Providing Client-Centered Care in the Remote Environment

COVID-19 has required many agencies to provide services remotely, for example, over the phone or via video calls. Providing care in a client-centered manner, the same way you were providing it to clients when you met them face-to-face, is one way to offer clients stability in all of this change. The following steps and strategies apply to providing client-centered care over phone or video calls:

How has your agency been preparing for remote service delivery?

Use the following checklist to review the potential policies that your agency may have developed for providing remote services at your agency:

Appropriate device to use with clients – Are personal devices ok to use?

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Appropriate spaces to conduct calls – Are you required to call clients from private spaces without disruptions?
Confidentiality practices – What confidentiality practices are in place, in addition to HIPAA, to protect patient confidentiality?
Documentation – Is there a way for you to document electronically in a client's chart? If not, how do you document?
Continuous Quality Improvement (CQI) – If you are a supervisor, what policies are in place to conduct CQI and supervise remote services?

Has your agency developed guidelines for calls?

- □ **Scheduling calls** Do you have to find a date and time that works best for clients? And do you ask the client how they would like to connect, for example, over phone or video chat? Do the clients need to be asked whether they have a private, quiet space to take the call from?
- □ **Appointment reminders** How are appointment reminders being done for remote appointments?
- □ **Conducting unscheduled calls** Can you conduct unscheduled calls, calling clients without an appointment set up ahead of time?
- □ What to do if someone else or the answering machine picks up What do you do or say if someone other than the client or the answering machine picks up?
- □ **Sending documents** How do you send required documents to clients ahead of appointments?
- □ **Preparing for calls** Are you required to have notes about the client in front of you that you can refer to which shows clients you remember the details of their lives and that you care? Does your agency have other requirements for how to prepare for calls in any specific ways?
- □ **Other considerations** Are there guidelines around other considerations like putting a client on hold or using speakerphone?



What strategies can you use to make a call client-centered?

You can use specific client-centered strategies when working with clients. Review the strategies related to each of the 4 steps below in the diagram below.

Engage and Build Rappport

Frame the Conversation

Conduct the Call

Conclude the Call

Engage and Build Rapport

- Spend a few minutes connecting
- Introduce or re-introduce yourself and your role, if necessary
- Ask how the client is doing

Frame the Conversation

- Review the purpose of the call
- Establish an agreement on what you will discuss
- Share that you are taking notes

Conduct the Call

Listen

- Give your undivided attention
- Listen to the client's tone, pauses, and when the client changes the topic
- If you sense the client isn't with you, check in with them

Smile

- Has a positive effect on your tone
- Clients can detect a smile

Use Silence to Get The Client To Open Up

- Do not interrupt
- Use verbal cues to show you are listening ("uh-huh" or "yes")

Use Affirmations

- "You've worked hard"
- "You don't give up"

Be Mindful of Your Tone

- Clients can't see your body language
- Most of the impression you make is your tone
- Positive and non-judgmental energy shows the client you are happy to speak with them
- Low energy shows you're bored and uninterested

Ask Open-Ended Questions

- Do you have someone to talk to?
- Tell me about your daily routine or how your daily routine has changed since COVID-19.
- Who have you been connected with over the phone, video chat, or text all this time?
- What do you need to do for you?

Other Strategies

- Be clear and specific
- Be mindful of health literacy
- Avoid "You should..." instead use "May I suggest..."

Conclude the Call

- Summarize what was discussed during the call
- Elicit feedback from the client
- Schedule the next call
- End the call on a positive note

