

Remote Assessment Guidelines

Thank you for your continued dedication and service as a helping professional and for your trust in WPS. We are here to help and support you as you adapt your assessment practices in these challenging times. We have heard from many of you with questions about remote assessment. WPS offers many rating scales that are ready to use in a remote capacity using the WPS online platform, OES. For performance tests, here are some factors to consider for individually administered assessments, in addition to the information provided in our [general statement regarding tele-assessment](#). For these purposes, tele-assessment/remote assessment refers to an assessment administration session where the examiner and examinee are in different geographical locations.

Though not exhaustive in scope, this review provides a comprehensive outline of general issues to inform using assessments remotely. Clinical training and judgment should be used to determine the extent to which an individual assessment can be validly administered. If you have questions about a specific assessment, please contact WPS.

CONSIDERATIONS FOR TELE-ASSESSMENT

Onsite Facilitator

For many remote administrations, the best practice is to utilize an onsite facilitator. This is a well-trained paraprofessional or professional who assists in the test administration at the examinee's location. The onsite facilitator brings any test materials that the examinee interacts with directly (e.g., manipulatives like blocks or toys; response booklets) and any other necessary equipment (e.g., document cameras). The onsite facilitator arranges for any testing materials completed by the examinee to be sent back to the examiner after the testing session.

In some cases, a parent, guardian, or other individual who is available in the examinee's environment may be the only option to fill this role. The examiner should use their professional judgment to determine if the test administration can be performed satisfactorily with a non-professional serving as the onsite facilitator. If using a non-professional as the onsite facilitator, the examiner must ensure that the administration procedures are followed as described in the test manual, that adequate equipment is used to capture responses (i.e., if multiple camera angles are needed), and that the facilitator does not interact with the examinee in any way that would invalidate the test results.

Testing Environment and Preparations

Prior to the scheduled test session, the examiner should practice administering the test of interest using the necessary materials and any testing platform to ensure all the technological aspects are functioning properly. For remote administrations, the examiner may wish to schedule a trial "virtual visit" with the examinee prior to the test session to troubleshoot any audio or visual issues if using a teleconferencing platform.

The assessment session should be conducted in a room that is quiet, well-lit, and as free of distractions as possible for both the examiner and examinee. Prior to starting the testing session, be sure all other applications on the testing devices are closed and all other electronic notifications are on silent. For remote administrations, an onsite facilitator should verify that the testing area is sufficient and ensure that the most updated version of any software has been downloaded and/or performed any required updates for the testing device. If an onsite facilitator is not available, the examiner should discuss with the examinee or the examinee's parent/guardian how to establish a quiet space in the house for testing (removing any possible auditory and visual distractions from that area).

The examiner should establish a rapport with the examinee before the test administration begins by providing a supportive and encouraging attitude. For remote administrations, the examiner may use this time to verify that the audio and video connections are functional and troubleshoot any possible interruptions or issues.

Test Considerations

The examiner should consider the needs of the examinee, taking into account age, duration of testing, physical conditions, and environmental factors to determine the appropriateness of remote administrations. All WPS individually administered assessments (“direct assessments/performance tests”) were standardized using in-person administration with physical materials (e.g., paper forms, print easels, physical objects, etc.). For these tests, remote administration using digital materials would be considered an adaptation of the standardized administration and should be taken into consideration when reporting and interpreting the results of a remote administration. Any deviations and/or adaptations to the standardized procedure as described in the test manual, including remote administration, use of digital test content, and having a non-professional serve as the onsite facilitator should be noted in the assessment report and considered when interpreting the results. Additionally, please review your local laws and regulations, national professional association and state guidelines (including any changes resulting from a state of emergency) regarding this type of assessment, and any additional training or certification you may need.

Teleconferencing Platform

Remote administration is ideally conducted using a secure platform designed for telehealth (i.e., one that follows the recommended security requirements listed in the next section). Some teleconferencing platforms meet these requirements, while others do not or require additional licensing to do so. Clinicians should understand the limitations of the wide range of teleconferencing platforms and any allowances on lifting certain restrictions when operating in a state of emergency situation.

In order to administer assessments remotely, select a teleconference platform that provides:

- high-quality video (HD preferred)
- password-protected meetings
- screen sharing so that the examiner can show his/her desktop in order to display any necessary test stimuli to the examinee (e.g., online videos, digital stimulus images, etc.)

Certain assessments may require the use of some additional features to consider, such as allowing annotations/shared writing on the display (i.e., whiteboard function) and allowing the examinee to take control of the mouse/pointer in order to select/point to areas of the shared display.

The examiner must not hold up the print test easels to the video camera in order to display the test items. Doing so will invalidate the test administration and test scores cannot be reported. This does not provide the same visual quality of presentation as an in-person administration using the test easel. High-resolution, quality digital materials are required in order to produce valid test results.

The examiner should use their clinical judgment as to recording sessions for later scoring purposes (e.g., to reference the response to determine codes/scores, speech samples, etc.) and follow necessary protocol in these cases, as they would for in-person sessions. **No recording is allowed by the examinee, facilitator, and/or any others present.** Many teleconference platforms have security settings to prevent this. Be sure to enable the function that prohibits any participant recordings of the session.

Use a platform that does not restrict you to a set time limit for each session, if possible. Some of the free platform services have time limits. If using a platform with a time limit, plan for when the meeting will be cut off so that it does not disrupt the administration. Log back into a new session immediately after the previous one ends and finish the administration. Multiple, shorter sessions can be done if needed to accommodate the needs of the examinee. If administering a single assessment over

multiple sessions that are not scheduled back-to-back, schedule any follow-up sessions as close in time to the original test date as possible. Also, consider the examinee's age at the first test session for calculating age for the test scores.

WPS is partnering with PresenceLearning for school-based teams.* You can now get access to remote administration of stimulus easels on the platform for the following assessments: CASL-2, OPUS, PPA Scale (Form A), Arizona-4, and OWLS-II (Form A). Students view the stimuli on the computer screen and respond just as they would in person. Print or online manuals and print forms will be needed for remote administration and can be purchased from WPS. For more information about how you can gain access and set up your account, visit presencelearning.com/wps.

*Currently, the PresenceLearning Tele-assessment 101 service offering includes assessment options for school-based teams, not private practitioners.

Security Requirements

For remote administrations, the testing session must be password-protected for secured privacy. Online platforms must meet HIPAA and FERPA requirements (encrypted transmission, secure login/access, maintaining client confidentiality). Some platforms require an additional license or agreement for this feature. For example, a Business Associate Agreement (BAA) is needed for Zoom to be HIPAA compliant. Given the current pandemic, some regulations regarding HIPAA compliance have changed (refer to your national association and/or professional organization for more information).

Hard copies of test documents should be kept locked and only accessible/visible to authorized individuals. If saving digital documents with client information outside of WPS OES accounts, be sure to follow your organization's procedures for HIPAA/ FERPA compliance to maintain data security.

WPS assessment materials should not be emailed or shared in any way outside of a testing session beyond that which is allowed using the WPS OES platform.

Copyright

WPS assessment materials in any form (e.g., print, digital, or otherwise) are subject to the same copyright regulations as all our proprietary materials, with the following stipulations:

- No reproduction, adaptation, or translation of the materials may be made for any purpose, in any format, electronic or otherwise, without the prior written permission of WPS, nor does this policy constitute any such permission.
- All materials must be purchased and used by, or under the direct supervision of, a qualified professional.
- All materials must be used ethically and for the purposes and in the manner for which they are intended.

Connectivity and Hardware Requirements

When using a Windows or Mac computer or iPad or Android tablet, install the latest version of any of the following modern web browsers: Chrome, Firefox, Safari, or Microsoft Edge. The screen size must be at least 9.7" measured diagonally (roughly the size of an iPad).

The examiner and examinee will each need:

1. A computer, laptop, or tablet with audio and video capability (integrated or external webcam, microphone, and speakers or headphones). ***A smartphone is not acceptable for administering performance tests.***
2. Secure, stable, high-speed internet connectivity. Do not conduct digital assessments using free, public Wi-Fi networks. Consider using a hardwired line if that is the most stable internet connection to avoid any pauses or delays in the audio/video connection.
3. A secure software platform designed for web-based sessions (i.e., teleconference platform with screen-sharing and audio/video capabilities).

Only the examiner will need:

1. Access to the OES platform for administering WPS digital content (rating scales, online videos, etc.) or access to WPS content through approved distribution partners (PresenceLearning).
2. A paper record form (or printed PDF response sheet, if available).

OR

A second computer screen for accessing a digital record form (if available and not using printed materials).

For remote administration, it is recommended that both examiner and examinee use headphones with an attached microphone to maximize auditory understanding unless otherwise indicated in the instructions of specific tests or accommodations for the examinee state otherwise. Over-the-ear headphones with an attached boom microphone are ideal. If only using the integrated computer speakers and microphone, ensure that both examiner and examinee can hear each other clearly.

Refer to the requirements of your selected teleconference platform for necessary upload speed minimums.

Some assessments may require the use of an additional document camera (stand-alone peripheral camera) to capture pointing or gestures, manipulating toys, writing/drawing, etc.

Presentation of Stimuli

When presenting digital test content for remote administration, the examiner should use the screen-sharing function on their teleconferencing platform. The examiner can navigate to the link for online videos or open to full screen any digital stimulus images. On the examinee's screen, they should have an unobstructed view of the test stimuli (e.g., digital stimulus images, online videos, etc.) as well as the video image of the examiner. The examiner's screen should display the digital test stimulus that is being shared as well as the picture-in-picture video of the examinee. Depending on the teleconference platform, the screen-share display may move the examiner's video image to a smaller window, which may need to be moved to another location on the side of the screen in order for the examinee to see the full test stimuli. An onsite facilitator may need to adjust the display so that the test stimuli and the examiner are both viewable without any obstructions and the examiner confirms that the view is accurate.

Recording Responses

For some assessments, a digital option may be available either for personal printing or using a digital record form (through the WPS OES platform). Otherwise, the examiner should use a printed record form to record responses. Please contact WPS Customer Service if you need to order record forms (shipping to individual addresses within an organization account is available during shelter-in-place).

For remote administration, the examiner may need to point to certain parts of an image or images for a specific item. The examiner will use the mouse to move around the image and the associated pointer will show on the examinee's screen. For items where the examinee may have previously pointed to a picture to give their response, the function to switch control to the examinee to use the mouse to point is available on some platforms. Another option is to have the examinee state any ID associated with the picture (i.e., labels "a, b, c"; "1, 2, 3", etc.). Alternatively, if the examinee is very young or nonverbal, the examiner should have an onsite facilitator say the response that the examinee pointed to. All these options change the task from the standardized procedure and could affect the response. Results should be interpreted with caution and any adaptations noted in the report.

Some assessments may require a printed form that the examinee uses during testing. For remote administration, the onsite facilitator brings the necessary forms, provides any onsite instructions needed, and gives the completed forms to the examiner.

When using a non-professional as the onsite facilitator, the examiner should use their clinical judgment to determine if the assessment still can be conducted. If so, the examiner should arrange to mail any print forms that the examinee uses during the assessment to the examinee in advance of the test session. The examinee (or onsite facilitator) opens the sealed envelope with testing materials on-camera when the examiner says to do so. This ensures that the test contents are not reviewed prior to testing. The examinee and/or onsite facilitator should not scan, photocopy, or photograph any test forms or share the test content in any way with anyone other than the examiner. It may be acceptable to have the examinee or onsite facilitator show the completed response booklet on camera after the testing session is complete in order to score the items. In all cases, they should also mail the testing materials back to the examiner after the testing session.

Statement for Reports

Once you have completed the administration, consider whether the results reflect a valid representation of the examinee's ability. Include in your report any adaptations made from the standardized procedures described in the test manual and why these adaptations were needed. This might include the use of digital test stimulus images, remote administration via a teleconferencing platform, using a professional onsite facilitator, or having a parent/guardian serve as the onsite facilitator. For remote administration, include a description of the teleconference platform used as well.

All WPS individually administered assessments ("direct assessment/performance tests") were standardized using in-person administration with physical stimuli. Remote administration and/or using digital materials would be considered an adaptation of the standardized administration. The extent to which any materials have been adapted for digital use depends on the nature of the stimuli, the nature of the behavior/skill being assessed, and the nature of the assessment process itself. For example, shifting from a print easel to a digital screen to display simple images is unlikely to have a significant effect on performance, whereas conducting a remote digital assessment is a larger deviation from the standardization process. Consider these elements when reporting any adaptations, and use caution when interpreting the results for adaptations that are more removed from the standardized administration. Citing any available equivalency studies will lend support to the application of the normative data when using digital materials and/or remote administration.