

CHECKLIST FOR COUNSELLORS SETTING UP PHONE/ONLINE COUNSELLING

Have you had a brief phone call with the client before work begins to set up the time and date of the first session (as you would if the meeting was face to face)? Please check with the client that they have received 3 emailed documents:

1. Preparation for Phone/Online working information sheet – setting out what they should consider/expect
2. The Phone/Online counselling Contract
3. The 'Information we hold about you' (GDPR) form

Explain that you will go through the contract and GDPR form during your first session and that you will explain how they can 'sign' the contract.

Practicalities to consider:

- Check notifications are turned off in settings – pop ups and/or alerts will interrupt your session.
- Check the device you are using is sufficiently charged/that you have a charger nearby.
- Check your virus protection/firewall is updated on the device you will be using and that your phone/device is password protected

- Ensure you are working from a quiet place where you will not be interrupted.
- Consider using earphones to prevent your client from being heard by anyone else.
- Have a soft drink to hand.
- If working online, ensure the camera is at eye level.
- If using **Zoom**, have the meeting details been sent to your client with at least 24hrs notice?
 - When scheduling the meeting remember to tick 'automatically generate' Meeting ID and password for each session, so there is a different one for each session (rather than using the recurring meeting feature)
 - Check in Settings that the recording meeting function is 'off'
 - Get ready 10mins early but with the host camera off and ensure the Waiting Room option is on (only authenticated users with the password can join). Turn the host camera/audio on when the session is due to start.
 - Once the meeting has started, click the padlock symbol to lock the meeting.

Remember to give your client suitable warning that the session is nearing its end. Only hang up/'end the meeting' once the client has been given appropriate opportunity to do so first.

Consider leaving more time in between counselling sessions that you might if the work was face to face.