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?**

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