

## How to Get Ready for your Tele-Behavioral Health Visit: Tips for Clients

### 1. Prepare your setup

- **Identify where you'll meet**
  - Find a place where you live that has reliable phone or internet connection
    - A wired connection can be more stable than a wireless one
  - If you have the option to be in a quiet and private place, go there
    - Be creative. It might be your car or some other place that offers privacy and comfort
- **Download any telehealth or meeting apps** (for example Zoom), register if necessary
  - Ask in advance if you need to install any apps on your device.
  - Ask how you will receive a link to the visit (and a password)
  - Ask if they can do a test with you to ensure your technology setup works.
- **Test your phone or webcam and audio**
  - Make sure you know how to use the camera, the microphone, and the speakers.
- **Set up a light**, so your provider will be better able to see you (it's best if the light is in front of you, instead of behind you)
- **Set up chargers**, so your computer and/or phone battery don't run low

### 2. Prepare for the visit

- **Think through what the visit is about**
  - If you want to accomplish something specific during the visit, be prepared to let the provider know this at the beginning of your appointment.
  - If there are symptoms you want to discuss or questions you would like answered, jot down some notes you can look at during the visit.
  - If there's medication to refill, gather that information if you have it.
- **Gather some information:**
  - If the visit is about some symptoms that concern you, think about these questions that you'll often be asked
    - What prompted this appointment today?
    - What symptoms do you have? How long have they been going on, and how have they developed and changed over time?
    - What have you done to treat them so far? What are the results from treatment?
    - Have you ever had these symptoms before? What treatments did you use and what were the results?
  - If you've been measuring your symptoms with a screening tool (like a PHQ-9 or a GAD-7), write down recent readings.
  - Medical history, including chronic medical conditions.
  - List of any prescriptions, vitamins, herbal supplements, and over-the-counter medications you are taking

- Your pharmacy phone number and address.
- Your primary care doctor's name and contact info.
- Insurance or credit card information.
  - Check with your provider's staff beforehand about billing in advance and/or copayments
- **Get ready to take notes.** Have paper and a pen handy.
- **Get yourself ready for the visit**
  - Use the restroom.
  - Dress appropriately. Although you're home, it's important to have clothes on that you'd wear out on the street.
  - Bring reading glasses if you need them.
  - Sit comfortably. The video session will last the same amount of time as an office visit, so make sure you're comfortable.
  - Have a glass of water handy in case you become thirsty during the visit.
- **15 minutes before your visit,** make sure your technology is working and your space is quiet and distraction-free.
- **Three minutes before your visit,** sign in to the video session, checking the camera, microphone, and speakers once again

### 3. During the visit

- **Take notes.**
  - You can ask the provider to wait while you write something down, they know this can help you remember important information later.
- **Make sure you have asked all your questions** before the visit ends.
- **Confirm any next steps** before you end the visit, to make sure you understand everything
- If the provider will be sending you any information or instructions after the visit is completed **check they have your correct email.**



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