Collaborating with School Team Members During Virtual OT Service Delivery via Telehealth

Collaboration is an important part of carrying out the occupational therapy (OT) process. Occupational therapists and occupational therapy assistants working in the school setting collaborate with many different school teams, including students' individualized education plan (IEP) teams. This Decision Guide includes information occupational therapy practitioners may consider when collaborating with team members during virtual OT service delivery. The items included in this decision guide are based on best practice, and some practitioners may recognize actions they already engage in on a daily basis.

Establish Communication Systems

- ☐ Recognize that each school team may follow different informal procedures or guidelines for communication.
- ☐ Obtain the contact information and preferred mode of contact for parents/caregivers of virtual students.
- ☐ When practical, have educational personnel coordinate communication with caregivers to minimize overload in the home setting.
- ☐ Identify the best methods for communicating with team members on an individual basis (e.g., phone call, text, email) and the best way to start a discussion with the entire team (e.g., including a topic on a meeting agenda, sending a group email).
- ☐ Provide notice to team members regarding when you are reliably available to answer questions or communicate about important topics.
- ☐ Answer questions and respond to voicemails and emails in a timely fashion (e.g., within 24–48 hours).
- ☐ Set aside times to touch base frequently and on a regular basis.
- ☐ Schedule meetings in advance and with adequate notice.

Participate in Virtual Meetings

- ☐ Establish common meeting times for discussions about student progress.
- ☐ Consider the use of formal roles to maximize efficiency during meeting times, such as:
    - ☐ Team facilitator
    - ☐ Note taker
    - ☐ Timekeeper
- ☐ Join meetings early to allow time to troubleshoot technology issues.
- ☐ Attend to expectations for online meeting participation (e.g., turning camera on, muting microphone when not speaking).
- ☐ Maintain professionalism in virtual meetings (e.g., turn camera on, avoid eating or multi-tasking).
- ☐ Monitor facial expressions (i.e., remain engaged while camera is on)
- ☐ Streamline your video background (e.g., remove clutter and personal items).
- ☐ Ask team members questions to gain insights and better understand perspectives.
- ☐ Refine interpersonal skills (e.g., effective communication, conflict resolution).
- ☐ Use common language and explain terms that may be unfamiliar to meeting attendees.
- ☐ Ensure the confidentiality and security of the information provided during and after the meeting.
- ☐ Use headphones or a headset with a built-in microphone when possible.

Provide Virtual Support

- ☐ Use consultation and coaching skills to foster collaborative partnerships with teachers and parents (i.e., ask questions, listen and learn).
- ☐ Discuss recent changes in the student's well-being, home life, and medical, socioeconomic, and/or social/emotional status.
- ☐ Acknowledge an increase in stress levels and ensure that basic needs are being met (e.g., food, shelter, self-care, safety).
- ☐ Emphasize the student's strengths, progress, and achievements.
- ☐ Ask questions to understand the student's educational history (e.g., prior academic performance, preferred subjects, effective learning strategies).
- ☐ Identify priority IEP goal areas and brainstorm with teachers, caregivers, and the student on how these areas can be addressed through virtual service delivery.
- ☐ Encourage the adoption of effective and efficient performance patterns to support virtual learning and service delivery (e.g., daily schedules, in-session routines, and healthy habits around technology use).
- ☐ Ensure that the student can access and participate in virtual education and service delivery.
    - ☐ Identify any barriers to student participation (e.g., accessible and reliable Internet connection, need for daily routine or schedule, need for functional workspace, need for screen breaks).
    - ☐ Collaborate with caregivers to problem solve solutions and identify strategies to support students during virtual learning and service delivery.
    - ☐ Join virtual instruction sessions and/or sessions led by other members of the team when possible to provide support and assist with problem solving.
    - ☐ Offer practical strategies to enhance access, participation, and occupational performance.

Web Resources

- ☐ U.S. Department of Education—Virtual IEP Meeting Tip Sheets

- ☐ Wisconsin Department of Public Instruction—Conducting Parent Friendly and Productive Virtual IEP Team Meetings

Additional Resources

Hanft, B. & Shepherd, J. (2016). *Collaborating for student success: A guide for school-based occupational therapy*. AOTA Press.

Sheperd, J., Hanft, B., & Read, J. (2019). Best practices in collaborating on school and community teams. In G. F. Clark, J. E. Rioux, , & B. E. Chandler (Eds.), *Best practices for occupational therapy in schools* (2nd ed., pp. 93–108). AOTA Press.

Developed for the American Occupational Therapy Association by Jean E. Polichino, OTR, MS, FAOTA and AOTA staff, with contributions by Linda S. Kinkade, OTR.

It is expected that occupational therapy services are delivered in accordance with applicable state or jurisdictional and federal regulations, relevant workplace policies, and the Occupational Therapy Code of Ethics (2015).