

# Preparing for a phone or video call

Here are some steps you can take before a call to make sure everything runs safely and smoothly.

## Planning ahead

- » Make time to ensure the person has all the information they need and check if they have any questions or concerns. This can be by text, email, or an initial phone call if appropriate. This includes:
  - explaining how phone or video is similar to and different from face-to-face
  - checking if the person has access to a phone or computer, internet data and a good connection
  - providing clear and simple instructions on how to access video calls.
- » Consider how you will need to adapt to meet the person's cultural, language and communication needs.
  - What language does the person prefer?
  - Does the person have a hearing or vision impairment?
  - Who else may be useful to have in the call?
  - Is the person familiar with using technology?
- » Check your organisation's requirements for confidentiality, security and getting informed consent. Do you need written, verbal or electronic consent?
- » Use your work phone or computer. If this is not possible talk to your organisation about appropriate steps.
- » Use programs or apps approved by your organisation. Avoid using personal accounts on social media apps, such as Facebook and Messenger, as these are not secure or confidential.
- » If video calling, use an audio headset and a fast, secure internet connection, where possible, to improve the quality of the contact.

## Before a call

- » Test your equipment and practice with co-workers, if needed.
- » Be mindful of how you will sound and appear on screen. Find a space that is well lit and reasonably quiet. Make sure your laptop or webcam is placed at eye-level.
- » When working from home, make sure there are no inappropriate background distractions, ask whānau or flatmates to respect the privacy of the call and make sure there will be no interruptions.
- » Send a quick text or email reminder to confirm the call. Remind the person to test their equipment, choose a private space if available and write down any questions they may have for you.
- » Make a back-up plan in case of technical issues, for example reconnecting via text, email or phone. Be prepared for things to not work at times and be kind to yourself.

**Make time** to help the person understand how the technology works.

**Become familiar** with your equipment and program to prevent issues.

**Use technology safely** to maintain privacy and professional boundaries.