In-Person Session Checklist

The following is a checklist of things to consider when conducting an in-person therapy session. These suggestions reflect best practice standards; however, not all items on this checklist will be relevant to you and/or your specific practice.

Security, Confidentiality, & Compliance

- ❏ The location must be private enough to ensure client confidentiality and reasonably guarantee sessions won't be interrupted. This includes a door that closes fully, the ability to cover any windows, and some degree of sound proofing, which can be accomplished via a sound machine.
- ❏ Make sure all confidential information is secured physically (e.g., locked cabinets) and electronically (e.g., password-protected computer, encryption, etc.).
- ❏ Ensure any consent forms are signed and present in the patient's chart.
- ❏ If possible, have a separate entrance and exit to avoid patients seeing each other.
- ❏ Display your license(s) in a location that is clearly visible to the patient if your state and/or Licensing Board requires you to do so.
- ❏ Take measures to ensure your office is ADA-compliant
  - ❏ Ensure that all furniture and other items in the office are accessible to clients with varying needs (e.g., people with different body shapes/sizes, etc.)
  - ❏ Ensure that doorways are accessible (wide enough)
  - ❏ Ensure that there is an elevator or office is on the first floor
  - ❏ Ensure that there are temperature control options (AC/heat) to control and maintain a comfortable temperature
  - ❏ Ensure that there is at least one accessible-identified parking space if your building has fewer than 25 parking spaces. If there are between 26 and 50 total spaces, at least two accessible spaces are required.
- ❏ Ensure that safe restrooms for clients of all genders are accessible.
- ❏ Ensure that patients are not being recorded on video, either during sessions or via security cameras maintained by you.

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Etiquette & Patient Comfort

- ❏ Place a box of tissues close to where the patient will be seated.
- ❏ Position a clock behind the client so you can keep track of time without visibly checking it.
- ❏ Ensure your office has comfortable chairs or a couch, and a space where the patient can place their personal items.
- ❏ If you take notes during the session, explain to the patient what you are doing and why. Ask the patient if it will be distracting, and have a backup plan (e.g., shorthand, handwritten notes) if the client says it is.
- ❏ Consider your decor choices, select options that convey a warm, supportive, inclusive environment conducive to therapy.
- ❏ If offering food/refreshments, please ensure you have multiple options available for varying dietary needs and avoid common allergy foods (e.g., no peanuts/peanut products in the office to ensure the safety of these individuals)

Personal & Patient Safety

- ❏ Place your chair in a location that allows easy access to an exit.
- ❏ Consider installing a panic button to quickly contact emergency services in the event of a patient crisis or when your personal safety is compromised.
- ❏ Share any safety precautions taken to prevent transmission of illnesses and ensure those measures are followed (e.g., face masks, air filtration, active symptom policy, etc.).
- ❏ Ensure that you have a secure place to put your valuables, including laptop, purse/wallet, etc.
- ❏ Develop a crisis management plan for your office.
    - ❏ Similar to your telehealth plan, this may include policies on safety planning, utilizing the patient’s support network or emergency contact, and having crisis resources (including 911) available.
    - ❏ If you work with patients who have the potential to be violent, consider having an office location where another clinician is available, such as a group practice building, so someone else can step in if a patient escalates.
    - ❏ If you work with high-risk patients, develop a step-by-step safety protocol and consider a “dry run” to practice its execution and identify any gaps.

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Prior to your session:

- ❑ Assess your office space for the above consideration through the lens: “Do I feel as though I can conduct safe, supportive therapy in this space for clients with varying needs while meeting my own needs as a person and as a therapist?”
- ❑ Ensure that the client has all of the correct information about their first in-person appointment, which can be communicated via the portal, including:
  - ❑ Address
  - ❑ Instructions on how to find the office (photos helpful)
  - ❑ Who they can call if they are lost/ going to be late?
  - ❑ Office staff names, roles, how they can expect to interact with them
  - ❑ Office policies
  - ❑ If there will be others in the office
  - ❑ What accommodations the office has (water, coffee, A/C, etc)
  - ❑ Locations of elevator, bathrooms, etc
  - ❑ Check-in procedure
  - ❑ What to expect
  - ❑ Emergency exits/procedure, including natural disaster concerns
- ❑ Share your expectations for in-person service with the client (including how to respect your office) and what can happen if these expectations are not met

Day of your session:

- ❑ Patient checks in/provider is notified of their arrival.
  - ❑ Missed Appointment policy should still be followed in in-person settings
- ❑ Tending to good client experience- welcoming them, ensuring their physical needs are met, and inviting them into the office space and asking them to sit where they like
- ❑ Turn on white noise machine, if applicable
  - ❑ Orienting client to places of safety (e.g., doorway, window, different seating options with varying views on the room, quick tour of the space, etc.)
- ❑ Conduct session
- ❑ End session, ensuring the client has left the premises.

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Rula resources:

- ❑ **Provider Community Support Groups Events Calendar (daily drop-ins, M-F)**
- ❑ **Rula Therapist H.E.L.P. Resource Guide to Support Clients Experiencing a Crisis**
    - ❑ This article details the Rula Therapist H.E.L.P. process, which is designed to support clients experiencing a mental health crisis such as thoughts of suicide, self-harm, or harming others, sudden and dramatic changes in mood, and/or a loss of touch with reality such as hallucinations or delusions.
- ❑ **In-Person Response Plan Checklist for Medical, Fire, and Police Emergencies**
    - ❑ Develop a Written Emergency Response Plan
        - ❑ Define your roles and responsibilities during emergencies
        - ❑ Create emergency policies
        - ❑ Maintain on-site emergency supplies and equipment
        - ❑ Consider office proximity to emergency services and hospitals
        - ❑ Account for skills and training of any on-site personnel
        - ❑ Identify types of emergencies most likely to occur in your practice
    - ❑ Roles and Responsibilities
        - ❑ If not a solo practice, consider designating who will call emergency authorities
        - ❑ Plan to meet and direct emergency responders
        - ❑ Document the course of events
        - ❑ Plan to manage other patients during the emergency
    - ❑ Acquire Necessary Emergency Supplies
        - ❑ Ensure supplies match common emergencies in your setting
        - ❑ Maintain adequate first aid supplies
    - ❑ Be Prepared
        - ❑ Maintain your emergency response plan
        - ❑ Uphold your emergency care training as indicated
    - ❑ Implement Communication Strategies
        - ❑ Maintain awareness of your local emergency resources and lines of communication
        - ❑ Foster a culture of safety in your practice
    - ❑ Take Preventive Measures
        - ❑ Use thorough intake and medical questionnaires to identify potential risks
        - ❑ Prepare for anxiety-related emergencies, which are common during crisis events
    - ❑ Regular Review and Practice
        - ❑ Schedule periodic reviews and updates of your practice emergency plan
        - ❑ Conduct regular practice implementation of your emergency plan