
INTRODUCTION

Dear Readers,

More than 450 counselors have taken the Distance Credentialed Counseling Training since it began in 2004. Counselors, social workers and other mental health professionals are increasingly interested in becoming Distance Credentialed Counselors as they recognize the importance of being exposed to the best practices, ethics and legalities associated with the distance delivery of counseling. ReadyMinds will be offering a total of 18 training programs across the country this year and plans to expand these offerings in 2006 due to the increasing demand for the training that when appropriate, leads to the Distance Credentialed Counselor Credential.

This newsletter focuses on two related issues that have been of interest to counselors who participate in the training sessions. One relates to the issue of supervision and consultation and the other is how to utilize software to keep client records, including using these records for third party payment documentation and case management supervision.

The first topic, supervision and consultation, is addressed by DeeAnna Merz Nagel, the CEO, President and Director of Merz Consulting, Inc as well as the President of the International Society for Mental Health Online. The second topic, tracking and documentation software is addressed by Kathy Stern, Southwest Surrogacy Arrangements, Inc. and Parenting Options in Houston, Texas and Rachel Eddins, Coordinator for Alumni Career Services at the University of Houston. All three writers participated in a DCC Training Workshop that was conducted during the past year.

Future newsletters will continue to address topics related to distance counseling based on feedback from the area and our training sessions. Please feel free to send any comments, questions or other articles related to this field by emailing them to RMDCnewsletter@readminds.com. We plan to address many more of these inquiries in our future issues.

Thank you,

*Harvey Schmelter-Davis, Editor
RMDC Newsletter*

FEATURED ARTICLE

During several DCC Trainings and through a number of inquiries submitted directly to ReadyMinds, the following topic has been raised:

“I have a question concerning Licensed Professional Counselors and Supervision. How does ‘distance’ fit into a potential supervision paradigm”?

We believe that it would be very valuable to share one particular response that was provided to that question, as it seems to address the topic in a very thorough and practical manner. The author of the email is DeeAnna Merz Nagel, LPC, CRC, DCC. She is a highly regarded professional in the field of distance supervision and is currently the CEO, President and Director of Merz Consulting, Inc as well as the President of the International Society for Mental Health Online (ISMHO). She has given us permission to share the below and it has been sanitized to protect confidentiality.

Dear John,

Your email was forwarded to me and I thought I would try to address your situation specifically and then give broader information regarding this topic.

You are correct. The composite board (in many states I presume) does not recognize distance counseling as a form of counseling that would meet the standards currently created for licensure. I am very much an advocate of distance counseling (online, telephone, written, etc) and the idea is not a new one. Crisis hotlines have been in existence for a very long time and having worked on a crisis hotline, I can vouch for the skill set needed and the intensity of the work. Unfortunately, many crisis hotline jobs do not require a master degree so allowing the position to qualify for counseling would be difficult without the qualifications for the position being more stringent.

I suspect that eventually, the assumption that most counseling work should be done face-to-face (f2f) will be passé and the new paradigm will embrace distance counseling as the primary way people receive assistance. Granted, this is a long way off, but as professionals looking ahead, we must be cognizant of where our culture is heading.

In order to present distance counseling in a more professional light, deserving of the recognition given to traditional f2f psychotherapy I think the following issues will need to be addressed (not just in the state that I practice in, but in every state):

- Professionalized crisis work via distance should match standards and qualifications of similar work performed f2f.
- Standardize training needed to provide counseling services via distance.
- Standardize supervision efforts with regard to distance counseling.

NBCC currently endorses a certification by CCE. The certification is the Distance Credentialed Counselor (DCC). The training for this certification provides the basic knowledge set necessary to provide effective distance counseling. A master degree is required to obtain the certification (more info on DCC training can be found at <http://www.readyminds.com/dcc>). I imagine in the future, distance counseling techniques will be part of standardized issues clinical supervisors must address.

Another scenario that is different but I think falls in the same category:

My company is based in the Northwest and Southwest rural areas of my state. LPCs are not plentiful, particularly LPCs who are qualified to offer clinical supervision. Currently, I offer clinical supervision to several LAPCs on staff who would not otherwise be able to obtain supervision (and would likely find employment elsewhere). I spend hour upon hour online in an encrypted and secure setting doing individual and group supervision, responding to emails about cases, reviewing written evaluations and progress notes. We are a virtual community in real time so I am often able to address issues as they arise instead of waiting until clinical supervision meeting time. Of course the composite board does not recognize this as hours toward licensure. Those hours must be f2f. So I meet with LAPCs in groups of six every 6 weeks or so for 3 and 4 hour marathons to meet the composite board requirement. In order to alert the composite board to my method of supervision, I detail the supervision plan with a list of scheduled "marathon" sessions stating each is 4 hours long and I write in the plan that f2f supervision is supplemented through distance supervision efforts including email, phone and chat. It is my way of letting the composite board that the time is now.

For more information on the International Society for Mental Health Online (ISMHO), please visit www.ismho.org.

DISTANCE COUNSELING (DC) FORUM

What software is available to enable Distance Counselors to maintain confidential records?

This is a question that is asked in many Distance Credentialed Counseling Training Workshops conducted by ReadyMinds Trainers. Participants are concerned about issues such as ensuring the confidentiality of transactions, keeping records and ensuring that their organization, if necessary, adheres to the Health Insurance Portability and Accountability Act of 1996 (HIPAA) regulations.

Two DCC Workshop participants, Kathy Stern, Director of the Southwest Surrogacy Arrangements, Inc. and Parenting Options Agency and Rachel Eddins, Coordinator of Alumni Career Services at the University of Houston Career Center share information about the software they are using for tracking purposes and how they will be starting to adapt it to best practices in distance counseling.

Kathy Stern

“I run an agency which offers counseling and legal services for third party reproduction. We needed a system that links files, potential surrogate mother and/or egg donors and the intended parents, together confidentially, and then have the ability to disconnect the link after the arrangement so that both parties could be kept anonymous if needed. We needed to be able to use a software where multiple counselors in different cities around the nation could have access, and offer case management. We also have clients from around the world and needed an email system to accommodate. For example one of our needs is to automatically file emails received and sent into confidential client folders. We also needed to have a system to provide the capability to keep records of phone calls made to counselors and clients and to make sure they were stored in confidential files. After much research we were surprised to find a software system that is used by lawyers called AMICUS. We found that it offered us the flexibility that we needed on the mental health side as well. There are also administrative rights that allow the directors to grant varying levels of permission rights. So, only the information that each team member needs to have access to is allowed. Visually the program is set up to look exactly like paper files so that it is easy to use. Phone calls and emails can be automatically tracked, making contact log information easy to use. It also offers the ability to keep billable hours on each client for those who are charging by time. We are just implementing the system so we are excited about using it as well as recognizing that we may need to modify our procedures and/or the software as we gain experience using it.

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Rachel Eddins

At the University of Houston, University Career Services office, we have developed a homegrown system to track client appointments and outreach events. When a student/alumnus arrives at the Center for an appointment, they log into the system and complete demographic information. The counselor then receives a pop-up notification that the client has arrived. This system allows us to track marketing data, client demographics, and the number of clients seen by counselor. Following the appointment, the client automatically receives a survey via email, which allows us to track satisfaction with services. This system is also used for students/alumni attending workshops and outreach events. It has been very successful for us in documenting the services our office provides, measuring the effectiveness of marketing efforts and obtaining direct feedback from our clients.

As we review options for tracking distance counseling appointments, it is clear that we will need to adapt our current system. Questions that we must now ask include: how will we track telephone appointments, email, and chat usage? Presently, to capture demographic information from telephone sessions, the counselor manually enters client data into our tracking system at the start of the session – as the client typically

would in person. For now, at least this data is being captured into our existing system. Email information could be tracked in a similar manner. Eventually, our tracking system will need to be tweaked for efficiency and ability to automatically capture statistical data for distance counseling sessions.

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ReadyMinds Training Updates

ReadyMinds will be announcing in July of 2005 a new online training and credential program called DCF (Distance Credentialed Facilitator). Individuals who obtain the Distance Credentialed Facilitator (DCF) title will provide assistance to clients in the area of life career development and planning. They may also facilitate the fostering and maintenance of interpersonal relationships but essentially in the context of helping clients to plan for, and maintain successful functioning within, the world of work. Distance Credentialed Facilitators will offer their services via appropriate technology-assisted methods. They will seek supervision/consultation, as required by the ethical standards that apply to Distance Credentialed Facilitation and those standards that govern their professional scope of practice.

A combination of the following education and experience* is required. In order to qualify for the Credential, experience must be acquired after obtaining at least an associate's degree.

Graduate Degree	2,800 hours (estimated 2 years)
Bachelor's Degree	2,800 hours (estimated 2 years)
Associate's Degree	2,800 hours (estimated 2 years)

*The work experience requirement can include a combination of Workforce Development, Coaching, Human Resources, Career and Job Development and/or Educational experience where you are assisting clients. This is required for each educational level.

If you feel that any of your colleagues may benefit and meet the criteria described above, please feel free to share this information with them. For more information about the DCF Training, please continue to check our website at www.readyminds.com/dcc.

For a listing of the remaining 2005 DCC Training Workshops, please visit www.readyminds.com/dcclocations.

Best wishes for a wonderful summer!