



# Introduction to Video Telehealth

**TRAINING EVENT: March 25, 2021**

# Housekeeping

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- Stay with us the whole time.
- Questions:
  - Ask in **CHAT** as they come up for you.
  - Participate in Q & A's.
- Please **MUTE** your microphone.



# Learning Objectives

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- After completing this training you will have an understanding of:
  - The opportunity and underlying need for advancement to Video telehealth at Codac
  - Your role in offering Video Telehealth to Codac patients
  - Codac Telehealth Policy
  - Best practices for the use of ZOOM, text and email technology and where you can get help
  - Telehealth counseling best practices, supervision, and competency development

# Agenda

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## PART I.

- Background: What is driving telehealth advancements for Behavioral Health in RI?
  - *Linda Hurley*
- Where is Codac going with Video Telehealth?
  - *Becky Boss*
- Codac Telehealth Policy Overview
  - *Jason Alexandre*
- Codac Technology: Demo & Best Practices
  - *Al Ashong-Katai, Christine Atkin & Jacki Gerchman*



# Agenda

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## PART II.

- Roles and Responsibilities in the Process
  - *Farrell Carley, Barbara Trout*
- Professional Ethics in Telebehavioral Health
  - *Farrell Carley, Jenn Adams*
- Clinical Principles
  - *Farrell Carley, Jenn Adams*
- Trends
  - *Farrell Carley, Jenn Adams*
- Supervision & Set Up
  - *Laura Levine*
- Next Steps
  - *Jenn Adams*
- Summary
  - *Beth Bennett*
- Closing Remarks
  - *Becky Boss*





## **What is driving Telehealth development for Behavioral Healthcare in Rhode Island?**

Linda Hurley  
CEO & President

# A Year of Challenge and Opportunity

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- All challenges were related to mitigating exposure during a global pandemic.
- The opportunities created a natural experiment for us to study alternative and more effective methods by which to provide our services and care.
- Thank you for meeting the challenge and for your performance throughout this pandemic period.

You've been silently winning battles and transforming yourself this year.

Be proud of every step you've made in the right direction.

# Why Video Telehealth?

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We have been presented with opportunities of care that increased utilization of our counseling and support services at the same time decreasing the amount of time individuals spent in our buildings.

Today we are going to talk about one of the most successful opportunities which is telehealth. Across the country, across the state and in each of our facilities we have found telehealth, including telephonic health services, is effective in many of the areas of the care we provide.

RI is currently in discussion between providers, payers and regulators as to how and when these services will be reimbursed and more importantly when they are most effective.





## **Planning a Post Pandemic Future: Where is Codac going with Video Telehealth?**

Rebecca Boss

Chief Operations Officer & Vice President Strategy

# Codac Telehealth

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- We need to be and we will be ready
- **We heard you**.....your dissatisfaction with telephone-based telehealth services is apparent from the survey
- **We heard our clients** – they like the convenience of telehealth and feel that it benefits their recovery
- It's important to get this right
- Expanding our capabilities now before the mandates come

# Codac Telehealth



- Providing an opportunity for video telehealth competency development
  - This is important to you and your career
  - This is important to Codac as the marketplace shifts after Covid
- What investments is Codac making from an Operations perspective
  - Technology
  - Supervisory Training : We sent people to TH training in the fall; some learning from that will be shared with you this afternoon
  - Competency development: Future training and continuing education to support professional staff in the development of video telehealth skills
  - Developing sound Telehealth Policy



## **Overview: Codac Telehealth Policy**

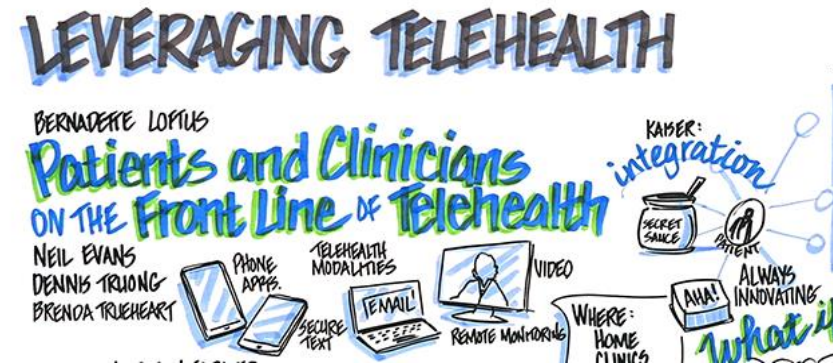
Jason Alexandre

Director of Quality Assurance

# Policy Development Overview

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- CODAC Telehealth Working Group sought input from a number of external key stakeholders
  - NETRC, SUMHLC, Ric Reamer, ATTC
- At this time, not all CODAC services are covered under this P&P
- As practice evolves, particularly post-COVID, we will need to establish criteria around acuity and appropriateness of telehealth
- Challenges/What we learned
  - There is a no 'one size fits all' approach.
  - Most organizations are still building the plane while they fly it.
  - We must be flexible. Codac processes will continue to evolve over time
  - **Communication is key!**
    - Issues encountered need to be relayed so that we can adjust, evolve and improve.
    - If we don't know there's a problem, we can't fix it!





# Policy Highlights & Key Points

## CODAC Policy 5.6 – Telehealth Practices

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- Ensure informed consent has been reviewed and signed by the patient.
  - Educate patients about the importance of not using telehealth for emergencies/crisis intervention.
- **Only CODAC approved technology and solutions are permissible** for audio-visual telehealth.
  - laptops, tablets, smart phones
  - Zoom for Healthcare and WebEx
- Use of public Wi-Fi networks is prohibited for both staff and patients.
- If you wouldn't do something in an office setting, it's probably not appropriate in a remote work setting.



# Policy Highlights & Key Points

## CODAC Policy 5.6 – Telehealth Practices

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### Telehealth Online Visits

- Sessions should NOT be recorded.
- Text messaging and email are prohibited for use in any form of CODAC employee-patient communication, **with the exception of communicating URLs used to initiate a telehealth session.**
- Documentation requirements still apply (within 24 hours of service delivery).
  - Concurrent documentation is **strongly** encouraged, when practicable.

# Email & Text Best Practices

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## Telehealth Online Visits

- Delete email acceptance responses from your email and empty Deleted Mail folder (42 CFR compliance)
- Delete all Text information from your phone at the end of the day (42 CFR compliance)
- Don't keep a running text stream with a patient.
- Don't add patients to your address book.



# Legal & Jurisdictional Considerations

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- Many jurisdictions have modified or waived licensing requirements for telehealth during the pandemic.
- Guidance from the Federation of State Medical Boards (3/2/2021) is updated regularly - <https://www.fsmb.org/siteassets/advocacy/pdf/states-waiving-licensure-requirements-for-telehealth-in-response-to-covid-19.pdf>
  - Effective 1/21/2021 (RI) out-of-state must apply for a full Rhode Island license to treat an existing RI patient or the patient must obtain treatment from a provider who holds an active Rhode Island license.
  - Waivers will remain in place until the end of RI State of Emergency, for established patients only (currently scheduled to expire March 24, 2021, per EO 21-16).
  - Similar provisions exist in CT
  - MA has more stringent guidelines.
- Confidentiality provisions under HIPAA and 42 CFR Part 2 still apply and are more important than ever.
  - Technology waivers under HIPAA will eventually be discontinued.
  - How long will “amnesty” be granted for providers who don’t adopt more secure technologies.



## **Codac Technology: Demo & Best Practices**

Aldrine Ashong-Katai, Director of Project Management

Christine Atkin, Program Analyst

Jacki Gerchman, Director of Administration

# Codac Mobile Clinician Technology

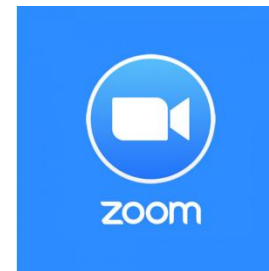
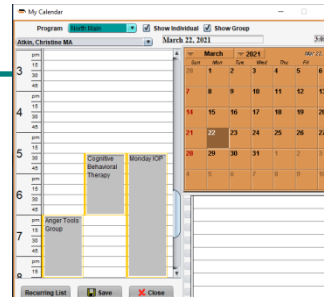


- PC – In the Codac office + Camera
- Laptop – Offsite
- Cell Phone + Stand – Offsite

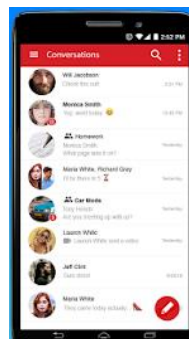
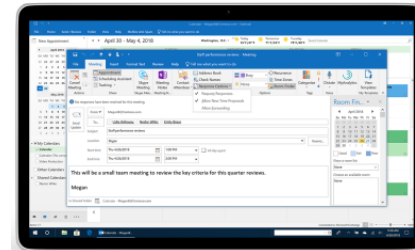


# Applications Used for Codac Telehealth

- SMART calendar
- ZOOM for Healthcare
- Outlook Calendar
  - Email (Calendar invites)
- Text (URLs)

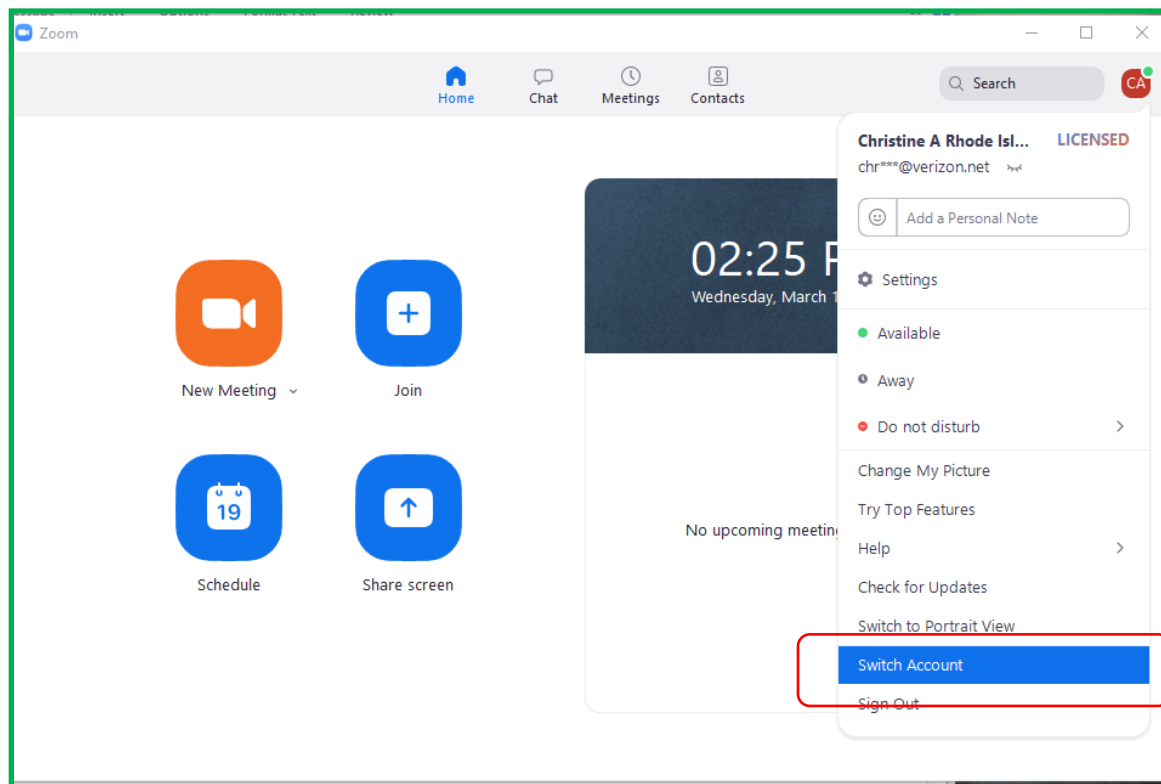


Healthcare Starts to Zoom Along

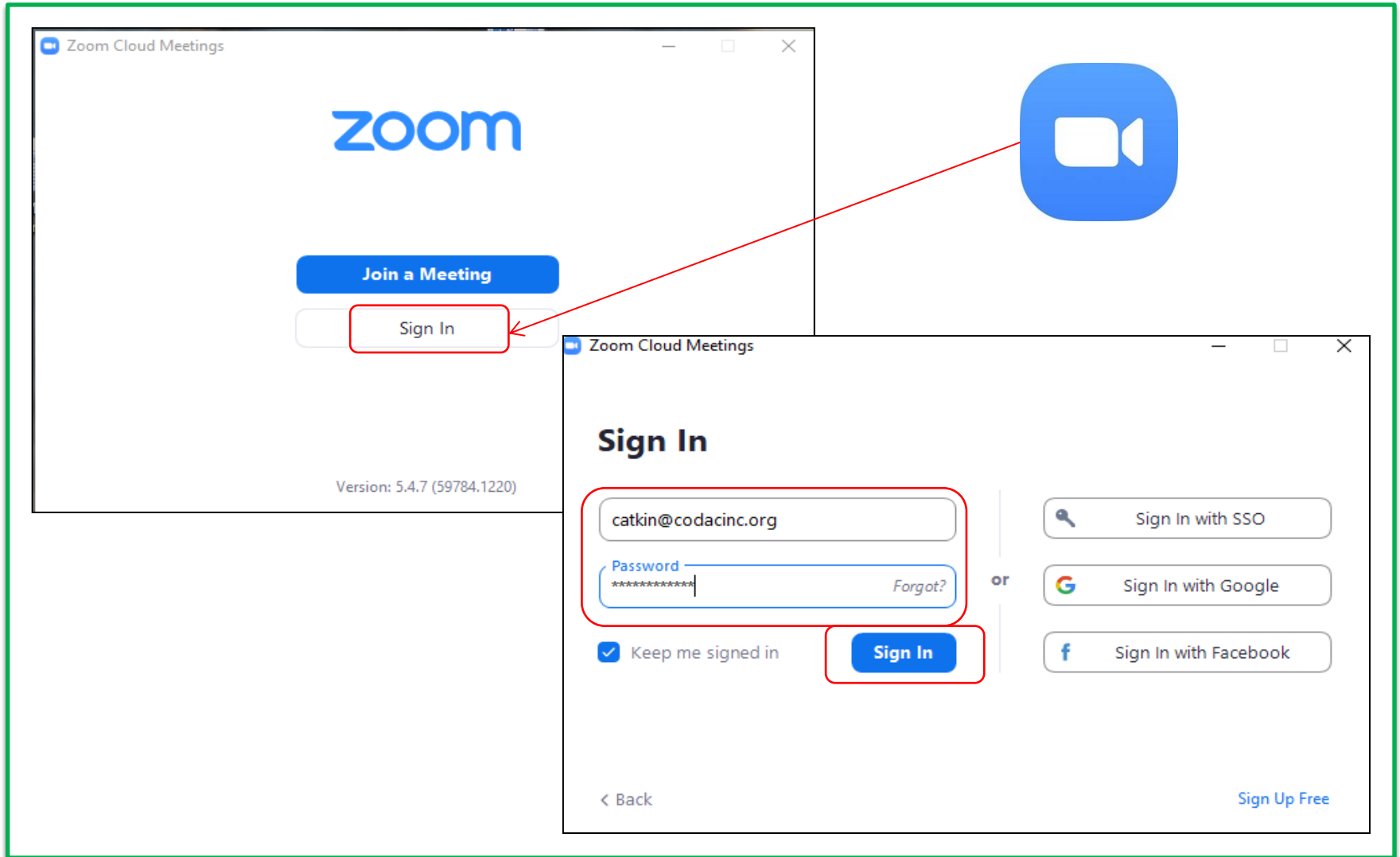


# Make Sure You Open Your Codac Account

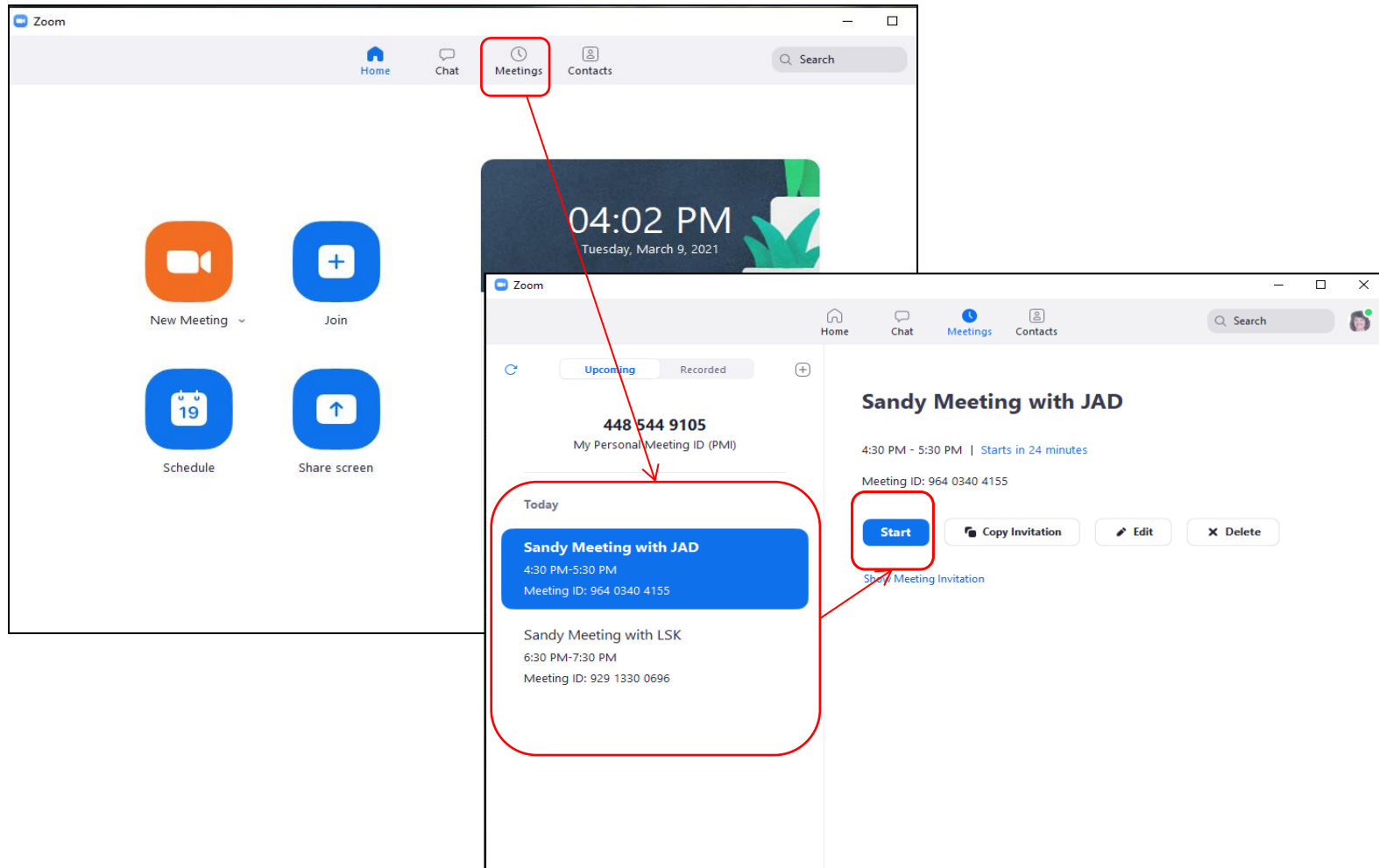
- If you have more than one ZOOM account, make sure you are opening your Codac account for patient meetings.



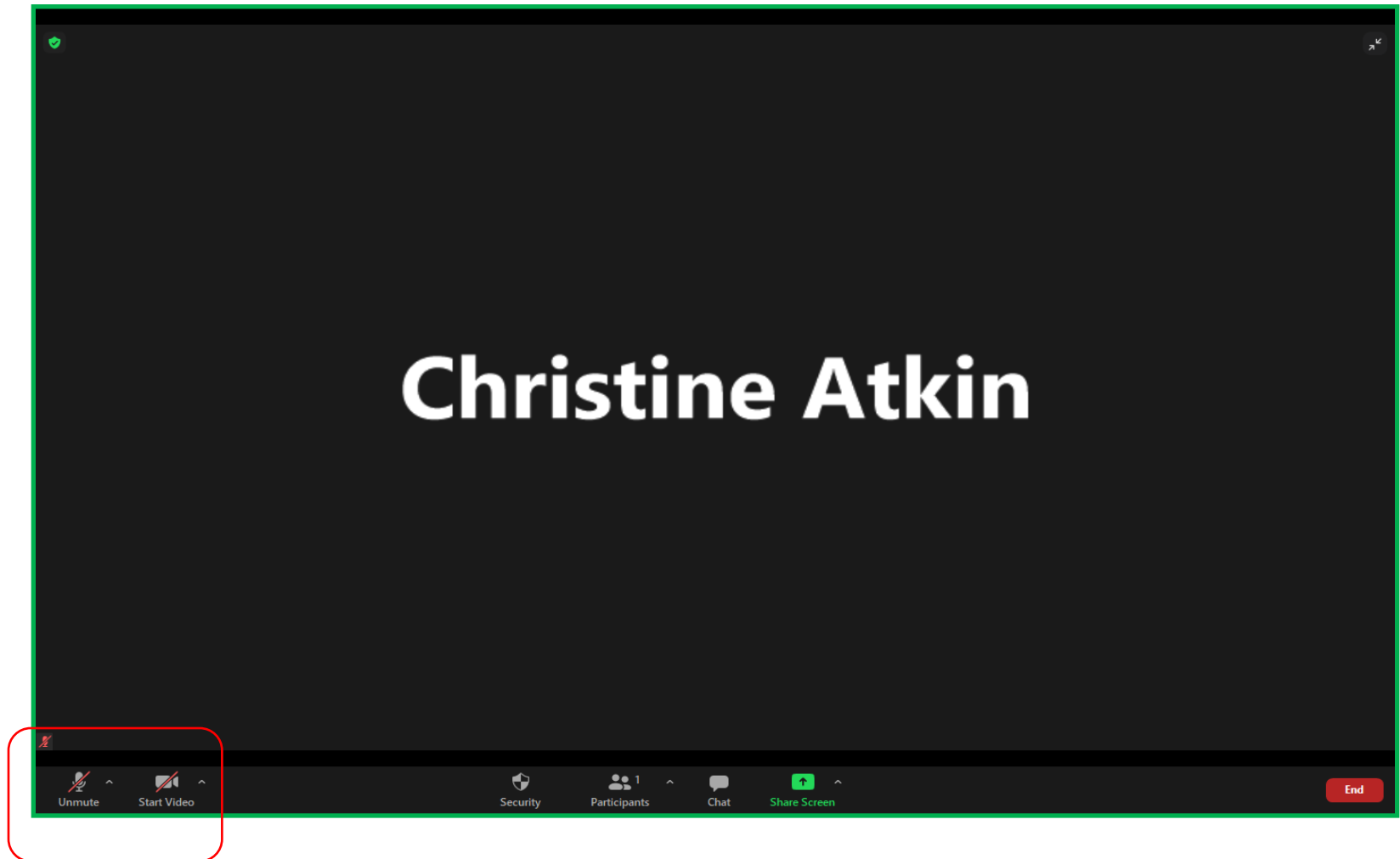
# Signing into ZOOM on a PC or Laptop Using the ZOOM App



# Open a Patient Meeting in ZOOM & Start the Meeting

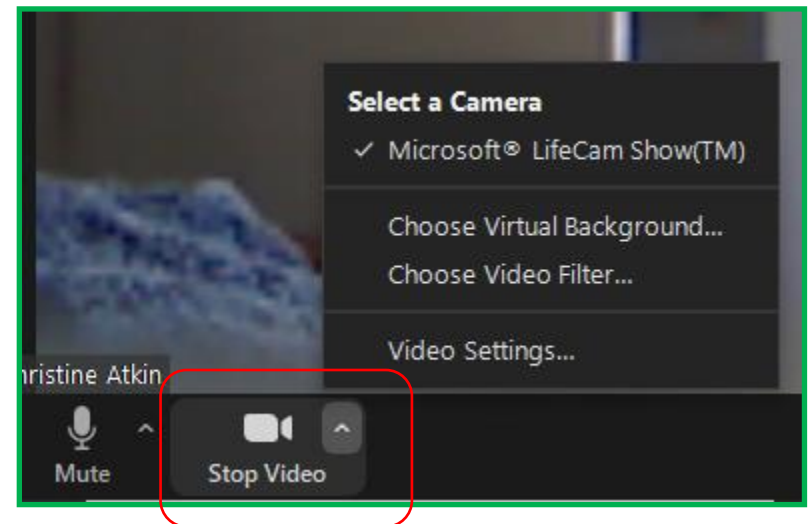
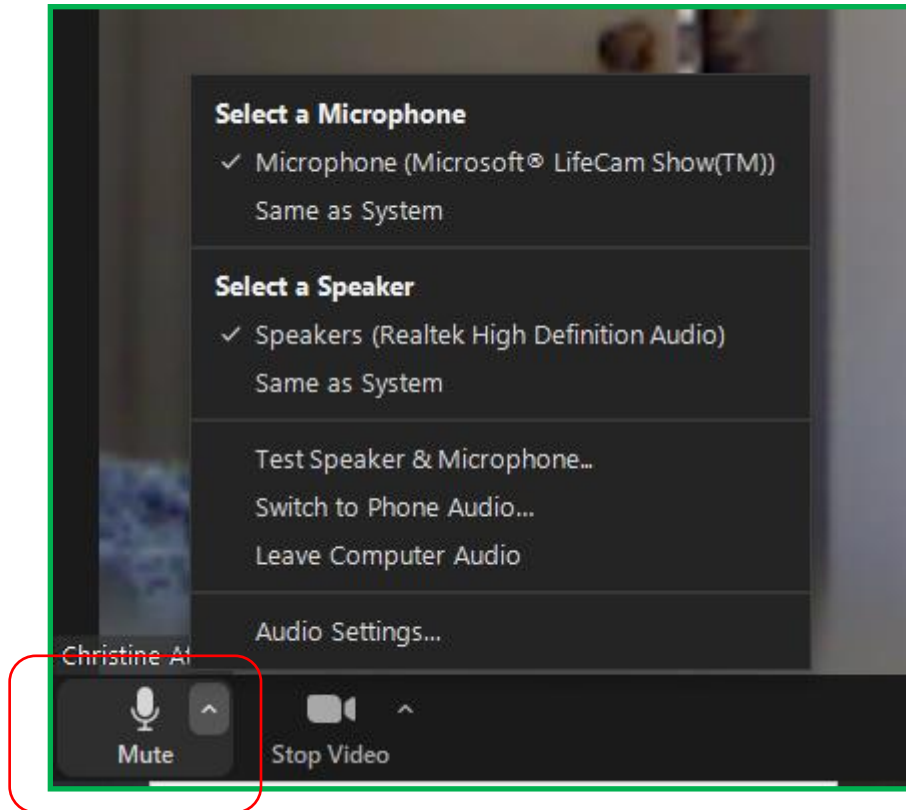


# Starting Your Camera & Microphone

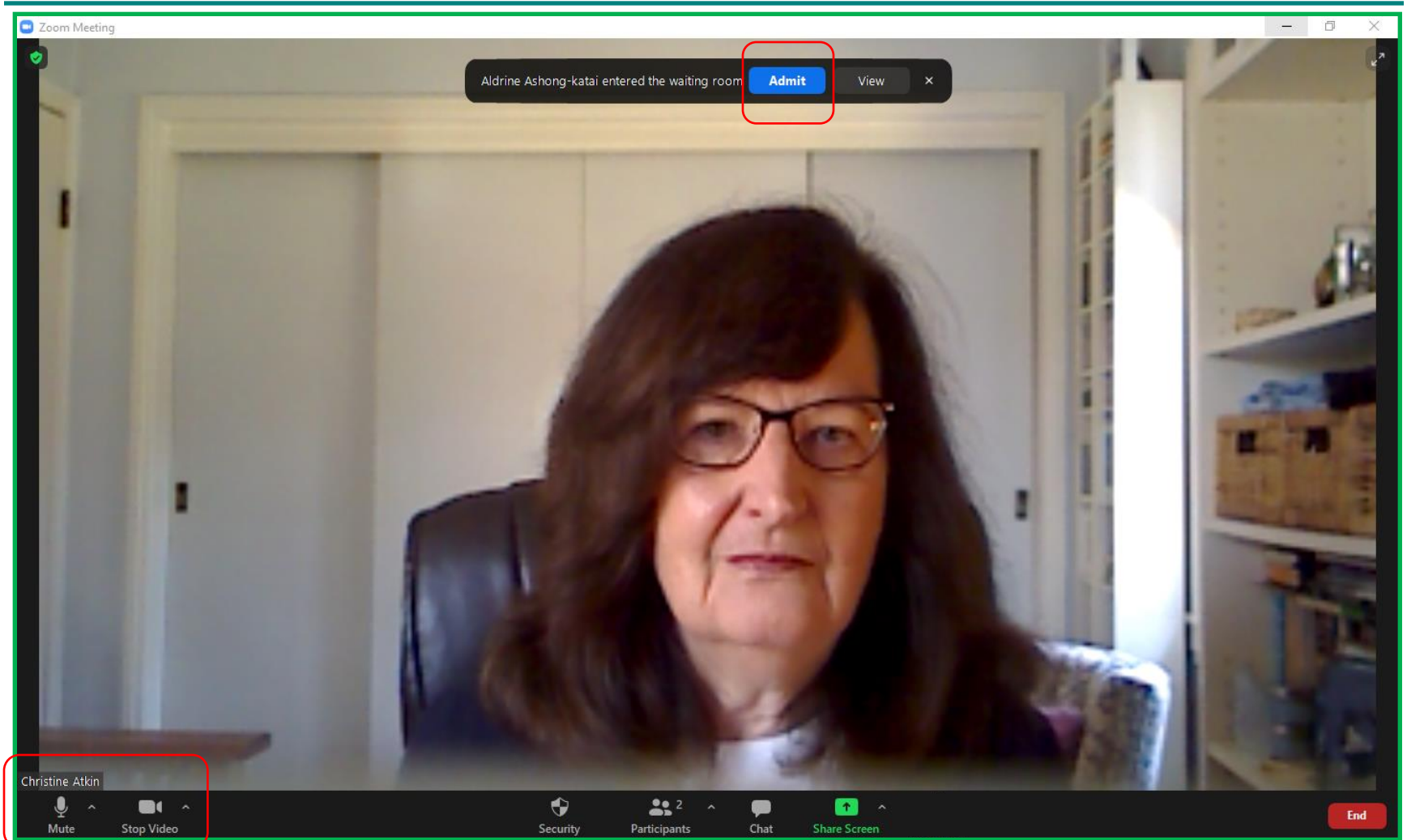




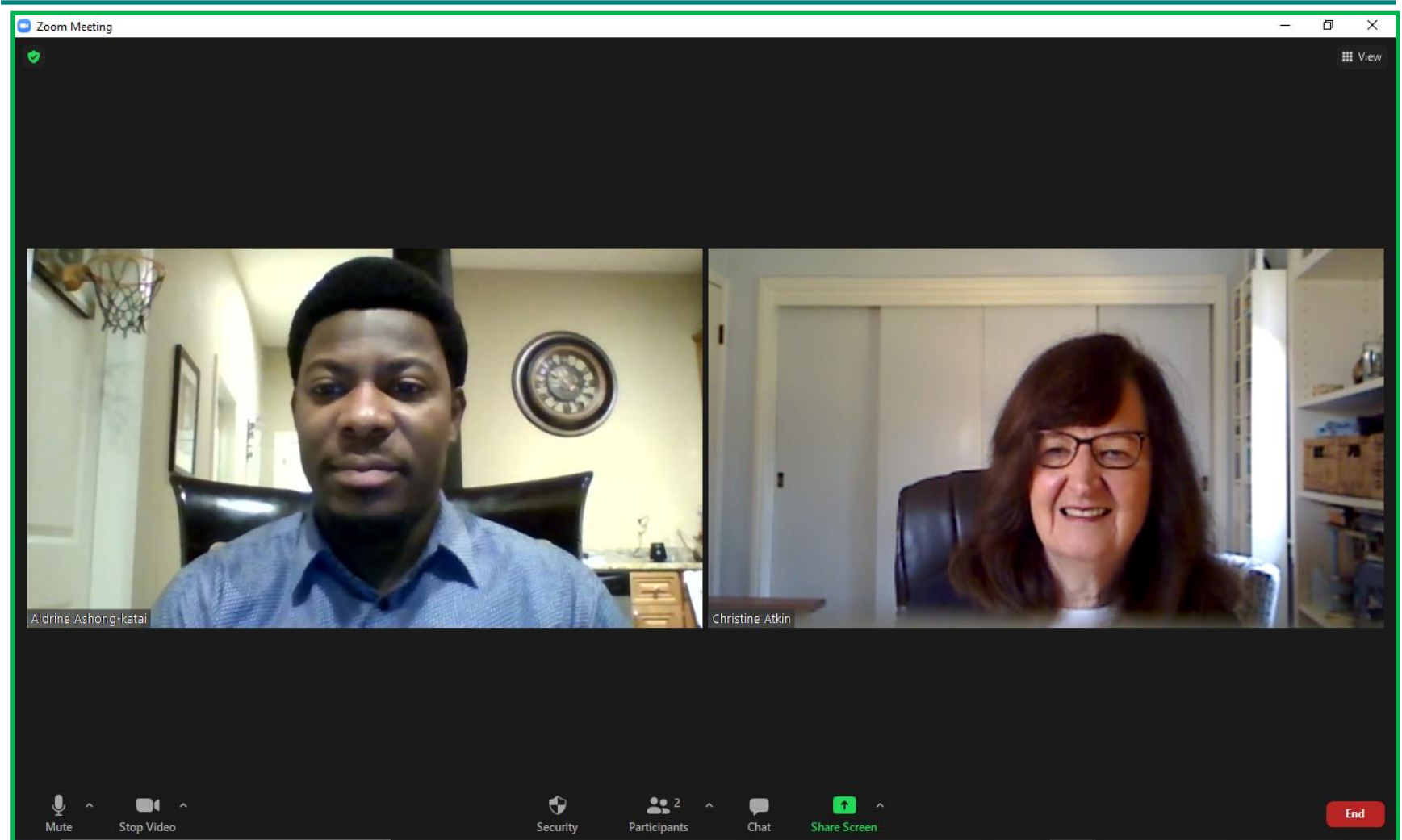
# Microphone & Camera Settings



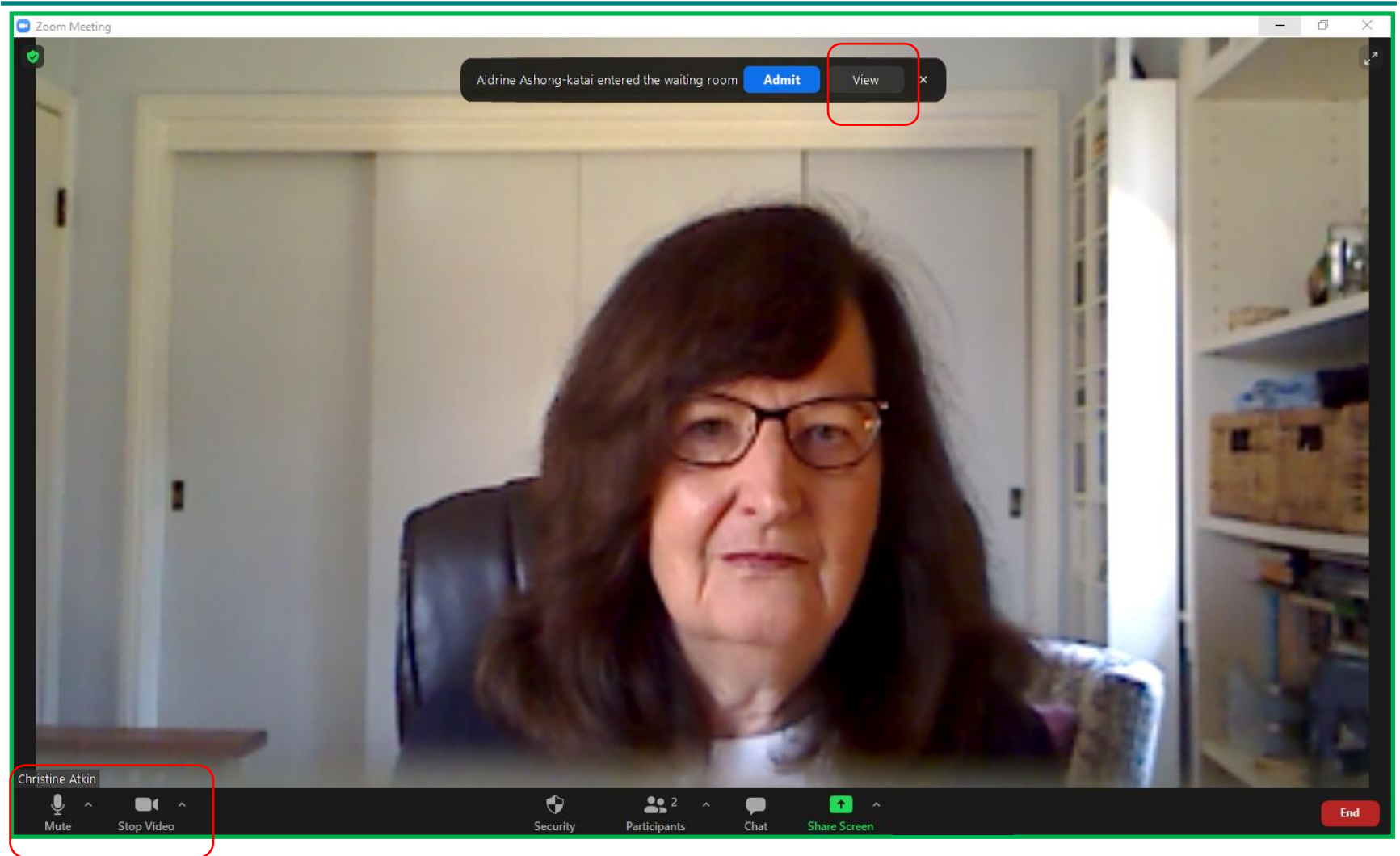
# Video Startup & Admit the Patient



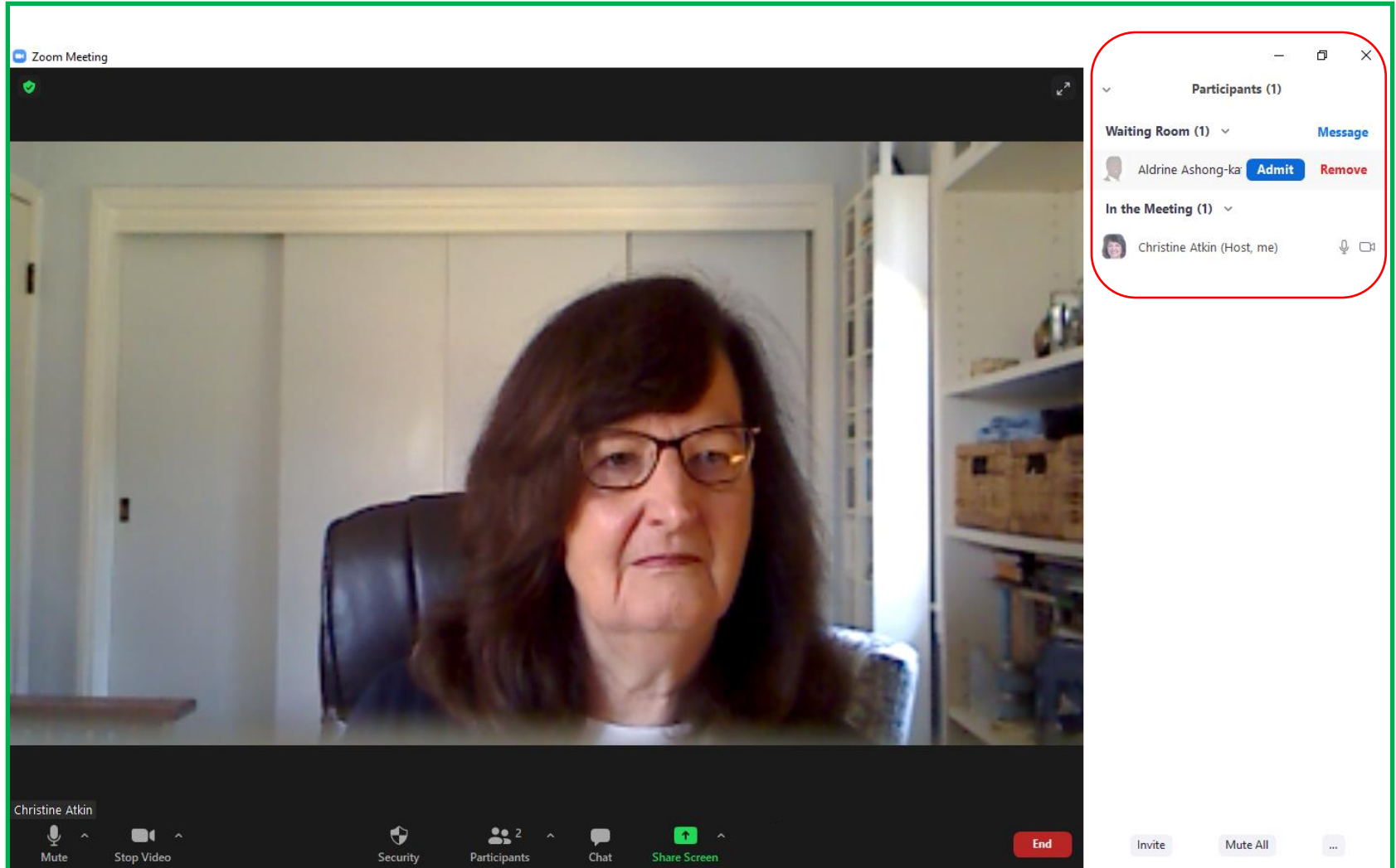
# Session Can Begin



# Option: View Participant before Admit



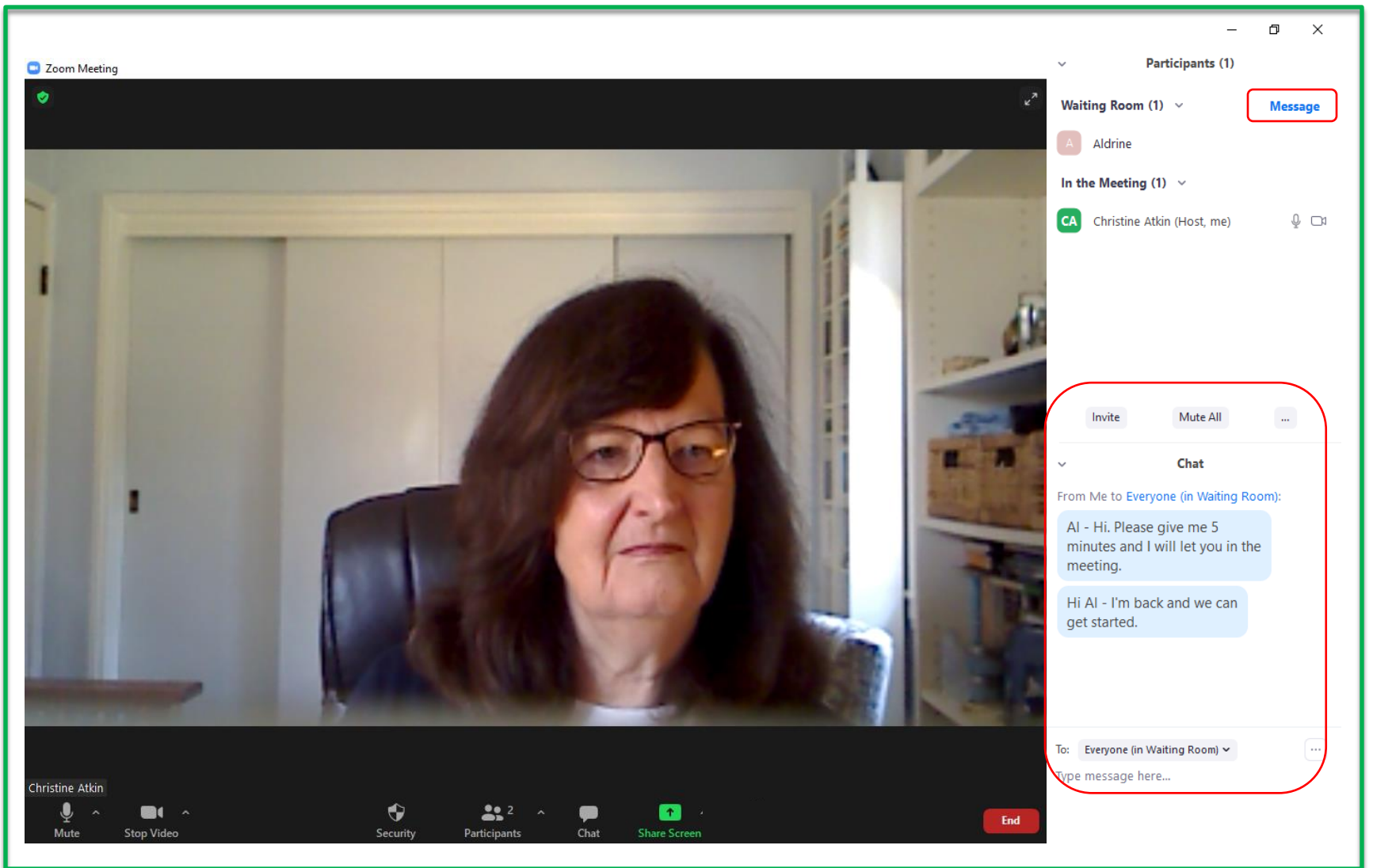
# The Participant List Opens



The screenshot displays a Zoom meeting window. The main video feed shows a woman with dark hair and glasses, identified as Christine Atkin. The top of the window has a title bar that says "Zoom Meeting". On the right side, a "Participants (1)" panel is open, highlighted with a red rounded rectangle. This panel shows a "Waiting Room (1)" with a "Message" link and a participant named Aldrine Ashong-ka with "Admit" and "Remove" buttons. Below that, it shows "In the Meeting (1)" with Christine Atkin (Host, me) and icons for microphone and video. The bottom of the window features a toolbar with icons for Mute, Stop Video, Security, Participants (showing 2), Chat, Share Screen, End, Invite, Mute All, and a menu icon.



# Type a Message to the Patient in the Waiting Room



The screenshot displays a Zoom meeting interface. The main video feed shows a woman with dark hair and glasses, identified as Christine Atkin, in a waiting room. The interface includes a top bar with 'Zoom Meeting' and a green checkmark. On the right, the 'Participants (1)' list shows 'Waiting Room (1)' with a 'Message' button and 'In the Meeting (1)' with Christine Atkin (Host, me). Below the participants list is a 'Chat' window with a red border, containing two messages: 'Hi - Please give me 5 minutes and I will let you in the meeting.' and 'Hi AI - I'm back and we can get started.' The bottom toolbar includes buttons for Mute, Stop Video, Security, Participants (2), Chat, Share Screen, and End.

Zoom Meeting

Participants (1)

Waiting Room (1) [Message](#)

A Aldrine

In the Meeting (1)

CA Christine Atkin (Host, me)

Invite Mute All ...

Chat

From Me to Everyone (in Waiting Room):

AI - Hi. Please give me 5 minutes and I will let you in the meeting.

Hi AI - I'm back and we can get started.

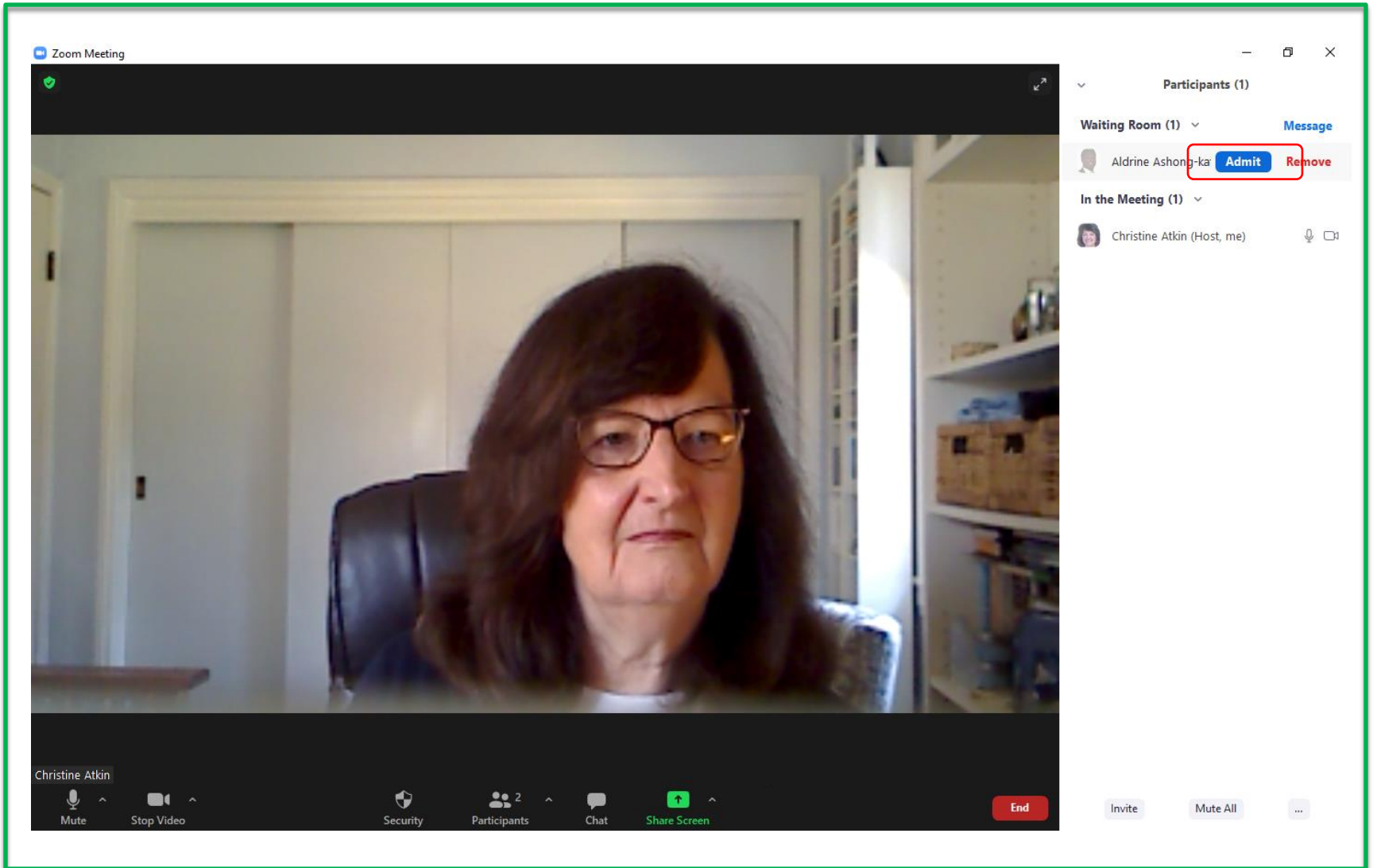
To: Everyone (in Waiting Room) ...

Type message here...

Christine Atkin

Mute Stop Video Security Participants 2 Chat Share Screen End

# Admit Patient or Remove from Session



The screenshot displays a Zoom meeting interface. The main video window shows a woman with dark hair and glasses, identified as Christine Atkin, in a waiting room. The top bar indicates 'Zoom Meeting' with a green checkmark icon. The right sidebar shows 'Participants (1)' with a dropdown menu for 'Waiting Room (1)'. Under this menu, a participant named 'Aldrine Ashong-ka' is listed with 'Admit' and 'Remove' buttons. Below this, the 'In the Meeting (1)' section shows 'Christine Atkin (Host, me)' with a microphone icon. The bottom toolbar includes icons for 'Mute', 'Stop Video', 'Security', 'Participants' (showing 2), 'Chat', 'Share Screen', and a red 'End' button. The bottom right corner has buttons for 'Invite', 'Mute All', and a three-dot menu.

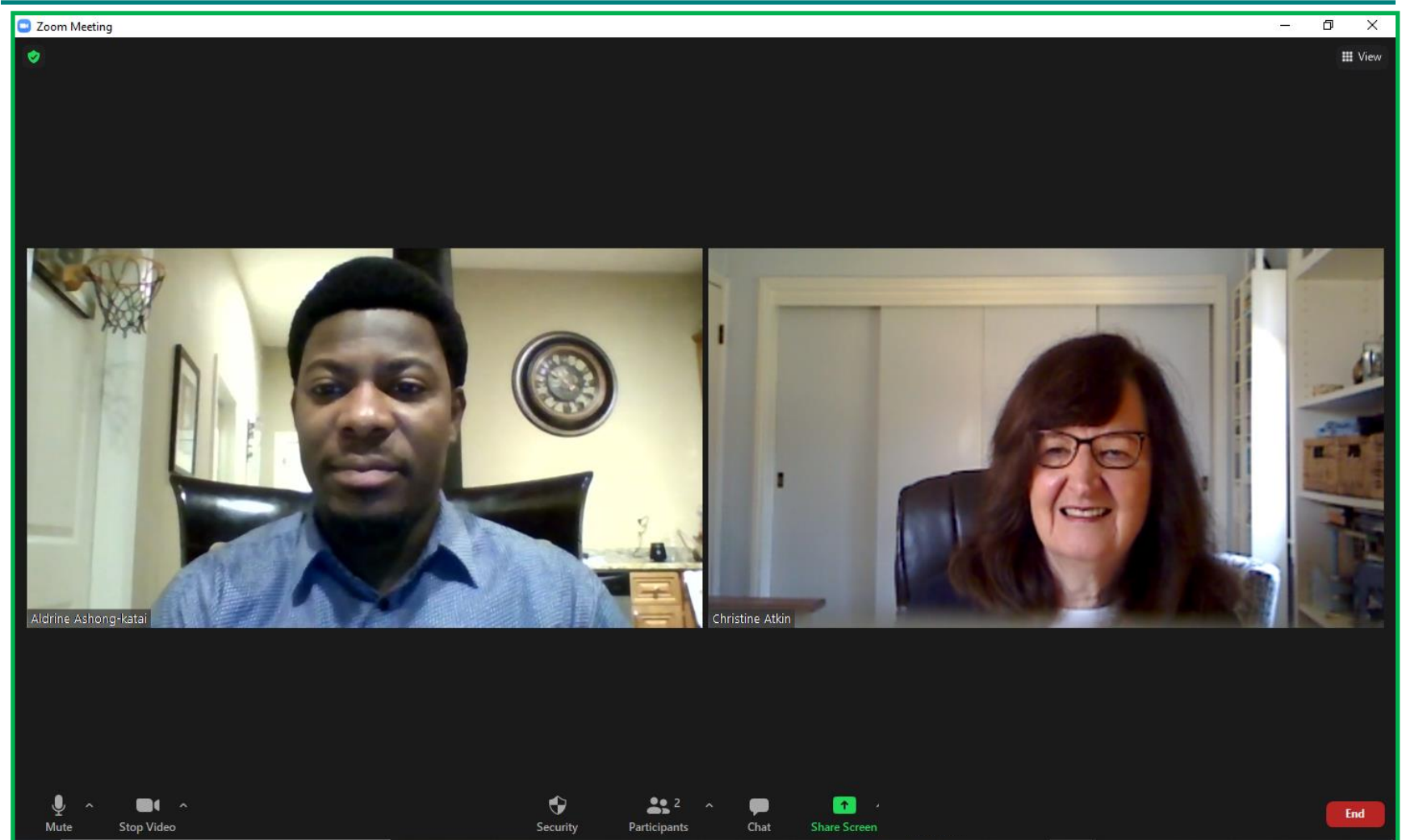
# Close the Participants Window



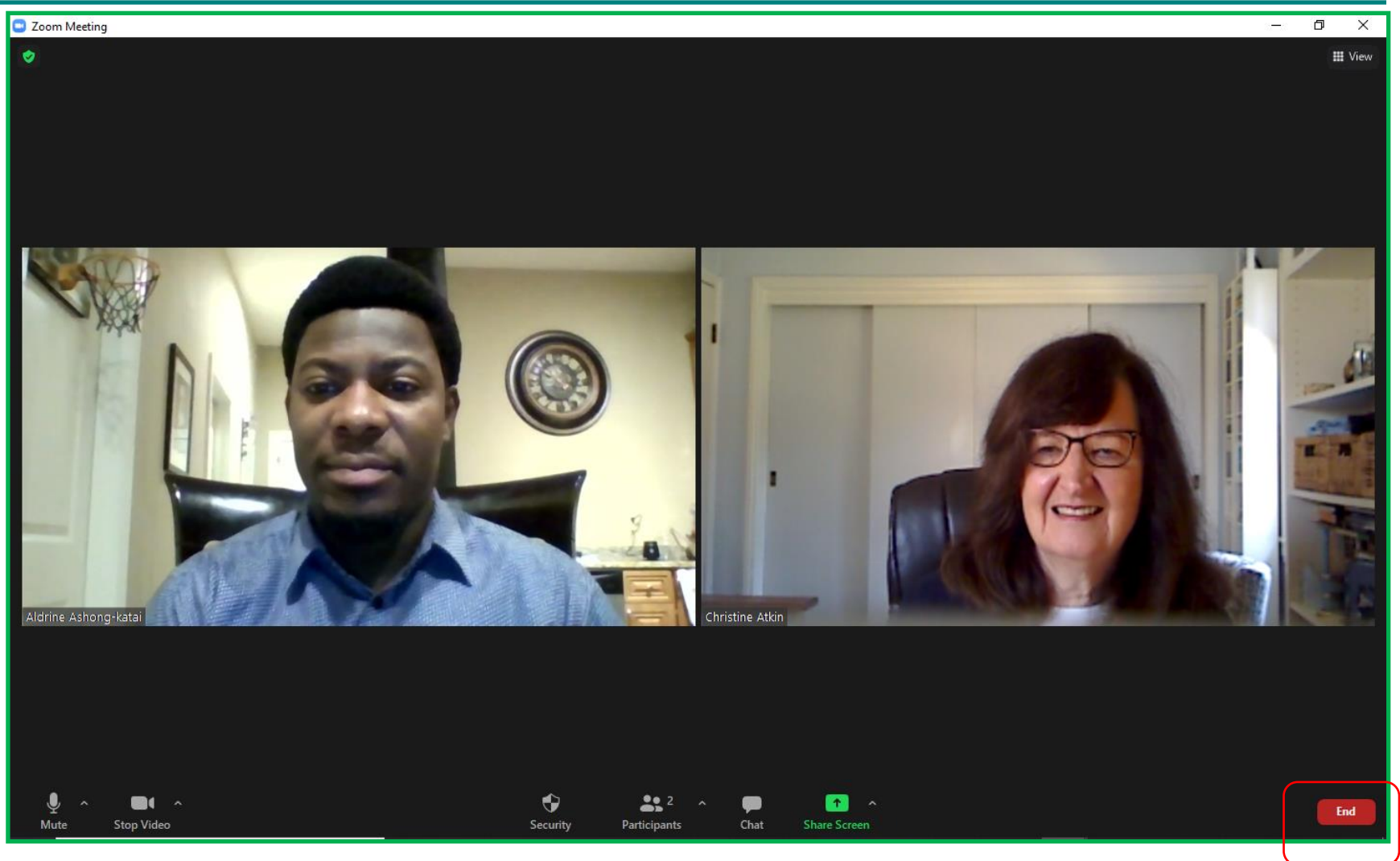
The screenshot displays a Zoom meeting interface. The main video area shows two participants: Aldrine Ashong-katai (top) and Christine Atkin (bottom). The bottom toolbar includes icons for Mute, Stop Video, Security, Participants (2), Chat, and Share Screen. On the right side, the Participants window is open, showing a list of participants: Christine Atkin (Host, me) and Aldrine. A red box highlights the dropdown arrow in the top-left corner of the Participants window. A red arrow points from this dropdown arrow to the 'Close' button in the context menu that appears when the dropdown is clicked. The context menu also includes a 'Pop Out' option. At the bottom right of the screen, there are buttons for 'End', 'Invite', 'Mute All', and a three-dot menu.



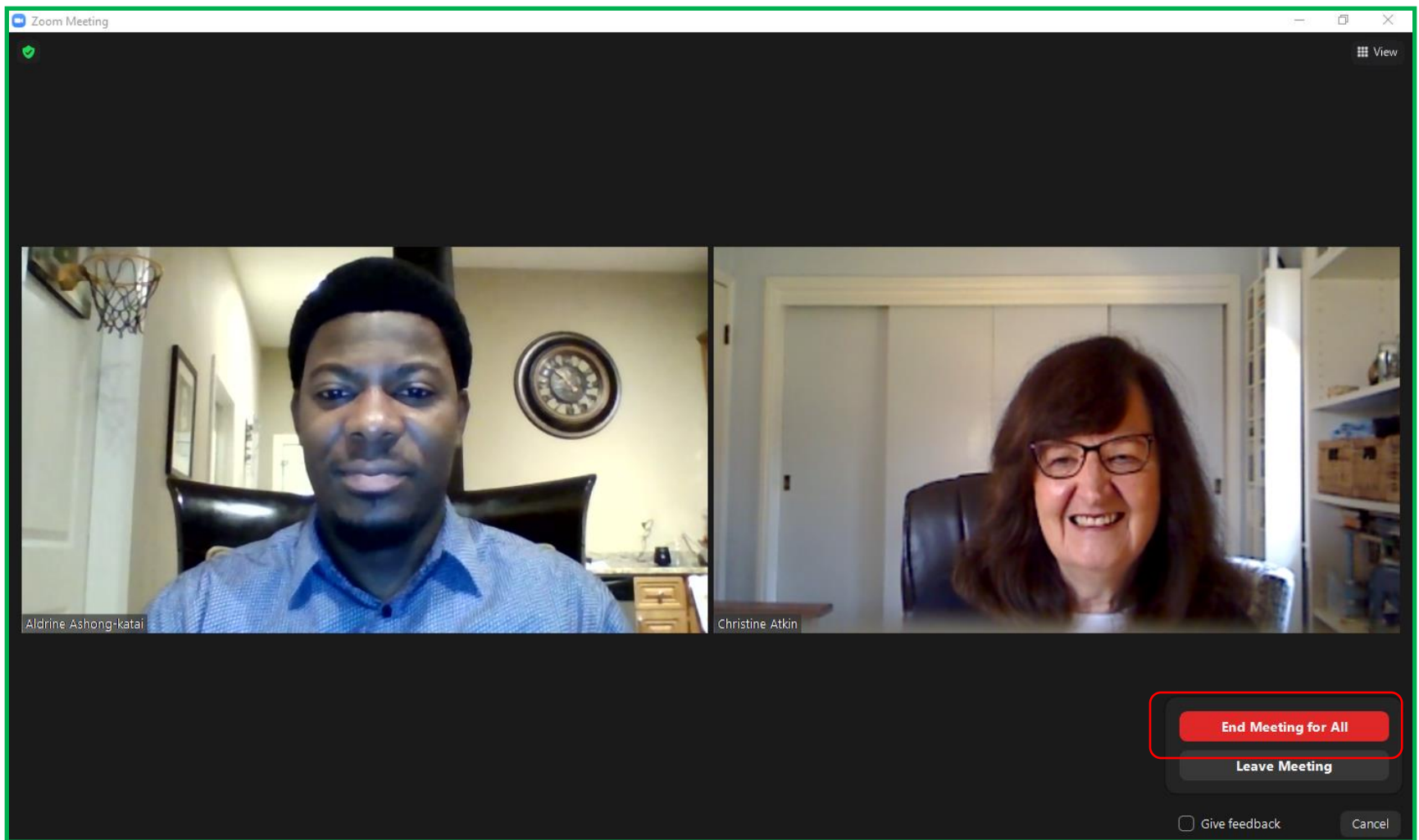
# Session Can Begin



# End the Session

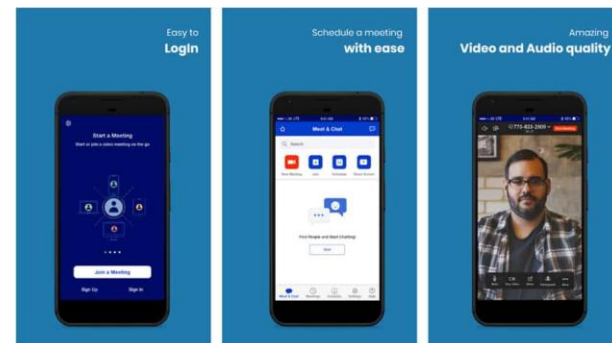


# End the Meeting for You and the Patient



# ZOOM Settings for Patient Meetings

- Patient meetings are enabled with the following settings:
  - Security
    - Everyone goes to the **WAITING ROOM**
    - Patient must be **ADMIT**ted to the session
    - Each meeting has a unique numeric **PASS CODE**
    - Only users accessing in the **USA** are allowed
  - Meetings
    - Participants can **JOIN** 10 minutes before start time
    - Participants are **MUTED** when they join
    - Upcoming **MEETING REMINDERS** are enabled in ZOOM
    - **ENCRYPTION** is enabled for all patient meetings
    - Participants can **JOIN** from ZOOM application or browser
  - Chat
    - Patient and counselor/provider can use **CHAT** for communication.
    - **CHAT** cannot be copied or saved
  - Screen Share
    - Only the counselor/provider can **SHARE** their screen
    - **REACTIONS & ICONS** are NOT enabled
    - Participant **PROFILE PICTURES** are hidden on Join and throughout the session
  - In Meeting
    - **REPORT TO ZOOM** for inappropriate behavior is enabled
    - **VIRTUAL BACKGROUND** is enabled for Codac backgrounds
    - **NOTIFICATION** of counselor/provider and patient is set if the meeting is cancelled



# Setting Up ZOOM Meetings in Outlook

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# Codac Comprehensive Guide Mobile Calendar & Zoom Instructions

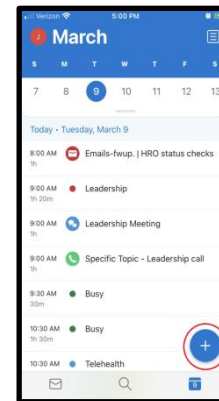
## Comprehensive Guide to using Zoom

The purpose of this guide is to help outline how different CODAC Staff members can leverage Zoom in a virtual counseling or patient visitation meeting. It is broken up into three sections so you can access the materials that are relevant to you. If it's your first time using Zoom, reference section 1 for everything you need to get started using Zoom.

### Table of Contents

- Section 1: Getting Started on Zoom
  - 1. How to Sign Up for the First Time.....Page 3
  - 2. How to Download the Zoom Client.....Page 3
  - 3. How to Schedule a Meeting.....Page 4
    - Scheduling Through Outlook.....Page 4
    - Scheduling Through Desktop App.....Page 7
    - Send Zoom Invitation via Outlook Mobile App.....Page 8
    - Scheduling Online.....Page 13
  - 4. Additional Features.....Page 13
    - Sending Zoom Invite via SMS Text.....Page 15
  - 5. How to Join a Class/Meeting.....Page 17
    - Join via Meeting URL.....Page 17
    - Join via Email/ Text Message Link.....Page 18
    - Call In To The Meeting.....Page 18
    - Join Through Desktop Client Using Meeting ID.....Page 18
    - Join Using the Web Client/Browser.....Page 19
  - 6. Best Practice while in a Class/Meeting.....Page 19
- Section 2: Common Zoom Controls
  - 1. Commonly Used Zoom Controls.....Page 20
- Section 3: Zoom Resources
  - 1. Resources.....Page 21

Comprehensive Guide to Using Zoom | March 2021 | March Page 1



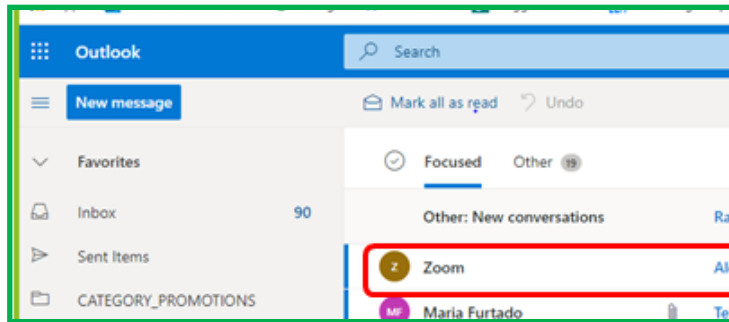
Outlook 365 for Android



Zoom for Android

# Roll Out

- You will receive an **email from ZOOM** by tomorrow morning ...Look for it.



- Set up your User ID and Password** according to instructions in the email

# Help Desk

## Computer Emergency Room

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### Immediate Help

- After this training, we would like to set up site Super Users?
  - **Are you interested?**
  - **Put your name in the CHAT**
- Reach out to your site super user FIRST
  - Try to get your question answered BEFORE you call Maria
- If all else fails, be prepared to switch from ZOOM on your laptop to the phone

### ZOOM Test Site

- [zoom.us/test](https://zoom.us/test)

### Non-Emergency Situations

- Need Help with ZOOM or Outlook?
  - Open a ticket at:  
**CER Help <[help@computeremergencyroom.com](mailto:help@computeremergencyroom.com)>**
- Provide your contact information in the ticket.
- A CER specialist will call you, or call them at 607-785-4357





# Put Your Questions in the Chat



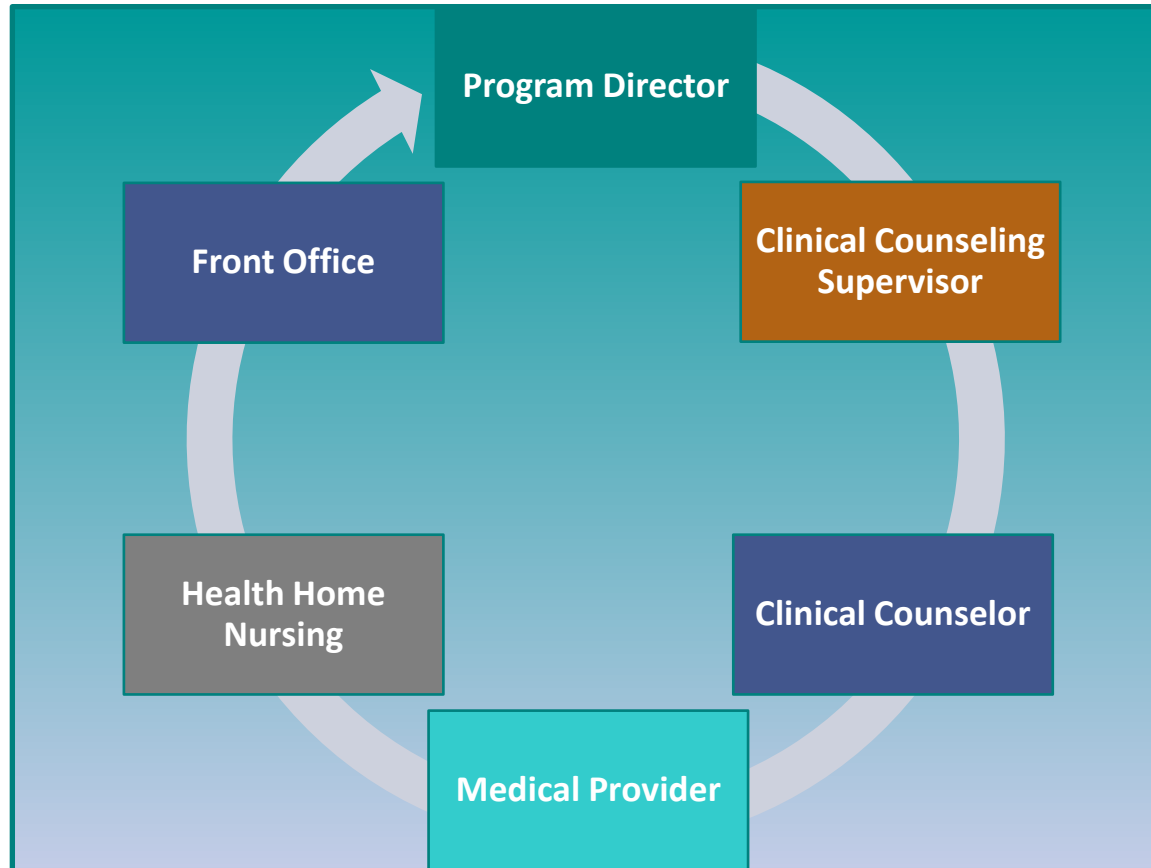
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## Roles and Responsibilities in the Process

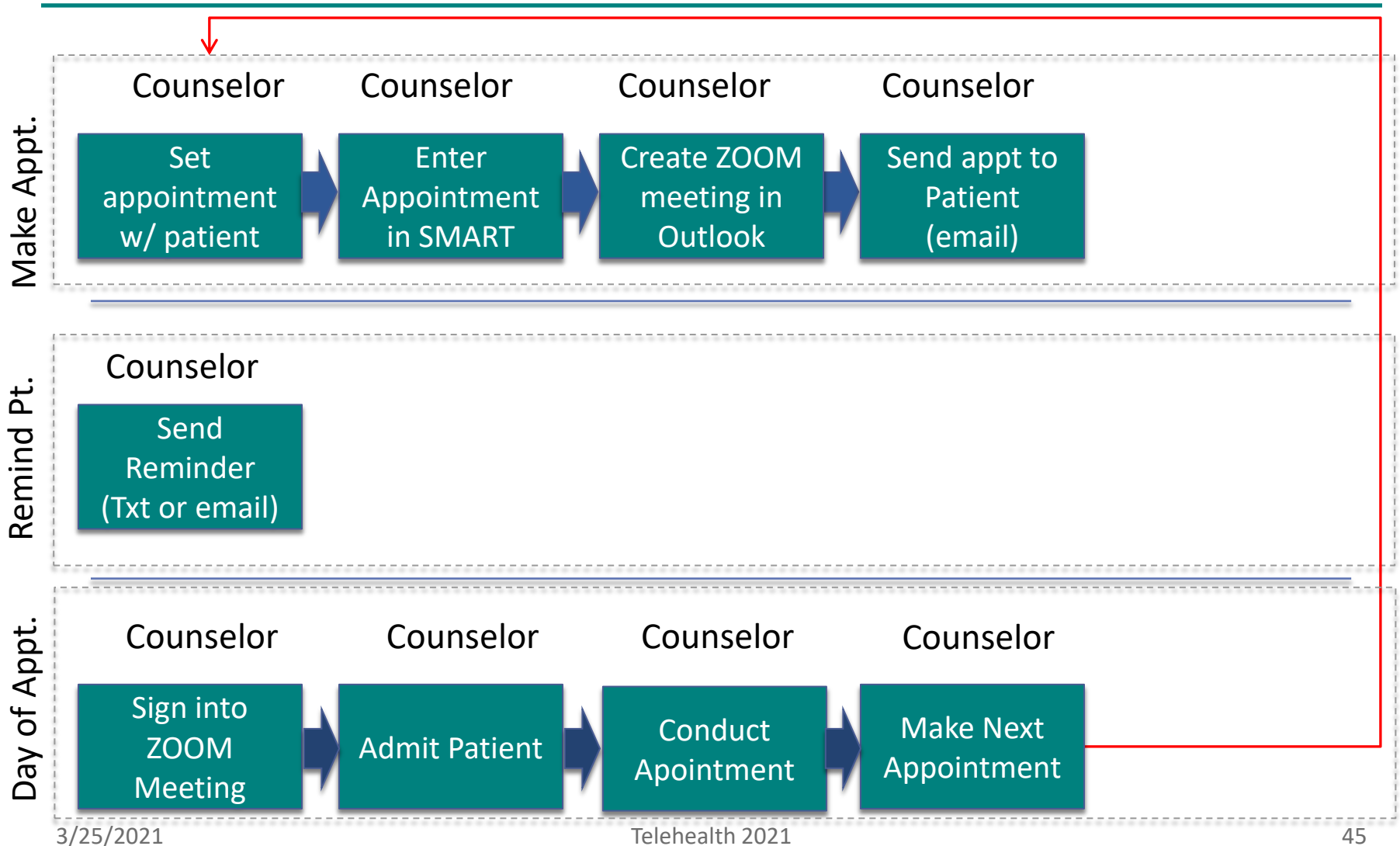
Farrell Carley, VP Clinical Services

Barbara Trout, Director Healthcare Services

# Summary of Roles in Audio-Visual Telehealth

CODAC Role	Responsibility
<b>Program Director</b>	<ul style="list-style-type: none"><li>• Ensuring patients are enrolled in the Video Telehealth Option as appropriate</li><li>• May participate in Video Telehealth with patients as appropriate</li></ul>
<b>Clinical Counseling Supervisor</b>	<ul style="list-style-type: none"><li>• Providing clinical supervision</li><li>• Support staff in the development of video counseling skills</li><li>• Participate in Video Telehealth with case load</li></ul>
<b>Counselor</b>	<ul style="list-style-type: none"><li>• Offer patients option to receive Video Telehealth and ensure that patient consents are discussed and signed</li><li>• Participate in development of video counseling skills</li><li>• Participate in Video Telehealth with case load</li></ul>
<b>Medical Provider</b>	<ul style="list-style-type: none"><li>• Provide Video Telehealth medical services as appropriate.</li></ul>
<b>Health Home Nursing / MA</b>	<ul style="list-style-type: none"><li>• Provide Video Telehealth medical consultation and case management as appropriate.</li></ul>
<b>Front Office</b>	<ul style="list-style-type: none"><li>• Support Video Telehealth scheduling as needed.</li></ul>

# RI Telehealth Project Working with the Patient



# Medical Provider Process

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Members of the  
Telehealth Steering Committee Team  
will meet with each Codac site  
to determine individual needs for  
Medical Scheduling



## **CODAC Video Telehealth Ethics, Clinical Principles, & Best Practices**

Farrell Carley, VP Clinical Services

Laura Levine, Associate Director Clinical Services

Jenn Adams, Program Director





**your  
feedback  
matters**



# Survey: What Codac Staff Had To Say....

- *“Telehealth allows for more flexibility in my schedule.”*
- *“Some of my patients are able to express themselves better through telehealth without fear of judgment that may be present face to face.”*
- *“Telehealth should continue to be an option post-Covid, so to minimize rescheduling (i.e. snow days, transportation issues).”*
- *“I’ve had the opportunity to touch base with my patients more frequently since we’re not constrained to dosing hours only.”*



# Feed Back: What Codac Patients Have To Say....

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*"Seeing my counselor in Zoom would be more helpful."*

*"The option of telehealth services will help me keep training schedule for peer support and be able to see my counselor."*

A large, dark blue speech bubble is the central focus. Inside the bubble, the text "Hear us out!" is written in a white, bold, sans-serif font. Below the bubble, several hands of different skin tones are visible, reaching up to hold the edges of the bubble, suggesting a group of people presenting this message.

Hear us out!

*"It's nice to have a choice!"*

# What's Trending In Telehealth

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## 2020 Telehealth Trends

- **Improved Access to Services**
- **Increased Patient Engagement**
- **Reduced Costs for Patients**
- **Reduction in Provider Burnout**
- **Millennial Appeal**



# Professional Ethics

## What services will telehealth cover within Codac?

- **Screening**
- **Intake assessments**
- **Counseling sessions**
- **Provider appointments for buprenorphine and psychiatric medication management appointments**
- **Care coordination appointments with outside providers such as DCYF**
- **Individual and group supervision**
- **Internal and external staff trainings**
- **Interviewing and hiring staff**
- **Aftercare and transition planning**



# Professional Ethics

- Follow CODAC Telehealth Policy & Procedure
- Follow all requirements for ethical conduct from your profession's code of ethics
- Practice within your scope of practice
  - Counseling
  - Nursing
  - Medical Providers
- Document all services in SMART as you would Face to Face services
- Confirm your malpractice insurance covers Behavioral Telehealth



# Is Telehealth The Right Fit?



## What makes a client appropriate?

- Computer and internet access
- Ability to participate safely and privately
- Motivation to engage in remote sessions
- Patient demonstrates benefit from telehealth counseling.
- Clinical Discernment

## What makes a counselor appropriate?

- Foundation of Clinical Skills
- Level of Experience
- Access to Supervision
- Knowledge and skill set in technology utilization
- Willingness to help patient navigate zoom platform
- Ability to provide online resources

# Digital Etiquette

## What is digital etiquette?

- The overall appearance
  - professionally dressed
  - good lighting
  - position of camera to self
  - professional background
- Ensuring equipment works
  - microphone
  - camera
  - connection
- Clear area of distractions
- Be ready to connect with folks
- Allow more time for responses, there can be a delay due to the technology
- Actively engage, and participate!





# Digital Etiquette

What's wrong with this picture???



# Let's See How We Did

What's wrong with this picture???



# Patient Engagement via Telehealth

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- How to establish good “Web-side” manner:
  - ✓ *Be punctual and set up your physical space*
  - ✓ *Make sure you have everything you need BEFORE the session starts*
  - ✓ *Be mindful of your position in relation to the webcam*
  - ✓ *Pay attention to how you speak (tone and voice level)*
  - ✓ *Body Language- lean in and nod when appropriate*
  - ✓ *Focus on your patient!*
  - ✓ *Empathy is just as important in telehealth sessions*
  - ✓ *Make sure your counseling session has a strong conclusion with a plan for follow up*





# Clinical Principles



## Essentials

- Do a technology check with the patient before sessions are scheduled.
- Make sure the patient understands ZOOM and is comfortable with the technology.
- Discuss how the patient has to not have distractions during the session, just as in face to face.
- When you begin a session, make sure that you get a phone number and location for the person.
- Have a “safe” word if the person cannot talk freely because someone is around and can hear.
- Discuss how to communicate in between sessions, rules around email and phone calls. Review this often.
- Discuss boundaries of the relationship, especially as one is seeing their home.

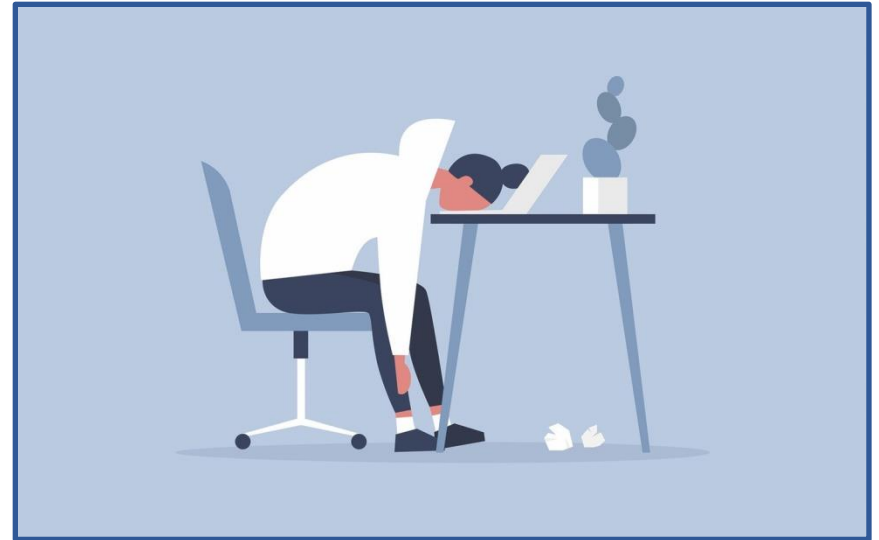
## Considerations

- The patient may not feel comfortable with telehealth.
- Some situations are not appropriate. When uncertain about appropriateness, SEEK SUPERVISION.
- Be aware that there are differences from face to face. The patient could become more emotional and worked up. It is harder to control.
- There are also similarities, such as what is expected in a session.
  - Participation in treatment (program adherence and patient engagement)
  - Discussing termination early on
- Adolescents seeing treatment
  - Location of services
  - Mindful of typical interventions and can these be completed on a telehealth platform
  - Safety!

# Telehealth Self- Care Tips

## Zoom Fatigue is Real!

- Try and space out sessions so you can get up, stretch, use the restroom, grab some water, etc.
- Make sure you are checking in with colleagues, fellow counselors, nurses, supervisors, etc. to remember that we are all in this boat together!
- Resources for self care.



# Clinical Supervision



## Next Steps for Supervisors

- **Peer supervision for clinical supervisors to include telehealth competencies and challenges**
- **Clinical supervisor to providing ongoing education and support surrounding telehealth implementation to the counselors**
- **Ongoing supervision to ensure accessibility and patient needs are being met**

# What To Expect in Supervision

## Continuous Review of:

- **Telehealth checklist**
- **Digital etiquette/web-side manner**
- **Pt appropriateness vs need for in person**
- **Boundaries**
- **Challenges & Tips**
- **Crisis management**
- **Extenuating circumstances** (i.e. patient safety, environment of care, ethical dilemmas, etc.)







**LET'S TALK**

# Acknowledgements!

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**The following staff have attended the telehealth training series and/or have provided input into this training!**

**Ray Lorraine  
Caitlin Connor  
Kate Hopkins  
Rebecca Elsing  
Nisa Sorensen  
Melissa McKenna  
Emilia Carter  
Darryl Walker  
Jeanette Giorgi  
Caitlin Pritchard  
Tori Panzarella  
Laura Levine**

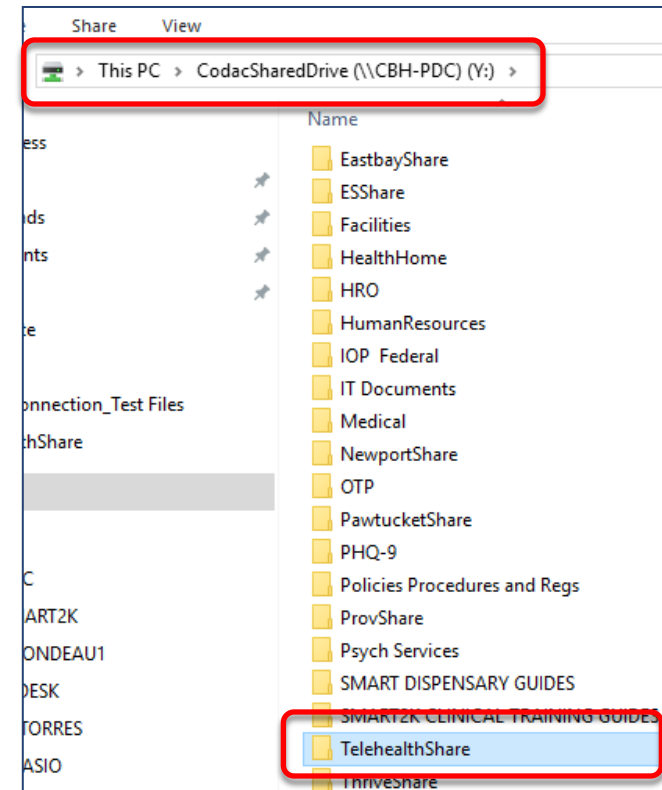


## Next Steps

Jennifer Adams  
Program Director

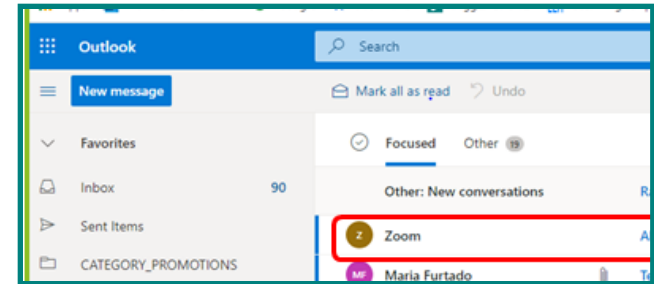
# What You Are Going to Receive

- Receive your ZOOM Account in email
- Pick up your cell phone stand if you are eligible – email coming from Maria
  - Pick up at Cranston front desk
- We are sending you.....
  - A copy of this presentation document
  - ZOOM Comprehensive Guide
  - Telehealth visit checklist
  - Patient introduction sheet
  - Telehealth Policy URL
- Access to Telehealth Share drive folder:



# What Do I Do Now?

- Action Items: Next Steps
  - Receive ZOOM access in email (from ZOOM)
  - Set up User Id
  - Determine readiness to get started
    - Meet with your supervisor before you get started to check out your Telehealth technology set up
    - Supervisor assesses environment of care
- Building Competency Over Time
  - Attend MI Office Hours for April to discuss Telehealth Competency Development
    - Experience sharing
    - Case studies
    - Skills development
  - Work with your supervisor to develop your Telehealth skills



# Where can I go to get questions answered?

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- **For clinical questions**, call or email ....Laura Levine, ([llevine@codacinc.org](mailto:llevine@codacinc.org)), Associate Director Clinical Services
- **For medical provider questions**, call or email ....Barbara Trout ([btrout@codacinc.org](mailto:btrout@codacinc.org)), Director Healthcare Services



## [Zoom video tutorials – Zoom Help Center](#)

Click the sections below to view video tutorials for Zoom. You can also register for upcoming live training or access recent recordings. Zoom Meetings Zoom Meetings and Webinars Join a Me...

[support.zoom.us](https://support.zoom.us)

<https://support.zoom.us/hc/en-us/articles/206618765-Zoom-video-tutorials>

- **For technical help**, follow the instructions on slide 40 for
  - Site Super User
  - Internal Codac
  - Computer Emergency Room



## Summary

Beth Bennett  
Training Director



# Learning Objectives

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- After completing this training you will have an understanding of:
  - The opportunity and underlying need for advancement to Video telehealth at Codac
  - Your role in offering Video Telehealth to Codac patients
  - Codac Telehealth Policy
  - Best practices for the use of ZOOM and email technology and where you can get help
  - Telehealth counseling best practices, supervision, and competency development



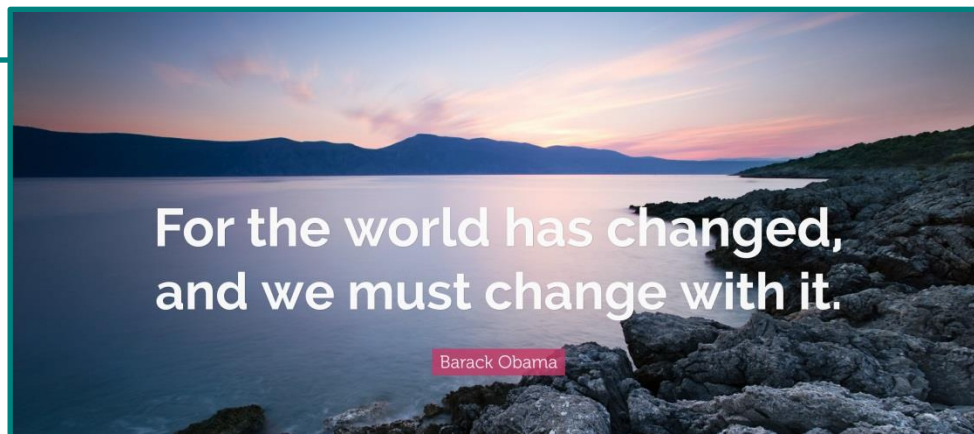
## **Closing Remarks**

### **Where are we going together?**

Rebecca Boss

Chief Operating Officer & Vice President Strategy

# In Closing.....



- **Telehealth is here to stay**
- **Telehealth has demonstrated value as A tool in the clinical toolbox**
- **Proficiency in telehealth service delivery will benefit not only your patients, but you as a professional**
- **CODAC is committed to supporting your growth in incorporating telehealth into your skills repertoire**

*Thank you!*



# Introduction to Video Telehealth

**TRAINING EVENT: March 25, 2021**