



LEARNINGbyte

EI Service Delivery

Conducting Tele-Assessments 3-Session Plan



PURPOSE OF ACTIVITY

This activity is designed to facilitate learning, problem-solving, and reflection among early intervention (EI) practitioners about the practices they use to prepare for and conduct tele-assessment using video conferencing with families.



RESOURCES NEEDED

Video conferencing platform with a shared screen option (if conducting sessions remotely) or laptop, projector, and screen (if sessions will be in-person)

Handouts:

- Tele-Assessment Video Chat Guided Viewing Sheet (see page 5)
- Tele-Assessment Themes (see page 6)

Resource Links:

- Blog post: [EI Tele-Assessment Video Chats & Strategies: You've Got This!](#)
- Infographic: [Definition of Functional Assessment](#)
- ECTA Center resource: [COS Completion: When Teams Can't Meet In Person](#)

Videos:

- [Tele-Assessment Video Chat #1](#)
- [Tele-Assessment Video Chat #2](#)
- Recording of a tele-assessment including the Child Outcomes Summary (COS) discussion (recorded by an EI team in your program with parental permission)



SPECIFIC STEPS - PART 1

Structure this discussion to occur across two sessions, either in-person or using video conferencing. Or, choose the session(s) that will address the interests and needs of your staff/colleagues. If using video conferencing, provide participants with instructions about the session at least one week prior to the first meeting. Provide participants with the video conferencing meeting link 1-2 days before the meeting.

Note: If your group needs an orientation to tele-intervention, you may want to start with the learning byte, [Orientation to Tele-Intervention](#). If your group wants to focus on tele-intervention visits, use the learning byte, [Using Tele-Intervention to Conduct EI Visits](#).

Session 1 – Common Themes and Tips for Tele-Assessment

1. Before the session, send participants the link to the blog, [EI Tele-Assessment Video Chats & Strategies: You've Got This!](#) Instruct participants to read the blog post and watch the [Tele-Assessment Video Chat #1](#) before the session. Send participants the Guided Viewing Sheet and ask them to jot down notes that will be used for discussion during the session.
2. Open the session by inviting participants to share their insights about the blog post and video chats. Ask participants: *How did what you read about and heard compare to how we do tele-assessments in our program?*
3. Invite participants to share their answers to Item #8 on the Guided Viewing Sheet first. Record these answers on a whiteboard, flip chart, or shared document if meeting via video conferencing.
4. Review the questions, concerns, and needs and identify 3-4 common themes, which you will use to guide the next discussion. For instance, if you see that many comments are connected to concerns about technology, then you will have a theme labeled Technology. Using the Tele-Assessment Themes document, label each theme and capture tips and ideas related to that theme during the discussion. You can provide each participant with a copy of this document OR use a shared document displayed onscreen to record everyone's input in one place.
5. Next, use the Guided Viewing Sheet to facilitate discussion. Review each item and invite participants to share their answers. Record any answers that address the themes on the Themes document.
6. After Items #1-7 are discussed, review the original list of questions, concerns, and needs to see if any still need to be addressed. Invite participants to share any additional questions, concerns, or needs they have and work together to brainstorm possible solutions.
7. Wrap-up the session by asking each participant to verbally share an action plan for using at least one strategy learned during this session. Tell participants you will begin the next session by discussing successes and challenges with implementing their action plans. Ask participants to watch [Tele-Assessment Video Chat #2](#) before the next session and use the Guided Viewing Sheet to take notes.
8. Email participants a copy of the Themes document and encourage them to add to it as they conduct tele-assessments and identify new tips or ideas for making it work.

Session 2 – Functional Assessment via Video Conferencing

1. About one week prior to this session, remind participants to watch [Video Chat #2](#) using the Guided Viewing Sheet. They should come to the session prepared to share an update on their action plan and insights about what they learned from the second video chat.
2. Open the session by inviting participants to share their experiences with implementing their action plan and using strategies to conduct tele-assessments. If time allows, use a round robin style to allow each participant to share an update.
3. Ask participants to review their Guided Viewing Sheet from Video Chat #2 and share any additional tips, ideas, or questions. Add these to the Themes document.
4. Initiate a discussion about functional assessment and how tele-assessment can be used to gather functional information. Review each component of the [Definition of Functional Assessment](#) and discuss how each component is implemented when using video conferencing. Use the following discussion questions:



Observation

- a. *How do you observe the child's development during tele-assessment?*
- b. *How is it working for your teams to coach the parent through the assessment activities?*
- c. *What goes well with using observation during tele-assessment? What is challenging? Why?*



Naturally Occurring Activities and Routines in Multiple Settings and Situations

- d. *How have you taken advantage of video conferencing during tele-assessment to observe naturally occurring family interactions and activities?*
- e. *How has this informed your assessment of the child's development?*
- f. *How might you use your time during tele-assessment to observe the child in multiple settings and situations?*



Asking Meaningful Questions and Listening

- g. *Have your practices with asking meaningful questions of families changed now that you're conducting tele-assessment? Or, how do you anticipate this might be different when you start tele-assessment?*
- h. *How do you let the parent know you are actively listening during tele-assessment?*



Analyzing Information

- i. *Do you feel that you are able to gather enough information about the child's development and functioning during tele-assessment? Why or why not?*
- j. *How do you share information with other team members during tele-assessment? How is this similar or different from face-to-face assessment?*
- k. *How is analyzing the information you gather similar or different during tele-assessment?*



Continuous and Collaborative Process

- l. *What ideas do you have for making tele-assessment a continuous process that begins at the intake/initial visit?*
- m. *How could we improve collaboration around tele-assessment with families? With other team members?*

5. Wrap up the discussion with inviting participants to identify any action items for their assessment teams to improve or extend functional assessment practices during tele-assessment. Plan to check at the next meeting on progress on these action items. Let participants know to expect an email with a link to information to review before the next session about the Child Outcomes Summary Process.
6. Send an updated copy of the Themes document to participants with the new information added during this session.

Session 3 – The Child Outcomes Summary Process during Tele-Assessment

1. At least one week prior to the session, email participants the link to the resource, [COS Completion: When Teams Can't Meet In Person](#). Instruct them to read the resource thoroughly and note any considerations or practices that are especially relevant to your program's approach to tele-assessment. As another option, assign each team member one of the 7 Broad Actions from the resource. Ask them to be prepared to summarize the action during the session and lead a brief discussion about how the action applies to tele-assessment in your program.
2. If possible, ask one assessment team to record a tele-assessment including the COS discussion (with parental permission) before the session. Edit the video so that you are prepared to show the Child Outcomes Summary (COS) discussion during the session, or note the time stamp so you can start the video at the beginning of the discussion.
3. Begin the session by inviting participants to share updates on any action plans from the previous session. Celebrate successes and work together to problem-solve any challenges that come up.

4. Open a discussion about the COS process and invite participants to share their experiences with it during tele-assessment.
5. Use the 7 Broad Actions from the resource to guide a discussion about implementing the COS process during tele-assessment. Review each Action and its considerations or use the following discussion questions to guide the conversation:
 - a. *What actions do you take to prepare yourself for the COS discussion?*
 - b. *How do you prepare families for the COS discussion? How is this similar or different from what you do when conducting face-to-face assessment?*
 - c. *How do you explain the COS process to families during the tele-assessment? How do you relate the process to the child's development and specific daily routines?*
 - d. *What strategies are you using to facilitate the team discussion and ensure that family members are actively involved in decision-making?*
 - e. *How are you sharing the Decision Tree during the tele-assessment so that all team members can use it for reference?*
 - f. *What goes well with the COS process during tele-assessment? What do you find challenging? Why?*
 - g. *What ideas do you have for overcoming these challenges?*
6. Watch the COS recording of a tele-assessment team from your program. Before playing the video, invite the team members who recorded the video to provide some context about the tele-assessment in the video. Ask participants to watch for Broad Actions #4-6 and note what the team did well. Participants can also note any missed opportunities so they can provide constructive feedback after the video.
7. After the video, ask participants to share which of the three Broad Actions (#4-6) they observed. Invite participants to share their insights using a sandwich method: participants should share one compliment (positive feedback), one suggestion (constructive feedback), and one more compliment (positive feedback) in this order.
8. Wrap-up the discussion by inviting participants to share their action plans for what they want to do to improve their facilitation of the COS process during tele-assessment. Plan to follow-up with participants about their plans at the next meeting or by email 2-3 weeks later.



ADDITIONAL RESOURCES

- VEIPD Topic Page: [Assessment](#)
- Infographic: [Decision Tree](#)
- Guidance Document: [Virginia's Child Outcomes Booklet: Team Engagement in the Child Outcomes Summary Process](#)
- ASHA Web Chat: [Telepractice Evaluation and Assessment](#)

Tele-Assessment Video Chat

Guided Viewing Sheet

Review these note-taking prompts before watching the video chat, then jot down notes as you watch. Be sure to listen for ideas and strategies that you can use when you conduct tele-assessments.

Preparing Families and other Team Members for Tele-Assessment

1. What are two strategies for preparing families and other team members for tele-assessment that you learned from the video chat?
 - a.
 - b.
2. What is YOUR favorite strategy that you use or plan to use when preparing for tele-assessment? Feel free to choose one you learned or list one from your own practice.

What Successful Tele-Assessment Looks Like

3. How is tele-assessment similar to your regular face-to-face assessments?
4. How is tele-assessment different from your regular face-to-face assessments?
5. How would YOU describe what successful tele-assessment looks like/will look like?

Tips for Tele-Assessment

6. What are two tips for conducting tele-assessment that you learned from the video chat?
7. What is YOUR favorite tip that you use or plan to use for conducting tele-assessment? Feel free to choose one you learned or list one from your own practice.

What Do You Still Need to Know

8. List any questions, concerns, or needs you still have regarding tele-assessment.

Tele-Assessment Themes

THEME 1 _____

Tips & Ideas:

THEME 2 _____

Tips & Ideas:

THEME 3 _____

Tips & Ideas:

THEME 4 _____

Tips & Ideas: