Technologies for Counseling Remotely

Toolkit for Delivering Services Remotely

A screen shot of a computer

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Contents

[Overview 1](#_Toc193873486)

[Technology Assistance 1](#_Toc193873487)

[Messaging Apps 2](#_Toc193873488)

[Web-based Video Calls 3](#_Toc193873489)

[Phone Calls 4](#_Toc193873490)

[Tips & Etiquette for Remote Counseling 5](#_Toc193873491)

# Overview

This document provides successful practices to help you prepare for remote counseling sessions. Messaging applications, video calls, web conferencing, and one-on-one phone calls can be useful choices for remote counseling. The resources shared are not all-inclusive, but they are reliable options that are common and low-cost or free to use. Additionally, you will find links to assistance with how to use the technologies.

The National Council on Aging (NCOA)[[1]](#footnote-2) and the National Resource Center for Engaging Older Adults (engAGED)[[2]](#footnote-3), Senior Planet, and Cyber-Seniors have technology support resources that are referenced in this document.

# Technology Assistance

## Senior Planet

Senior Planet is a technology assistance website supported by AARP and designed by Older Adults Technology Services (OATS), also a charitable member of AARP.[[3]](#footnote-4) They offer free classes, articles, videos, and resources to improve technology skills. They can help with how to use video calls and messaging apps. These tech tools are listed in the sections below in more detail. You can sign up for free, [personalized tech help](https://seniorplanet.org/tech-help/) with a one-on-one tech tutoring session through Zoom. They also offer a free [tech hotline](https://seniorplanet.org/hotline/) (888-713-3495) staffed by technology trainers prepared to answer tech questions.

## Cyber-Seniors

Cyber-Seniors is a non-profit organization that provides older adults with free tech training using an intergenerational, volunteer model.[[4]](#footnote-5) They offer classes and [Tech Drop-In](https://cyberseniors.org/webinar/tech-drop-in/) sessions on a regular basis. Drop-In allows you to join a Zoom session to ask a quick tech question. If the tech session leader thinks it will take more time to answer, they will schedule a free one-on-one call. You can also directly book a one-on-one tech call through their [Cyber-Seniors website](https://cyberseniors.org/free-tech-help/) or call them at 844-217-3057.

# Messaging Apps

This communication tool allows someone to send a message directly to clients who use messaging apps as well. However, protected health information (PHI) and personally identifiable information (PII) should not be sent through this method for security reasons. Messaging apps allow calls when an agency phone is not available, preventing a team member’s personal phone number from becoming visible to a client during a counseling session. Senior Planet offers [online classes](https://seniorplanet.org/classes/) on messaging apps and provides the following list of common no-cost messaging apps, with underlined links to their websites and descriptions of features. [[5]](#footnote-6)

[**iMessage**](https://support.apple.com/messages)

* Apple’s default messaging app
* Send IMs only to other Apple users (blue)
* Send SMS texts to anyone (green)
* End-to-end encryption

[**Google Chat**](https://support.google.com/chat/answer/7653601?hl=en&co=GENIE.Platform%3DDesktop)

* Requires a Gmail address
* iOS & Android compatible, also available on browser
* Start Google Meet video calls from your chats

[**WhatsApp**](https://www.whatsapp.com/?lang=en)

* iOS, Android & Windows compatible
* Must have a mobile phone number for set-up
* Voice & video calls, group chats, send docs
* AI chat feature called Meta AI
* End-to-end encryption

**Other Popular Messaging Apps**

* [Facebook Messenger](https://www.facebook.com/help/messenger-app/345021679200618/?helpref=hc_fnav)
* [WeChat](https://help.wechat.com/cgi-bin/newreadtemplate?t=help_center/index&lang=en&Channel=helpcenter)
* [Google Messages](https://support.google.com/messages/?hl=en#topic=7502209)
* [Viber](https://www.viber.com/en/)
* [Telegram](https://telegram.org/)
* [Line](https://www.line.me/en/)

# Web-based Video Calls

Several platforms are available that offer web-based video calls, or video chat, along with some of the messaging apps above which offer this feature, allowing for a virtual face-to-face counseling session. Senior Planet offers [online classes](https://seniorplanet.org/classes/) on using web-based video call platforms and provides the following list of common no-cost platforms, with underlined links to their websites and descriptions of features.[[6]](#footnote-7)

**Video Chat**

* For phones, tablets, or computers
* See the person at the other end of the line
* End-to-end encryption
* More popular apps: [Google Meet](https://support.google.com/meet/topic/14074331?hl=en&ref_topic=14074839&sjid=6657816493473221173-NA), [Facebook Messenger](https://www.facebook.com/help/messenger-app/1673374996287506/?helpref=hc_fnav), [WeChat](https://help.wechat.com/cgi-bin/newreadtemplate?t=help_center/index&lang=en&Channel=helpcenter), [Teams Free](https://www.skype.com/en/) by Microsoft in 2025

[**FaceTime**](https://support.apple.com/en-us/105088)

* Pre-installed on all Apple devices
* iOS 15 and above users may invite Android and Windows users to calls using links
* Group chats

[**WhatsApp**](https://www.whatsapp.com/?lang=en)

* Compatible with iOS, Android, and Windows
* Available in 60 languages
* Group Chats
* Can only video chat with other WhatsApp users

[**Zoom**](https://www.zoom.com/)

Zoom is one of the most used web-based video call platforms for one-on-one meetings, larger group meetings, and web events. During a remote counseling session, you can easily share your screen to share information and send clients resource links and documents. You can also set up meetings that include a third party if needed. Having the skills to feel comfortable hosting a Zoom meeting and navigating the features can be important for remote counseling. Senior Planet has a webpage for [Zoom Resources](https://seniorplanet.org/zoom-3/) that includes classes, on-demand training, and video tutorials. They also offer the following tip sheets:

* [Video Chat with Zoom](https://seniorplanet.org/wp-content/uploads/2020/03/Zoom.pdf)
* [Introduction to Hosting on Zoom](https://seniorplanet.org/wp-content/uploads/2022/04/Intro-to-Hosting-on-Zoom-Update-3-8-22.pdf)
* [Hosting a Meeting on Zoom](https://seniorplanet.org/wp-content/uploads/2022/04/Zoom-Hosting-a-Meeting-handout-4.26.22.pdf)

If you need Zoom technical assistance or have questions, you can access this help at no cost through the Cyber-Seniors [Tech Drop-In](https://cyberseniors.org/webinar/tech-drop-in/) and [one-on-one tech call](https://cyberseniors.org/free-tech-help/one-on-one-tech-session/) and the Senior Planet [tech hotline](https://seniorplanet.org/hotline/) and [personalized tech help](https://seniorplanet.org/tech-help/).

* For iOS, Android, and Windows
* Often used in businesses or professional context
* Do not need a Zoom account to join a video call
* Only Zoom basic is free

# Phone Calls

One-on-one counseling can be done by phone. Here are a few phone call related functions that may be helpful to know if you do not have access to an organizational based phone line.

* Set up a [Google Voice](https://voice.google.com/u/0/about) account: Google Voice provides a phone number for making and receiving calls, texts, and voicemails
* Make a three-way cell phone call
  + iPhone [instructions](https://support.apple.com/guide/iphone/have-a-conference-or-three-way-call-on-iphone-iphab7e28b7e/ios)
  + Android [instructions](https://www.samsung.com/ph/support/mobile-devices/how-to-make-a-conference-call-on-your-galaxy-phone/)

# Tips & Etiquette for Remote Counseling

* **Be familiar with the application(s) you are using.** Know how to set up and facilitate a meeting/call and be ready to help other participants with any platform questions.
* **Check your internet connection**. Test the connection beforehand by having a quick practice call with coworkers or friends.
* **Be early**. Log in or be ready to call a few minutes early. This will give you a chance to check your technology to make sure it is working.
* **Be aware of your surroundings.** Adjust your technology so that you face a window and have plenty of light. Also, make sure you have privacy for a confidential counseling session.
* **Adjust your camera and video settings.** Your camera should be at eye level. If needed, use a stack of books to get your computer to the right level. Make sure what your camera shows in the background is in order and professionally appropriate. Check your video settings, as you may be able to adjust light levels and blur your background.
* **Check your audio settings and/or reduce noise.** A video call platform has audio settings and will allow you to test your speaker and microphone. It will also let you adjust background noise removal. For example, Zoom has a setting for noise removal to “high” and it removes almost all background noise. Consider wearing headphones to help you hear everyone more clearly and vice versa. If you are meeting by phone, be aware of the volume of your voice and adjust as needed for the client.
* **Close other applications.** Be aware of what you have open on your computer or phone if you are going to share your screen. Close things you don’t need so you are only sharing information you have prepared for the meeting and potentially not other clients’ personal information.
* **Identify yourself.** Make sure you introduce yourself and allow them to do the same. This can be important if you are meeting only by phone.
* **Observe professional etiquette.** Show business appropriate demeanor and behavior throughout the meeting and dress appropriately (if using video).
* **Stay seated and stay present.** Keep the camera in a fixed position and do not walk around with your camera or computer.  If you do this, turn off the camera, otherwise, everyone is going to get dizzy.
* **Actively listen, be considerate, and patient.** Mute yourself when you’re not talking or pause if it is a phone call. Muting yourself every time someone else is speaking prevents others from hearing any background noises. Make sure to give the client opportunities to talk and complete their thoughts. Avoid talking over others and use the chat feature if you don’t want to interrupt.
* **Minimize your hand gestures.** If you use your hands a lot when you talk, try to keep these gestures to a minimum in a video call.
* **Respect privacy**. Don’t record or take screenshots without permission.
* **Don’t stray from the purpose of your video call.** A face-to-face connection can help the conversation flow more easily than it does in an audio call. However, remember to focus on the purpose of the call.

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1. NCOA: [FAQs: Technology Resources for Remote Evidence-Based Programs](https://www.ncoa.org/article/frequently-asked-questions-technology-resources-for-remote-evidence-based-programs/) [↑](#footnote-ref-2)
2. engAGED: [Tapping into Technology to Stay Connected and Engaged](https://static1.squarespace.com/static/5b855bd5cef372d1e9a8ef0e/t/61828d77976de1356a9a6955/1635945852438/engAGED+Technology+Pub_508.pdf) [↑](#footnote-ref-3)
3. [Senior Planet](https://seniorplanet.org/welcome/) [↑](#footnote-ref-4)
4. [Cyber-Seniors](https://cyberseniors.org/about/) [↑](#footnote-ref-5)
5. [Senior Planet - Messaging Apps](https://seniorplanet.org/wp-content/uploads/2024/03/Messaging-Apps-Lecture-Handout-3.5.24.pdf) [↑](#footnote-ref-6)
6. [Senior Planet - Video Chat](https://seniorplanet.org/wp-content/uploads/2022/04/Video-Chat-Update-1-19-22.pdf) [↑](#footnote-ref-7)