points. These can be a shared point of focus to help deepen the collaboration.*



## Navigating Common Challenges

### 1. Clinical risk management

Management of elevated clinical risk follows the same principles of face-to-face work, with additional considerations for (a) the risk of losing contact with the client when they are not physically present, and (b) the possibility that the client is in a distant location where the practitioner may be less familiar with services.

Useful elements of a risk management protocol include:

- Ensuring an alternative means of contact such as telephone is available
- Ensuring there is a record of address details for the client, and contact details for their mental health practitioner or GP
- Becoming familiar with psychiatric triage services local to the client
- Familiarising oneself with relevant legislation or regulations local to the client if in another state
- Reinforcing with the client the importance of accessing the telehealth service from a consistent location and/or knowing their location at the time of the session
- Considering the impact that any location changes have on risk management and access to local resources
- Considering the use of a support person (family, friend, etc) in sessions, and/or as an emergency contact

### 2. Maintaining boundaries

Use of communication platforms that may also be used socially can make boundaries less defined.

Avoid use of personal log-ons for any platforms used, and clarify boundaries and expectations when required.

### 3. Dealing with lag

Many of us have experienced an awkward lagged conversation when using video conferencing to talk to colleagues, friends, or family. The causes of lag are most commonly associated with Internet connectivity.

A video call relies on simultaneously uploading video data from one's own computer and downloading video data from the caller's computer. These tasks occur within the bandwidth you have available in your internet connection. Lag happens when you don't have enough bandwidth to support the simultaneous upload and download of data.

Note that upload speed is slower than download speed, so when someone has a connectivity issue, it is more noticeable to the other parties on the call than it is to the person with the slow connection. If you receive notifications about poor connectivity, these are a flag to check in with the client about whether the quality is okay for them, rather than relying on your own experience of the call.

Options for dealing with lag include:

- Reducing the quality of your video call
- Closing any other programs using the Internet
- Switching to a different connection
- Explaining why lag occurs
- Slowing the pace of your conversation to reduce talking over one another
- Switching to your back-up plan



PRO-TIP

*Consider your standard practices for session time being interrupted by technical issues. Do you extend the length of a session to make up for the interruption?*



## Further Resources and References

### Selecting a video conferencing platform

When selecting a video conferencing platform note that there are differences between platforms designed for social use (e.g., Skype, FaceTime), business use (e.g., Zoom) and telehealth (e.g., CoviU, VSee).

Both business and telehealth platforms may have whiteboard, screen sharing and file sharing functions, which are useful features in mental health consultations.

Dedicated telehealth platforms often additionally have features such as a virtual waiting room and integration with appointment scheduling and billing.

In comparing platforms, consider the user experience: does the client just need to click on a link to connect, or do they need to download software or register an account?

It is also important to consider platform specifications in relation to the data protection, privacy and health records legislation for your jurisdiction, and any health insurance regulations.

Some data protection considerations include:

- Is end-to-end encryption used for all forms of data transmission (e.g., audio, video, chat, file sharing)?
- Do clients need to register using personal identifiers to use the platform? Do personal identifiers become linked with use of your service or any other data?
- Will data flow over state or national borders?
- If there is a recording function, would this generate material that would be classed as a health record with associated storage requirements?

It can be useful to walk through step-by-step how the client (and the practitioner) will interact with the platform, considering points at which personal data is generated, and if and where data will be stored.

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### Further resources and reading

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