DALLAS CHILDREN'S ADVOCACY CENTER
DISTANCE SERVICES PROCEDURES

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TRAINING RESOURCES

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ACCOUNT SETUP

– Account creation email: You received an email from support@doxy.me – click through this email to sign in for the first time.

– Logging in:

  o Go to dcac.doxy.me **(bookmark this page!!)**

  o Click Provider Login in the top right corner

  o Login with your dcac.org email and Doxy.Me password

– Account Settings and Password

  o In Account Settings > Personal Info > Preferred Display Name - Set to: **Firstname Lastname, Credential**

  o In Account Settings > Room Settings > Customize Display Name - Set to: **Firstname Lastname, Credential**

    o If your name is too long to add the credential, simply put your first and last name

  o Set your profile picture by following the prompts to create a Gravatar account and upload a photo (further instructions to come)

  o Change your video quality from Low to Standard (note – this may be too much for some connections to handle. If this is the case, change back to Low)

  o In Account Settings, scroll down to Login Credentials and change your password from the automated password you received in the email to your own, secure password.

  o In Account Settings > Notifications, turn on the Desktop alert and the Email alert. **Be sure that Text message alerts are turned off to prevent client names from being texted to your phone.**

– Work in Google Chrome

– Be advised: Doxy.Me is experiencing a MASSIVE influx of new users, and they are experiencing some server capacity issues as a result. You may find that you have to retry some tasks a few times before they "work."

- You have a unique "waiting room" link that you can send to your clients. A complete list of waiting room web addresses is below.

- Send this link to your clients, and they will jump into your waiting room queue, where you can start a call with them.

- Unfortunately, there is not a way for us to change the default message sent via text message in Doxy.me to Spanish. You can, however, put the link to your waiting room into an ETO engage message and it will appear as a live link when your client receives the message.

- **A client has to stay on the doxy.me page** in their phone's browser in order to stay on the call.

- **Anything else using the Wi-Fi** in your home OR the client's home will negatively affect the quality of the call.

- Once in the waiting room, the client's screen will look something like this.

  o They'll see their provider on the left, whether the provider is logged in, not logged in, or logged in but on another call.

  o They'll see their own video feed on the right.

  o They'll see the contents of the waiting room (set by us) in the middle.
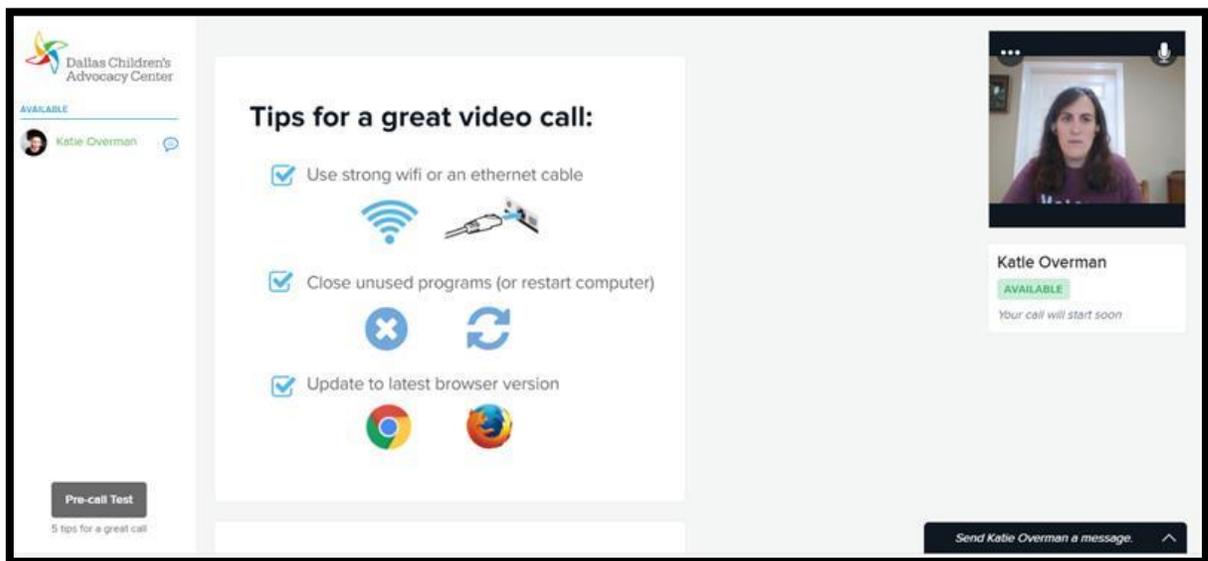
- It's a good idea to run a pre-call test **and** have your client run their own pre-call test to see if their connection strength, device, and browser will work: https://doxy.me/precall-test/

- Ensure all other programs and tabs are shut down – **especially Teams**, or any other service that uses your webcam. The video won't work if you have these other services running! **If you close Teams, it may still be running in the background. Open your Systems Tray and right click on Teams to "Quit" the program.**
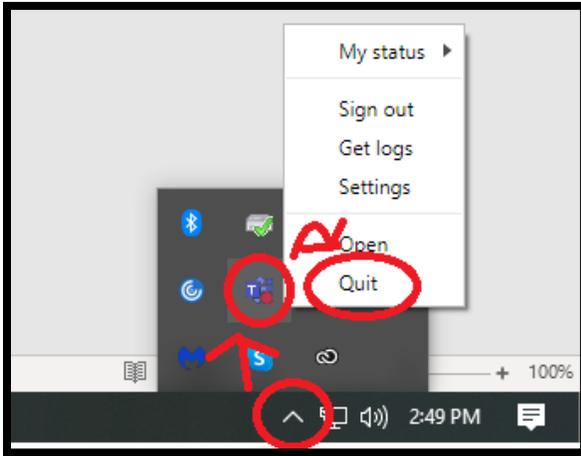
- When you login, you should be prompted to allow access to your camera and microphone. If you miss it, you can also enable this during the call.

- You may have to refresh your dashboard to see new people in the waiting room.

- Share the url to your waiting room, if you haven't done so already. When a client has entered the waiting room, you will see them show up in your "Patient Queue" in the top left of your screen.

- While on a call, you can capture photos, share your screen (or a particular document on your screen), and send files to your clients using the left-hand menu:

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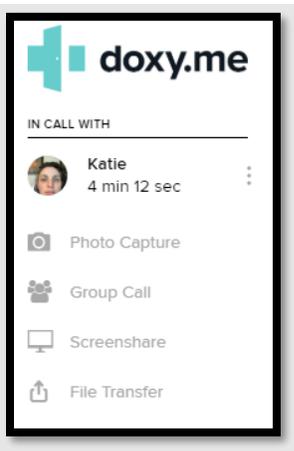
- In addition, you have further options by tapping the three dots next to the client name, including chat and a check on their device and connection.
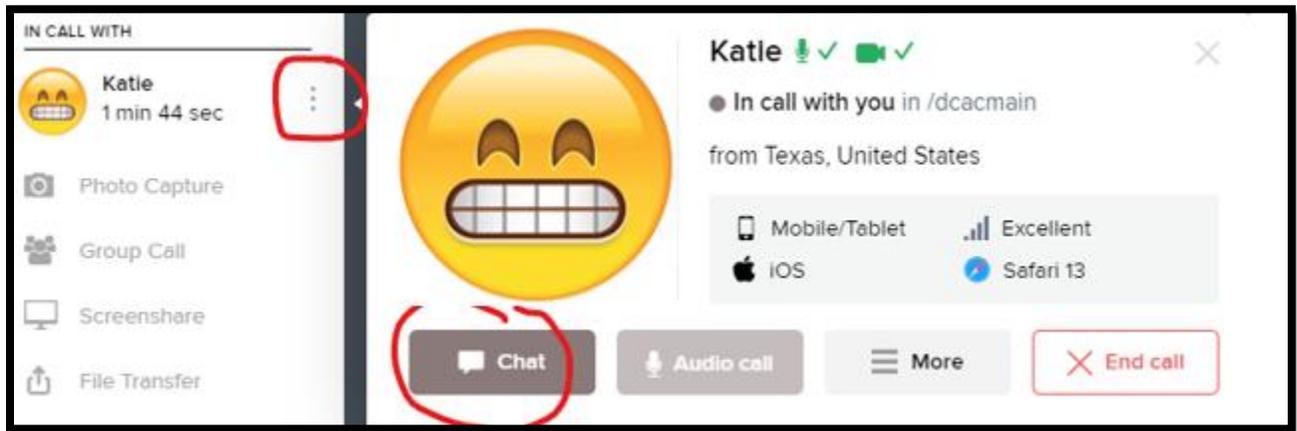
PLEASE NOTE – this is not a fully functional chat. Clients can only initiate chat if they're on a computer (rather than a phone) or in the waiting room. Also, they may not be able to respond to your chat if they click away from the chat box during a session. Use this chat only for notification purposes.

– If you have multiple people in your waiting room, you can conduct a group call by …

o Start a call with one person, just like you would if you were having a one-on-one call. (If you have a co-provider, start with them.)

o Have this person mute themselves.

o In the left-hand menu of your call, hit the "Group Call" option. From there, you can select one or more callers in your patient queue (waiting room)
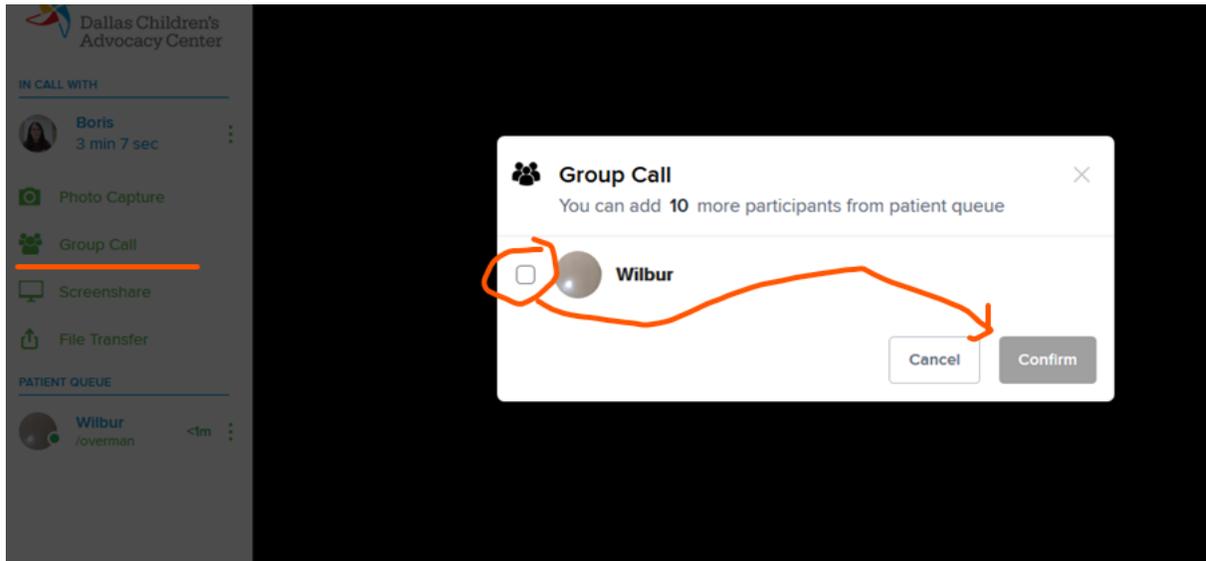
o As you add people to your Group Call, you'll see their thumbnails start to tile down the right side of your screen. You can control your own video and audio from the middle of the screen, just like on a one-on-one call, and you can see how other callers' audio and video is toggled as well.
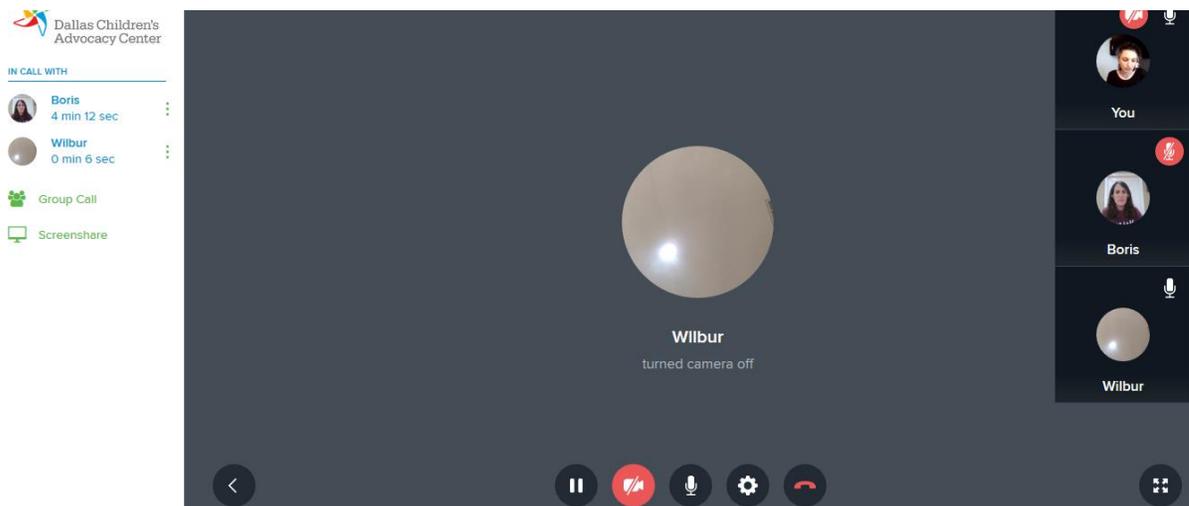
- It's a good idea to run a pre-call test **and** have your client run their own pre-call test to see if their connection strength, device, and browser will work: https://doxy.me/precall-test/

- A provider can operate a session with multiple people at a time.

- Only one provider can be "at the controls" in Doxy. A co-provider will need to enter the first provider's waiting room, just as a client would. Add your co-provider to a call from the waiting room before adding any clients.

    o If you are conducting a group with another provider, the provider who is "at the controls" should focus on adding people to the session from the queue while the co-provider leads the session. People will drop from the session frequently, and it is a lot to manage to continue adding people to the session.

    o Only the provider "at the controls" can share their screen with everyone in the session. Make sure the provider "at the controls" has whatever documents you want to share with group.

    o Only the provider "at the controls" can request to see someone else's screen and that screen then is only shared with the provider "at the controls."

- Up to 12 people can be on a call, including you. However, the more callers you add, the worse your connection will get.

- It's advisable to add people to your call one at a time. This way, you can ask each person to mute themselves as you add them and reduce the chaos.

- If possible, avoid having more than one person in the same household on separate lines calling you. The Wi-Fi demand of running one video call is high. If each household can share a phone, or be on the phone one at a time, your call quality will be better.

- If someone leaves a call – either because they hang up, are disconnected, or you boot them from a call – they need to go back to the waiting room on their own before you can add them into the call again.

o   As the provider, you can only share your screen or request your client's screen if you (the provider) are using Doxy.me **from a computer**. Clients cannot initiate a screen sharing; a provider must request a client's screen.

    o   Screenshare by a provider is supported by Chrome / Firefox / Safari 11+

    o   A provider requesting a client to screenshare is not currently supported in Safari 11+

o   When sharing your screen as a provider, you have the option to share your entire desktop, which allows you to toggle between documents, or share a specific document.

    o   If you want to share your entire desktop, make sure the "Your Entire Screen" tab is selected. Then, click on the preview of your desktop so it is selected and click "Share." If you do not click on the preview of your desktop to select it, the "Share" function will not be accessible.
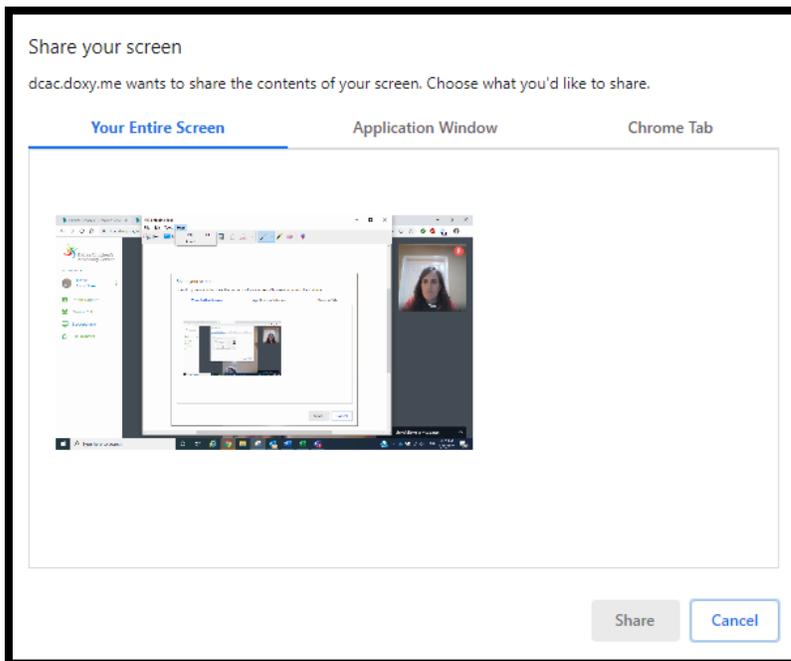
If you share your entire desktop, PLEASE make sure *all* unnecessary applications and documents are closed. The last thing we need is PHI that is not the clients being shared on a video call.

If you only want to share a specific document, make sure the "Application Window" tab is selected. Then, click on the preview of the document so it is selected and click "Share." If you do not click on the preview of your desktop to select it, the "Share" function will not be accessible.

o   If you share a specific document through the Application Window, you have to stop sharing that document and then share a new one. You cannot toggle between documents.

o   If clients are using their phones for sessions, sometimes rotating the screen allows them to see the documents better.

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- Try switching from standard video quality to low video quality in your settings.

- Try switching to an Audio Only call, or audio for you.

- Restart your computer. Other software might be using computer power or interfere with your video or microphone. Restarting your computer will assure your computer is ready for video.

- Turn off other devices on the same Wi-Fi connection are using high bandwidth activities (e.g., Netflix / YouTube / Skype / FaceTime) – this means other devices in your home, on your Wi-Fi network.

- Move physically closer to your Wi-Fi router, and switch to the 5GHz frequency. This will increase the maximum amount of bandwidth available to your device over a shorter distance.

- Use an ethernet cable connecting your computer to the router. This will provide the most stable connection possible.

- Make sure your router isn't physically obstructed or out of view. Keep it in the open, and the signal will be stronger.

First Name	Last Name	Room name	Link to Waiting Room
Each staff first name	Each staff last name	Each staff room name	Each staff waiting room url

Please ensure you have tested the Doxy.me software and your internal or external microphone prior to initiating sessions.

Other recommendations include:

- Close other applications running in the background.

- Make sure your computer is fully charged or plugged into a power source.

- Use a white noise machine, if needed, to limit distracting sounds and ensure privacy on your end.

- If you plan to share documents, have the documents open ahead of time.

  o Have a safety plan accessible just in case

- Be on time

  o "Arrive" 5 minutes prior to session and mute microphone

- Turn on your camera and assess the background and lighting in the room you are using

  o The background used should be free of distractions and appropriate for all clients

  o Be mindful of the glare from natural and artificial light sources

- Display a professional image

  o Look presentable

  o Remove clutter in the background

  o Look directly at the camera

While you won't review the Distance Services Agreement with the client and/or caregiver until the first Distant Services session, you will want to review certain information with the client and/or caregiver to make sure Distant Services, particularly those delivered through tele-video, are appropriate. Remember: we hold the same expectations for participation in treatment that we would if we were delivering in-person sessions, regarding caregiver involvement.

- Staff with your supervisor to determine what level of distance services your client should receive.

- Determine if families have access to WiFi at home.

  o If they do, inform them they will need to log on to the WiFi for tele-video services.

  o If not, determine the family's data allowance to ensure tele-video services do not exhaust their data.

- Determine how many phones are available in the home.

  o If two phones are available, determine which phone should be used for sending the Doxy.me session invite and to which phone caregiver will have access during session.

- Inform caregiver that at the beginning of every session, you will be obtaining emergency contact information from the caregiver. Inform the caregiver that by giving you this information, the caregiver is granting you permission to contact this person in the event of an emergency.

  o Encourage caregivers to (a) think about whom their emergency contact will be and (b) inform this person of their status as the emergency contact. An emergency contact does no good if the emergency contact doesn't know to be available in the event of an emergency.

- Assess the feasibility of caregiver being able to secure a private space for the client for tele-video sessions.

- Remind caregivers they need to be present on-site and accessible to the client during the session.

  o If the caregiver designated an alternate adult to be present for sessions **prior** to us working from home, this permission should have been obtained through a signed Release of Information (ROI). If the caregiver designates an alternate adult to be present for sessions and an ROI has not been sign, obtain permission from the caregiver for this adult to be present, discuss what information will be shared with this adult, document in your note permission was obtained, and have caregiver sign the ROI at the next available opportunity.

- Remind caregivers to have their phones charged prior to the session.

- You should not be late to session, and if you are, determine how much time a client and/or caregiver should wait for you.

- Explain how Doxy.me works

    o Ask client to close applications running in the background prior to session. Close all apps and browser tabs.

    o Client will receive an invitation from the provider and can follow the link to join the session.

    o Client will need to enter their name prior to entering the Waiting Room.

    o Request that client and/or caregiver join the Waiting Room at least 15 minutes prior to the session.

        ▪ Explain to caregiver you will join the session at the session start time. The 15 minutes allows the caregiver enough time to access the Waiting Room, grab a charger, get disconnected a few times, etc.

        ▪ Similar to our no-show policy for in-person sessions, make a phone call to caregivers from your phone if caregivers have not joined the Waiting Room 15 minutes after the start of session.

- Review how caregivers can contact you for assistance and that if you need to contact caregivers outside of a Doxy.me session, you may be calling from an unknown, restricted, or private number. Caregivers may need to adjust their call-block settings to receive your call.

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BEFORE INTAKE

1. Contact client by phone and triage for suitability

    a. Clients must be willing to agree to the emergency management protocol and the privacy safeguards

    b. You should use your best clinical judgement to determine a client's suitability for distance services based on the initial referral concern and later presenting concerns

2. Complete all the steps recommended in the "Setting up distance services with caregiver before the first session" section of these procedures.

3. Schedule appointment by phone.

COMPLETING AN INTAKE:

1. Client will be in the Waiting Room on Doxy.me. Open the session and greet the client and/or caregiver.

2. Verify identification of caregiver (or client, if client is an adult) by having the caregiver or adult client hold up identification to camera.

    a. If the client is a child, have the caregiver verify the client's identity by stating the client's date of birth.

3. Complete the Distance Services Emergency Contact form with client and caregiver.

    a. Explain that the caregiver is giving permission for the provider to communicate necessary information to the emergency contact in the event of an emergency and that this person will **ONLY** be contacted in the event of an emergency when the provider determines additional assistance is necessary.

4. **For the first session only,** review the Consent for Treatment (if it was not previously completed), the Service Agreement, the Distance Services Agreement, and the limits of confidentiality with client and caregiver and obtain verbal consent. If needed, obtain verbal permission for the needed releases of information (ROIs). **Caregivers should sign the consent forms and ROIs upon returning to DCAC or when the teleconsent feature is available again on Doxy.me. This protocol will be updated as needed to capture any changes to this process.**

5. Explain procedure if session is disrupted.

    a. Provider will attempt to reinitiate the Doxy.me session. If this does not work after a few attempts:

        i. Provider will call from a cell phone that may have a blocked, private, or unknown number to continue session via a phone call rather than a Doxy.me session. Client should program their phone to accept blocked or private calls.

        ii. Provider should attempt to call the client on the number originally used to connect for the Doxy.me session. If the provider cannot reach the client at this number, provider may try the alternate number.

        iii. Document the session disruptions and how you ended up conducting the session. Please, if Doxy.me is unsuccessful, we should make every attempt to still have a session or check-in with the client. Continue to be available to the client for the amount of time you initially allotted for the session.

6. Explain additional features of Doxy.me.

    a. Ask client to close applications running in the background. Close all apps and browser tabs.

    b. A client and/or caregiver may need to unmute the microphone and enable the camera.

    c. Educate client about the screen sharing capability of the platform.

7. Remind the client and/or caregiver about privacy requirements for distance counseling and then ask the caregiver or client to leave the room. For child clients, confirm where the caregiver will be so the child can access the caregiver as needed during the session.

8. Verify the privacy of the client. This may be done by asking the client to use the device to pan the room.

9. Conduct intake with client and/or caregiver.

10. To administer assessment tools, the provider may give the client and/or caregiver the link OR access the measures on the provider's computer and share the screen with the client and/or caregiver. In the intake note, providers should document how the measures were administered to each party.

*If there is a breach in privacy during the session (e.g., someone enters the session from either the client or provider end), you and/or the client may need to mute the phone, turn down the volume, or turn the screen. Document the breach in your note, what you did to protect client privacy when the breach occurred, and the breach was resolved.

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1. Client will be in the Waiting Room on Doxy.me. Open the session and greet the client and caregiver.

2. Complete the Distance Services Emergency Contact form with client and caregiver.

   a. Explain that the caregiver is giving permission for the provider to communicate necessary information to the emergency contact in the event of an emergency and that this person will **ONLY** be contacted in the event of an emergency when the provider determines additional assistance is necessary.

3. **For the first session only,** review the Distance Services Agreement with client and caregiver and obtain verbal consent. **Caregivers should sign the consent form upon returning to DCAC or when the teleconsent feature is available again on Doxy.me. This protocol will be updated as needed to capture any changes to this process.**

4. Explain procedure if session is disrupted.

   a. Provider will attempt to reinitiate the Doxy.me session. If this does not work after a few attempts, ...

   b. Provider will call from a cell phone that may have a blocked, private, or unknown number to continue session via a phone call rather than a Doxy.me session. Client should program their phone to accept blocked or private calls.

   c. Provider should attempt to call the client on the number originally used to connect for the Doxy.me session. If the provider cannot reach the client at this number, provider may try the alternate number.

   d. Document the session disruptions and how you ended up conducting the session. Please, if Doxy.me is unsuccessful, we should make every attempt to still have a session or check-in with the client. Continue to be available to the client for the amount of time you initially allotted for the session.

5. Explain additional features of Doxy.me.

   a. Ask client to close applications running in the background. Close all apps and browser tabs.

   b. A client and/or caregiver may need to unmute the microphone and enable the camera.

   c. Educate client about the screen sharing capability of the platform.

6. Remind the client and/or caregiver about privacy requirements for distance counseling and then ask the caregiver to leave the room. Confirm where the caregiver will be so the child can access the caregiver as needed during the session.

7. Verify the privacy of the client. This may be done by asking the client to use the device to pan the room.

8. Conduct session with client.

*If there is a breach in privacy during the session (e.g., someone enters the session from either the client or provider end), you and/or the client may need to mute the phone, turn down the volume, or turn the screen. Document the breach in your note, what you did to protect client privacy when the breach occurred, and the breach was resolved.

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- The emergency contact should **ONLY** be contacted in the event of a physical or mental health emergency that does NOT warrant a call to 9-1-1. To be clear, you should use your best clinical judgement (i.e., your brain).

  - If a call gets disconnected or interrupted and there is not an emergency, attempt to reinitiate contact with the client using the number you originally used to connect to the client.

  - If the caregiver provides an alternate phone number, then use that number to try to reinitiate contact.

  - The emergency contact should **NOT** be contacted due to a simple disconnection or interruption. This is not necessarily an emergency.

- You may save a copy of the Emergency Contact Form for each of your clients on your OneDrive for easy accessibility for verification purposes before each session. This way, you have easy access to the information and do not have to retype it or go to your ETO note to find this information each time.

  - Consider sharing the link to the Emergency Contact Form for your client with your FA/Therapy partner so you both have easy access to this information.

  - Ask a friend if you don't know how to use your OneDrive.

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Safety concerns should be handled just like we would handle them in session, by assessing for risk and safety planning as necessary.

1. If after safety planning you still need to staff with a supervisor, inform the client you are going to consult with a supervisor to determine the best way to support the client and/or caregiver. Inform the client you are going to stay in the Doxy.me session to monitor for safety and will mute your microphone so you can speak with the supervisor.

2. Call your supervisor from your phone.

3. Follow your supervisor's recommendations.

   a. Provider should remain on the phone call/tele-video session with the client and/or caregiver while all steps of safety planning are completed.

Somewhere, somehow, the following information needs to be included in your ETO note.

- Each service delivered via Doxy.me should include "Telehealth" in the identifier of the note.

- Once you have reviewed the Distance Services Agreement (DSA) and obtained verbal consent from the caregiver, put "DSA" in the identifier of the note to indicate to others that you reviewed the DSA and obtained consent.

- For an intake session

    o Session was conducted via the Doxy.me tele-video platform due to the suspension of in-person services at DCAC as a result of the COVID-19 outbreak. During today's session, client was located at **<<insert name of location and address here>> and was contacted through Doxy.me/at <<insert phone number here>>.** Client's on-site caregiver was **<<insert name and relationship of caregiver>>**. The client's emergency contact for this session was **<<insert name of emergency contact, relationship to client, and phone number>>.** Provider reviewed the Consent for Treatment, the Service Agreement, the Distance Services Agreement, and the limits of confidentiality with the client and/or caregiver and answered any questions. The client and/or caregiver verbally agreed to the parameters outlined in these agreements. A signature could not be obtained from the client and/or caregiver at the time but will be obtained when in-person sessions resume or when the capability to obtain an electronic signature is available.

- For the first session that is not an intake session

    o Session was conducted on the phone/via the Doxy.me tele-video platform due to the suspension of in-person services at DCAC as a result of the COVID-19 outbreak. During today's session, client was located at **<<insert name of location and address here>> and was contacted through Doxy.me/at <<insert phone number here>>.** Client's on-site caregiver was **<<insert name and relationship of caregiver>>**. The client's emergency contact for this session was **<<insert name of emergency contact, relationship to client, and phone number>>.** Provider reviewed the Distance Services Agreement with the client and/or caregiver and answered any questions. The client and/or caregiver verbally agreed to the parameters outlined in the Distance Services Agreement. A signature could not be obtained from the client and/or caregiver at the time but will be obtained when in-person sessions resume or when the capability to obtain an electronic signature is available.

- For every session thereafter

    o Session was conducted on the phone/via the Doxy.me tele-video platform due to the suspension of in-person services at DCAC as a result of the COVID-19 outbreak. During today's session, client was located at **<<insert name of location and address here>> and was contacted through Doxy.me/at <<insert phone number here>>.** Client's on-site caregiver was **<<insert name and relationship of caregiver>>**. The client's emergency contact for this session was **<<insert name of emergency contact, relationship to client, and phone number>>.**