

Tech set-up checklist

Here are some suggested steps to support your service user's readiness for your online sessions. They have been created for use by clinicians.

Please use as applicable/helpful and be aware of the need to tailor these steps depending on the service user's device and their experience and confidence with technology.

Steps	Completed	Notes
Confirm language of service delivery and what support is required to facilitate sessions	☐	
Confirm consent from client for telehealth	☐	
Confirm contact details with client, including phone number, email and address	☐	
Ask what client's previous experience is using video calls and technology more generally	☐	
Confirm internet connection and device that will be used	☐	
Check internet download speed is over 5mbps - www.speedtest.net	☐	
Check an account for videoconferencing software is set-up (if needed)	☐	
Is a helper present?	Yes ☐ No ☐	

Steps	Completed	Notes
Find a position that is comfortable for client, with good lighting, quiet, place for device to stand independently.	☐	
Confirm client can access their email	☐	
(Send email invite) Check client can join the online meeting via a one click link.	☐	
Check audio settings microphone and speaker are working (increase volume if needed)	☐	
Check placement of camera and visibility of image on screen share	☐	
Check client can turn microphone and camera on and off.	☐	
Able to click “got it” / “yes” button for accepting recording (if needed)	☐	
Discuss preferred communication modes and practice use (i.e. typing into chat, use of annotate)	☐	
Agree plan if you get disconnected during a video call	☐	
Provide client with step-by-step guides for logging in (if needed)	☐	