



# Conducting Evaluation/Assessments Through Teleconferencing

On March 17, 2020, WV Birth to Three (WVBTT) issued a Technical Assistance Bulletin granting WVBTT providers permission to conduct evaluation/assessments, Individualized Family Service Planning (IFSP) services and team meetings through teleconferencing. When planning for evaluation/assessment, there are many considerations necessary to assure the best results and to feel comfortable in making informed decision for eligibility and IFSP planning.



## Step 1

### Guidelines and Requirements

As a professional, you are responsible for understanding guidelines and requirements for your professional association, as well as state regulations. Check with your licensing board on technologies approved (i.e., HIPAA and FERPA compliant) and your liability insurance carrier for coverage in case of a formal complaint.



## Step 2

### Inform and Choose Platform

Some technologies are HIPAA and FERPA compliant to protect information safety and confidentiality. During the COVID-19 emergency, WV Birth to Three does allow for use of non-public facing platforms such as: Zoom, Skype, Apple Face Time, Facebook Messenger Video Chat or Google Hangouts Video. Prior to using technologies, you must inform families that these are third-party applications and that they may pose a risk. Let families know that you are enabling all available encryption and privacy modes.



## Step 3

### Appropriate Assessment Tools

Each practitioner should have a tool box of various assessment tools that you are qualified and trained to administer. Review and use tools that are easy and most accurate/appropriate to use during teleconferencing. The tool should allow for parent report and observation. Review publisher websites for guidance on use of telecommunications, including non-public facing options for the administration of the tool. Verify that you are authorized to make modifications to the original test content.



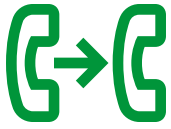
## Step 4

### Prepare for Your Assessment

Review the administration manual and formulate a plan to incorporate the family in the assessment. Consider the child's age and other factors such as vision or hearing loss, medical conditions, referral reasons and the family's priorities and concerns. (Examples: with an infant, ask the family to show you how they feed their child, have the family place the child on back, tummy and side and offer the child a toy; with an older child, ask the family to have the child play with their favorite toys, feed himself, look at a book with the family and name pictures).

Practice using your teleconference platform with family, friends or other team members. Limiting distractions in your home, good lighting and sound (preferably a head set) are essential. Practice giving directions as if you are supporting a family knowing what you are looking for or what you would like them to do.

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## Step 5

### Preparing the Family for Assessment

Conduct a phone call or video conference to explain what the remote evaluation process will look like. Discuss some items that the family might want to have available (if they have them) for the testing session (pretend play items, doll, a snack, crayons, paper, etc).

Ask which times of the day are the biggest concern for the family and schedule the assessment during those times.

Let the family know it will be important to limit who is in the room, to turn off the TV, radio, other distractions.

Gather any background information on medical history, current health status and any concerns with vision/hearing. Schedule the evaluation/assessment.



## Step 6

### Conducting the Assessment

Begin with an interview of concerns, priorities, and resources and where there are concerns within the daily activities and routines.

Start testing the primary area(s) of concern as you may not be able to gather information across all five areas in one assessment.

Support the parent to help you gather information about test items. Give clear directions as to what you want them to do, and what you are wanting to see. Praise, praise, praise the parent.

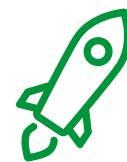
Seek parent report for items you could not see if using video conferencing.



## Step 7

### Provide Assessment Report to the Family

Send your signed assessment report to the family prior to submission to the child's early intervention record to verify accuracy



## Step 8

### Submit Assessment to the Regional Administrative Unit (RAU)

Upload your completed evaluation/assessment to WVBT Online so that it is available for review by other team members.

Send your completed evaluation/assessment report to the RAU prior to billing for the service. If you complete the assessment over two sessions, your billing date will be the last day that you completed the evaluation/assessment.

Bill for the service **after** you have submitted your report to the RAU.