

# Telehealth Information Sheet for Mental Health Providers

Created by Jonathan Perle, PhD, ABPP – [jperle@midwestern.edu](mailto:jperle@midwestern.edu)

Last Updated: May 2, 2020

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Due to the fragmentation of information regarding telehealth-based services, I attempted to condense many of the “high points” into this form. Information is not exhaustive, and each provider should do their due diligence to educate themselves on telehealth-based modalities, including the strengths and limitations, prior to using them. Education can help ensure an appropriate level of competence, and foster general adherence to guiding standards. Please note that information is based upon my review and knowledge, and is meant to help colleagues. I am not claiming authorship or ownership of any of the following information, nor am I endorsing one over the other.

<b><u>Guidelines And Recommendations From Guiding Organizations:</u></b>		
*Several guiding organizations have created guidelines and recommendations for proper use of telehealth modalities.		
American Psychological Association	Guidelines for the practice of telepsychology	<a href="https://www.apa.org/practice/guidelines/telepsychology">https://www.apa.org/practice/guidelines/telepsychology</a>
American Telemedicine Association  *Note: ATA has many guides and recommendations applicable to mental health practice.  *Note: Some information is behind paywalls, while some is available through their corresponding journal and/or organizations such as SAMHSA.	Practice guidelines for video-based online mental health services	<a href="https://www.integration.samhsa.gov/operations-administration/practice-guidelines-for-video-based-online-mental-health-services_ata_5_29_13.pdf">https://www.integration.samhsa.gov/operations-administration/practice-guidelines-for-video-based-online-mental-health-services_ata_5_29_13.pdf</a>
	Utilization of the American Telemedicine Association’s clinical practice guidelines	<a href="https://www.liebertpub.com/doi/10.1089/tmj.2013.0027">https://www.liebertpub.com/doi/10.1089/tmj.2013.0027</a>
	American Telemedicine Association Practice guidelines for telemental health with children and adolescents	<a href="https://www.liebertpub.com/doi/10.1089/tmj.2017.0177">https://www.liebertpub.com/doi/10.1089/tmj.2017.0177</a>
	ATA practice guidelines for video-based online mental health services	<a href="https://www.liebertpub.com/doi/10.1089/tmj.2013.9989">https://www.liebertpub.com/doi/10.1089/tmj.2013.9989</a>
	Operating procedures for pediatric telehealth	<a href="https://pediatrics.aappublications.org/content/pediatrics/140/2/e20171756.full.pdf">https://pediatrics.aappublications.org/content/pediatrics/140/2/e20171756.full.pdf</a>
American Counseling Association	Ethical and professional standards	<a href="https://www.counseling.org/knowledge-center/ethics#2014code">https://www.counseling.org/knowledge-center/ethics#2014code</a>
National Association of Social Workers, Association of Social Work Boards, Council on Social Work Education, Clinical Social Work Association	Technology in social work practice	<a href="https://www.socialworkers.org/includes/newIncludes/homepage/PRA-BRO-33617.TechStandards_FINAL_POSTING.pdf">https://www.socialworkers.org/includes/newIncludes/homepage/PRA-BRO-33617.TechStandards_FINAL_POSTING.pdf</a>

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<b>General Information:</b>		
*Websites with consolidated information related to COVID-19 changes.		
Trainers of school psychologists	Resources for COVID-19	<a href="https://tsp.wildapricot.org/">https://tsp.wildapricot.org/</a>
National Register of Health Service Psychologists	Amidst COVID-19 outbreak, what resources can you use?	<a href="https://www.nationalregister.org/coronavirus-resources/">https://www.nationalregister.org/coronavirus-resources/</a>
Association of State and Provincial Psychology Boards	Licensure related matters and COVID-19	<a href="https://www.asppb.net/page/covid19">https://www.asppb.net/page/covid19</a>
American Psychological Association	Telehealth guidance by state during COVID-19	<a href="https://www.apaservices.org/practice/clinic/covid-19-telehealth-state-summary">https://www.apaservices.org/practice/clinic/covid-19-telehealth-state-summary</a>
Epstein, Becker, and Green	COVID-19: Telemental health laws update	<a href="https://www.ebglaw.com/covid-19-telemental-health-laws-update/">https://www.ebglaw.com/covid-19-telemental-health-laws-update/</a>
American Group Psychotherapy Association	COVID-19	<a href="https://www.agpa.org/home/media/covid-19">https://www.agpa.org/home/media/covid-19</a>
<b><u>Training Outlet – Paid Programs:</u></b>		
Telebehavioral Health Institute (sale due to COVID-19)	Individual telehealth training courses	<a href="https://telehealth.org/individual">https://telehealth.org/individual</a>
Zur Institute	Individual telehealth training courses	<a href="https://www.zurinstitute.com/">https://www.zurinstitute.com/</a>
American Telemedicine Association	Individual telehealth training courses	<a href="https://www.americantelemed.org/resource_categories/webinars/">https://www.americantelemed.org/resource_categories/webinars/</a>
Telehealth Certification Institute	Individual telehealth training courses	<a href="https://telementalhealthtraining.com/thtc-certificate-courses/product/listing">https://telementalhealthtraining.com/thtc-certificate-courses/product/listing</a>
PESI	Telehealth for mental health professionals: 2-day distance therapy training	<a href="https://catalog.pesi.com/item/52191/?utm_source=featuredad&amp;utm_medium=banner&amp;utm_campaign=BH_telehealth_POS055645">https://catalog.pesi.com/item/52191/?utm_source=featuredad&amp;utm_medium=banner&amp;utm_campaign=BH_telehealth_POS055645</a>
	Telehealth 101 for mental health professionals: Best practices in the basics and beyond	<a href="https://catalog.pesi.com/item/telehealth-101-mental-health-professionals-practices-basics-beyond-59120">https://catalog.pesi.com/item/telehealth-101-mental-health-professionals-practices-basics-beyond-59120</a>
	Telehealth: How to practice across state lines for mental health professionals	<a href="https://catalog.pesi.com/item/telehealth-practice-state-lines-mental-health-professionals-57691">https://catalog.pesi.com/item/telehealth-practice-state-lines-mental-health-professionals-57691</a>
The Trust	Telepsychology: Managing risk in practice	<a href="https://beacon360.content.online/xbcs/S1537/catalog/product.xhtml?eid=7191">https://beacon360.content.online/xbcs/S1537/catalog/product.xhtml?eid=7191</a>

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	Telepsychology – Clinical applications of technology	<a href="https://beacon360.content.online/xbcs/S1537/catalog/product.xhtml?eid=7190">https://beacon360.content.online/xbcs/S1537/catalog/product.xhtml?eid=7190</a>
	Practice in the age of telepsychology	<a href="https://beacon360.content.online/xbcs/S1537/catalog/product.xhtml?eid=7186">https://beacon360.content.online/xbcs/S1537/catalog/product.xhtml?eid=7186</a>
<b><u>Training Outlet – (Potentially) Free Programs</u></b>		
American Psychological Association	Telepsychology best practice 101 series	<a href="https://apa.content.online/catalog/product.xhtml?eid=15132">https://apa.content.online/catalog/product.xhtml?eid=15132</a>
National Register of Health Service Psychologists (free for members)	A practical guide to providing telepsychology with minimal risk	<a href="https://www.nationalregister.org/npc-telepsych-video/">https://www.nationalregister.org/npc-telepsych-video/</a>
	A practice guide to providing telepsychology with minimal risk	<a href="https://parma.trustinsurance.com/Workshops-Webinars/Free-CE/A-Practical-Guide-to-Providing-Telepsychology-with-Minimal-Risk">https://parma.trustinsurance.com/Workshops-Webinars/Free-CE/A-Practical-Guide-to-Providing-Telepsychology-with-Minimal-Risk</a>
	Telepsychology with children and teens in the age of COVID-19	<a href="https://ce.nationalregister.org/videos/telepsychology-with-children-and-teens-in-the-age-of-covid-19-archived/">https://ce.nationalregister.org/videos/telepsychology-with-children-and-teens-in-the-age-of-covid-19-archived/</a>
	Pragmatics of telepsychology practice in the age of COVID-19	<a href="https://ce.nationalregister.org/videos/pragmatics-of-telepsychology-practice-in-the-age-of-covid-19-archived/">https://ce.nationalregister.org/videos/pragmatics-of-telepsychology-practice-in-the-age-of-covid-19-archived/</a>
	A telepsychology primer	<a href="https://ce.nationalregister.org/publications/a-telepsychology-primer/">https://ce.nationalregister.org/publications/a-telepsychology-primer/</a>
The Chicago School of Professional Psychology	Telehealth 101	<a href="https://jungchicago.org/blog/tcspp-free-home-study-ce-webinars/">https://jungchicago.org/blog/tcspp-free-home-study-ce-webinars/</a>
	Best practices in online pedagogy	<a href="https://jungchicago.org/blog/tcspp-free-home-study-ce-webinars/">https://jungchicago.org/blog/tcspp-free-home-study-ce-webinars/</a>
International Neuropsychological Society	Teleneuropsychology (TeleNP) in response to COVID-19	<a href="https://www.the-ins.org/webinars/">https://www.the-ins.org/webinars/</a>
<b><u>Free Podcasts</u></b>		
National Register of Health Service Psychologists – Dr. Samuel Lustgarten	Telepsychology dos and don't for clinicians	<a href="https://www.nationalregister.org/education-training/podcasts/?mm=telepsychology-">https://www.nationalregister.org/education-training/podcasts/?mm=telepsychology-</a>

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		<a href="#">dos-and-donts-for-clinicians#mm-featured_1</a>
	Providing telepsychology services	<a href="https://www.nationalregister.org/education-training/podcasts/?mm=providing-telepsychology-services#mm-featured_1">https://www.nationalregister.org/education-training/podcasts/?mm=providing-telepsychology-services#mm-featured_1</a>
<b><u>Informed Consent Information:</u></b>		
American Psychological Association	Informed consent checklist for telepsychological services	<a href="https://www.apa.org/practice/programs/dmhi/research-information/informed-consent-checklist">https://www.apa.org/practice/programs/dmhi/research-information/informed-consent-checklist</a>
Trust Parma	Sample informed consent form	<a href="https://parma.trustinsurance.com/Resources/Articles/sample-informed-consent-form">https://parma.trustinsurance.com/Resources/Articles/sample-informed-consent-form</a>
California Telehealth Resource Center	Sample forms and guidelines	<a href="https://www.caltrc.org/knowledge-center/best-practices/sample-forms/">https://www.caltrc.org/knowledge-center/best-practices/sample-forms/</a>
<b><u>Helpful Documents for General Practice:</u></b>		
American Psychological Association	Office and technology checklist for telepsychological services	<a href="https://www.apa.org/practice/programs/dmhi/research-information/telepsychological-services-checklist">https://www.apa.org/practice/programs/dmhi/research-information/telepsychological-services-checklist</a>
American Academy of Pediatrics	Getting started in telehealth	<a href="https://www.aap.org/en-us/professional-resources/practice-transformation/telehealth/Pages/Getting-Started-in-Telehealth.aspx">https://www.aap.org/en-us/professional-resources/practice-transformation/telehealth/Pages/Getting-Started-in-Telehealth.aspx</a>
American Psychiatric Association	Telepsychiatry practice guidelines	<a href="https://www.psychiatry.org/psychiatrists/practice/telepsychiatry/toolkit/practice-guidelines">https://www.psychiatry.org/psychiatrists/practice/telepsychiatry/toolkit/practice-guidelines</a>
National Association of School Psychologists	Guidance for delivery of school psychological telehealth services	<a href="http://www.nasponline.org/assets/documents/Guidance_Telehealth_Virtual_Service_20Delivery_Final%20(2).pdf">http://www.nasponline.org/assets/documents/Guidance_Telehealth_Virtual_Service_20Delivery_Final%20(2).pdf</a>
Helping Give Away Psychological Science/Telepsychology	Guidelines for conducting mental health services with technology.	<a href="https://en.wikiversity.org/wiki/Helping_Give_Away_Psychological_Science/Telepsychology">https://en.wikiversity.org/wiki/Helping_Give_Away_Psychological_Science/Telepsychology</a>

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<b><u>Additional Helpful Organizations and Links:</u></b>		
American Psychological Association	Comparing the latest telehealth solutions	<a href="https://www.apaservices.org/practice/business/technology/tech-column/telehealth-solutions">https://www.apaservices.org/practice/business/technology/tech-column/telehealth-solutions</a>
National Consortium of Telehealth Resource Centers	NCTRC	<a href="http://www.caltrc.org/">http://www.caltrc.org/</a>
Center for Connected Health Policy	National Resource Center Partners	<a href="https://www.cchpca.org/about/national-telehealth-resource-center-partners">https://www.cchpca.org/about/national-telehealth-resource-center-partners</a>
Epstein, Becker, and Green	50 state survey of telemental/telebehavioral health (2017 appendix)	<a href="https://www.ebglaw.com/content/uploads/2017/10/EPSTEIN-BECKER-GREEN-2017-APPENDIX-50-STATE-TELEMENTAL-HEALTH-SURVEY.pdf">https://www.ebglaw.com/content/uploads/2017/10/EPSTEIN-BECKER-GREEN-2017-APPENDIX-50-STATE-TELEMENTAL-HEALTH-SURVEY.pdf</a>
Center for Connected Health Policy	Current state laws and reimbursement policies	<a href="https://www.cchpca.org/telehealth-policy/current-state-laws-and-reimbursement-policies#">https://www.cchpca.org/telehealth-policy/current-state-laws-and-reimbursement-policies#</a>
Association of State and Provincial Psychology Boards	PSYPACT	<a href="https://www.asppb.net/mpage/legislative">https://www.asppb.net/mpage/legislative</a>
American Counseling Association	Telebehavioral health information and counselors in health care	<a href="https://www.counseling.org/knowledge-center/mental-health-resources/trauma-disaster/telehealth-information-and-counselors-in-health-care">https://www.counseling.org/knowledge-center/mental-health-resources/trauma-disaster/telehealth-information-and-counselors-in-health-care</a>
National Association of Social Workers	Clinical social work practice tools: Technology	<a href="https://www.socialworkers.org/Practice/Clinical-Social-Work/Technology">https://www.socialworkers.org/Practice/Clinical-Social-Work/Technology</a>
Veteran's Affairs	Safety plan quick guide for clinicians	<a href="https://www.mentalhealth.va.gov/docs/va-safetyplancolor.pdf">https://www.mentalhealth.va.gov/docs/va-safetyplancolor.pdf</a>
Person Centered Tech	Person Centered Tech	<a href="https://personcenteredtech.com/">https://personcenteredtech.com/</a>
TelehealthROCKS – University of Kansas Medical Center	Rural Outreach for the Children of Kansas	<a href="https://www.telehealthrocks.org/">https://www.telehealthrocks.org/</a>
<b><u>Helpful Research:</u></b>		
<i>Ethics/Legal:</i>		
<ul style="list-style-type: none"> <li>• Gamble, N., Boyle, C., &amp; Morris, Z. A. (2015). Ethical practice in telepsychology. <i>Australian Psychologist</i>, 50(4), 292-298. <a href="https://doi.org/10.1111/ap.12133">https://doi.org/10.1111/ap.12133</a></li> <li>• Lustgarten, S. D., &amp; Elhai, J. D. (2018). Technology use in mental health practice and research: Legal and ethical risks. <i>Clinical Psychology: Science and</i></li> </ul>		

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*Practice*, 25(2), e12234. <https://doi.org/10.1111/cpsp.12234>

- Chaet, D., Clearfield, R., Sabin, J. E., & Skimming, K. (2017). Ethical practice in Telehealth and Telemedicine. *Journal of General Internal Medicine*, 32(10), 1136-1140. <https://doi.org/10.1007/s11606-017-4082-2>
- Murphy, J. M., & Pomerantz, A. M. (2016). Informed consent: An adaptable question format for telepsychology. *Professional Psychology: Research and Progress*, 47(5), 330-339. <https://doi.org/10.1037/pro0000098>

## *Logistics of Practice:*

- Luxton, D. D., Pruitt, L. D., & Osenbach, J. E. (2014). Best practices for remote psychological assessment via telehealth technologies. *Professional Psychology: Research and Practice*, 45(1), 27-35. <https://psycnet.apa.org/doi/10.1037/a0034547>
- Krupinski, E. A., & Bernard, J. (2014, March). Standards and guidelines in telemedicine and telehealth. In *Healthcare* (Vol. 2, No. 1, pp. 74-93). Multidisciplinary Digital Publishing Institute. <https://doi.org/10.3390/healthcare2010074>
- DeJong, S. M. (2018). Professionalism and technology: competencies across the tele-behavioral health and e-behavioral health spectrum. *Academic Psychiatry*, 42(6), 800-807. <https://doi.org/10.1007/s40596-018-0947-x>
- Maheu, M. M., Drude, K. P., Hertlein, K. M., Lipschutz, R., Wall, K., & Hilty, D. M. (2018). Correction to: an interprofessional framework for telebehavioral health competencies. *Journal of Technology in Behavioral Science*, 3(2), 108-140. <https://doi.org/10.1007/s41347-019-00113-x>
- Chou, T., Comer, J. S., Turvey, C. L., Karr, A., & Spargo, G. (2016). Technological considerations for the delivery of real-time child telemental healthcare. *Journal of Child and Adolescent Psychopharmacology*, 26(3), 192-197. <https://doi.org/10.1089/cap.2015.0043>
- Drum & Littleton (2014). Therapeutic boundaries in telepsychology: Unique issues and best practice recommendations. *Professional psychology research and practice*, 45(5), 309-315. <https://doi.org/10.1037/a0036127>

## Helpful Books:

- Tuerk, P. W., & Shore, P. (Eds.). (2014). *Clinical videoconferencing in telehealth: Program development and practice*. Springer.
- Goss, S., Anthony, K., Stretch, L. S., & Nagel, D. M. (2016). *Technology in mental health: Applications in practice, supervision and training – Second Edition*. Charles C Thomas Publisher.
- Luxton, D. D., Nelson, E. L., & Maheu, M. M. (2016). *A practitioner's guide to telemental health: How to conduct legal, ethical, and evidence-based telepractice*. American Psychological Association.
- Maheu, M. M., Drude, K. P., Merrill, C. A., Callan, J. E., & Hilty, D. M. (2020). *Telebehavioral health: Foundations in theory & practice for graduate learners*. Cognella.

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## **General Comments:**

- If considering videoconference (or telephone-based options):
  - Many suggest a face-to-face initial meeting to evaluate the patient for the appropriateness of such services.
  - Create a verification method to ensure both the provider and patient identity before beginning each session.
  - Prior to beginning, the provider should create a safety plan to pre-plan for potential crises that may include the location of the patient, alternative contacts, the nearest medical center, local police department, etc..
  - If using videoconference:
    - Ensure a thorough review to ensure that the platform aligns with field recommendations, including, but not limited to, at least 128-bit encryption and high definition (with consideration of resolution and screen size).
    - To ensure HIPAA compliance, the provider should have a Business Associations Agreement (BAA) between themselves (covered entity) and the company that is hosting the service (business associate).
      - See <https://www.hhs.gov/hipaa/for-professionals/covered-entities/sample-business-associate-agreement-provisions/index.html>
    - Possible platforms (depending on version and BAA) include:
      - Doxy.
      - Vsee.
      - Skype for Business.
      - Zoom.
      - Thera-LINK.
      - Polycom.
      - Cisco systems.
- If considering smartphone app options:
  - Evaluate if the app has been tested for general use and/or with the population you may be assigning it to.
- If considering cross-state practice:
  - Given ongoing changes and the potential for emergency policies, providers are suggested to reach out to the licensing boards and guiding organization of any states that they aim to practice in. While the safest way is to only practice in states that the provider is licensed in (e.g., Ohio and Texas if licensed to practice in both) until alternative means are fully enacted (e.g., PsyPact; <https://www.asppb.net/mpage/legislative>), some states have enacted the possibility of temporary care for extenuating circumstances.
- Billing insurance for telehealth services:
  - Given rapid changes since the onset of COVID-19, policies are changing very frequently. Policies for telehealth care, as well as methods that must be used by providers to meet the carrier's telehealth reimbursement standards vary by carrier, and often vary further by state. To better understand the coverage, providers may reach out to their respective insurance panels to explore options and requirements (e.g., MDLive for BCBS?). In supplement of speaking to a representative, depending on when they were signed, some provider-insurance company contracts have telehealth service requirements outlined. As such, providers should review these contracts to ensure that they are providing care in line with the contract to avoid any issues or lack of coverage for those in their care.

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## **Final Thoughts:**

- If considering telehealth practice, per guiding organizations and research, providers should consider several key factors including, but not limited to:
  - The research related to specific populations and conditions relative to the appropriateness of different telehealth modalities. Not all people/conditions may be appropriate for telehealth services if other viable options are available.
  - The research related to specific telehealth modalities (e.g., videoconference, telephone, smartphone app, etc.) and outcomes, including differences between technology-enhanced and face-to-face services.
  - Patient attitudes, past experiences with, and desire to use technology in their care.
  - Provider competence.
  - Ethics and legal.
  - Licensure and jurisdiction.
  - Informed consent.
  - Therapeutic boundaries.
  - Safety planning.
  - Data security.
  - Appropriate note taking and logging of telehealth services.
  - Supervision and training approaches.
- If a provider is to begin using telehealth, (if possible) it is suggested that they seek supervision and/or consultation.