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CPA GUIDELINES ON TELEPSYCHOLOGY

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ABOUT THE CPA

The Canadian Psychological Association is the national voice for the science, practice and education of psychology in the service of the health and welfare of Canadians. The CPA is Canada's largest association for psychology and represents psychologists in public and private practice, university educators and researchers, as well as students. Psychologists are the country's largest group of regulated and specialized mental health providers, making our profession a key resource for the mental health treatment Canadians need.

VISION

A society where understanding of diverse human needs, behaviours and aspirations drive legislation, policies and programs for individuals, organizations and communities.

MISSION

Advancing research, knowledge and the application of psychology in the service of society through advocacy, support and collaboration.

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INTRODUCTION

With the advent of the Covid-19 pandemic, psychology practice in Canada abruptly shifted to a virtual environment. A 2017 survey of Canadian psychologists' use of information technologies in their practice¹ showed that just under half (47%) used technology to deliver care and only 8% used it independently of face-to-face service. The pandemic changed all that, and most Canadian psychologists began to provide telepsychology. Since then, psychologists and their clients have had the opportunity to experience the advantages and benefits of telepsychology practice, with many choosing to continue meeting in the virtual environment. At the same time, the risks and challenges associated with telepsychology have become clearer.

In 2020, the Canadian Psychological Association (CPA) Board of Directors approved in principle *Interim Ethical Guidelines for Psychologists Providing Psychological Services via Electronic Media* which offered valuable guidance to Canadian psychologists. These guidelines focused on the ethical considerations of telepsychology practice. With the rapid changes in the psychological practice environment as a result of the pandemic, the CPA Board of Directors decided in November 2021 that it was critical to develop more broadly-based guidelines that directly addressed a variety of practice areas, including ethical considerations. Content from the *Interim Ethical Guidelines* has been integrated into these *Guidelines*.

The intention of these *Guidelines* is to provide direction and support to Canadian psychologists in order to enable them to practice ethically, competently, and reflectively while engaging in a virtual environment. The *Guidelines* are designed to assist practitioners in the delivery of telepsychology services, with a primary focus on synchronously delivered services (delivery and receipt of service happen at the same time), while recognizing that mental health services and supports can be asynchronous (receipt of service happens at any time).

TERMINOLOGY

A wide range of terms are employed to describe psychological services delivered through electronic means. After a review of current terminology, the working group decided to adopt *Telepsychology*, which is the most commonly used term and applies to a broad range of psychological services.

Telepsychology is a method of providing psychological services through electronic means, such as video conferencing, telephone, texting, or the internet, when the psychologist and client are not in the same physical location. It includes a range of psychological services, such as psychological assessments, individual therapy, group therapy, couples therapy, consultation, therapist guided e-mental health, workshops, and supervision.

PROCESS OF DEVELOPING THE GUIDELINES

A working group to develop guidelines was struck in February 2022, with representation from members of the CPA board, CPA staff, and experts in telepsychology. The work began with a review of the literature related to telepsychology. Given the rapidly evolving nature of the field, a review of the literature is not included in these *Guidelines*. As stated below, it is psychologists' responsibility to keep up to date with the literature related to their telepsychology practice. The group then reviewed 17 provincial, national, and international relevant guidelines (they are listed in the Appendix). The working group consulted with CPA members at the CPA Convention in 2022. A draft of the guidelines was circulated for feedback in February 2023 to relevant individuals and groups in Canadian psychology. Constructive feedback was received from a broad range of stakeholders, including regulators; provincial psychology associations, training sites; CPA sections and committees; psychologists working in range of settings, such as independent practice, hospitals, community organizations, universities, schools, rural and northern communities; and areas of practice including clinical psychology, counselling psychology, neuropsychology, forensic psychology, child and family, and geriatric psychology. The draft was revised and submitted to the CPA Board of Directors. The *Guidelines* were approved by the Board of Directors in June 2023.

SCOPE OF GUIDELINES

These *Guidelines* provide guidance that is specific to telepsychology practice. The foundation for the guidelines is the *Canadian Code of Ethics for Psychologists (2017) (the Code)*, the *Mutual Recognition Agreement (2001) (MRA)*, and provincial and territorial regulatory requirements of telepsychology practice. In the event of any apparent discrepancy between these guidelines and the Code and/or regulatory requirements, the Code and regulatory requirements take precedence. The regulations for interjurisdictional telepsychology practice are evolving in Canada. Psychologists should keep themselves up to date and abide by current legislation, regulations, and guidelines in the jurisdictions in which they practice.

While technology impacts teaching, education, and research in psychology, these *Guidelines* are practice focused to highlight the unique needs and accountabilities of the practice environment. The *Guidelines* are concerned with four primary areas of psychological practice: assessment, intervention and consultation, training, and supervision. Specific guidelines are organized into seven domains:

1. Ethics, Standards, and Legal Considerations
2. Equity and Access
3. Technical issues, Administrative and Organizational Considerations
4. Assessment
5. Intervention and Consultation
6. Education and Training
7. Supervision (including for the purposes of training, employment, and licensure)

OBJECTIVES OF GUIDELINES

- To offer practical guidance to Canadian psychologists who are engaging in telepsychology practice.
- To identify advantages and benefits of telepsychology practice.
- To alert psychologists to the risks, potential harms, and challenges associated with telepsychology practice.
- To provide a framework for psychologists to assess when telepsychology practice may be appropriate and/or warranted.

BENEFITS AND RISKS ASSOCIATED WITH TELEPSYCHOLOGY

As outlined in Principle II of the *Code*, Responsible Caring, psychologists have the responsibility “to discern and balance the potential harms and benefits to the individuals and groups involved ... to predict the likelihood of the occurrence of harms and benefits, to proceed only if the potential benefits outweigh the potential harms, to develop and use methods that will minimize harms and maximize benefits, and to take responsibility for correcting clearly harmful effects.”

In deciding whether and how to engage in telepsychology, psychologists need to be aware of and assess the following possible benefits and risks.

BENEFITS

- Enhanced access to psychological services for clients, e.g., for individuals with mobility issues and those living in rural and remote communities where there are few psychologists
- Comparable efficacy for many interventions whether delivered in person or in a virtual environment
- Increased flexibility and convenience for clients
- Increased comfort and decreased stigma for some clients by not accessing services in person in institutions
- Access to psychological services that may not be available locally
- Access to a larger selection of potential providers of psychological services
- Continuity of care when clients change location within the same jurisdiction
- Access to psychological services when in-person is not feasible, for example, due to client illness or incapacity or public health restrictions.

RISKS

At the time of writing, published reports indicated that adverse events associated with telepsychology use were uncommon. Nonetheless, the risks of telepsychology practice can vary considerably and dynamically with the context of practice. While it is not possible for psychologists to eliminate all risks inherent in the use of telepsychology, they can work to minimize them. In addition to the specific risks identified below, the following contexts are generally anticipated to carry more risk, and thus call for greater due diligence by practitioners, educators, and supervisors: communication via teleconference (compared to telephone); independent practice without IT support (compared to institutional practice with IT support); teleconferencing over unsecured WIFI (compared to hard-wired connection); and practice with clients who are less familiar with digital technology or may have difficulty appreciating the possible consequences of a loss of privacy.

Some of the specific risks associated with telepsychology:

- Challenges in maintaining the security and privacy of client information
- Psychologists, students/trainees, and clients not having access to adequate technology, internet, or private space
- Use of virtual platforms that do not meet confidentiality standards
- Clients bearing increased responsibility for ensuring the meeting space is private and conducive to practice
- Technology difficulties, disruptions, and/or failure
- Psychologists, students/trainees, or clients not having sufficient technological skills
- Many assessment methods not validated for remote/virtual assessment
- Psychologists not located in clients' communities may not have knowledge about local resources, referral networks, and/or the cultural and community context
- The technology used may not be adequate to support or accommodate clients' needs, for example, related to sensory abilities or developmental level
- The use of telepsychology may create confusion about professional boundaries and potentially problematic expectations for communication within or between sessions, such as an expectation of immediate response to text messages or clients texting others during sessions.

ASSESSING WHETHER TELEPSYCHOLOGY IS WARRANTED

When determining whether to provide psychological services via telepsychology, psychologists assess its appropriateness, including the following factors:

Clinical Relevance: Consider the client's characteristics (e.g., developmental level, sensory ability), presenting concerns, preferences, symptoms, and diagnosis. The psychologist should evaluate the potential risk and benefits of telepsychology. Some characteristics and conditions may be more appropriate for in-person treatment than for telepsychology.

Technology Access and Literacy: Ensure that the client has access to and can use or be guided to use the technology required for the services. This includes the client's environment having adequate bandwidth to maintain a stable connection if using video conferencing

Psychologist Competence with Telepsychology: Self-assess competence with the proposed technology and determine whether additional consultation or training is required.

Adequacy of Technology: Assess whether the proposed technology can adequately support the communicative needs and abilities of clients, e.g., young children or clients with cognitive impairment. If not, consider whether there are technological adaptations or whether telepsychology may not be appropriate.

Adequacy of Assessment Tools: Consider whether the available online/virtual assessment tools are sufficiently validated for the referral question, assessment type, clinical condition, and/or characteristics of the examinee (e.g., age, education, computer literacy), or whether an in-person assessment is preferable.

Privacy and Security: Ensure that the technology utilized for telepsychology is secure and safeguards the confidentiality of the client's personal and health information. As much as possible, ensure that the psychologist and client are in private and secure locations during the telepsychology session.

Therapeutic Alliance: Consider how telepsychology may impact, both positively and negatively, developing and maintaining a rapport and alliance with clients.

SPECIFIC GUIDELINES IN THE SEVEN DOMAINS

1. ETHICS, STANDARDS, LAW

Psychologists discuss with clients the potential risks and benefits with virtual care when obtaining informed consent for telepsychology.

Psychologists discuss with clients the importance of having access to private space and secure internet. They should consider establishing a code word for their clients to use in the event that their private and secure space is compromised during a session (e.g., if someone else enters the space).

Psychologists establish an alternate means for contacting clients in the event of technology interruption or failure.

Psychologists inform themselves about the mental health resources in a client's community or region.

Psychologists discuss with clients the procedures to be followed in an emergency, including who can provide local back-up assistance and the local emergency resources.

Psychologists keep themselves up to date and abide by current legislation, regulations, and guidelines in the jurisdictions in which they practice, as well as those of the current physical location of the client.

Psychologists delivering telepsychology services outside of their home jurisdiction ensure they are legally entitled to do so. Provinces, territories, and countries vary in whether they allow provision of service when a psychologist is located elsewhere.

2. EQUITY AND ACCESS

Psychologists are knowledgeable about and responsive to the social and cultural contexts of the communities in which they are practicing via telepsychology and ensure they are culturally responsive when engaging with clients.

Psychologists recognize that technological factors, such as lack of access to private space and reliable and affordable internet, may be barriers to clients accessing telepsychology.

Psychologists attempt to facilitate solutions whenever possible that enable clients to access telepsychology services, such as identifying alternative spaces.

Psychologists are aware of the ways in which technology can be a facilitator or a barrier to clients of diverse abilities and disabilities accessing telepsychology. For example, online sessions may be an advantage for clients who have limited physical mobility or a barrier for clients without access to technological adaptations.

Psychologists may identify virtual programs and adaptations that can accommodate and support clients of diverse abilities and disabilities when necessary and requested.

3. TECHNICAL, ADMINISTRATIVE, AND ORGANIZATIONAL

Psychologists ensure that the spaces, processes, tools, and virtual platform(s) they use for their telepsychology practice have the appropriate security to protect clients' privacy.

Psychologists who work independently and do not have access to a secure institutional platform may consider having a legal review of the security and privacy specifications of the user agreement with their platform provider.

Psychologists ensure the security and privacy of client information transmitted and stored electronically and inform clients about third-party data systems. Psychologists take a comprehensive view of security by assessing and securing each "layer" of the electronic environment they operate in. This includes securing all devices, accounts, connections, and documents used in their practice with secure passwords and encryption.

Psychologists have policies and procedures regarding their telepsychology practice that are made available to clients. If the psychologist works within an organization, the institution's policies and procedures should be available to clients.

Psychologists understand their cyber-related risks and carry cyber insurance that covers these risks.

Psychologists have the technological knowledge and skill to offer telepsychology services and will troubleshoot and/or access IT expertise when problems arise.

Psychologists assess whether clients have the technological knowledge, skill, and level of comfort to participate effectively with the mode of delivery being offered. If clients do not have the knowledge, skill, or level of comfort, psychologists either provide guidance in how to use the technology, provide an alternate mode of delivery, for example, telephone or in-person, or facilitate a referral to another provider who can provide the appropriate mode of delivery.

Psychologists discuss and clarify with clients professional boundaries and their expectations regarding different forms of telecommunications - for example, text messaging, email, and social media - both within and between sessions.

4. ASSESSMENT

Psychologists recognize that the knowledge about and tools for teleassessments are evolving and familiarize themselves with the current evidence.

Psychologists respect and keep up to date with copyright requirements of assessment instruments when engaging in teleassessment.

Psychologists protect the security and privacy of any data collected electronically, as well as of assessment instruments, including knowledge of how to destroy data as appropriate.

Psychologists understand and acknowledge the limitations of using assessment instruments in non-standardized ways when engaging in teleassessment.

Psychologists document in their reports both their rationale for the decision and how they have deviated from standardized procedures if they elect to use an assessment instrument in a non-standardized manner.

5. INTERVENTION AND CONSULTATION

Psychologists are competent in the intervention they provide to clients, regardless of the modality.

Psychologists educate themselves and keep up to date with the evolving literature on the effectiveness of interventions and consultation provided electronically.

Psychologists seek out professional development, consultation, and/or supervision regarding the effective application of different modes of delivery.

Psychologists collaboratively assess with clients their satisfaction with the effectiveness of the delivery mode and switch to another modality, or refer, if it is not meeting clients' needs.

6. EDUCATION AND TRAINING

When conducting training in telepsychology, training programs and sites should include the following elements:

Students/trainees become knowledgeable about standards, laws, regulations, and guidelines that are germane to telepsychology.

Students/trainees learn the risks, benefits, and applications of using assessment tools that are not normed for telepsychology and the requirement to specify the non-standardized use of tests in their reports.

Students/trainees become competent in the use of relevant technologies for telepsychology and recognize the need for ongoing professional development.

Students/trainees learn how to communicate effectively in virtual settings to promote rapport, engagement, and mutual understanding. This includes how to use and interpret non-verbal cues, such as facial expression and tone of voice.

Students/trainees learn how to provide culturally-responsive telepsychology services to clients from diverse backgrounds.

Students/trainees are aware of the benefits and risks associated with telepsychology and how to assess and discuss them in their work with clients.

Students/trainees receive supervision from psychologists who are competent in telepsychology (see below).

7. SUPERVISION

Telesupervisors ensure that they have sufficient competence in telepsychology to train and supervise the work of their supervisees.

Telesupervisors assess the competence of their supervisees to use telepsychology.

Telesupervisors provide the necessary training and supervisory oversight relative to their supervisees' competence to ensure the safe and competent delivery of telepsychology services.

Telesupervisors deliver telesupervision in a manner consistent with the current best practice literature and ensure that they provide a level of supervisory support comparable to in-person supervision.

Telesupervisors are mindful of possible negative psychological impacts of videoconferencing (e.g., "Zoom fatigue") on the quality of supervisory meetings and the supervisory relationship and attend to the supervisee's well-being and the quality of the supervisory relationship.

Telesupervisors ensure that their supervisees have a reliable means of reaching them in case of a client emergency and identify an alternate interim supervisor when they are unavailable.

Telesupervisors establish, communicate, and implement guidelines regarding the ethical, security, and privacy considerations for recording telepsychology sessions in the context of training. This includes having protocols: to securely store recordings, identifying who has authorized access, and for appropriate destruction of records when no longer needed.

APPENDIX

DOCUMENTS REVIEWED IN DEVELOPING GUIDELINES

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