

Telehealth Informed Consent Checklist

A checklist of topics, not consent language. No Oregon rule prescribes this wording.

What a telehealth informed consent conversation usually covers, as common practice. Tick each topic as you cover it, and note the conversation in the client's record.

- ☐ **Platform.** Which video platform you use, and that the vendor has signed a business associate agreement (BAA) with you.
- ☐ **Privacy on both ends.** A private room on your side and theirs, headphones if others are nearby, and who else might be able to hear.
- ☐ **Client location, every session.** Confirm and record where the client is physically located at the start of each session. Why: licensure follows the client's location. The OBLPCT says Oregon licensees may practice electronically with clients who are within Oregon, and that when a client is elsewhere, that jurisdiction decides. Oregon has not joined the Counseling Compact.
<https://www.oregon.gov/oblpc/pages/practice.aspx>
- ☐ **Emergency plan.** A local emergency contact, the emergency services near where the client usually joins from, and what you will do if a crisis comes up mid-session.
- ☐ **If the connection drops.** Who calls whom, at which number, how long to wait, and when the session moves to the phone or gets rescheduled.
- ☐ **Recording.** Your policy on whether either of you may record a session.
- ☐ **Fees and insurance.** Your fee for telehealth sessions, and that coverage varies by plan; the client checks with their payer.
- ☐ **Limits of confidentiality.** The same exceptions as in person, plus the risks that come with any technology.
- ☐ **Professional Disclosure Statement given and acknowledged.** OAR 833-075-0050 requires a PDS for each client; when you deliver it electronically, you need a way to document confirmation of receipt and acknowledgement. Registered associates follow OAR 833-050-0031, which adds the supervisor's name and supervision requirements.
<https://secure.sos.state.or.us/oard/view.action?ruleNumber=833-075-0050>
- ☐ **Ethics.** The OBLPCT adopts the 2014 ACA Code of Ethics (OAR 833-100-0011). Section H covers distance counseling, technology, and social media.
<https://secure.sos.state.or.us/oard/view.action?ruleNumber=833-100-0011>
- ☐ **OHP clients.** OAR 410-172-0850 covers telemedicine for behavioral health under the Oregon Health Plan, including HIPAA-compliant technology and policies that prevent a privacy breach.
<https://secure.sos.state.or.us/oard/view.action?ruleNumber=410-172-0850>

Client:

Date discussed:

Clinician:
