

PRACTICE REFERENCE

Telepsychiatry setup and webside manner checklist

An educational checklist of setup and presence practices for video visits, drawn from American Psychiatric Association and telehealth best-practice guidance. Adapt to your platform and setting.

Educational example only. This is not legal, medical, or compliance advice, and it is not a ready-to-use legal document. Requirements vary by state, payer, and setting. Adapt anything like this to your own situation and have it reviewed by qualified legal and compliance counsel licensed in your jurisdiction before using it in a practice. You are responsible for compliance with all applicable federal and state laws, including HIPAA. shrinkiatry publishes professional commentary and education, not legal or medical advice.

Current as of July 7, 2026. Laws, payer rules, and billing codes change. Confirm the current requirements for your jurisdiction and setting before you rely on anything here.

Environment and technology

- A private, quiet room where you cannot be overheard, and a plain, professional background
- A HIPAA-compliant platform, tested connection, and a backup plan such as a phone number
- Camera at eye level, good front lighting, and framing from mid-chest up

Presence on camera

- Look toward the camera to approximate eye contact, and let the patient finish before you speak
- Speak a little more slowly and check understanding, since cues are harder to read on video
- Name and normalize the medium, and address any awkwardness early

Safety and logistics each visit

- Confirm the patient's physical location and a phone number in case the connection drops or a crisis arises
- Confirm who else is present and that the patient consents
- Know the local emergency resources for the patient's location; in a crisis, direct to 911 and 988 in the US

Clinical and legal fit

Confirm you are licensed where the patient is located, that the visit type suits video, and that you can arrange in-person care or referral when it is needed.

shrinkiatry is the profession layer of The Shrink Network. Reviewed by Shariq Refai, MD, MBA, FAPA, a board-certified psychiatrist. More educational resources at shrinkiatry.com/resources/.