How to Authentically and Virtually Collect Information About What Young Children Know and Can Do: A Guide for Practitioners

Conducting authentic virtual assessment (VA) with young children who have or may have developmental delays and disabilities involves many of the same skills practitioners use to conduct an in-person assessment. But it also involves learning new skills. Practitioners new to VA need to acquire skills in two areas: how to collect information virtually about what children know and can do, and how to use the technologies involved in VA.

This resource is for practitioners who already know how to conduct good authentic assessments. It provides guidance on the skills needed to conduct high-quality VA that benefit both practitioners and families. VA allows practitioners to see the child in their everyday environment, engaged in everyday routines and activities without the distraction of the practitioners being there in person. Also, in VA the family is key to learning about what their child knows and can do. By effectively supporting the family in working with their child to demonstrate skills during VA, practitioners reinforce the critical role that families play in their child's development. Visit the **INTECA website** for more on **authentic assessment** and the **benefits and challenges of VA**.

Preparing for the Virtual Assessment

Prepare families for what to expect and what they will need

Ideally, your program has already developed a protocol for how to prepare families for VA so that preparation is consistent across all practitioners. Such a protocol should include the following:

General – Before the assessment is scheduled

- ☐ Help families understand what VA is, what its benefits and challenges are, how it works, and that it can be high-quality and produce accurate results.
- ☐ Review and refer families to the INTECA **resources for families**.

General – Once the assessment is scheduled

- ☐ Set clear expectations before the session. Explain what will happen, what the goals are, and what you will be asking of the family.

- ☐ Help the family understand their role during the VA. Explain some of what will happen, such as you asking the family to interact naturally with their child and to model, elicit, or prompt skills during the assessment.
- ☐ Ask the family about the child's favorite toys or objects and request that they have them handy during the VA. If there are other things you would like the family to have available, such as blocks, books, or crayons, provide a list or discuss them so they can have them ready. Make sure the family understands they are not expected to buy things that they do not already own and that the child is not familiar with. Help the family identify alternative objects in their household that will serve the same purpose for learning about the child's skills. Ask the family to have the objects out of sight if the child is likely to be distracted by them.

Technology

- ☐ Ask about technology the family has available for the VA (cell phone, tablet, or computer). If the family has multiple devices and the program has a preference, communicate the preference. Some considerations:
  - ○ Alert the family that they may need to follow the child around with the device so the child stays on camera and can be heard.
  - ○ Phones and tablets are easier to move around if the child is mobile.
  - ○ Ask the family to try to remember to pause for a few seconds after the child speaks, before saying anything else, so you can hear everything the child says.
- ☐ Ask about the family's cellular or internet coverage.
- ☐ If your program loans equipment (e.g., a hot spot) and the family needs the equipment, make arrangements for getting it to the family. If your program does not provide the needed equipment, consider having one member of your team in person with the family to provide the equipment.
- ☐ If your program reimburses families for cell phone minutes, make the necessary arrangements.
- ☐ Review the family's familiarity with the device and the platform you will use (e.g., Zoom, Microsoft Teams).
- ☐ Have a plan and communicate with the family about what to do if the internet connection is lost during the VA. (For example, the family member should keep your phone number handy during the assessment so they can call if there is an internet issue.)

Programs can support practitioners and families by developing a "Tech Tips" sheet to be shared with families prior to the VA. Examples of tech tips include:

- Fully charge the technology prior to the call.
- Minimize background noise such as the television during the assessment.
- Turn on lights or open curtains if the room is dark.
- Identify the best position in the room for the device, where it will be stable and the adult(s) and child can be heard and seen.
- Locate the device out of the child's reach and sight if the child is likely to be distracted by the device.

- ☐ If you will record the VA, inform the family and explain why, how the recording will be used, and who will have access to it. Obtain permission from the family to record.
- ☐ Make sure the family understands that other family members and caregivers can participate in the assessment even if they cannot be in the same room with the child. Let them know how to share the meeting link with others who they would like to participate.
- ☐ Schedule a separate call or plan to use the first part of the VA call to check the technology and prepare the family for using it if they are not familiar with it.
- ☐ If you will ask the family to provide videos of the child before or after the VA, give them instructions for sharing the video and a secure way to upload it.

We recommend reviewing this information on a call so the family can ask questions. Also send an email with the same information to the family to help them prepare for the VA.

Prepare yourself and, if you are part of an assessment team, jointly prepare with the other practitioners on the team

- ☐ Ensure that all the items listed above for preparing the family have been addressed and that all practitioners on the team are prepared to use the technology.
- ☐ Ensure all team members (including translators and sign language interpreters) have the information for the call and know to use the call-in number if any issues arise with using the link to connect.
- ☐ Identify practitioner roles, including who will facilitate the assessment, who will address technology issues, and who will monitor the chat.
    - Technology responsibilities include alerting anyone who is the source of background noise, asking a practitioner to mute if needed, making sure the family is given ample time to answer, making sure people are not talking over one another, and verbally confirming nonverbal nods or cues that could be missed.
    - The person monitoring the chat will inform the facilitator or the team if a message appears that requires acknowledgement or attention.
- ☐ If the VA will be recorded:
    - Identify who will be responsible for starting and stopping the recording and saving the chat transcript.
    - Plan how and when to upload, store, share, and delete the recording and/or chat transcript.
- ☐ Make sure all members of the assessment team know they should conduct the VA from a location with a strong, secure internet connection, minimal background noise, and privacy (where others will not be able to hear the conversation).
- ☐ If you will complete an assessment protocol online or take notes online, plan to use a second device for this.

Conducting the Virtual Assessment

Engage family members as active partners during the assessment

- ☐ Remind the family that their role in the assessment process is essential.
- ☐ Rely heavily on the family to interact with their child in familiar activities that allow you to see the child communicate, interact, move, and reveal what they know and can do. Family members can often provide information that you cannot see or hear.
- ☐ Coach the family on what to say (or not to say), how to present materials, and when to step back.
- ☐ Ask a family member to repeat what the child said if it was not clear.

Use everyday activities for observation

- ☐ Ask the family to conduct typical activities (e.g., mealtime, clean-up, getting dressed) during the session. When possible, check with the family to determine if what you observed during the session were typical routines.
- ☐ Ask the family to initiate familiar activities and provide the child with toys and other objects to play with as they typically would outside of the assessment. Mention that you would like to see what the child can do on their own, so suggest that it may be helpful to pause and let the child work through challenges as much as possible.
- ☐ Encourage the family to video-record skills not demonstrated during the VA if they can.

Rely heavily on your observation skills

- ☐ Observe how the child uses skills within everyday routines. Observe the child's actions and interactions.
- ☐ Take time to develop observational skills for tone, posture, affect, and engagement.
- ☐ Use your clinical skills to infer key information from subtle behaviors or patterns based on your training, experience, and knowledge about child development.

Combine parent report with observations

- ☐ You will not be able to observe the full range of what the child knows and can do on camera during a short session, so keep in mind that parent report is an important part of a high-quality assessment.
- ☐ Ask open-ended questions to learn about behaviors not observed directly.
- ☐ Ask questions to learn:
  - ○ How frequently does a behavior occur?
  - ○ In what context does it happen?
  - ○ Is it consistent or emerging?
- ☐ Document both observed and parent-reported behaviors and skills.

Be flexible and creative

- ☐ Demonstrate something you want the family to do with the child (e.g., use dolls or other props to demonstrate positioning of the child).
- ☐ Substitute materials as needed (e.g., cups instead of blocks).
- ☐ Improvise with available objects you can see in the visual field of the camera. For example, "Grab those cups behind you and let's see how he stacks them"; "We can use the pen on the table, no need to have crayons."
- ☐ Adapt to routine activities and what the child is interested in during the session, especially to assess attention, language use, or problem-solving in more natural ways.
- ☐ Be ready to shift approaches on the fly, especially in environments that are unpredictable.
- ☐ Be sensitive to what is and is not working in the VA with this family, and adapt the process as needed.

After the Virtual Assessment

Document that information was collected virtually

- ☐ Document carefully. Clarify in your notes that you conducted the observation virtually and include the context and any limitations.

Review recordings

- ☐ If you recorded the VA, review the video for additional information about the child that you may have missed during the session.
- ☐ If the family shared video recordings of the child after the VA, review that information.
- ☐ Store all recordings securely according to your program's policies.

To access this and other resources, visit **https://inteca-idea.org/**

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