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# Evaluation Considerations for Delivering Virtual School-based OT Services via Telehealth

Occupational therapists and occupational therapy assistants provide a continuum of services and supports to students in general and special education. Conducting remote occupational therapy evaluations requires occupational therapists to consider new legal, ethical and procedural factors related to service delivery, such as the validity of test results when standardized assessment tools are administered virtually.

Before conducting a virtual evaluation, review district and local educational agency (LEA) policies, the [Legal, Ethical and Procedural Considerations for Delivering Virtual OT Services in Schools](#), and AOTA's [Advisory Opinion for the Ethics Commission: Telehealth](#).

## Remote Consultation and Screening, Occupational Profile, and Analysis of Occupational Performance

- Review educational records and academic and social histories.
- Use virtual mediums (e.g., email) to plan with teachers, caregivers, and students how best to obtain needed data for the evaluation. Email intake forms if applicable.
- Consider asynchronous (store-and-forward) options, if virtual options are not feasible (e.g., mailing documents).
- Schedule virtual meetings using online scheduling tools, and ensure invites include meeting log-in instructions and applicable passwords. Ensure invites also include general and special education instructional personnel, parents and caregivers, and the student if applicable.
- Prepare to utilize time spent in virtual meetings effectively by reviewing the [Occupational Therapy Practice Framework](#) and ensuring focus on occupational performance (e.g., occupations, context, performance skills and patterns, and client factors).
- Use the [AOTA Occupational Profile Template](#) to guide and document structured interviews with the teacher(s), student, and caregiver(s).
  - Review the Occupational Profile Template [school-based example](#) prior to the interviews.
  - Collect data related to the student's mental health and social and emotional issues that may impact access, participation, and occupational performance.
  - Ask specific and detailed questions related to the student's learning environment(s) and daily routines, and how they differ from when the student is in the school building.
  - Identify adaptive equipment and assistive technology that may not be accessible in the remote environment.
- Use LEA-approved video technology to observe the student in the remote environment and conduct clinical observations. If virtual technology is not available, use asynchronous methods to collect data, such as verbal or written communication, recordings, or photographs.

## Selection of Assessment Tools

- Consider the purpose and scope of the evaluation (e.g., screening, determining eligibility, justifying the continuation of services, informing the frequency of services, establishing goals, or documenting progress).
- Consider the types of assessment tools that may be effectively delivered in the virtual environment. Examples include:
  - Interviews conducted with the student, caregiver(s), and teacher(s)
  - Caregiver report
  - Self-report
  - Scoring based on work samples
  - Naturalistic, observation based-tools
- Considerations for administering assessments virtually or online.
  - Easy-to-give instructions
  - Properly positioned web camera that provides view needed for observation.
  - Supplies needed for assessment that are common and easily obtained in the remote environment.
- Determine which assessment tools will be used.
  - Review the publisher's policies and resources related to virtual service delivery.
  - Review the publisher's online evaluation systems, including those that allow the occupational therapy practitioner to purchase tools that may be stored in an online library.
  - Contact the publisher and request information or training related to assessments provided virtually.
  - Review aspects of the assessment tool that are specific to remote administration so that any checklists or worksheets may be sent to school personnel, caregivers, and/or the student in advance.

## Documentation

- Review the [Guidelines for Documentation of Occupational Therapy](#).
- Review suggested validity statements from publishers.
- Create a validity statement related to assessment tools used during the evaluation.
  - Name the assessment and the **areas assessed** (e.g., occupations, performance skills, performance patterns, client factors).
  - Describe **method of administration** (e.g., caregiver present, synchronous video observation, asynchronous photo/video) and its **effectiveness**.
  - Describe validity of test results (e.g., **validated/not validated** in research for use in teleservices, administered in a standardized or non-standardized way).
  - Describe factors that would **affect testing or create variance** (e.g., student attentiveness, prompting or cueing).
  - Note whether the test was administered according to the established **testing protocol**.
  - Name the components/sections of the assessment tool that could not be administered in the remote environment.

### Example Validity Statement:

"[Name of assessment] was used to assess [areas assessed]. This assessment tool was [effectively/ineffectively] administered [method of administration], and [has/has not] been [validated/not validated] in studies as resulting in scores that are equivalent to in-person administration. The student was *[factors that would affect testing or create variance]*

throughout the test. Due to these factors the test [was/was not] administered according to protocol. The [name sections of the tool] could not be administered in the remote environment.

## Recommendations

- Share recommendations resulting from the evaluation with the IEP team through the IEP process.
- Include recommendations for OT services, if appropriate.
- Provide recommendations for modifications and accommodations associated with the virtual learning environment.

## Web Resources

- [Using the Occupational Therapy Practice Framework to Guide the Evaluation Process and Make Assessment Choices in School Practice](#)
- Telehealth Share YouTube Channel—[Telehealth in Occupational Therapy-School-aged Child: Observation of Fine Motor Skills](#)
- Western Psychological Services—[OT Assessment via Telehealth](#)

## Additional Resources

Cahill, S. (2020). Evaluation, interpretation, and goal writing. In J. C. O'Brien & H. Kuhaneck (Eds.), *Case-Smith's occupational therapy for children and adolescents* (pp.181–197). Elsevier.

Clark, G. F. & Rioux, J. E. (2019). Best practices in school occupational therapy evaluation and planning to support participation. In G. F. Clark, J. E. Rioux, & B. E. Chandler (Eds.), *Best practices for occupational therapy in schools*. AOTA Press.

Criss, M. (2020). *TelehealthShare: OT evaluation in telehealth*. YouTube TV (video). <https://www.youtube.com/watch?v=tRbewgZKZjQ>

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