



Engaging with Clients Over the Telephone and Using Texts

Amid the current COVID-19 social distancing and stay at home orders many behavioral health providers have quickly shifted their primary interactions with clients to remote engagement. For some, this means using video conferencing software to simulate an in-person meeting. However, for many people access to a computer or tablet and reliable internet service is not available. For these individuals you may need to engage with them primarily, or solely, through the phone via voice calls or texts. This tool will provide information about strategies for quality engagement with clients using the phone.

This guidance can be applied to your work during the COVID-19 public health emergency, as well as when engaging with clients who may live in remote, rural, and otherwise difficult to access areas. Please note that it is best to talk with your agency's administration to determine any potential issues or concerns with providing remote services, including, but not limited to, HIPAA compliance, reimbursement, and authorizations.

Important Considerations



Review with the client their phone plan.

Identify the number of minutes allowed for talk and text, upgrades currently available during the public health crisis, and other relevant phone access details.



When engaging in services via phone or text, be aware of your agency's policies regarding agreement or consent from the client to engage in services using this technology.



Be mindful of HIPAA compliance rules and documentation requirements. Note that HIPAA rules and existing policies may have been waived and/or modified during the pandemic.

Helping Clients Prepare to Engage in a Phone Session



Try to find a quiet, private location where you won't be interrupted



Remove distractions (family members, TV, things outside the window, etc.)



Make sure your phone is charged and has minutes available



Think ahead about what you want to discuss, make notes if that's helpful



Have a pen and paper available to take notes during the call

Preparing Yourself for a Phone Session with a Client

The guidelines for preparing yourself are very similar to those for the client.

- Find a quiet, private location where you won't be interrupted
- Do not multitask while meeting with the client, give the client your full attention
- Remove distractions, turn off email and other notifications on your phone and computer
- Dress as if you're meeting with the client in person, so you will be in a prepared mindset
- Make notes before the meeting about what to discuss with the client, focus on the client's goals, and prepare questions to solicit information and engagement
- Be transparent with the client regarding the challenges of a phone session and how collectively you both can help address these challenges
- Recognize that while support around the current crisis may be a priority you don't want to forget to also address the client's pre-crisis goals - there may be objectives that can be addressed and may serve to support both coping with the crisis and long-term goals

Orientation to Phone Sessions

Orientation is an important component of any therapeutic session. Orienting describes the purpose of the meeting and gives both the provider and the client an opportunity to discuss their objectives. Orientation during a phone session is just as important as in a face-to-face session and can be similar. You will want to include the following:

WHAT

Describe the purpose of the phone meeting and what it will involve.

WHY

Identify the intended outcomes and benefits of the session.

HOW

Discuss action steps the client will take to accomplish goal(s) within timeframes.

QUESTIONS

Ask the client what questions they have about what was discussed and how you can provide support.

Facilitating a Meaningful Conversation

When you're communicating with someone over the telephone or via text it can be difficult to have a meaningful exchange. The types of questions you ask can encourage or discourage a more expansive response than a simple yes or no or short answer. Similar to your in-person meetings, the use of open-ended questions will provide a better opportunity for the client to expand on their thoughts and feelings. Plan to use more facilitative questions, relying on closed questions minimally.

Facilitative Questions

- Tell me about how you have been feeling.*
- What are some things I can do to help you?*
- What would you like to talk about today?*
- How has the current situation made you feel?*
- What are you planning to do today?*
- Tell me how you and your family/others in the home have been getting along.*

Closed Questions

- Are you feeling well?*
- Can I help you with anything?*
- Is there anything you would like to talk about?*
- Do you feel upset about what's going on?*
- Are you doing anything today?*
- Are you and your family/others in the home getting along?*

Other Considerations

There are many unique aspects of engaging in a therapeutic exchange over the phone, some of which can be challenging. During a phone meeting, you will be unable to see the client's non-verbal cues and body language, making it more difficult to assess for incongruence between their words and their behaviors. Some things to look for in the absence of visual observations are:

Tone of Voice

Is the client's intonation angry, anxious, pleasant and does it match with what they're saying?

Negative Language

Is the client using more negative words or language than is typical for them?

Atypical Speech

Is the client more silent or more talkative than usual or is their speech pressured?

Distraction

Does the client seem distracted, unable to focus, or jumping from topic to topic?

Using Texts to Engage Clients

For clients with limited minutes on their phone, particularly individuals with cell phones provided by social services, using texts may be a good way to maintain engagement without using up precious minutes.



Consider scheduling a time to text with the client so you can converse in real time and avoid having an exchange in which you and the client are texting back and forth at different times. This will allow for more continuity and may reduce any client anxiety resulting from waiting on your response.



You may want to discuss with the client use of common text abbreviations, characters, or emojis. Come to an agreement so that you and the client are on the same page. Reassure the client that they don't need to worry about spelling and grammar mistakes, you're more interested in what they have to say. Remember that texts can easily be misinterpreted by both you and the client. Practice reflective responding to confirm understanding.



If you are able to have a phone call with a client you can use text messaging as a way to provide ongoing support between calls (e.g., encouraging messages or quotes), reminders (e.g., medication support or completing an agreed upon activity), or check-in (e.g., what is your mood today?). Other examples include sending voice recordings of the counselor or client sharing a coping reminder, suggestions of relaxation exercises or apps, visuals of soothing images such as flowers, streams, animals, etc. Supplemental text messages should be discussed with the client prior to sending to receive consent and plan what types of messages would be most helpful.

Basic Guidelines for Dealing with an At-Risk Client

- Request the person's location (address) at the start of the session in case you need to contact emergency services
- Request or confirm you have emergency contact information
- Develop a contact plan should the call/video session be interrupted
- Assess for suicide/at-risk behavior (use ACT Suicide Scale or Columbia Suicide Scale)
- Prior to contact, develop a plan for how to stay on the phone with the client while arranging emergency services, if needed.
- With adolescents, make sure you have guardian contact information close by to access in case of an emergency

Source: Suicide Prevention Resource Center