



Occupational Therapy  
Board of New Zealand

TE POARI WHAKAORA NGANGAHAU O AOTEAROA

FOSTERING FAITH AND CONFIDENCE IN THE PROFESSION

# Guidelines: Telehealth guidelines for occupational therapists

These guidelines provide guidance to occupational therapists in delivering care using telehealth

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## *Background*

Telehealth comprises the delivery of health services that involve technology. This includes:

- phone consultations
- email consultations
- video conferencing
- digital photography and video
- text communication
- instant messaging.

## *Appropriateness of telehealth*

Practitioners need to use their clinical judgement to decide if a telehealth consultation is clinically appropriate. Consider:

- Availability of appropriate devices and wifi/ internet access
- Digital ability and literacy of the service user
- Constraints which may impede likelihood of success (eg financial or situational barriers)
- Consent and support of person/ Whānau to receive care this way
- Risk factors of providing the service in a non-face to face manner.

## *Jurisdiction*

The HPCAA applies to the delivery of health services to New Zealanders. Practitioners delivering occupational therapy services via telehealth should be registered with OTBNZ and hold a current practising certificate.

Practitioners providing telehealth are required to comply with the Privacy Act (including the Health Information Privacy Code), and the [Code Health and Disability Services Consumer Rights](#). The [OTBNZ](#) Code of Ethics and Competencies for Registration and Continuing Practice also apply to all forms of telehealth provision.

## *Consent*

Informed consent must be obtained prior to

consultation using telehealth.

Consent processes include:

### **Accepting Telehealth**

Documented consent to receive a health service via telehealth. In cases of emergency, verbal consent must be obtained and documented with reasons. Obtaining informed consent for Telehealth includes the same considerations as face to face contact.

### **Consent to content**

Where it is usual to obtain written consent for any photos, video or audio recordings this is still required and needs to be stored as part of their health record. Consent must be obtained before each recording or photo/s. In emergency situations verbal consent may be obtained and must be documented with a rationale for why it has been used.

### **Sharing information**

- Consent for sharing of information, including what information may be shared
- Disclosure of how client data is stored, including what information third party providers hold

### **Use of technology**

- The preferred platform, including instructions for use and troubleshooting arrangements
- Requirements for the service user (eg, smartphone, data requirements, ideal physical environment).
- Costs to service user and payment arrangements
- Available alternatives.

### **Privacy**

- Privacy rights of the service user, including access to information held about the client.

## **Professional relationship**

Service user complaint process information.

Identity confirmation should occur at the beginning of any interaction, including who else is in the room or party to the interaction. Care needs to be taken when discussing confidential information when it cannot be ascertained who else is listening/watching.

Please refer to the *Best Practice Guide for Telehealth* for example of consent forms in the resources section below.

## *Choice of technology*

Consider:

- What information is required prior or during the contact to provide safe care. Consider what written, verbal and/or visual information is required
- Communication and health literacy needs of the service user/ whānau
- Cultural practices. Consider the role of face to face interaction in developing rapport and connection with whānau as a whole.

Video-conferencing may be an important initial technology to use.

- The internet access and speed/ bandwidth
- Available devices for use
- Refer to <https://www.telehealth.org.nz/regulations-and-policies/regulations-and-standards/> for detailed technical advice to guide choices of platforms.

## *Privacy*

The same requirements apply for the protection of personal information obtained via telehealth as to all other service user information. Ensure:

- Digital documentation, records and access to platforms are all protected with secure passwords.
- Arrangements for secure backing up of data are in place.
- Processes and policies for the protection

of personal information are in place, including arrangements for managing and reporting breaches or incidents.

## *Documentation*

All interactions via telehealth must be identified as such and documented in clinical records as for any other contact.

- Verbal and written consents need to be documented in clinical notes as and when obtained.
- Text messages and emails should not be paraphrased but downloaded or replicated and stored in clinical records.
- Video and photographs should be stored in an accessible format and form a part of the clinical record.

## *Professional boundaries*

It is essential to separate work and personal digital technologies.

- Do not use personal social media accounts for healthcare provision
- Use work mobile phone numbers and email addresses to create accounts
- Refer to [OTBNZ Social media and electronic communications guidelines](#)
- Do not store digital photographs or video recordings on personal devices

## *Risk management*

Appropriate policies and processes must be in place to ensure that concerns that arise during a telehealth consultation can be escalated and managed appropriately.

## *Contracts and insurance*

Practitioners may be subject to telehealth policies and requirements from their respective employers and should ensure that they are familiar and compliant with these.

Practitioners should check with their

indemnity insurance provider about cover for telehealth services.

*Sources of further information*

- [NZ Telehealth Forum and Resource Centre](#)
- [OTNZ-WNA special interest group eHealth/ Telehealth](#)
- [Allied health Best Practice guide for Telehealth](#)
- [www.privacy.org.nz](http://www.privacy.org.nz)
- [www.cert.govt.nz](http://www.cert.govt.nz)
- [Canadian Assoc Occupational Therapy \\_\\_\\_\\_\\_ Telehealth guidelines](#)