

# Examiner assessment checklist for clinical practitioners

*The telepractice information in this document is intended to support professionals in making informed, well-reasoned decisions regarding remote assessment. This information is not intended to be comprehensive regarding all considerations for assessment via telepractice. It should not be interpreted as a requirement or recommendation to conduct assessment via telepractice.*

*Clinicians should remain mindful to:*

- *Follow professional best practice recommendations and respective ethical codes*
- *Follow telepractice regulations and legal requirements from federal, state and local authorities, licensing boards, professional liability insurance providers, and payors*
- *Develop competence with assessment via telepractice through activities such as practicing, studying, consulting with other professionals, and engaging in professional development*

*Clinicians should use their clinical judgment to determine if assessment via telepractice is appropriate for a particular child, referral question, and situation. There are circumstances where assessment via telepractice is not feasible and/or is contraindicated. Documentation of all considerations, procedures, and conclusions remains a professional responsibility.*

## Preparing to deliver services via telepractice

### Setting up devices/platforms

#### Select a virtual meeting platform.

- \_\_\_ Consult with guiding authorities for approved meeting platforms that enable the practitioner to be HIPAA- and FERPA-compliant.
- \_\_\_ Review online practitioner reviews from professional organization websites and list serves, special interest groups, or Facebook groups. Select a platform that allows screensharing as well as audio and video.
- \_\_\_ Determine if you will be able to grant and retrieve permissions for the examinee to share their screen, if necessary.

#### Prep examiner's computer

- \_\_\_ Print and digital test results must be in a locked cabinet or available only on a secured device. Do not store test results on a shared computer where other individuals could have access to the information.
- \_\_\_ Determine whether you will administer the assessment(s) via Q-global®, Q-interactive®, or a combination of both.

#### Verify screensharing capability

- \_\_\_ Identify a procedure for displaying test visual stimuli on the computer screen and sharing the screen with the examinee.

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- \_\_\_ Identify commercially available or shared assessment materials available digitally.
- \_\_\_ Review No Objection information on publishers' websites to identify assessment materials available for use temporarily during the COVID-19 pandemic.
- \_\_\_ Identify ways to mirror digital assessments available on nonproprietary platforms using Pearson's Q-global and Q-interactive platforms (or a combination of these two or other digital assessments available) to display test materials.
- \_\_\_ Identify software to mirror digital assessments or other educational materials requiring mirroring of an iPad® screen using your teleconferencing platform.

## Developing competency in administering assessments via telepractice

- Read the information available at professional organization websites and journals related to telepractice assessment administration and develop competency in digital and remote administration.
- Practice remote assessment administrations with another professional until you can administer the test with the same fidelity as you would during an in-person assessment.
- Practice administering each assessment you will use with a client *in its entirety* at least one time before administering the test to an examinee. Identify and remediate any administration concerns before scheduling a live assessment.
- Determine whether you will need an on-site facilitator (e.g., parent or caregiver) for the assessment versus simply accessible for emergency purposes. Always obtain contact information from the facilitator. Because most assessments have not been normed in a telepractice environment, there are some test items that will require assistance from a facilitator.

## Determining if the examinee is an appropriate candidate for telepractice

- Meet with the family/caregivers and candidate before the test session to determine if the examinee is an appropriate candidate for telepractice. Review the client selection criteria available at professional organization websites, research literature, continuing education events, or state licensing boards.
- If an appropriate candidate, determine if the examinee's needs are best met by remote assessment at this time.
- Provide information to the family/caregivers about the pros and cons of the assessments that will be administered via telepractice, and provide options that enable them to give informed consent for an evaluation delivered via telepractice.

## Planning the test environment requirements before test administration

- Confirm the client has a digital device that includes video, audio, microphone, WiFi, and at least a 9.7" screen.
- Discuss on-site options for a quiet, undisturbed test environment with the parent/caregiver/facilitator, in a home or in a secure, clean clinical site.
- Identify the preferred location and setup for testing, as well as plans for maintaining a quiet, undisturbed test environment.

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## Preparing the facilitator for test administration

- Determine the level of on-site adult support that is sufficient and appropriate for remote assessment and who will serve as the facilitator.
  - The facilitator may only be needed for tech support (e.g., setting up a third camera, manipulating a web cam, troubleshooting) and personal needs (e.g., getting a tissue, handling a medical situation).
  - The facilitator may need to provide minimal support such as handing the examinee print materials or letting the examiner know if the examinee needs a break.
  - The facilitator may need to provide support by engaging the examinee in interactive tasks or complex test administration. If so, extensive training on test administration procedures is required.
- As needed, train the facilitator on any complex test administration procedures that will require their assistance with material delivery and/or presentation.

## Prior to assessment day

- Determine whether you will deliver any rating scales using either on-screen or remote on-screen administration. Prepare an email that contains the digital links for remote on-screen administration of rating scales if they're being used. Decide whether to send ahead of time or once the assessment session connection has been established.
- Determine whether you need to send to the facilitator any materials in advance (such as response booklets). Send these materials in a sealed, inner envelope with SASE (self-addressed, stamped envelope) features. Place in an external envelope and deliver to the on-site facilitator with instructions for use and return.
- Provide guidance to the on-site facilitator on expectations for the facilitator role, which includes:
  - \_\_\_ Preparing the test environment.
  - \_\_\_ Setting up the technology (e.g., computer, log-in, camera, headset, speakers).
  - \_\_\_ Supporting the examinee when specifically directed by the examiner (i.e., refocus the examinee's engagement to the task).
  - \_\_\_ Managing materials (e.g., presenting manipulatives, securing pencil, scratch paper, managing response booklets).
- Confirm that the necessary assessment materials are available at the remote location:
  - \_\_\_ Stable internet connection
  - \_\_\_ Functional and charged technology
  - \_\_\_ Record forms or iPad if using Q-interactive
  - \_\_\_ Administration manual
  - \_\_\_ Administration directions

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- \_\_\_ Digital or paper copy of response booklets
- \_\_\_ Pencil/paper
- \_\_\_ Timer
- Schedule your meeting. Consider examinee endurance and tolerance to determine length and number of sessions.
- Develop a plan for the examinee to access the remote session (i.e., send the invite). If you will be using a second web-enabled device in the home as a document camera, determine whether your videoconferencing platform requires two separate invites or if both devices can log in with a single invite.
- Develop a set of criteria for determining when to pause or abort a remote testing session to address technology or personal needs, such as:
  - \_\_\_ When the technology gets in the way of the administration (for examiner or examinee)
  - \_\_\_ When X number of audio or video lags/interruptions/blinks has made you question the viability of the internet stability and the fidelity of your administration
  - \_\_\_ When the examinee/facilitator is not able to make adequate technology adjustments for tasks
  - \_\_\_ Other situations that interfere with testing or that are distracting throughout testing

## Assessment day

### Before connecting with the client

- Confirm that the environment identified for testing is available and make any necessary modifications.
- Determine your assessment order.
  - When possible, consider grouping technologically similar tasks together to reduce the number of transitions between technology features (e.g., consider giving subtests that require the second camera one after another) or grouping subtests that require similar camera viewpoints together (view of screen vs. view of written materials being completed).
  - Consider the impact of such a change when offering interpretation. If you are using Q-interactive, the technology transitions are greatly reduced.
- Ensure you have the necessary test materials within reach.
- Ensure technology is connected to WiFi and fully powered.
- Test video and audio. If using Q-interactive, ensure settings are correct (e.g., brightness turned all the way up).
- Ensure good lighting. Eliminate screen glare and bright sources of light behind you.
- Eliminate other visual distractions from your background (including pets, children, background noise, ceiling fans, etc.).
- Turn off device notifications that may interfere with assessment.
- Make sure the cursor is easy to see but not overly large.

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## Starting the assessment

- If possible, disable recording on the platform being used.
- Launch the meeting.
- Confirm the examinee's identity, location, and phone number to reach the examinee if necessary.
- Discuss the necessity for privacy and need for a distraction-free session.
- Ensure the examinee's face is fully visible.
- Perform an audio and video check of all devices. Is the sound at the right volume? Is there adequate lighting? Make sure the speaker and volume on the second camera are turned off.
- Ask the examinee or facilitator to turn off all device notifications (e.g., phone calls, social media, messaging).
- Explore possible distractions in the remote site. Get a video tour of the work environment if possible.
- Ensure the examinee is seated with an appropriate chair (preferably without wheels) and table.
- Confirm all materials are available (e.g., pencils, scratch paper, response booklets).
- If the examinee's computer keyboard is not needed and moveable for a specific activity, ask the facilitator to put it off to the side.
- Review the assessment process.
- Launch the assessment.

## During the assessment

- Stick to your planned and practiced assessment order as much as possible.
- Provide periodic process check-ins with the examinee and facilitator while avoiding distractions or workflow interruptions.
- Let the examinee know when you are transitioning tasks and what to expect.
- Focus on rapport and the assessment (not the process or technology) just like you would in your office. Procedural memory will quickly develop.
- Take breaks as needed.
- When sharing your screen, be sure to share stimuli in FULL SCREEN mode.
- Move any thumbnail images off presented stimuli.
- Document any technological problems or other distractions.
- Know when it may be time to abort the assessment using your predefined criteria noted above.

## Interviews

- Conduct your interviews as you would do in an in-person assessment. Take notes and maintain appropriate eye contact and voice quality.

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## Concluding the assessment

Before closing the session, review the next steps for the examinee.

- Prompt the examinee or facilitator to log out of the second camera.
- Remind the examinee or facilitator to mail a self-addressed, stamped envelope if needed.
- Provide feedback, guidance or instructions and make sure the client knows how to close the session or call the facilitator to help.
- Log out of the virtual meeting platform.

## Results and reporting

- Document your assessment methodology.
- Discuss the impact of methodology on reliability and validity.
- Follow the test-specific guidance for highlighting assessment administration and results.

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## Using Q-global

### Q-global Rating Scales using On-Screen Administration (OSA)

1. Launch Q-global.
2. Initiate on-screen administration of rating scale.
3. Share your screen so the examinee can read the items.
4. Decide how you will capture responses:
  - a. Examinee provides verbal responses.
  - b. Examinee takes control of the cursor and clicks through the rating scale while you watch and facilitate.

### Q-global Rating Scales using Remote On-Screen Administration (ROSA)

1. Launch Q-global.
2. Send already prepared email with link to ROSA session and direct examinee to the email to locate and launch the assessment.
3. If appropriate, ask the examinee to share his or her screen with you.
4. Examinee clicks through the rating scale while you watch and facilitate if necessary.

### Q-global assessments that require visual/verbal stimuli and visual/verbal responses

- Examples: WAIS®-IV (except PSI and Block Design subtests), WIAT®-III (some subtests), CVLT™ 3, Raven's 2™, PPVT™-5
  - Examinee looks at a stimulus and provides either a verbal response or points to the response.

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- How to conduct the assessment:
  - Examiner screenshares stimuli from a digital stimulus book and provides verbal directions, using the cursor when there is a need to point to stimuli.
  - Examinee provides a verbal response or uses the cursor or a finger to point to the response (additional camera may be required to view pointing response).
  - Examiner records responses on record form.
  - Examiner either hand scores or scores using Q-global.

## Q-global tests that require written responses

- Examples: WAIS-IV PSI subtests, WMS® VR, WIAT-4 Written Expression subtests, CELF®-5 Structured Writing
- How to conduct the assessment:
  - Examiner coordinates with the facilitator or examinee, where appropriate.
  - Examiner has previously mailed to the home the response booklet(s) in sealed envelopes with directions not to open until on screen.
  - While on screen, the examinee or facilitator opens and displays the response booklet using the camera on the examinee device.
  - Examinee or facilitator launches the document camera (or other second device) to allow the examiner to observe the examinee recording responses.
  - Examiner uses permissible screen-capture practices to secure responses for scoring pending the return of the response booklet(s) in the mail. Scoring must be done by the examiner or a professional facilitator ONLY.
  - Examinee or facilitator places completed response booklet(s) in SASE (self-addressed, stamped envelope) while on-screen and mails to the examiner after the assessment.

## Q-global tests that require manipulatives

- Consider substitutions (e.g., WAIS-IV Figure Weights or Picture Completion for Block Design).
- Use a professional facilitator and follow the telepractice guidance document posted on the the digital product's web page on PearsonClinical.com. Click on *Guidance on using this test in your telepractice*.

## Using Q-interactive

### Q-interactive: Option A

1. Set up your assessment ahead of time.
2. Log into the meeting platform from the client iPad.
3. Share the image from the client iPad in the virtual meeting.

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4. Use a second camera to observe examinee physical responses such as pointing.
5. Document the examinee response either by selecting the response on the client iPad (for subtests such as Matrix Reasoning, for example) or on the practitioner iPad.
6. Record scores, verbal responses, etc., on the practitioner iPad.

## Q-Interactive: Option B

1. Set up your assessment ahead of time.
2. Mirror your client iPad to your presentation device connected to the virtual meeting.
3. Use screensharing to share the iPad stimulus image with the client.
4. Use a second device to observe examinee physical responses such as pointing.
5. Document the examinee response either by selecting the response on the client iPad (for subtests such as Matrix Reasoning, for example) or on the practitioner iPad.
6. Record scores, verbal responses, etc., on the practitioner iPad.

## Q-interactive: Option C

1. Set up your assessment ahead of time.
2. Screenshare stimuli from the digital stimulus book using Q-global.
3. Use a second device to observe examinee physical responses such as pointing, or the examinee may use the cursor to point to a response.
4. Document the examinee responses on the practitioner iPad.

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## Links to additional resources

PearsonAssessments.com/Telepractice

<https://www.pearsonassessments.com/professional-assessments/digital-solutions/telepractice/about.html>

Q-global Web-based Administration, Scoring, and Reporting

<https://www.pearsonassessments.com/store/usassessments/en/Store/Professional-Assessments/Q-global-Web-based-Administration%2C-Scoring%2C-and-Reporting/p/100000680.html?tab=webinars>

Q-interactive, Pearson's 1:1 iPad Based Assessment System

<https://www.pearsonassessments.com/store/usassessments/en/Store/Professional-Assessments/Q-interactive%2C-Pearson%E2%80%99s-1%3A1-iPad-Based-Assessment-System/p/100000773.html>

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