

## Seven Steps for a Successful Telehealth Road Trip

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Telehealth therapy sessions take you out of the driver's seat and turn the controls over to the parent. Every successful therapy session depends upon strategic planning and the ability to think on your feet. Telehealth sessions also rely upon your ability to organize and manage them from a "hands-off" perspective through the trusting relationship you've built with your clients and their families.

I offer these Seven Steps to help you design a telehealth road trip that will end in a successful journey. I hope that you will find them useful.

### The Steps

1. Know the mechanics of your technology.
2. Assemble a compact Tool Box.
3. Compile an efficient Road Map.
4. Select a comfortable "Ride."
5. Prepare a competent "Shot Gun Rider."
6. Create a Travel Planner for detours and traffic jams.
7. Keep a Travel Diary.

### **Step One: Know the mechanics of your technology.**

Technology is the driving force in a telehealth session. It is important to become familiar with the nuances of the internet, computer, and communication systems you will be using to avoid delays and interrupted sessions.

- a. Telehealth presentations come in various models, each with its own design features.
  - Face Time, Google Hangouts, Skype
  - Parents will take the lead on the one you'll use depending upon their accessibility to and knowledge of a particular system.
- b. Become the "expert mechanic" on each one.
  - Become familiar with the mechanics of the communication modes for a smoother ride.
  - Some parents may be accessing this technology for the first time.
  - Be prepared to discuss, train, and assist parents in buying and installing systems.
  - You may need to assist in setting up accounts and accessing help lines.
- d. Be sure to take a solo "test drive."
  - Take a ride with the technology alone before bringing any passengers to avoid wasted therapy time.

- e. Pick up the parent and student before the initial session to check brakes and wheel alignment.
  - A test ride before the initial session will help both you and the parents to get the kinks out, regardless of the level of proficiency on either side.
  - Bring the students along, as well, and have them familiarize themselves with telehealth. Some may not have had the opportunity to use this technology.
- f. Have access to Emergency Road Service handy!
  - Compile a list of FAQ's and Help Line numbers.
  - Print these off and have them close by for "quick fix" jobs to avoid a cancelled session.
  - Share the list with the parents!

### **Step Two: Assemble a compact Tool Box.**

- a. OT Tool Box Motto:
  - Keep It So Simple
- b. Design a Tool Box that includes activities that fit most of the basic therapy models:
  - Gross Motor Warm-Up: to warm the motor
  - Vision Warm-Up: to set the course
  - Fine Motor Warm-Up: for the journey
  - Culmination Activity: to arrive at the destination!
- c. Make it Accessible for You:

Choose materials and activities that:

  - can be stored close by during the ride,
  - are easy to manipulate and construct in the driver's seat, and
  - are clearly visible through the window!
- d. Make it Accessible for the Parents:

In some cases, the parents will be asked to purchase materials for the sessions. Be sure the materials you choose:

  - are affordable,
  - can easily be purchased, and
  - are not too technical.
- e. Two Options for Assembling a Tool Box:
  - (1) Provide a list of items for the parents to purchase.
  - (2) Provide the items for use in the session, with some borrowed and some dispensable.
    - Most likely, the tool box will be a combination of these.

(a) Option 1: Provide A Tool Box Checklist for Purchases before initial session to:

- alert them about materials needed for the sessions,
- provide them ample time to gather them, and
- allow them time for questions about the materials.

(b) Option 2: Provide a Tool Box to parents before initial session that is:

- affordable,
- portable,
- reproducible, and
- easily returned.

f. Be prepared to order specific tools for parents.

- therapeutic putty
- pencil grips
- handwriting paper

g. Be savvy about scanning and emailing! A large part of a successful telehealth session relies upon:

- an efficient scanning and email strategy,
- consistent procedures for emails between you and the parents, and
- a clear delineation of these responsibilities for both you and parents.

h. Conduct Routine Maintenance of your Tool Box to ensure that it will serve you well.

Frequent maintenance will allow you to:

- repair damaged materials for appropriate modeling,
- redesign of the tool box for efficiency, or
- replace materials that no longer serve a purpose.

**Step Three: Compile an efficient Road Map.**

a. Telehealth sessions are a type of "hands-off" therapy that utilizes our senses more than our hands, much like driving a car.

Sessions will be driven by:

- our visual and auditory senses directly as we observe and monitor our surroundings (our students and their parents),
- our vestibular and tactile senses virtually as we view the horizon and feel the car move (see and "feel" their movements) and,
- our ability to maximize our communication skills by signaling or using the horn (using modeling and our voices to guide them).

b. Prepare sessions filled with "Are we there yet?" activities that:

- will keep them interested and engaged and
- help them remain in their seats.

- c. Schedule your stops with a written list of activities for you and the parents that:
  - outlines the therapy progression,
  - provides a timeline to guide the activity flow,
  - offers a supplemental list of "pit stop" activities for times when something doesn't appear to be working,
  - and schedules a "parent debriefing" at the end for questions and feedback.
  
- d. Keep your eye on the destination - the session (not therapy) goals - by:
  - positioning a clock behind your computer that can easily be seen during the session to keep you on schedule.
  - keeping an eye on the written time schedule that you have shared with the parent.
  - allowing time for strategic planning for changing or adapting the schedule based upon the child's needs.
  
- e. Alert passengers to "Points of Interest" by efficiently guiding parents in their role.
  - Provide adequate demonstrations of the activities before asking them to assist their children in performing them.
  - Ask parents to demonstrate the activity first before students attempt it.
  - Provide clear communication for "hand-over-hand" directions for editing students' work by guiding parents to step in with your words and modeling.
  
- f. Talk to your Shot Gun! Communication with the parent is the key element in a successful telehealth journey.
  - She is your hands.
  - He is your tactile and vestibular feedback.
  - They are the eyes in the back your head!
  
  - Schedule a 5-minute chat with them at the end of the session for:
    - a review of the student's progress,
    - a chance to discuss homework and the next session,
    - an opportunity for everyone to ask questions to enhance the carryover of skills,
    - AND a chance to say "thank you!"

**Step Four: Select a comfortable "ride."**

- a. Get comfy! Telehealth can feel like a compact car ride in a snowstorm!
  - small windshield
  - small dashboard
  - small foot wells
  - limited visibility
  - limited spaces for coffee cups and phones!
  
- b. Test drive before you decide. Set up your technology and working space for efficiency and then take it on a ride with a friend, relative, or coworker who is in the next room:
  - so that you can "see what he sees" on his screen.
  - so that you can "see what you see" on your screen while he works on a simple activity.
  - and then, switch seats, so you can see where your screen, chair, desk space, and other materials (e.g., chalkboard) need to be for the maximum visibility and clarity.

c. Prepare for the trip.

- Arrange your space for easy access to materials during the session.
  - This is especially important if this is not your dedicated workstation.
  - This can avoid "down time" while you "disappear" to collect materials.
  - Avoid "Solar Glare" from:
    - the sun (e.g., lighting from windows) and
    - inside lighting: (e.g., lights behind you).

d. Keep your eyes on the road. Distractions can be detrimental to your session.

You can avoid them with:

- a dedicated space for the ride (even if is shared at other times).
- a door with a sign that says "Road Trip!" to ensure privacy for an effective and confidential a session.
- silent phones. (Don't forget the land lines!)

**Step Five: Prepare a competent "Shot Gun Rider."**

This could be the most important aspect of your telehealth journey:

- Training
- Communication
- Relationship

a. Training: This is the time to form the basis for the relationship by discussing the "**what's**" of telehealth and the parent's role in it's success.

- What is the destination of a telehealth session?
  - The destination is a successful session, not the therapy goals.
  - A successful session begins with identifying parent's level of needs and confidence.
- What will be on the road to your destination?
  - This is the road map for the events and points of interest.
  - Discuss the sequence of activities and the opportunity for a parent feedback session.
- What will be their role on the trip?
  - Provide them with insight about your expectations for their involvement, including the scope of responsibilities that you will offer them.
- What will be their responsibilities before and after the trip?
  - Discuss the strategy for sharing session and homework plans, as well as timeliness and preparedness for emails.
- What technology do they have for use on the trip?
  - Determine their access to scanners, printers, email, and teleconference methods.
- What is their level of proficiency with that technology?
  - Determine the level of training the parent will need from you to facilitate successful sessions.

- b. **Communication:** This is the time to cement the relationship by going through the "**how's**" of your relationship:
- How will you communicate with each other before and after the trip?
    - Determine the parent's preferred method of communication (e.g, phone or email).
  - How comfortable are they with redirection, asking questions, and hands-on involvement?
    - Gain an insight into their needs and expectations of you.
  - How will you communicate during the trip?
    - Provide them with a comfortable sense of your expectations for:
      - their interjections,
      - their level of "hands-on" involvement,
      - and the amount of guidance that you will provide them during the sessions.
  - How can you help them pack for the trip?
    - Explain the need for:
      - limited distractions,
      - accessibility to materials,
      - and the position of their "shot gun" seat.
  - How can you help them understand the importance of their role in a successful trip?
    - Express your appreciation for their taking on the responsibilities for their child's success with therapy.
- c. **Relationship:** This is the key to success with your telehealth road trip. You can facilitate it by packing:
- a sufficient supply of patience - for the parent, student, and yourself;
  - a hearty dose of understanding - of the limitations of the parents. (Avoid placing too many responsibilities in their hands, before, during, and after the trip); and
  - a sackful of Give and Take! Give them your support by listening to their feedback about the session. Take their suggestions when you can.
  - Remember: They are your hands!

**Step Six: Create a Travel Planner for detours and traffic jams.**

Remember that "anything can happen!" You have turned the wheel over to the parents and will need to help them throughout the ride. Some of the most common areas that may need attention will be:

- a. **The Technological Flat Tire!**
- This is caused by:
    - an inability to connect,
    - the screen freezing up, or
    - unexpected internet shut downs.
  - Be prepared with a plan:
    - Who calls who to reconnect?
    - How much time is allowed for fixing the tire before rescheduling?
    - What are the rescheduling options?

b. Sibling Rivalry!

- This is caused by:
  - a noisy environment (TV, talking, computers) or
  - interruptions by family members.
- Be prepared with a plan:
  - Suggest a short break while the parent redirects family members or quiets the environment. (Continue your engagement with the student to avoid "losing her!")
  - Discuss repeated traffic jams with the parent after the session or on the phone later and offer suggestions for remediation.

c. Lost the Map!

- This is caused by:
  - materials not yet downloaded from your email,
  - disorganized or unavailable activity materials, or
  - homework not available.
- Be prepared with a plan:
  - Work on a simple fine- or visual-motor warm-up while the parent collects the materials, or
  - Change your trip route to utilize previous or simple activities that they have on hand that will meet your needs.
  - Discuss repeated traffic jams on the phone later and options for remediation.

**Step Seven: Keep a Travel Diary.**

Parent feedback is an important factor in planning for future telehealth road trips. With older students, their feedback is equally useful for successful sessions.

Here is a sample of the feedback I have received from parents:

- Communication was the key for letting them know how to guide the sessions.
- Tool Box Kits helped to make their jobs easier and to facilitate consistency with homework.
- Scanning and email were tedious but worked well for session preparation and feedback.
- After-sessions briefings were helpful for updates and allowed them "access" to me for questions.
- Telehealth provided them with the opportunity to be a "hands-on" parent in their children's therapy.
- Parents whose children had received services at my clinic indicated that it did not replace my hands-on therapy but was a suitable replacement that got results.

**AND FINALLY: PACK A SUITCASE FULL OF HUMOR!**

If you have any questions, I can be reached at [katherine@handwritingwithkatherine.com](mailto:katherine@handwritingwithkatherine.com).

Thank you for your interest in telehealth and for attending this session!