

Telehealth Guidelines for Group-Delivered Videoconference Interventions

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Videoconference technology settings and tools to consider for group interventions

- Use unique meeting IDs for each cohort and treatment group to avoid having uninvited attendees join or “Zoombomb” the meeting. Do not use your personal meeting link.
- Disable the *Share Screen* feature so that only the host can share the screen.
- The *Manage Participants* menu has useful features including *Mute All* and *Unmute All* settings.
- Other tools for managing participants, including *Ask to Start Video* and *Stop Video*.
- *Rename* a participant (e.g., list their first name only should full name appear on screen)
- Disable *Private Chats* among participants.
- *Waiting room* feature puts participants into a “waiting room” if they sign on early. You enter them into the conference when you are ready to start.
- Disable the ability for participants to individually record meetings.
- Look for other helpful settings, which are dependent upon your platform’s settings.

Preparing for your first videoconference session

- Practice videoconferencing and using the Zoom features you may use in your sessions. Common features that are recommended to be familiar with include screen sharing, turning camera/audio on/off, and managing participants via other tools (e.g., per above, mute individual participants, mute all, stop video, and disable chat among participants).
- View yourself on video to make sure that your face is easily seen, the lighting is good, and the background is professional (e.g., free from distractions, glare, photos of your children, or other items that you may not want to share with participants).
- Set the camera for the view you prefer (e.g., closer or farther away from you).
- Figure out how you will access the electronic medical record during the session.
- Plan what you will do if you lose contact with the participant or have an emergency:
 - Have each participant’s address, phone number, and email address available and confirm ahead of the first session (ideally, during scheduling) whether they are attending the session from that address.
 - If a participant is interstate, have the emergency number for that state available and/or the 10-digit phone number for law enforcement in the community where assistance may be needed. Such numbers may be found on the local law enforcement agency’s website.
 - Have the name and phone number of an emergency contact available in case you are not able to reach the participant in an emergency.
- Consider creating a PowerPoint or Word document with didactic information and/or group exercises to be used via screen share during sessions. Ideally, send the document to participants electronically ahead of the session.

- If available, arrange for a staff or co-leader to provide technical support to participants prior to and/or during the first session. This could include:
 - Reaching out to participants ahead of the session to confirm technology is set up correctly, discuss having a private space and appropriate backdrop from which to join the sessions, and answer questions.
 - Joining the first session 15-20 minutes early and remaining in the session for the first 20 minutes to assist participants as needed.

Content to cover in the initial videoconference session

- If possible, for the first group, ask group members to sign into the videoconference 5-10 minutes before the start of the first group to address potential technical issues and ensure video and audio are working before the session starts.
- Introduce self: show ID badge and introduce anyone else in the room. You might also use the video to show the room you are in, so that participants know who, if anyone, is in the space.
- Confirm each participant's name, using only first names given the group context. Use the *Rename* feature with anyone who has another name or full name on the screen.
- Ask participants to raise their hand if they are not at their previously confirmed address. If someone raises their hand, send them a private chat message requesting their address or obtain via some other private method.
- Remind them how to reconnect if disconnected (via meeting link and/or phone # included in the Zoom invitation).
- Confirm that each participant is alone, in a private space, and is not driving in a car or operating machinery.
- Review other issues related confidentiality, nature of telehealth service, risks, and benefits (as described below).
- Remind participants to treat the videoconference session as if they are in person in a clinic, meaning that they are scheduled in advance, start/stop on time, focused solely on the session, and conducted in private.
- Inform participants that the technology is only used for scheduled sessions (not prn) and not a phone number or meeting link that works outside of sessions.
- Discuss some potential challenges and how you will manage them together, selecting the most common ones in Table 1.

Privacy rules to review in the first session

- **Key points to make:**
 - Group delivery has some inherent limits to confidentiality.
 - Videoconferencing from home poses some challenges to privacy.
 - Privacy guidelines help participants respect one another's privacy and foster a comfortable, safe place for participants to engage in treatment.

- **Example language:** *Given that this is a group intervention, group members will know one another's first names and other information shared in group. We ask you to share only your first names and to disclose only information that you are comfortable sharing and that pertains to treatment. We also ask that you to respect one another's privacy by not talking about other members of the group to people outside the group. Also, please join the meeting from a private place where nobody else can see the screen or hear others' comments. If someone else is in the house with you, please ask them to stay out of the room during the session. Finally, we ask that you please do not take any screenshots or photos of the session or share any content about the group via social media or email.*

Pointers for participants getting the most out of the videoconference: Example language

To maximize our virtual time together, we have a few additional pointers:

- *When you sign into the Zoom conference, type in your first name to facilitate discussion. Do NOT type your last name, in order to protect your privacy.*
- *Join the videoconference from a quiet place so that you and others will not be distracted by background noise. If there is background noise you cannot help, please mute your microphone when you are listening.*
- *If you need to alert me to something or wish to speak while I have you muted, wave at me or send me a message via the chat function (Note: it may be challenging to monitor the chat in large groups while delivering content, so consider your level of confidence with Zoom when deciding whether to provide this chat option to participants).*
- *Remember that everyone can see you, all the time, and so act as if we were all in a room together. For example, I encourage you to use good eye contact (look into the camera), let us know if you have to leave the room for any reason, and otherwise use good manners to make this a comfortable and relaxed learning experience for everyone.*
- *Please focus on the group session and interactions; ignore texts, emails, and calls while in the conference.*
- *It is important for each participants' privacy that you do not have any other people in the room during the web session.*
- *To keep you safe and free from embarrassment you should avoid driving, eating, smoking, or using the restroom during the session.*
- *Many of you have probably been on conference calls before. Any other suggestions? (Give participants a brief moment to add in any suggestions.)*

Strategies for Facilitating Treatment Engagement via Videoconferencing

- **Be natural:** Look at the camera, make eye contact, lean forward, and act as if you were interacting with the group participants in person.
- **Any time you do something off camera or avert your eyes, explain.** Examples:

- *“I am going to look at another screen to see in the record when you are scheduled for your next appointment with me.”*
- *“During our session, I will sometimes look away to take notes.”*
- Be aware that a lot of hand movement can be distracting, particularly if the internet connection is slow and there are delays.
- To facilitate discussion when it does not naturally occur, call on participants or use the “go-around technique” where you inform participants you are going to ask each person to share one response.
- Encourage group cohesion and participant crosstalk, for example:
 - Encourage or require everyone to turn on their camera.
 - Ask participants to weigh in on the discussion (e.g., *“I am curious if others have had a similar experience?”*).
 - Reflect how one participant’s experience might relate to another’s experience.
- Strategies for using worksheets or other “written” documents during session:
 - Use the Zoom screen sharing feature.
 - Type into a blank word document or worksheet (e.g., a thought record) while displayed using screen sharing.
 - Provide supporting worksheets and materials ahead of time via email or eCare.
 - Use the Zoom *Chat* function to write notes or share content in session.
 - Use Zoom’s whiteboard feature to draw and write in session (on Zoom desktop application, not web-based version).
- Strategies for delivering treatment exercises (e.g., cognitive-behavioral exercises, hypnosis exercises, mindfulness meditation practices, etc.) in session:
 - Provide an overview of what to expect before starting.
 - Discuss getting physically comfortable and adjusting position for the exercise, if appropriate. For example, if the participant is sitting in a wheelchair or a regular chair without support for the neck, discuss with them what position would be most comfortable for their neck during the exercise (having support at the back of the head by using a pillow or slightly tilting head) or whether they would be more comfortable lying down.
 - In the unlikely instance that a participant has elected to practice the in-session exercise lying down on the floor and then is unable to get themselves back up off the floor at the conclusion of the practice:
 - First suggest that they take a few moments to take a few deep breaths, slow down, and relax and notice if there is a shift in how their body is feeling. Then, slowly attempt to get back off the floor.
 - If the participant is still not able to get up off the floor safely, ask them if there is anyone around at home that can hear them and that could come and help them.

- If the participant remains stuck with no assistance nearby, arrange for a family member, friend, or local emergency service go to the participant's address to help.
- Discuss beforehand what to do should they fall asleep during an exercise such as a guided relaxation. Explain that this is normal and happens to many people during some exercises (to prevent them to feel embarrassed).
- Supplement sessions with audio recordings of the exercises that they can use at home, if appropriate. You can also suggest free or low-cost recordings available on the internet (including on Soundcloud).
- Use eCare or After Visit Summaries to reinforce ideas, summarize sessions, and share resources (e.g., worksheets, info).

Managing Disruptions and Other Challenges

- Anticipate disruptions, as they occur more commonly in telehealth, possibly due to the less formal context.
- Discuss how interruptions may occur and how you may problem solve and manage them together.
- See Table 1 for common challenges that we have encountered while conducting telehealth as well as potential solutions.

Table 1: Potential Challenges and Solutions During Group Telehealth Sessions

Potential Challenges	Strategies
Difficulties hearing a group participant or provider.	Use a headset or headphones (noise cancelling preferred). Minimize background noise. To help manage audio feedback and/or pt background noise, use the “mute” or “mute all” option within the “manage participants” feature. Dial in (using phone # provided in meeting invite) or join by computer audio. Avoid typing on a noisy keyboard in session (or mute when typing). Avoid moving your laptop or tablet around, as that creates noise.
You frequently interrupt one another while speaking.	Explain that this is normal during video sessions. Pause and allow extra time to communicate.
Participant joins by audio only.	Do not offer a phone-only option (except in rare situations where an established group member’s video is not working). If a participant repeatedly joins only by phone, consider reaching out to them to discuss and request they join by video.
Provider’s or participant’s face is shadowed or difficult to see.	Increase lighting in space; sit so that the main light source is in front of you, lighting your face. Ask participants to adjust their lighting if possible.
Interruptions at your site (e.g., someone walks in unexpectedly, dog barks, pager goes off).	Explain interruption and fix if feasible (e.g., turn off cell phone). If someone else enters the room, pause session, introduce them, and explain why they are there. <i>“My colleague Dr. ABC just came in to get some test materials from this room.”</i> You can also put a sign on your door so that others do not enter in the room during the session. For those with indoor pets, consider exercising or feeding them before the session so that they are less likely to interrupt you.
Sessions are frequently interrupted by notifications, calls, emails.	Role model turning your notifications off and silencing other devices; ask participants to do the same and explain why.
Participant repeatedly interrupted by others in their household.	Encourage participants to put a “do not disturb” sign on their door. Coach them in setting limits with others as needed.
Technical difficulties, such as losing video, video freezing, poor connection, or dropped call/video.	In each session discuss a plan for reconnecting, e.g., <i>“Occasionally we may have technical difficulties. If that happens, join the Zoom meeting by phone. If all or most of the participants have technical difficulties, we will reschedule the session.”</i>
Participant is late, misses appointments, cuts them short, treats them like a casual social phone call.	Remind participants that sessions are conducted as if they were delivered in-person (see points above). Contact the participant outside of the group to discuss and problem solve what is getting in the way of their full participation.
Participant is driving during a session.	Tell participant that you want them to be safe and thus are going to stop their participation until they can get somewhere safe, and you are going to use the <i>Remove Participant</i> function within Zoom. Ask them to resume the group once they are home or in a safe place. Do <u>not</u> let the participant continue participating in session while they are driving or operating machinery, regardless of their explanation.

Table 1 (continued)	
<p>Participant is riding in a vehicle or public transportation during a session.</p> <p>Participant is in a public place like a cafeteria or park.</p>	<p>Tell participant that to get the most out of the session and to protect their privacy, they need to be in a private, quiet space.</p> <p>Ask them to move to a private space, and then rejoin the session.</p> <p>Use the <i>Remove Participant</i> function if needed.</p>
<p>Smoking or drinking alcohol during session.</p>	<p>Ask participant to stop or postpone substance use during the session, and explain why (can be distracting and may interfere with therapy).</p> <p>Address with the participant outside of the group, asking them to refrain during the session. If needed, ask them to wait until the break or to excuse themselves quietly to smoke. Review all group rules at next session.</p>
<p>Cannot see all participants in the group.</p>	<p>Encourage participants to use the <i>Gallery View</i> video layout in Zoom, which shows all participant videos on the same screen. Change view by clicking on the icon in the upper right-hand corner of the screen.</p> <p>For group leaders, use the desktop application of Zoom, as it has more features. For example, when screen sharing in groups larger than 5 participants, select the “Show Grid Video” option (i.e., icon of 9 small boxes) on the bar at the top of participant videos to continue seeing all Participants (albeit in smaller form).</p>

*discuss in first visit during consent process