Teletherapy in OT:

Engagement, Assessment, and Outcomes

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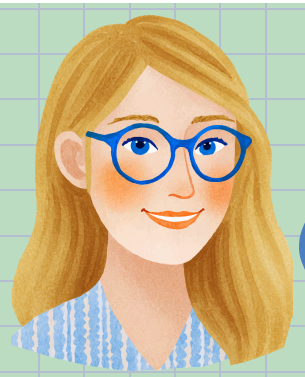
Welcome! Please answer a few questions before we start.



Becky Crouch, OTD, OTR/L

- BS in OT in 2001 from Loma Linda University (Southern CA)
- Post Professional OTD in 2021 from University of St. Augustine for Health Sciences
- Pediatric experience:
  - Outpatient medical focus
  - Outpatient clinic SI, developmental focus
  - School-based
  - Home-based
- Current:
  - Instructor for pediatric class for OTA program at Clovis Community College
  - Assessing OT for an independent study charter school
- OTAC Experience
- Telehealth Experience
  - COVID
  - Current

Presenters



Presenters

Karen Shelton, OTD, OTR/L

- OTD (2022)- University of St. Augustine
- MSOT (2010)- Loma Linda University
- Pediatric experience:
  - Outpatient (medical + sensory integration)
  - School-based & home-based
  - Early intervention
- Current Role:
  - Virtual OT Teletherapist
  - Assessment Lead – Virtual Charter & Brick-and-Mortar Schools (via teletherapy)
- Telehealth Experience
  - 2018-Current



Course Content:

- Benefits and challenges of teletherapy in pediatric occupational therapy practice
- Key considerations for effective teletherapy service delivery
- Technology, equipment, and accessible digital resources used in teletherapy sessions
- Communication, engagement, and relationship-building strategies in virtual settings
- Facilitator collaboration and caregiver coaching strategies
- Roles and responsibilities of occupational therapists and occupational therapy assistants in teletherapy practice
- Licensure, telehealth regulations, and documentation considerations

Desired Learning Outcomes:

- Identify strategies for adapting occupational therapy assessments for teletherapy delivery
- Demonstrate techniques to increase client engagement during virtual sessions
- Apply facilitator coaching strategies to support participation in teletherapy
- Select appropriate technology and accessible resources to support teletherapy sessions
- Apply documentation principles to support a legally defensible teletherapy practice
- Describe regulatory, ethical, and role considerations in teletherapy service delivery

Teletherapy

Tell us what you think

Tell Us What You Think



History of Teletherapy

1920's-1940's
Early forms of "telemedicine"

→ **1950's-1970's**
NASA & Telemedicine

→ **1970's-1990's**
Focus shifted to improving access

1990's-2010's
AOTA began supporting telehealth

→ **2020-2022**
COVID-19
Rapid, widespread adoption

→ **2022- Present**
Now a permanent part of service delivery

Myths and Concerns vs. Reality (for Practitioners)

Common Myths

- Less effective than in-person services.
- Rapport is harder to build virtually.
- OT must be "hands-on" to be effective.
- Primarily screen-based intervention.
- Only appropriate for higher-functioning clients.
- You can't accurately assess clients through teletherapy.

Common Concerns

- Maintaining engagement & attention
- Technology or connectivity barriers
- Observing & assessing performance virtually
- Providing physical assistance when needed
- Reliance on caregivers or facilitators
- Confidence adapting clinical skills to a virtual environment

Myths and Concerns vs. Reality (for Practitioners)

Reality

- Evidence supports teletherapy as a viable OT service delivery model for appropriate clients and contexts.
- Teletherapy can promote:
  - Independence and self-advocacy
  - Caregiver/facilitator collaboration
  - Skill carryover within natural environments
- Virtual practice can provide direct observation of occupational performance within the client's everyday environment.

Clinical reasoning—not the delivery platform—drives effective OT practice.

Myths and Concerns vs. Reality (for Families)

Common Myths

- My child won't pay attention.
- This is just playing on the computer.
- I'm not a therapist—I can't help.
- My child needs hands-on therapy to make progress.
- Teletherapy means more screen time.
- My child has to sit at a computer for the whole session.

Common Concerns

- Managing behavior and attention during sessions
- Understanding when and how much to help
- Technology or connectivity challenges
- Finding appropriate space and materials
- Time and scheduling demands

Myths and Concerns vs. Reality (for Families)

Reality

- Caregivers can be valuable members of the therapy team.
- Teletherapy can support:
- Practice within real-life routines
- Practice and carryover of strategies
- Use of familiar materials and environments
- The therapist provides:
- Coaching
- Modeling
- Structured activities and adaptations
- Caregiver involvement can support carryover beyond the therapy session.

Myths and Concerns vs. Reality (for Payor Sources)

Common Myths

- Is lower quality than in-person services.
- Is harder to justify medically or educationally.
- Compliance cannot be adequately maintained virtually.
- Functional outcomes are harder to demonstrate through teletherapy.
- Provides less accountability than in-person services.

Common Concerns

- Documentation and legal defensibility
- Attendance and verification of service delivery
- Compliance with applicable regulations and requirements
- Appropriateness of teletherapy vs. in-person services
- Measuring functional progress and outcomes
- Privacy and security

Myths and Concerns vs. Reality (for Payor Sources)

Reality

- Teletherapy is a recognized OT service delivery model.
- Teletherapy can support:
- Access to qualified providers
- Continuity of services
- Intervention within natural environments
- Clear documentation can identify:
- Service delivery method
- Client participation
- Facilitator involvement
- Skilled OT intervention
- Functional progress and outcomes
- The same standards for ethical, skilled, and occupation-based OT practice apply.

Foundations of Teletherapy

Things that will help set you up for success for telehealth and beyond!

Communication

Facilitators

Environment

Technology and Equipment

Treatment Materials

Documentation

Communication

Key Considerations

- **Scheduling matters**
  - Confirm times in advance
  - Build in reminders as needed
- **Follow your setting procedures**
  - School/district/platform expectations
  - Attendance and service guidelines
- **Communicate with the support team**
  - Parents, caregivers, facilitators, and learning coaches
  - (Or directly with adult clients when appropriate)
- **Set clear expectations for:**
  - Roles during sessions
  - Materials needed
  - Level of support



Why It Matters

- Strong communication = smoother sessions + fewer disruptions
- Ensures everyone understands their role in the therapy process
- Increases consistency and follow-through

Practical Tip

- Teletherapy success starts before the session begins.
- Communication is what makes or breaks the session.

Facilitators

Key Considerations

- **Define roles clearly:**
  - Setup vs. hands-on help vs. prompting
- **Provide simple coaching strategies**
- **Check for understanding**
  - Ensure the facilitator knows what is being asked
  - Clarify expectations before and during the session
- **Be mindful of language barriers**
  - Use interpreters when needed
  - Simplify language and use visuals when possible
- **Avoid over-assisting (promote independence!)**
- **Build rapport with facilitators too**



Why It Matters

- They are your hands in the environment
- They directly impact carryover
- Clear understanding leads to more effective and consistent support

Practical Tip

- Coach the adult, not just the child.

Tips for Effective Communication & Relationship Building

What clients need from us:

Be Visually Clear
- Show, not just tell
- Use your camera, gestures, and models

Be direct, guide more
- Clear directions
- One step at a time

Use the client's environment
- Include items from home/school
- Make it feel relevant to them

Keep the client involved
- Ask the client to show, do, or explain
- Avoid long talking

Be okay with tech issues
- Stay calm if things freeze or glitch
- Help the client problem-solve

Make it feel personal
- Use the client's interests
- Talk to the client, not at the client

Environment

Key Considerations

- **Quiet, low-distraction space**
- **Appropriate seating + surface**
- **Good lighting**
  - So you can see what is happening
- **Limit background noise and movement**
- **Ensure space matches the activity**
  - Clear the area of clutter for movement tasks
- **Provide enough room for safe participation**
- **Maintain privacy (HIPAA compliance)**
  - Only the caregiver/facilitator and client are present
  - Others should announce themselves if entering

Why It Matters

- Environment directly impacts:
  - Attention
  - Behavior
  - Performance
- Safety and privacy are essential for effective and compliant sessions

Practical Tip

- Set the space before you start the session.



Technology and Equipment

Key Considerations

- **Camera positioning:**
  - Can you see hands/body part + task?
- **Test audio, video, and platform ahead of time**
- **Use appropriate devices**
  - Larger screens (laptop/tablet) are preferred over phones when possible
- **Consider audio quality**
  - Headphones/mics to reduce background noise
- **Have a backup plan**
  - Use a phone or an alternate activity
- **Minimize distractions on screen**
  - Close extra tabs/apps



Why It Matters

- Technology issues = lost treatment time
- Visual access is critical for assessment + intervention
- If you can't see it, you can't treat it.

Practical Equipment Needed:

- Camera or Document camera
- Headphones
- Internet connection

Treatment Materials



Key Considerations

- Use common household items
- Plan backup options
- Keep materials simple + accessible
- Prep caregivers ahead of time when possible

Why It Matters

- Increases participation
- Reduces session disruption
- Promotes real-life skill use

Practical Tip

- If they already have it at home or in their environment, it's teletherapy gold.

Treatment Materials

Teletherapy Treatment Materials (Easy & Accessible)

Household Items (Go-To's)

- Paper, crayons, markers
- Scissors, glue
- Coins, buttons, beads
- Cups, bowls, containers
- Socks, clothespins
- Pillows, blankets

Fine Motor

- Paper folding/tearing
- Coin manipulation
- Bead/string activities
- Drawing & coloring



Visual Motor / Visual Perception

- Drawing from models
- Copying shapes/letters
- Hidden picture activities
- Puzzles (physical or on screen)

Gross Motor / Movement

- Animal walks
- Obstacle courses
- Yoga/stretches
- Wall push-ups

Executive Function / Engagement

- Following multi-step directions
- "Simon Says"
- Scavenger hunts
- Turn-taking games

Websites & Resources for OT Teletherapy



OT-Specific Resources

- AOTA Telehealth Resources
- The OT Toolbox
- Toolstogrow
- nOTeworthy OT interventions Hub

Interactive / Digital Tools

- ABCya (games)
- Toy Theater (fine motor + visual)
- Boom Cards

Worksheets / Printables

- Teachers Pay Teachers
- YourTherapy Source

Practical Tip:

- Use digital tools to engage—but always tie back to functional, real-world skills.

Key Considerations

- **Follow the setting procedures**
  - Special education documentation systems
  - EMR/platform requirements
- **Clearly document**
  - Service delivery model (teletherapy)
  - Level of support:
    - Facilitator presence and role
    - Assistance provided
      - Type and frequency
  - Technology barriers
  - Environmental factors affecting student engagement and participation
- **Tie everything to functional outcomes**
  - Intervention and occupational relevance
  - Skilled strategies/adaptations
  - Client response and functional performance
  - Progress toward identified goals

Documenting the Differences



Why It Matters

- Ensures legal defensibility
- Justifies services and the service delivery model
- Provides transparency across the team

Practical Tip

- If it's not documented, it didn't happen

Assessment Guidelines

Key considerations for assessing in the virtual space.

- Facilitators / Communication / Environment
- Limitations
- Assessment Materials
- Assessment Considerations
- Comprehensive Assessments and Tools
- Assessment Guidelines
- Documentation
- Legal Defensibility
- Anecdotal Comments

Facilitators / Communication / Environment

Key Considerations

- Clarify assessment expectations for facilitators (i.e., not repeating instructions or how much to help)
- Know who the facilitator is
- Communicate when to assist and when to allow the struggle
- **Help avoid over-assisting to maintain validity**
- **Be aware of and Document environmental factors:**
  - Who is present in the testing environment
  - What is happening around the client and off-camera
  - Where is the client's focus



Why It Matters

- Maintain assessment validity
- Clearly defined expectations lead to more accurate assessment results and outcomes

Practical Tip

- It's ok to ask the facilitator to not help the client and allow for productive struggles

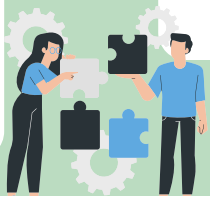
Limitations of Virtual Assessments

Physical Access

- Some performance components may be difficult to assess virtually
- Positioning, tone, ROM, strength, or tactile responses may require alternative methods or in-person assessment

Environment & Technology

- Camera angle
- Connectivity or audio/video quality
- Materials and testing space may vary
- Distractions may influence performance



Standardized Assessment Constraints

- Not all assessments support virtual administration
- Standardized procedures may be difficult to replicate remotely
- Modifications may affect interpretation of standardized scores

Facilitator Influence

- Assistance or cueing may unintentionally affect performance
- Facilitators may need clear instructions about when to help—and when not to

Assessment Materials





Why It Matters

- Reduces interruptions or delays in deadlines
- Ensures time for a defensible and comprehensive evaluation process



Key Considerations

- Sending/receiving assessment protocols
  - Ensure sufficient time for mailing
  - Tracking numbers help!
- Online scoring vs. manual scoring
- Additional materials
  - Printables
  - Non-standardized manipulatives
  - Household items
- Ensure the camera(s) is positioned to clearly observe the client and their work surface
- Plan backup options
  - Client needs
  - Missing or unavailable materials
- Keep materials simple
- Prep caregivers ahead of time

- Standardized
- Age appropriate
- Occupation-based
- Ease of materials
  - Roles during sessions
  - Materials needed
  - Level of support
- Normed or validated for teletherapy administration
- State and federal assessment guidelines apply for teletherapy as they do for in-person



Assessment Considerations

Why It Matters

- Ensures comprehensive, legally defensible, and occupation-based assessment

Practical Tip

- Choice matters
- Check with other service providers (i.e., psychs for VMI, BRIEF, MVPT, etc.)

Comprehensive Assessments and Tools

Visual Perception:
- DTVP-3
- TVPS-4
- MVPT-4
- VMI-6

Sensory Processing:
- SP-2
- SPM-2
- C-SEA
- SOSI
- MAIA-Y

Typing:
- Typing.com
- Typingtest.com

Gross Motor:
- Balance
- Coordination
- Reflexes

Fine Motor:
- VMI-6
- BOT-3
- DAYC
- MFUN- Infant

Visual motor:
- DTVP-3
- VMI-6
- BOT-3
- MFUN

Handwriting:
- THS-R
- Print Tool
- Informal Writing: Samples

Executive Functioning:
- BRIEF-2
- Student Interview

Why It Matters

- Ensures a comprehensive and defensible evaluation

Practical Tip

- Plan ahead
- Make it simple

Online Assessment Tools and Resources

Worksheets / Printables
- Teachers Pay Teachers
- YourTherapy Source
- Schoodles
- Tools to Grow

Practical Tip:
- Ensure the use of **at least** two standardized measures for legally defensible evaluation reports



OT-Specific Resources
- Pearson
- WPS
- Pro-Ed
- ATP
- MOHO

Interactive / Digital Tools
- Boom Cards
- Slides



Key Considerations
- Follow publisher requirements for administration
- Check current assessment manuals for teletherpy administration guidlince
- Check current telepractice guidance within OT
- Follow setting guidelines and requirements
- Follow publisher copyright requirements for using protocols
- Check state consent laws for recording (audio, video, and transcripts)



Assessment Guidelines for Virtual Administration



Why It Matters

- Ensures legal defensibility
- Provides transparency

Documentation: Virtual Assessments

Clearly Identify

- Assessment completed via teletherapy
- Client and facilitator locations/roles, when relevant
- Technology and environmental conditions

Document Changes

- Adaptations or modifications
- Deviations from standardized procedures
- Assistance or cueing provided
- Limitations encountered during administration

Consider Interpretation

- Potential impact of adaptations or limitations on results
- Behavioral observations
- Factors affecting interpretation of results
- Rationale for additional assessment when needed

Why it Matters

- Supports transparent interpretation
- Communicates assessment conditions
- Demonstrates clinical reasoning
- Supports defensible reporting

Documentation: Virtual Assessment in the Report

Whole Virtual Assessment:

Sample Report Language

This occupational therapy evaluation was completed via teletherapy using synchronous audio and video. Assessment procedures included standardized and non-standardized measures, clinical observation, interviews, and review of available records. Relevant environmental conditions, technology, facilitator involvement, and any modifications to standardized procedures were considered when interpreting findings.

Partial Virtual Assessment:

Sample Report Language

Portions of this occupational therapy evaluation were completed via teletherapy using synchronous audio and video. Additional evaluation data were obtained through [record review/interviews/work samples/in-person assessment].



Legal Defensibility: Does the Standard Change?

In-Person vs. Virtual Assessment

Multiple Sources of Data

- Standardized/non-standardized measures • interviews • observations • work samples • record review • team input

Clinical Reasoning

- Assessment selection addresses the referral question • Conclusions are supported by the data

Functional Relevance

- Findings connect to occupational performance • Functional impact and recommendations follow from the findings

Recognizing Limitations

- Know when additional information is needed • Recognize when the assessment method cannot adequately answer the referral question

Legal Defensibility: The Standard Doesn't Change

IN-PERSON ASSESSMENT → **SAME PROFESSIONAL STANDARD** ← **VIRTUAL ASSESSMENT**

- Multiple Sources of Data
- Clinical Reasoning
- Functional Relevance
- Recognizing Limitations

The setting changes.
The professional standard does not.

Anecdotal Comments

It's a learning process!

AOTA & Artificial Intelligence

AOTA: Ethical Use of AI

- AI can support occupational therapy practice, education, and research.
- AI should enhance—not replace—professional judgment.
- AI-generated information should be evaluated for accuracy and safety.
- Practitioners should prioritize AI systems that are transparent, ethical, and evidence-based.
- AI use should align with existing AOTA policies and professional standards.

American Occupational Therapy Association. (2025). Policy E.19: Ethical Use of Artificial Intelligence (AI).

AI in Teletherapy: Use With Caution

Before Using AI

- Is this tool approved by my organization?
- Am I entering identifiable information?
- Can I verify the output?
- Does the final product reflect my clinical reasoning?



Protect Client Information

- Do not enter PHI/PII into unauthorized AI tools
- Use only organization-approved platforms
- Follow HIPAA, FERPA, and setting-specific privacy requirements
- De-identify information when appropriate

AI ≠ Clinical Judgment

- Verify AI-generated information
- Watch for errors, bias, and fabricated information
- Apply your own clinical reasoning
- Ensure documentation reflects the actual service provided

Offloading vs. Outsourcing Video

Teletherapy Resources & CEUs

AOTA Resources

- OT Telehealth Decision Guide
- State-by-State Chart of Telehealth Laws, Regulations, and Guidance
- Telehealth Position Paper
- Ethics Advisory: Telehealth
- Virtual School-Based Services via Telehealth

CEU Considerations

- Verify CEUs are approved by your state licensing board
- Not all teletherapy courses are automatically accepted
- Check requirements for:
  - License renewal
  - Continuing competency hours

CEU Providers

Popular Platforms

- aota.org
- occupationaltherapy.com
- summit-education.com
- otpotential.com
- otaconline.org

Practical Tip

- CEU requirements must follow the state where the client is located.

Telehealth Practice Requirements

General Telehealth Requirements

- Practice must comply with the requirements of the state where the client is located
- Telehealth requirements vary by state
- The same standards of care and ethical practice apply to telehealth
- Additional payer, employer, or setting requirements may apply

Check Before You Practice

- State licensure/authorization requirements
- Telehealth laws and regulations
- Consent requirements
- OT/OTA supervision requirements
- Payer requirements
- Employer, facility, or school/district policies

Practical Tip

- Verify the client's physical location at the time of service and confirm that you are authorized to practice there.



Teletherapy & OTP Roles

Shared Teletherapy Responsibilities

- Maintain therapeutic rapport and engagement
- Use clinical reasoning within their respective roles
- Adapt communication and the virtual environment
- Coach caregivers/facilitators as appropriate
- Document skilled services and functional outcomes
- Follow applicable telehealth, licensure, ethical, and setting requirements



The OT Role:

- Determines the appropriateness of teletherapy
- Directs the evaluation process
- Develops and modifies the intervention plan
- Establishes goals and monitors outcomes
- Determines appropriate delegation and supervision
- Provides skilled intervention and caregiver/facilitator coaching

The OTA Role

- Implements the established intervention plan
- Contributes observations and data to the evaluation process
- Monitors and communicates client response and progress
- Adapts activities within the established plan and level of competence
- Supports client engagement and participation
- Collaborates with the OT, client, and caregiver/facilitator

Activity: Application

For those giving instructions:

- What was challenging about explaining the task?
- What did you find yourself needing to do more of?

For those following directions:

- What was confusing or frustrating?
- What helped you understand the task better?

Clinical Reasoning:

- What skills were being used in this activity?
- What types of clients might struggle with this? Why?
- How can you adjust your communication to improve outcomes?
- What would you do differently if you could redo this activity?
- What strategies would improve success in a teletherapy session?

Closing Activity: Virtual Problem-Solving

Scenario 1: The Virtual Assessment

You're administering a fine-motor assessment. The student's caregiver repeatedly corrects their pencil grasp and provides additional directions. The student becomes frustrated, and the camera doesn't consistently show their hands.

Clinical Reasoning:

- What would you address immediately?
- Would you continue, modify, pause, or supplement the assessment?
- How might the assistance affect interpretation?

Closing Activity: Virtual Problem-Solving

Scenario 2: The Regular OT Session

You're working on handwriting and executive functioning. The student is distracted, refuses the planned writing task, and wants to show you something they built. The facilitator is available but unsure whether to intervene.

Clinical Reasoning:

- How could you adapt the session while maintaining the occupational goal?
- How would you address the facilitator's concerns?

Closing Activity: Virtual Problem-Solving

Scenario 3: The Unexpected Problem

You're midway through a virtual treatment session when the video freezes repeatedly. Audio still works, but you cannot reliably observe the student's performance. The student and caregiver want to continue.

Clinical Reasoning:

- What could you reasonably continue?
- When should you stop or reschedule?
- How would you communicate your decision?

Your impact isn't limited by the screen—it's defined by your connection.

5 Take-Aways about Telehealth

- Keep it simple and functional
- Prioritize clear communication
- Use the client's environment
- Embrace flexibility and technology
- Focus on engagement and connection

Teletherapy

Tell us what you think now

Post-Presentation Survey Link

Teletherapy

Questions?

Teletherapy

Thank you for listening

Slides: **PDF** (4 per page)

Slides: **Canva** (1 per page)

Contact us with questions:

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