Guidelines for Electronic Communication
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Research on this topic states the importance of having **agency policies related to the use of electronic communication with clients, co-workers, and other professionals.**

Questions to Consider
- Does the use of electronic communication as a primary means of communicating with clients place some clients at a disadvantage? What are the implications for those that don't have easy access to these tools?
- Are there cultural factors that need to be considered

Professional Self
- Importance of learning how to regulate, control, and set clear boundaries within context of personal and professional relationships.
- Presentation of a professional self is associated with boundaries that can often be skewed with electronic communication
- Lack of contextual cues in the virtual communication world (cell, email, social media, texting) can lead to potential missteps in information received and transmitted.

Electronic Communication Suggestions

ALL types of electronic communication must have policies and procedures clearly spelled out in agency personnel documents (i.e. employee handbook) as well as client/consumer forms.

Email
- Must be password protected
- Security- email should be encrypted; confidentiality statement at the end of all emails
- Standard turnaround time for responding to client emails provided in writing
- Message Content – clients informed on what is appropriate or inappropriate content
- When not to use email should be clearly written in procedures, etc.
- Emergencies or crisis – email is not appropriate when a client is in crisis; what procedures are there for client to use?
- Confidentiality and privacy – some providers have a word or phrase, agreed upon in advance, which helps to serve as a low-level verification of the sender's identity
- Informed consent – signed client approval to use email for communication purposes
- Documentation/record-keeping- what are the policies/procedures on this?
  - What happens when an agency goes totally electronic with all client documents and communication?
- Fees: will clients be charged for time spent reading and responding to emails, text messages?

Fax
- Where is the fax machine located to ensure confidentiality maintained?
- Importance of double checking fax number for accuracy

Cell Phone
- Must be password protected
- Work phones only, not for personal use

- Have a word or phrase, agreed upon in advance, which helps to serve as a low-level verification of the sender's identity

Social Media: Facebook/Websites
- Must be password protected
- If used to communicate with clients/consumers, agency should have Facebook/websites for work-related communication only
- Employees should not use or give access to personal Facebook

Text Messaging
- Must be password protected
- Have a word or phrase, agreed upon in advance, which helps to serve as a low-level verification of the sender's identity
- Professional texting relationships to not imply personal texting relationships
- Limit texts to office hours only (in most cases). Unlike email, text messages are instant and are not checked voluntarily in an inbox
- Avoid slang
- If you send a text and then follow-up with an email remember that Smart-phones receive both on the same device.
- Appropriate word choice is essential. You should edit a text message as if it were an email
- Establish agency protocol on the use of text messaging
- Maintain formality and professionalism
- Spell out all your words, no abbreviations (leave your LOL and OMG at home), no acronyms
- Avoid emotions; they are not appropriate for formal communication
- Be ready for the normal back and forth of a text exchange. You don't have to ask or say it all in your first text.
- Carefully review your text before sending for spelling, grammar and unintended auto correction mistakes
- Before you hit send, double check that you're sending the message to the right person. When you are carrying on several conversations at once, it's easy to mix them up

Tablets (IPad)
- Must be password protected
- Used for work-related business only; not personal tablets also used for work

Do I text, email, or call a co-worker or agency practitioner?

Text Message	Email	Phone Call
Quick connections	Formatted messages	Serious conversations
Checking meeting details	Communicating concepts	Emotional conversations
If a colleague specifies texting as preferred communication	Messages over 160 characters	If in a rush (avoid errors in text messaging or email)
	Messaging past office hours	