



PREPARE YOUR VIDEO PRESENCE

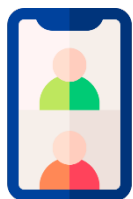
1. Choose a location for your computer that:

- Is relatively quiet and comfortable.
- Has plenty of light.
- Has space behind you that is empty or can be changed.



2. Use framing (or how you appear on the screen) to make it easier for your participants to connect with you.

- Have a wide background, with you in the middle.
- If you don't have space and need to use a narrow background - move closer to the camera, zoom in, or use an empty wall, closet door, or window with the blinds closed.
- Remove anything that's distracting in the background.
- Use front lighting, when possible, and adjust for any glare.



Tip: Adjust your framing each time, since the light and sounds around you can change throughout the day.

3. Create your video presence.

- Dress professionally (you may need to stand up during the appointment).
- Show your face and shoulders.
- Find a position to create “eye-to-eye” contact (or as close as possible). When we can only see faces and can't use body language, we rely on facial expressions and hands to convey our messages.

Practice Makes a Difference!

Your *video presence* is how you look and act while video chatting.

Test your framing and practice your *video presence* and skills with a co-worker.

HELP YOUR PARTICIPANTS TO BE MORE COMFORTABLE

1. Use small talk to start the appointment.

- “Hi, thanks for joining me, I'm (your name) with (your clinic or agency).” “I hope things are going OK for you.” or, “It's great to see you! How are you?”

2. Assist the participant for the best experience.

- Offer help with setting up camera and angles.
- If needed, help the participant to find a comfortable position, you might say: “Try propping your phone up and then sitting back to help me see you clearly.”

3. Explain the video platform and the appointment.

- Share instructions about the video chat, including how to use the platform, and what to do if something goes wrong. Feel free to read these instructions, just let the participant know you'll be reading the information.
- Verify the purpose of the appointment and ask for any questions the participant may have.





- Briefly describe the steps and the time needed for the appointment.
- Listen actively and use your face and hands to express yourself.

THE INTERACTION

1. Starting the appointment.



- Ask if the participant is ready to start and confirm their location, for example, are they alone and feel safe to talk, are they in a comfortable and safe location, e.g., not driving, are they in a public or private location?
- Use a phrase that lets the participant know you're both ready, like, *"Let's get started."*
- Describe the progress through each step and be careful not to rush.
- Say something if you feel the participant is uncertain about the technology or if something goes wrong.

2. Tips to address differences between video chat and in-person appointments.



- Participants may be less likely to talk on a video chat. Be reassuring and ask specific questions to keep communication going.
- Since it's harder to use non-verbal communication or body-language, listen actively, use your face and hands to express yourself, and use your words.
- Some participants may feel like they need to hurry. Reassure them there's no rush. Say things like, *"I'll give you a minute to think."* or *"Take your time..."*
- It may be hard to see or hear. Watch for changes in angles or views that make it harder to communicate. Help the participant adjust back to the best view.
- Some participants may be distracted. It's good to let them know it's OK to deal with distractions. Bring them back in a positive way and remind them where you were in the appointment.
- Be ready for interruptions. If the participant is interrupted, reassure them you don't mind and remind them where you were in the appointment. If you're interrupted, apologize, mute your microphone if you speak with anyone else. Return to the appointment as soon as possible.



CLOSING

1. Signal the appointment is ending.

- Say something like, *"We're almost done."* or *"Only one more thing to do."* or *"Do you have any questions?"*

2. Ask for any last questions or concerns.

- Make sure they don't feel rushed by waiting a moment before moving on.

3. Apologize for anything that went wrong.

- Ask the participant for any feedback to make the video chat experience easier for the next time.

4. Verify the most important information is heard.

- You may want to repeat things like benefits or next appointment information.

5. Thank the participant for joining the video chat session.



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