

**Virtual
Assessments/Reviews**

THE SCRIPT



Virtual assessments/Reviews – Lights, Camera, Action!

Setting the Scene

As OT's, we start our assessment as soon as we park in front of the client's house. By the time we enter the door, we have already noted access and started to consider intervention options. Every step further into the house, we start to formulate a picture about the client and their situation, constantly assessing risk and considering intervention.

When doing a virtual assessment/review (A/R), it is important to note that you will need to **be intentional** about engagement and about the information you want to gather. Where in the past your actions and observations may have been automatic and natural, you will now have to think about, and consciously make an effort, to gather information as you enter the client's life through a different lens.

The following tips will help to ensure a comprehensive and confident A/R is completed;

- ⇒ Keep the virtual A/R as brief as possible – gather as much information as possible prior to the A/R by telephone.
- ⇒ Ensure all devices are charged before the A/R.
- ⇒ Ensure you have good internet access and prewarn clients that, if the reception is poor, either at their location or yours, the call may cut out. Agree that *you* will call back should this happen.
- ⇒ Allocate enough time for A/R to allow time for potential technical issues and setup.
- ⇒ Ensure the relevant App/Platform is set up on the client/carer/care worker/family's device in advance/prior to the A/R and that it is in good working order. This will save time and avoid unnecessary confusion/frustration during the time set aside for the A/R.
- ⇒ Prior to A/R, inform client/care staff that an additional person will be required to operate the phone/tablet/device used for the virtual A/R. Otherwise, the device used should be positioned in a place with a view of where the transfer will take place.
- ⇒ Send relevant information to the client/carer/care agency prior to the A/R to ensure all parties are prepared for the A/R and are familiar with the relevant equipment. This may include images, YouTube links, videos, etc.
- ⇒ Most importantly, **the client needs to be at the centre of the A/R.** This may sound obvious, however, when there is much to think about and when you are not there in person, it is easy to forget to put the client at the centre. Ask the client how they are, their views, their concerns, etc. Their participation should be encouraged throughout the A/R.

The Assessment/Review (A/R) process – The 4 Scenes

- ⇒ Scene 1: Introduction
Essential element of A/R to avoid confusion, reduce risk and to facilitate an environment and level of engagement from all participants to ensure optimal outcomes.
- ⇒ Scene 2: Rehearsal
Opportunity for OT to see whether the equipment is in good working order. It also gives the opportunity for the OT to establish the confidence of the care workers when introducing new equipment and for the client to see how the equipment works.
- ⇒ Scene 3: The Assessment/Review
OT to observe the M&H of the client with the care workers.
- ⇒ Scene 4: It's a wrap!
Opportunity to discuss what went well during the A/R and the future steps.

Scene 1: Introduction

The Client – The Star

- ★ Your script: Please tell the OT what you are comfortable for him/her to observe during the virtual A/R. If there are any elements of your care you do not want the OT to observe through the camera, please tell him/her.
- ★ Your role: Please vocalise any discomfort/pain. Observations of body language may be limited due to the camera position, distance, as such, please tell the team when you are in discomfort/pain or are afraid.

The OT – The Director

- ★ Face 2 Face: Introduce yourself to the client when you are sure the phone/tablet/device screen is seen by the client. Tell the client your name, your role, show your badge and tell them the reason for the A/R.
- ★ The Star: Ask the client how they are, their views, their concerns, etc. Encourage their participation throughout the A/R.
- ★ The Crew: Make a note of the names of everyone in the room. To avoid confusion when giving instructions, you will need to use the names of individuals. Important - this includes the name of the camera man!
- ★ Take the Lead: Own the A/R - ensure everyone understands what will happen during the A/R. Be clear and specific as to what activity the A/R will focus on and that you may interrupt an action when safe to do so in order to have a closer look. Ownership of the A/R prevents the A/R slowing down the natural process which takes place during the care of the client.
- ★ Detail: Decide how much detail you want to observe and agree on the level of instruction/detail you will provide to avoid confusion/delay. New equipment may need more detailed instructions/feedback. Less experienced care workers may need more instructions. Agree for experienced care workers to continue with the activity with you 'talking them through it', or for them narrating to you what they are doing, rather than them waiting for your instructions before every move.
- ★ Casting: Explain to each individual what their role is and what you want them to do.
- ★ Screen shots: Ensure the client is aware that you may take screen shots during the A/R.
- ★ Contract: Gain the client's consent for the call.
- ★ ????: Ask if anyone has questions.

The Camera Man – Care Worker/Carer/Family/Friend

- ★ Face 2 Face: Take the phone/tablet/device to the client and turn it for the client to see the face of the OT on the screen.
- ★ Sound Check: Can the client hear the OT and can the OT hear the client? If not, pump up the volume.

The Care Workers/Carers – The Actors

- ★ Your Role: When two care staff are present, the OT may ask one care worker to focus on the client and to verbally communicate body language when the client is unable to do so or to speak up when the OT did not hear the client speaking. The reason for this is that the camera may be too far away for the OT see/hear, the streaming quality of the video call may not be very clear, etc. Even though everyone in the room will need to assess and monitor risk, this care worker will be tasked to pay extra attention to the safety of the client.
- ★ Back stage: The OT will only see what is captured through the camera lens. If any activity/action takes place in the background, outside of the scope of the camera lens, you will need to tell the OT.

Scene 2: The Rehearsal

The Client – The Star

- ★ Your Observations: Please tell the team what your concerns are when looking at the use of the equipment. Your thoughts and opinions matter.



The OT – The Director

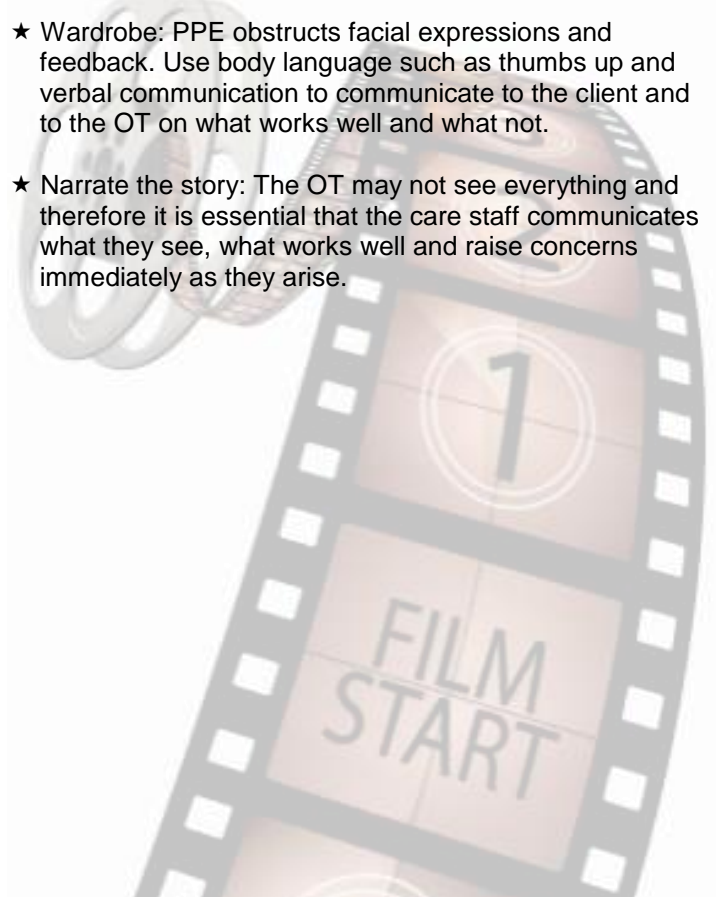
- ★ Portrait or Landscape: Some devices (Hybrid laptops) may not display the full image as seen on the phone/device used by the 'Camera Man' when the orientation of the devices is different. As such, it is important for the OT to check and make sure that what he/she sees on his/her device is the same as what the Camera Man is seeing on theirs in its entirety – check what can be seen at the top and bottom of the images. Once it has been established that the image/frame is the same on both devices, the OT need to advise the Camera Man not to change the orientation of their device or, if they do change the orientation, they need to tell the OT immediately.
- ★ One Team: Reiterate that everyone's roles and observations are essential and important. The Team needs to verbally give relevant feedback or even prompts to the OT throughout the activity.
- ★ The Location: Before the A/R starts, ask if you can have a look around the room to familiarise yourself with the environment.
- ★ Experience: Ask if anyone is familiar with the equipment you are about to trial and how experienced they are with it.
- ★ Take the Seat: Do what you are trained to do, however, remember that you will need to be intentional about your actions and do not make any assumptions. Ask questions if needs be.

The Camera Man – Care Worker/Carer/Family/Friend

- ★ Sound Check: Ask if client, care workers and OT can hear each other. If not, pump up the volume!
- ★ Focus: Listen attentively to the OT's instructions and anticipate what you need to capture. You are the OT's eyes.
- ★ Clear shot: Make sure the OT's view is not obstructed at any point. Move around if you need to. It is better for you to move rather than asking the care workers performing the activity to move out of the way, as this may compromise their posture.
- ★ Portrait or Landscape: The OT may not see the full image as some devices (Hybrid laptops) may not display the full image as seen on the phone/device used by you when the orientation of the devices is different. As such, it is important to check with the OT and make sure that what he/she sees on his/her device is the same as what you see on yours in its entirety – check what can be seen at the top and bottom of the images. Once it has been established that the image/frame is the same on both devices, do not to change the orientation of your device or, if you do change the orientation, tell the OT immediately.
- ★ Pin up: Filming may be easier if you pin what the OT sees, i.e. the image you are filming, to your screen. Ensure you know how to do this on your device prior to A/R.

The Care Workers/Carers – The Actors

- ★ Wardrobe: PPE obstructs facial expressions and feedback. Use body language such as thumbs up and verbal communication to communicate to the client and to the OT on what works well and what not.
- ★ Narrate the story: The OT may not see everything and therefore it is essential that the care staff communicates what they see, what works well and raise concerns immediately as they arise.



Scene 3: The Assessment/Review

The Client – The Star

- ★ Your script: Please tell the OT what you are comfortable for him/her to observe during the virtual A/R. If there are any elements of your care you do not want the OT to observe through the camera, please tell him/her.
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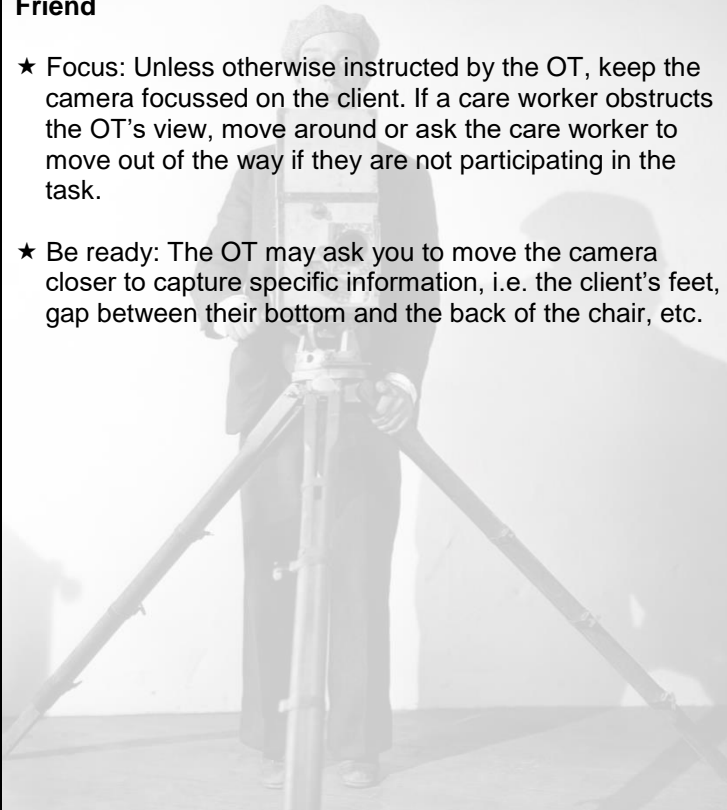
The OT – The Director

- ★ The Star: Remind yourself to encourage the client to engage. Ask them what their thoughts/concerns are, are they comfortable, in pain? How is the action affecting them?
- ★ Screen shots: Take screen shots during the A/R if needed.



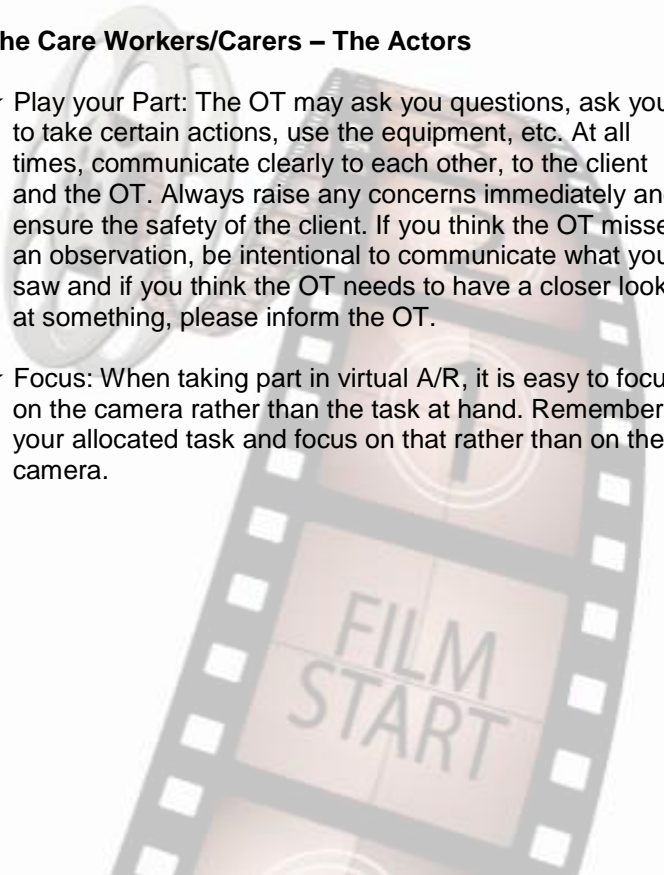
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- ★ Focus: Unless otherwise instructed by the OT, keep the camera focussed on the client. If a care worker obstructs the OT's view, move around or ask the care worker to move out of the way if they are not participating in the task.
- ★ Be ready: The OT may ask you to move the camera closer to capture specific information, i.e. the client's feet, gap between their bottom and the back of the chair, etc.



The Care Workers/Carers – The Actors

- ★ Play your Part: The OT may ask you questions, ask you to take certain actions, use the equipment, etc. At all times, communicate clearly to each other, to the client and the OT. Always raise any concerns immediately and ensure the safety of the client. If you think the OT missed an observation, be intentional to communicate what you saw and if you think the OT needs to have a closer look at something, please inform the OT.
- ★ Focus: When taking part in virtual A/R, it is easy to focus on the camera rather than the task at hand. Remember your allocated task and focus on that rather than on the camera.



Scene 4: It's a wrap!

The Client – The Star

- ★ Your Experience: Please tell the team how you thought the activity went. What was good, what was bad and any suggestions you may have.



The OT – The Director

- ★ Wrap it up: Discuss with the team the outcomes of the A/R, the next steps and plan and answer any questions they may have. You may show clients/carers/care staff pictures/videos of equipment, etc by sharing links or images in the chat box for them to look at.



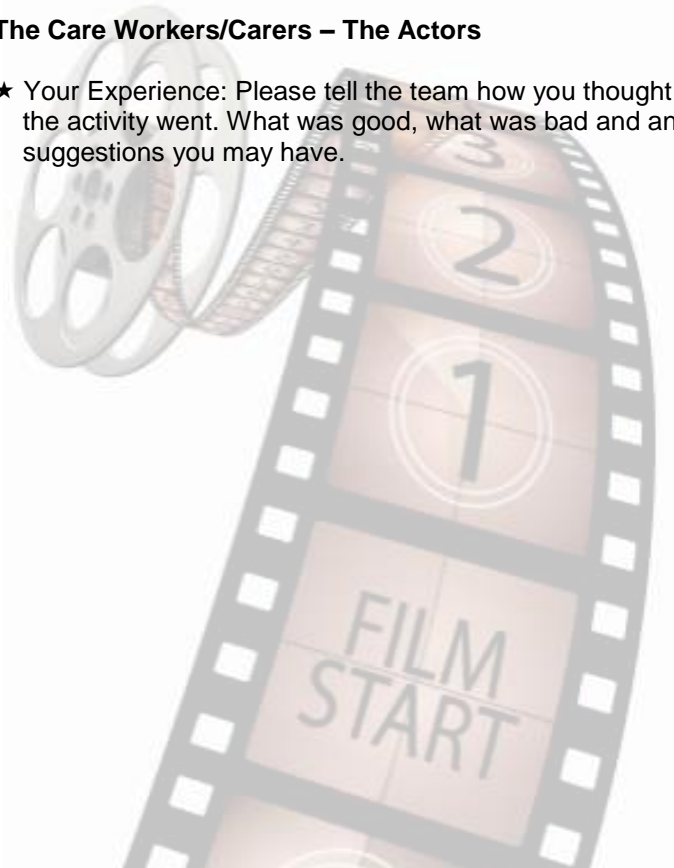
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Your Lines: The Client - The Star

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Scene 2: The Rehearsal

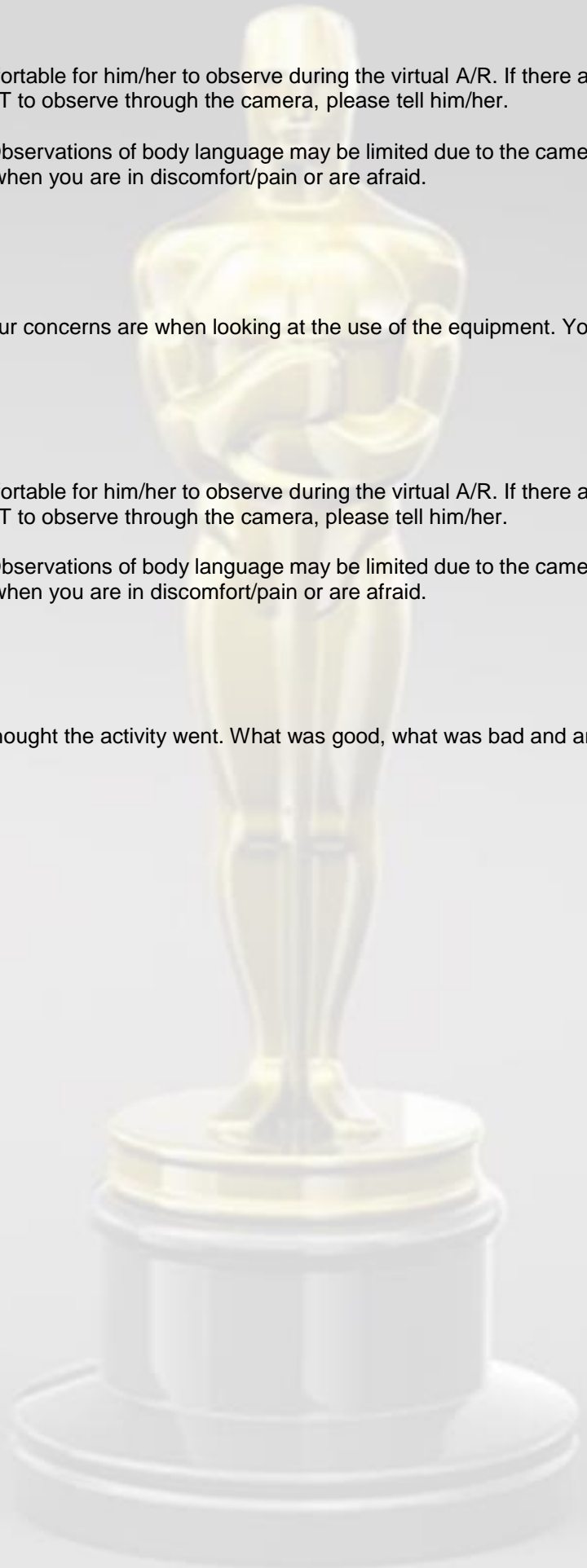
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The Credits

The above script is a compilation of thoughts, experiences and learning captured by the Reigate and Banstead Occupational Therapy Team:

Kirsten Callander, Senior OT

Hannah English, OT

Katie Hill, OT

Chay Campbell-Roofe, OT

and

Jonè Vosloo, Assistant Team Manager, OT

Special guest appearance:

Penni Merron, Senior OT

With special thanks to:

Adrian Goddings and Katie Kumar for being the prop masters.

