

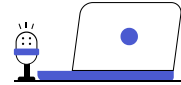
TELEHEALTH EVALUATION GUIDE

THERAPIST HANDOUT GUIDE

As you provide pediatric telehealth services, you will administer evaluations to assess the clients' skills. Telehealth brings different types of challenges. This guide will offer tips and strategies to help prepare you for providing telehealth evaluations.

What technology will I need?

- Technology device
 - Ideally, use a desktop or laptop with microphone, webcam, and speakers.
 - A tablet and phone can be used, but they may be challenging for you to participate in certain therapy activities.
- External microphone
 - An external microphone is optional.
 - You may use it if your device does not have a high-quality, internally integrated microphone.
- External camera
 - An external camera is optional.
 - You may use it if your device does not have a high-quality, internally integrated webcam.
 - A separate webcam and a webcam mount may provide the ability to give the child different views of your therapy activities.
- Mouse
 - A mouse is optional.
 - It can be used to help you with demonstrations.
 - Some devices, such as laptops, has a touch pad.
- Headphones
 - Headphones are optional.
 - It may reduce background sounds and improve audio output and input.
 - You can use them if you want more privacy during your session or if your device does not have a high-quality, internally integrated speaker.



What telehealth platform should I use?

- Use a HIPAA-compliant video conferencing system that meets the HIPAA regulatory requirements to protect the confidentiality and integrity of therapy services.
 - Examples of HIPAA-compliant systems are Zoom and Theraplatform.
 - Skype and FaceTime are not suitable options.



How do I choose an assessment?

- Consider child's safety when selecting an assessment.
 - The caregivers will require therapist instruction for preparation as they will be responsible for setting up the environment and supervising the testing as the occupational therapist provide directions.
- Review testing materials to determine if the selected tests are protected by copyright laws, which may prohibit the reproduction of tests.
 - Awareness of this information may decide whether or not you have the right to use a selected test.
- Ensure you can facilitate the test correctly to yield the expected results.
 - Reviewing the assessment's publisher's websites for specific instructions on administering the test remotely.
 - Have clear instructions prepared and a plan to resolve issues that may arise.
- Consider evaluations that involve checklists, questionnaires, or more observational.
 - If you prefer to provide other assessments, such as the Beery VMI, you may need to send the test booklets to the caregivers and then have them mail them back to you. These tests may not have been administered in a non-standardized manner as they were completed via telehealth.
 - In your daily note, you will need to state that the evaluation took place via telehealth and the evaluations you selected to use for the assessment.
- Review and analyze the child's testing environment, such as home or school.
 - Consider the potential barriers related to the child's device, distractions, required testing materials, and how the caregiver can support the evaluation process.
- Discuss and review the caregiver's comfort level with assisting in the evaluation.
 - Provide the caregiver with support through training preparation and providing concise and clear instructions.



How do I prepare for an evaluation?

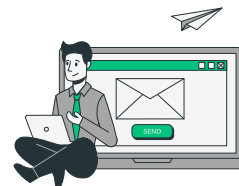
- Assist the caregivers to set up the child's "evaluation" room in their home. You can set up a similar "evaluation" room in your own setting.
 - Ideally, use a desktop or laptop with microphone, webcam, and speakers.
 - A tablet and phone can be used, but they may be challenging for you to participate in certain therapy activities.
 - Position the device so that the occupational therapist can see the child.
 - Use a space that is quiet and private.
 - Set up and maintain a consistent lighting source.
 - Avoid having a window or light behind the child, as it may make it hard for you to see the child.
 - Create a background that is simple and free of distractions.
 - Have an open, clutter free space on your desk for testing or tabletop activities.
 - Have a small open space for movement activities.
 - Easy access to visual aids and behavioral aids



- Prepare the caregiver as the "virtual helper"
 - Educate the caregiver on their role as a "virtual helper" and ensure that they are comfortable with this position.
 - Provide caregiver support on technology use, such as using camera and troubleshooting.
 - Discuss behavioral strategies with caregivers to ensure safety for child and engage child's attention.



- Communication strategies before the evaluation
 - Contact caregivers via email and provide an introduction letter.
 - The introduction letter may contain the following information:
 - Consent for telehealth
 - Privacy policy
 - Attendance policy
 - Insurance information policy form
 - Information on telehealth platform
 - Instructions for downloading or accessing the platform
 - Information on what the evaluation may entail, items and room set up for the session, and the role of caregivers
 - Provide parent questionnaires
 - Have a first meeting with the caregivers only, which may take place on the phone, virtually, or email.
 - After reviewing the child's medical history, ask questions about any missing information that may be helpful for the evaluation and report.
 - Review with parents the information about the telehealth platform
 - Explain the assessment process, which may include details about the room set up, items needed, and behavioral strategies.
 - Review parent questionnaires with the caregivers.
 - Discuss the role of the caregivers as a "virtual helper."

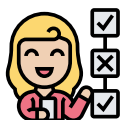


- Communication strategies during the evaluation
 - Help the child feel comfortable by introducing yourself, getting to know them, and beginning with a fun short activity.
 - Remind the caregivers to let the child complete the presented activities on their own.
 - Ask the caregivers to move the camera and zoom in to be able to better see the child sit, stand, and do small finger movements.
 - Have similar supplies as the child so that you can demonstrate an activity.
 - Use pre-discussed behavioral strategies.
 - Consider switching between sitting and standing activities to maintain the child's attention.



What kind of problems may arise during an evaluation and how do I address them?

- You should expect the unexpected. This means that there are different types of problems that may arise during a telehealth evaluation. You should have a contingency plan to help address these problems.
 - Examples of some problems and solutions are:
 - Technological problems
 - Solutions:
 - Discuss with caregivers about using an ethernet cable to attach directly to the modem to improve the internet connection.
 - Try connecting with a different device.
 - Close unnecessary programs and applications on the device.
 - Ask caregivers to move the camera to better see the child.
 - Provide caregivers with the clinic's phone number for technical assistance.
 - Poor video quality
 - Solutions:
 - Ask caregivers to take photos of work or paper samples
 - Ask caregivers to provide short videos of the child completing a similar activity that was instructed during testing, such as stacking blocks and eating with a spoon or fork.
 - Caregivers can email the photos and videos to the occupational therapist.
 - Poor audio quality
 - Solutions:
 - Headphones may be helpful with hearing instructions and comments.
 - Ask the caregivers to ensure there is none to minimal background noises.
 - Child exhibiting behaviors
 - Solutions:
 - Ensure to have prior discussed behavioral strategies are easily accessible.
 - Have the child's preferred toy and activity ready to assist with attention.
 - Have visual supports to assist the child with attention.
 - Decrease clutter on the testing table and room to decrease visual distractions.
 - Caregivers overwhelmed
 - Solutions:
 - Provide clear and concise instructions for caregivers.
 - Remind the child to take some deep breaths with the caregivers.



For more information about telehealth, please refer to <https://www.aota.org/practice/practice-essentials/telehealth-resources>.

Disclaimer: The available information about telehealth OT is ever-evolving. Please verify all information before incorporating it into your interventions.

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