

## Tip Sheet

# Creating a Positive Virtual Experience for Your RETAIN Participants

The widespread availability and use of technology (e.g., mobile phones, internet, videoconferencing) offers new opportunities to deliver RETAIN services virtually. This includes, but is not limited to, participants whose injury or illness makes it difficult for them to attend in-person appointments, those who are concerned about maintaining social distancing, and participants who live in remote or underserved areas. Successful virtual service delivery (VSD), which includes telehealth,<sup>1</sup> hinges on creating an environment in which participants feel that they are receiving quality services aligned with their needs. This tip sheet offers considerations for RETAIN states that are starting or expanding VSD in the workforce or health components of their projects, and it provides broad strategies to help create positive experiences for RETAIN participants.

### Preparing for the Experience

#### *Choose Your Technology*

There are a number of platforms to choose from, each with advantages and disadvantages. When determining which platform is best suited for your RETAIN project, consider the following:

- **Security**—Is the platform secure and/or encrypted or, if required, HIPAA (Health Insurance Portability and Accountability Act) compliant (e.g., Skype for Business, Zoom for Healthcare, Google Meet)?
- **Accessibility**—Is the platform accessible to participants with various abilities? Is the platform compatible with different types and brands of devices?
- **Ease of Use**—Is the platform easy to understand and navigate? Does it require certain hardware or technological specifications?
- **Confidentiality**—Are you able to maintain participant confidentiality on the platform?

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<sup>1</sup> *Virtual service delivery* refers to the provision of services remotely through the use of technology. It includes *telehealth*, which refers to a broad scope of remote clinical and nonclinical services that uses electronic information and telecommunication technologies to support health and well-being.

- Cost—Is it free, or is there a cost? Is the cost prohibitive with respect to the number of participants who may be engaged over time?
- Reliability—Does the platform usually work as intended?

Additional factors to consider when choosing your technology include:

- Determine what device you will use during the session (e.g., computer or laptop, smartphone, or tablet) and what device the participant may be using, to ensure compatibility.
- Minimize disruptions during the session. It is necessary to have a reliable internet connection, and your device should be fully charged.
- Provide training to RETAIN staff who will use the platform, and if possible, have someone available during the session to provide technical support if needed.

### **Audio and Visual Considerations**

**Audio.** Whether you are communicating with a participant by phone, leaving a voicemail message, or communicating on a live videoconferencing platform, having clear audio will enhance RETAIN participant and staff experience.

- Eliminate background noise (e.g., turn off overhead fan, close windows).
- Test your audio with another person and have them verify that the communication is clear.
- Consider using an external microphone instead of the computer's built-in microphone.

**Visual.** When conducting a virtual visit in which you will be seen on video, it is important to verify that the participant can see you clearly.

- Avoid seating that places the light source directly behind you, as this may darken your image, making it difficult for the participant to see your face.
- Position your camera so that the participant can see your entire face when you speak.
- Position your camera at eye level so that it appears as if you are looking directly at the participant instead of down at them.
- Make sure that your background is neat and free from distractions. You may be able to create a virtual background with your RETAIN logo or another image.



## **Communicating With RETAIN Participants**

### **Setting Expectations and Educating Participants**

Although some participants will welcome the opportunity to engage with RETAIN service providers without having to participate in an in-person session, others will be apprehensive

about connecting with RETAIN providers virtually. Common reasons for this apprehension include concerns about receiving the same quality of care and a lack of familiarity with technology. Providing sufficient information about the process beforehand may help alleviate these concerns. Topics to discuss when setting expectations and educating participants about the process include:

- How the RETAIN appointments might differ from, or how they might be similar to, telehealth or virtual appointments with their health care providers.
- The dynamics of the interaction (e.g., what to expect when communicating via teleconference, what to expect after the visit, the role of all RETAIN staff who are involved in the appointment).
- Review confidentiality, data sharing, and reporting guidelines.
- Logistical expectations (e.g., internet connection, type of device used by the participant, finding a private place to talk).
- An alternative option—or plan B—for reaching the participant (e.g., text, email, phone) if you are disconnected or are experiencing technical difficulties.

Develop a guide or checklist to help participants prepare for the session. Example items for the participant checklist include the following:

- Test your phone, webcam, and/or microphone before the visit.
- Download the app (if applicable).
- Make sure your device is charged.
- Verify whether the location for your session has a reliable internet connection.
- Invite a caregiver or relative to join the session, if needed.
- Close unnecessary programs that are running on your device.
- Find a quiet and private space where you can speak without distractions or interruptions.
- Write down any thoughts or questions that you may have ahead of time. Have a pen and paper handy in case you want to take notes.

### ***Communicating Empathy***

Communicating empathy and building rapport is key for establishing trust, improving participant Return to Work (RTW) outcomes, and promoting program retention. However, this can be more challenging during a virtual encounter, especially at the beginning of the relationship between a participant and the RETAIN team. The following steps may help to communicate empathy during a virtual appointment:

- Be “present” and reduce potential distractions (e.g., place a sign outside your door to let others know you are meeting with a participant, close windows, turn off automatic alerts on your device).
- Look directly at the webcam instead of looking down or directly into the participant’s eyes on the screen. It will appear to the participant that you are looking at them and are focused on what they are saying.
- Ask questions and listen for both content and emotion. This will give you a better understanding of what the participant is trying to communicate about their needs and expectations about returning to work.
- Use reflections and summarize what you heard the patient say. In addition to demonstrating that you are listening, this will give the participant a chance to modify the information or correct any misconceptions.
- If you plan to take notes during the session, let the participant know this ahead of time so that they understand what is happening when you look away from the camera.
- Pay attention to your verbal and nonverbal cues. Avoid behaviors that might indicate discomfort or disinterest (e.g., crossing your arms, fidgeting). Nod your head at appropriate intervals to convey understanding and interest.
- Pay attention to the *participant’s* verbal and nonverbal cues (e.g., body language, facial reactions) in order to assess underlying feelings about their injury or illness.
- Consider the timing of your response. Responding too early during a participant’s narrative may be interpreted as an interruption. When you do respond, rely on communication strategies to help the participant feels heard (e.g., acknowledge feelings, validate the participant’s perspective, respond with reflective statements).
- Provide jargon-free information and check for understanding by asking the participant to summarize what they heard you say.
- Allow ample time for the participant to ask questions and actively participate in identifying solutions to their personal situation.
- At the end of the first appointment, check in with the participant about the experience of receiving services virtually.



## Creating an Inclusive Experience

### ***Access and Accommodations***

Although the use of personal technology devices has increased exponentially over the years, the availability of and access to these services (e.g., mobile phones, internet, telecommunication devices) varies. Therefore, when developing virtual services for your RETAIN project, it is important to avoid making assumptions about a participant's ability to access and use technology. Just as some participants may need accommodations to successfully return to work, similar needs may arise and will need to be addressed to facilitate the successful use of virtual services. When planning for VSD, consider the following:

- Assess the participant's access to technology, preferences, and technological literacy as well as the benefits and risks of using technology to provide services as a regular part of the intake process.
- Be mindful of the participant's need for website accessibility, captioning, and assistive technology and equipment. For example,

*For participants who are deaf or hard of hearing, consider:*

- Using remote interpreting or captioning on the same screen/platform, or on a separate screen or device
- Employing an approach that allows the participant to type responses. This will accommodate those who prefer to communicate by typing and will provide an opportunity to clarify points that were inaccurately translated by the interpreter

*For participants who are blind or low vision, consider:*

- Using a platform that provides assistive technologies such as screen readers and magnification
- Communication about RETAIN virtual or telehealth services should assume limited knowledge of technology; therefore, instructions should be comprehensive and easy to understand. Communications should be available in multiple formats (e.g., written, video).
- Consider the compatibility of phones, equipment, and computer-based programs used by participants and whether the products can work effectively with your method of service delivery.
- Be aware of and understand the accessibility features of the technology being used.
- Train all staff on accessibility features.

## ***Cultural and Linguistic Competence***

Cultural and linguistic competence has been linked to increased participant and patient satisfaction, information seeking and sharing, and adherence to treatment and should be integrated within your RETAIN project. The same considerations regarding cultural responsiveness that apply to in-person interactions also apply to virtual interactions. However, it is particularly important to think about what this looks like in a virtual setting, in which it may be more difficult to recognize a participant's cultural needs or barriers. Considerations for providing cultural and linguistically responsive services include:

- Take steps to consistently communicate in a manner that is easily understood by diverse audiences (e.g., individuals with low literacy skills, individuals with various disabilities, and individuals with limited English proficiency).
- Determine whether translation or interpretation services are needed, or whether there are language barriers that might pose a challenge to virtual communication.
- Consider whether various technological approaches are aligned with the strengths and needs of your participants. Provide adequate time for those who have had less exposure to technology to ask questions and practice using the platform before the first session.
- Connect with professional associations or groups in your community that focus on populations with whom you may work as part of your RETAIN project (e.g., individuals with disabilities, racial/ethnic minority groups, groups involved in rural service delivery).
- Ask open-ended questions, such as “what” and “how” questions, to learn about the beliefs, values, preferences, and priorities of the individual.

## ***Caregiver Engagement***

Some RETAIN participants may have a family member or caregiver who supports their healthcare and other needs. **With consent from participants**, these caregivers can play an essential role in the RTW/SAW (stay-at-work) process, including helping participants navigate new technology. Strategies for engaging caregivers include:

- Determine what the participant would like the caregiver's role to be with respect to supporting his or her health, well-being, and/or career development goals.
- Involve the caregiver in all communications related to preparation for a virtual appointment, and allow time for this individual to ask questions about the process.
- Explore ways in which telehealth can be used to educate caregivers and help improve their caregiving experience (e.g., scheduling and tracking appointments, remote monitoring of the participant's care, tracking career development activities).

## References

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