Remote Psychological Evaluations Guide

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Contents

Objectives

The following guide regarding remote educational evaluations has the following 4 objectives:

Objective 1: To discuss considerations for setting up a virtual testing space

Objective 2: To examine the different remote evaluation modalities

Objective 3: To explore assessment materials available in a digital format

Objective 4: To review general assessment administration tips and tricks

1. Setting up a Virtual Testing Space

Prior to any remote evaluation with a student, the examiner should discuss with the family and the examinee about the testing space in their home/location. The following should be considered:

1. Ensure that their digital device is connected to the internet. A desktop or laptop is ideal, but an iPad, tablet, and/or Chromebook will also work
2. Verify that the digital device has a built in camera or attached webcam
3. If the digital device does not have a built-in microphone, the examinee can use headphones with a microphone
4. Encourage the examinee to be in a private room with little to no distractions (if possible)
5. Encourage the examinee to have paper and pencil or a small whiteboard. This is useful for any measures requiring written responses, particularly academic assessments

2. Most Commonly Used Platforms for Remote Evaluations

Zoom

Zoom is a videoconference application, with the option of HIPAA and FERPA complaint licenses. Thus, Examiners should make sure to use their school district's account, not a personal account. To increase the security of the evaluation, examiners can require a Meeting Password and enable the Waiting Room feature. Zoom conveniently allows to schedule meetings and email the link for a meeting directly to parents and students. Furthermore, parents and examinees do not need to have a zoom account to access the meeting.

Examiners working remotely should consider several things. First, examiners should make sure to access Zoom through their local computer rather than a virtual desktop (if applicable), since the latter can cause connectivity issues. Second, many of the zoom features discussed in this guide need to be enabled in the settings prior to scheduling or starting the meeting. It is really important to become acquainted with the zoom features and settings prior to scheduling and setting up a remote evaluation.

Zoom features

Screen sharing

This feature allows the examiner to show testing stimuli on the computer screen. Examiners can find these options by clicking the "Share Screen" icon in the center of the toolbar on the bottom of the zoom screen.
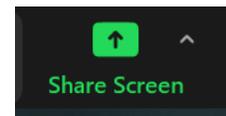

There are 3 possible options:

1. Entire screen
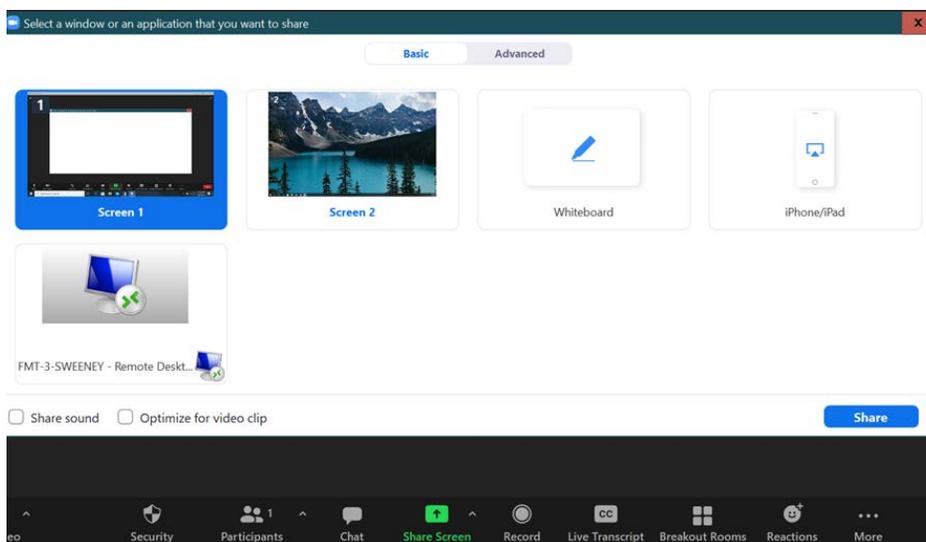
2. Portion of the screen: can drag and adjust the green box over what you want the examinee to see. This is helpful when working with only one screen.
3. Computer audio (for auditory tasks)
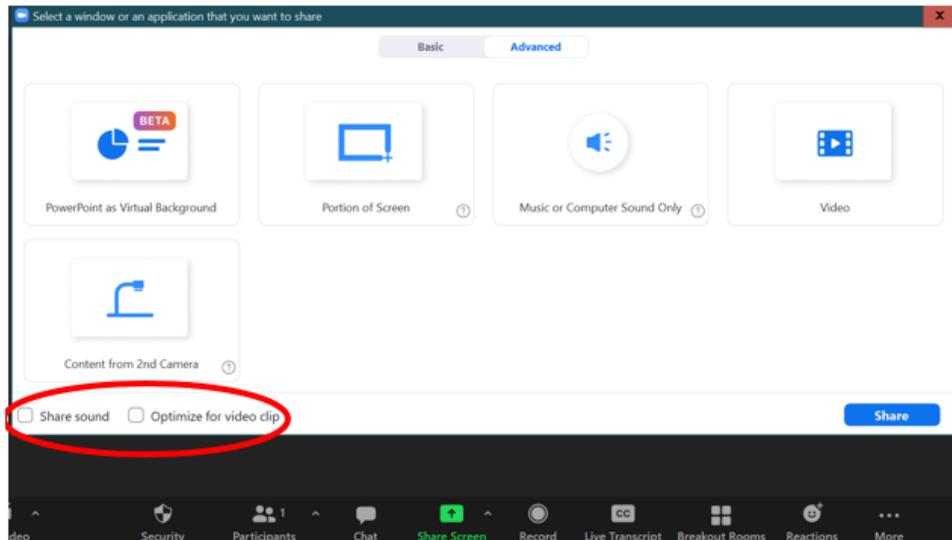
Waiting room

Enabling this feature will ensure that meeting participants, other than the host, will enter a waiting room when logging on to the zoom meeting. It also allows the host to send participants to a waiting room at any time during the meeting. This feature needs to be enabled in settings when scheduling the meeting or prior to starting it.

Shown below are screenshots of how to send a participant to the waiting room. The host can right click on the participant's window (i.e. examinee) and select "Put in Waiting room" or the host can select the examinee from the participants list in the toolbar, at the bottom of the zoom screen.
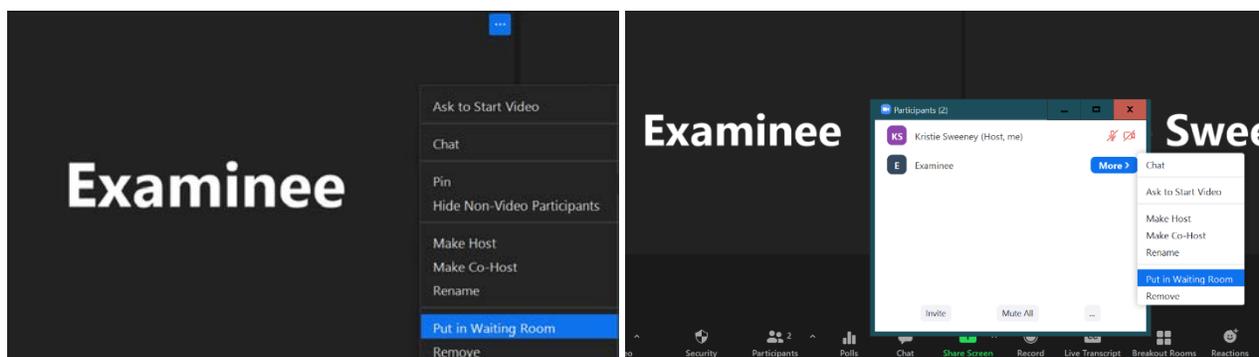
Remote control

This feature allows the examinee access to the examiner's computer screen so that the examinee can point to a response in a stimulus book or complete a questionnaire/rating scale presented on the examiner's computer. Feature must enabled in settings when scheduling the meeting.

To use this feature, use the following steps:

1. The examiner must select "Remote Control" in the top zoom toolbar and select the examinee
2. A toolbar will then appear on the examinee's screen and they must click the screen to take control
3. The examinee can then point to stimuli in digital stimulus books or complete a questionnaire
4. The examiner can terminate remote control at any point by clicking on the shared screen
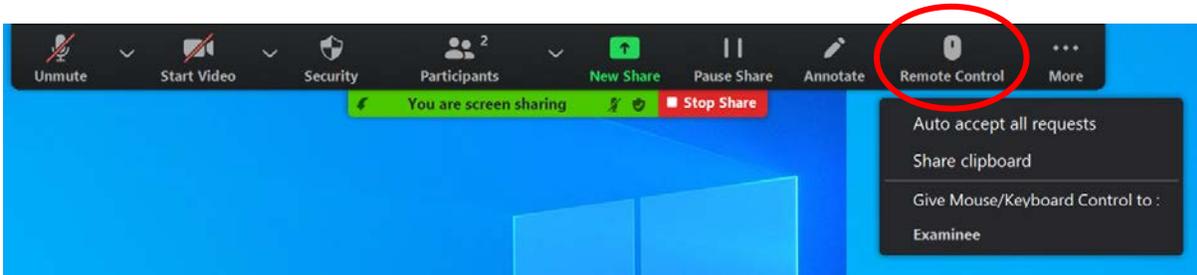
Note: This feature is only available if the examinee is using a laptop or computer (i.e. not available when using Chromebook or iPad).

Annotation
This feature allows the examinee to mark the shared screen during the zoom session.

- Allows access to the "Stamp" feature (must enable in zoom settings when scheduling the meeting)
  - o Laptop or Computer: use Stamp
  - o Tablet or iPad: use the "Draw" feature, stamp feature not available
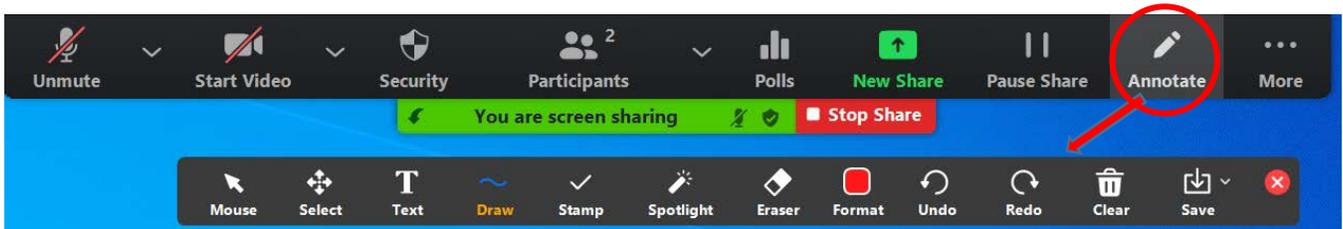
  - o Can use annotation and remote control simultaneously
    - ▪ Activate "Remote Control" for examinee, then "Annotate" to allow child to control screen and select items
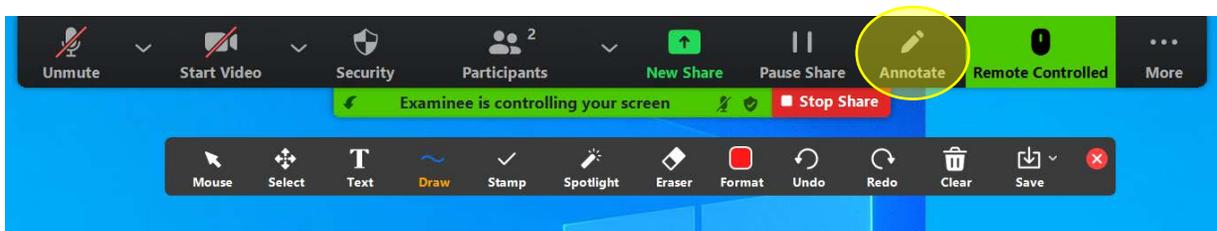
Note: <u>Annotations are applied to the screen</u>, not the document being shared. Therefore, if you scroll through a document or flip the page, the annotations will not stay on the page, so <u>examiners will have to save a screenshot of the examinee's annotation each time</u>, and then erase the marks prior to going to the next item. Annotations will also disappear once you end screen sharing.

Chat

The Chat feature allows an examiner and examinee to communicate via text. This is helpful to improve accessibility and when experiencing audio or connectivity issues.
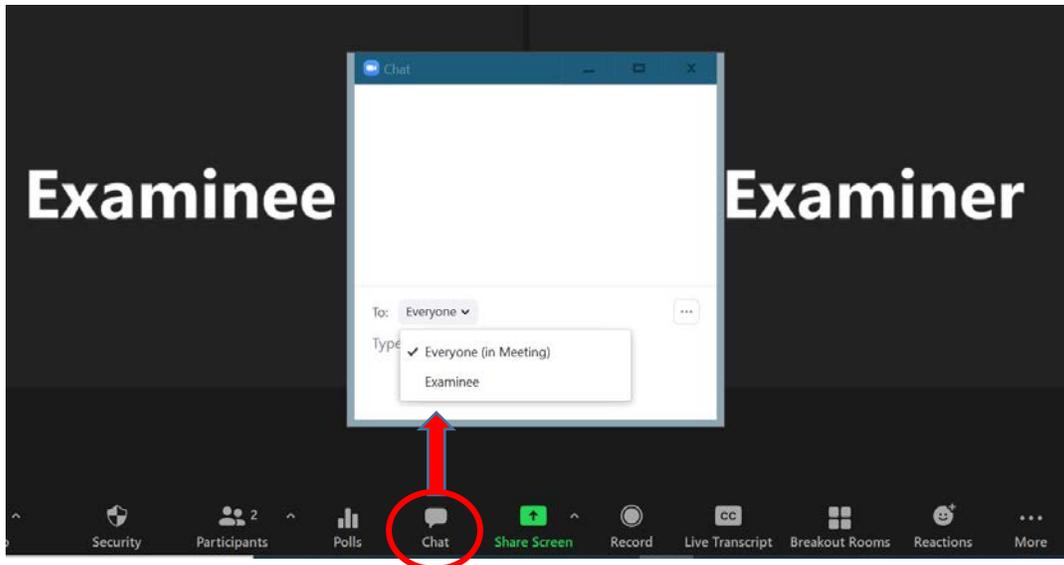
Note: it is important to turn off the examinee's ability to save the chat in the settings before scheduling the meeting.

Closed Captions

This feature also improves accessibility and can be used when evaluating a student who is deaf or hard of hearing. The feature must be enabled in the advanced settings when scheduling the meeting. This will enable a live transcript of the meeting.
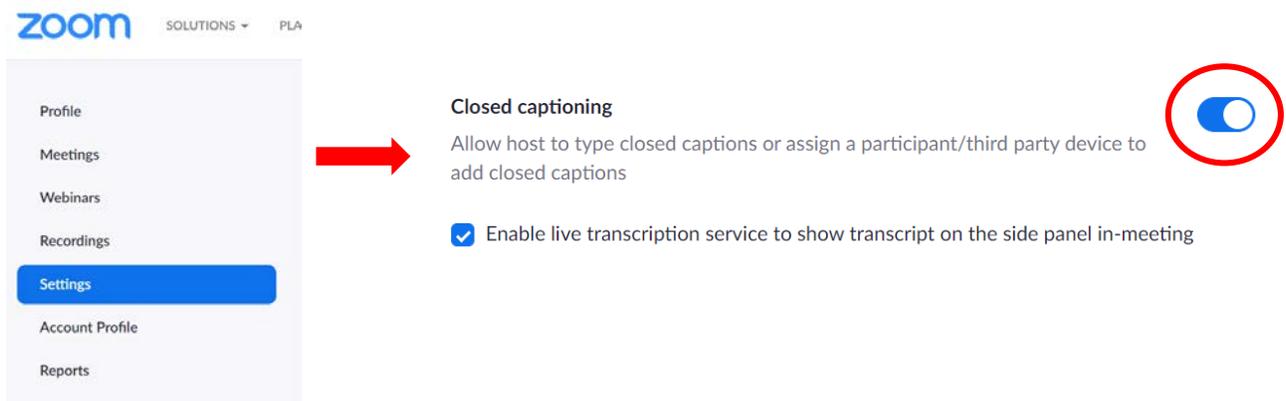
Note: consider the implications of using the Closed Captions feature when administering specific assessments, such as those that do not allow repetition of instructions or memory and attention measures.

Audio/Video

The audio and video settings can be tailored in several useful ways such as to:

- Mute participants upon joining the meeting
- Mute a participant during a live zoom session
- Select video filters or virtual backgrounds

Mute all participants when they join a meeting

Automatically mute all participants when they join the meeting. The host controls whether participants can unmute themselves. ⅴ.
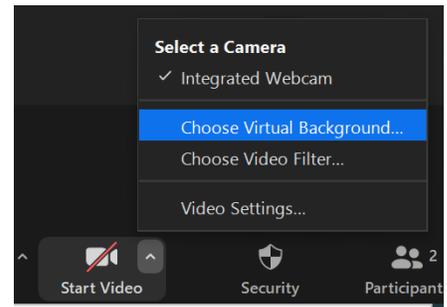
Microsoft Teams

Microsoft Teams is another remote evaluation platform that has capabilities similar to Zoom. It is secure and HIPAA/FERPA compliant under the school district's license. Notably, it uses two-factor authentication and encryption of data (in transit and at rest). As with Zoom, the examiner can share a meeting link directly to the examinee via email.

This platform is unique in that it allows examiners to create "teams" of people and content, which can be set to private and used to meet, chat, call, and collaborate.

Microsoft Teams features

Screen sharing

Comparable to Zoom, Microsoft Teams has a screen share feature, which allows the examiner to share testing stimuli on the computer screen. The examiner can share the entire screen (choose an option in Desktop View), a portion of the Screen (choose an option in Window view and adjust the red box), or a PowerPoint presentation.
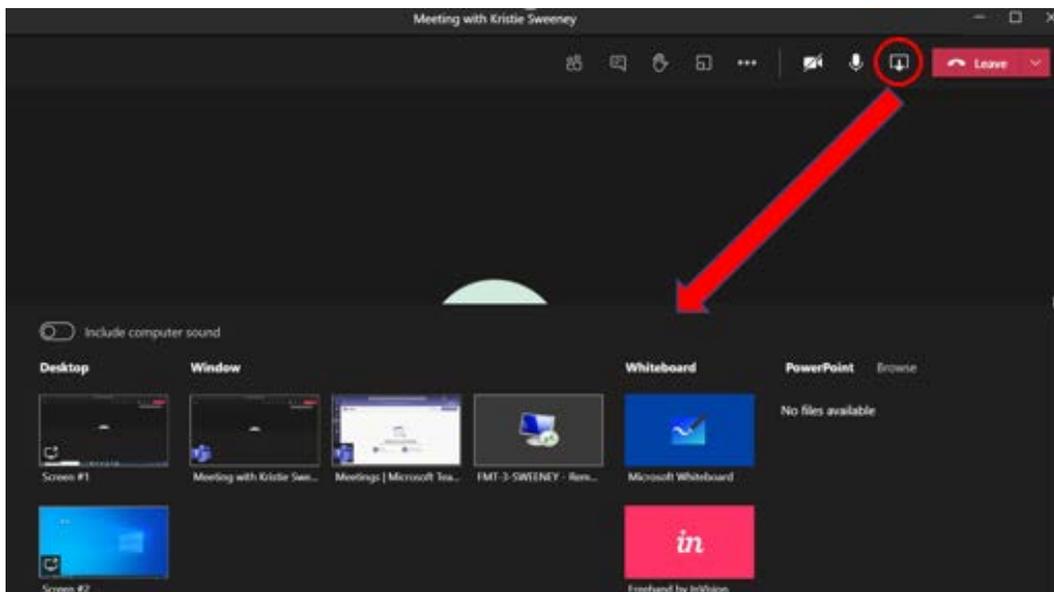
Computer Audio can be enabled with either of these options. The examiner can select "Include computer sound" when choosing which screen to share, or "include system audio" once the screen is already shared.
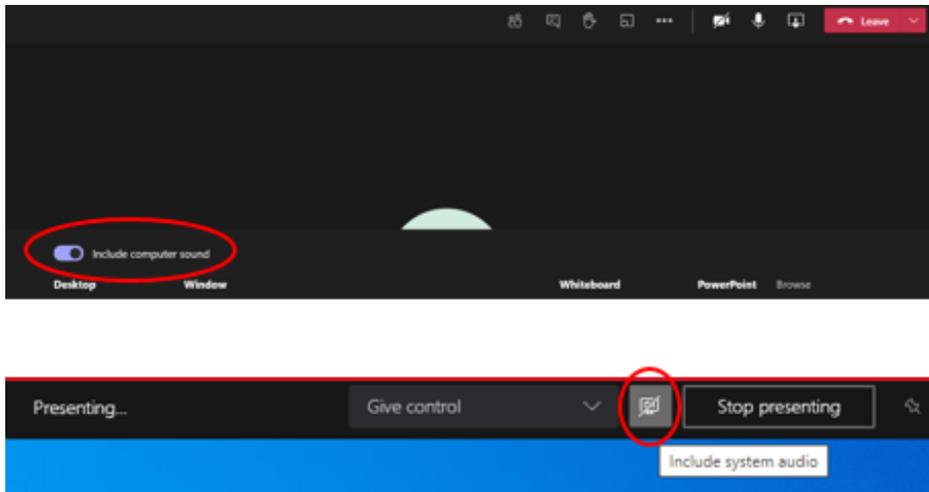
Breakout room

During an evaluation using Microsoft Teams, an examiner can send a meeting participant to another room through the "Breakout Room" feature. In the right side bar, a user should click the three dot icon in order to access the Breakout Room options. As show below, a user can create multiple rooms and assign participants accordingly.
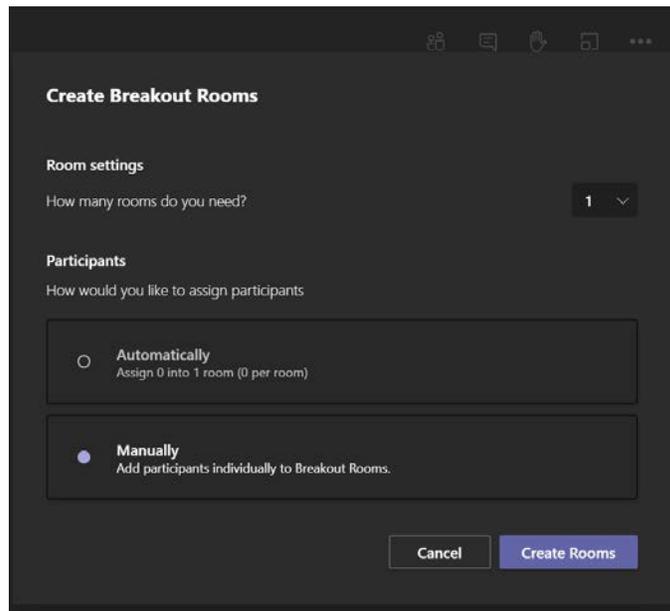
Remote control

As with Zoom, the "Remote Control" feature can provide the examinee with access to the examiner's screen. This allows the examinee to point to stimuli in digital stimulus books or to complete a questionnaire.
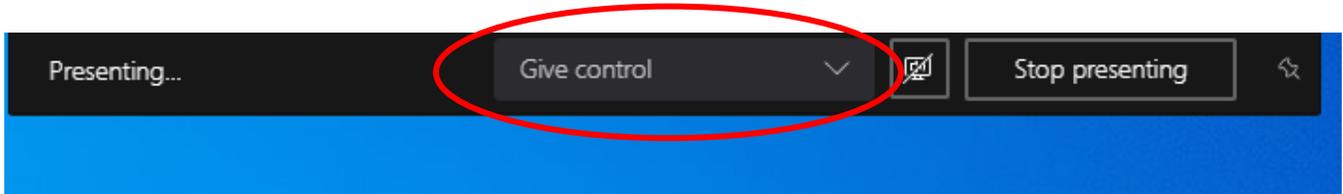
Chat

The Chat feature allows an examiner and examinee to communicate via text. This is helpful to improve accessibility and when experiencing audio or connectivity issues.
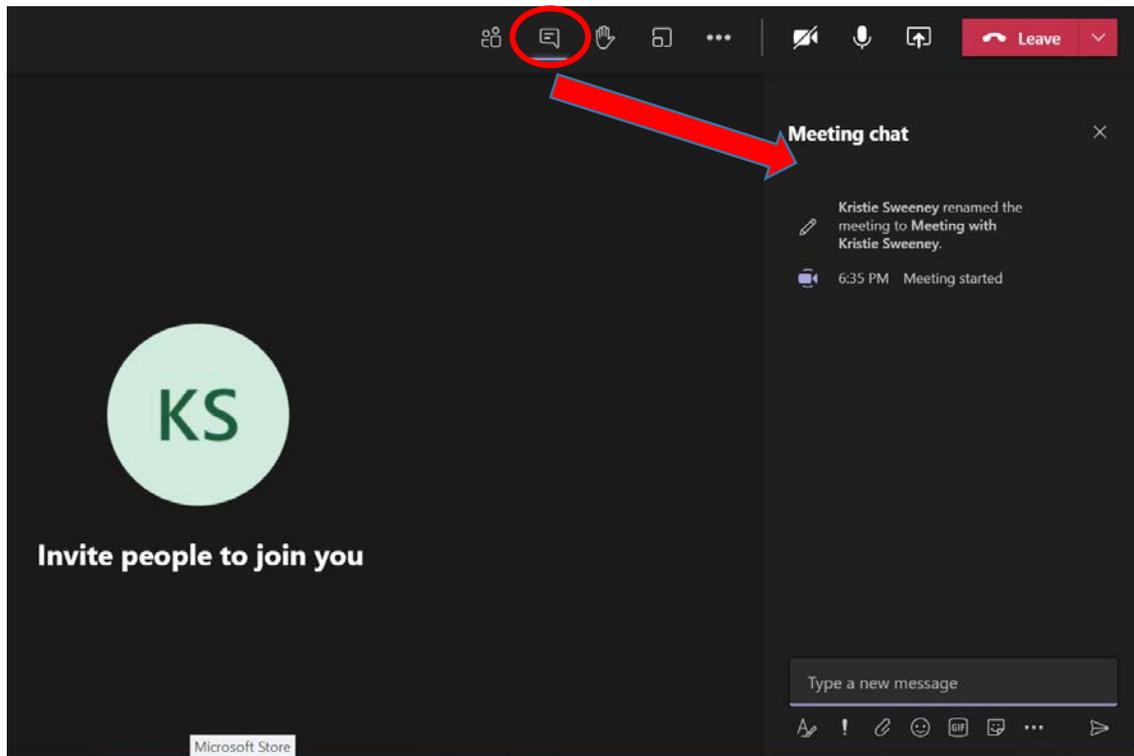
Closed captions

Closed captions is available to use when evaluating a student who is deaf or hard of hearing. This feature can be enabled during a live Microsoft Teams meeting. To access this feature the examiner should click on the three dot icon circled in the screenshot, and then select "Turn on Live Captions".
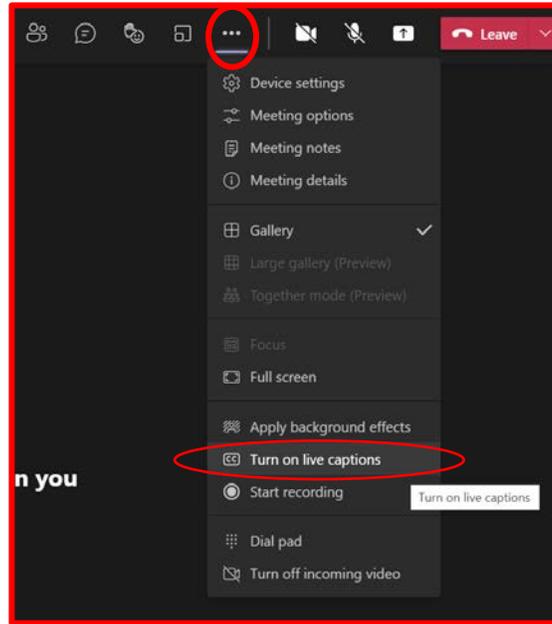
Audio/Video

Examiners can mute themselves as well as other participants during a Microsoft Teams meeting. Additionally, a user can select video effects and virtual backgrounds to use during an evaluation.
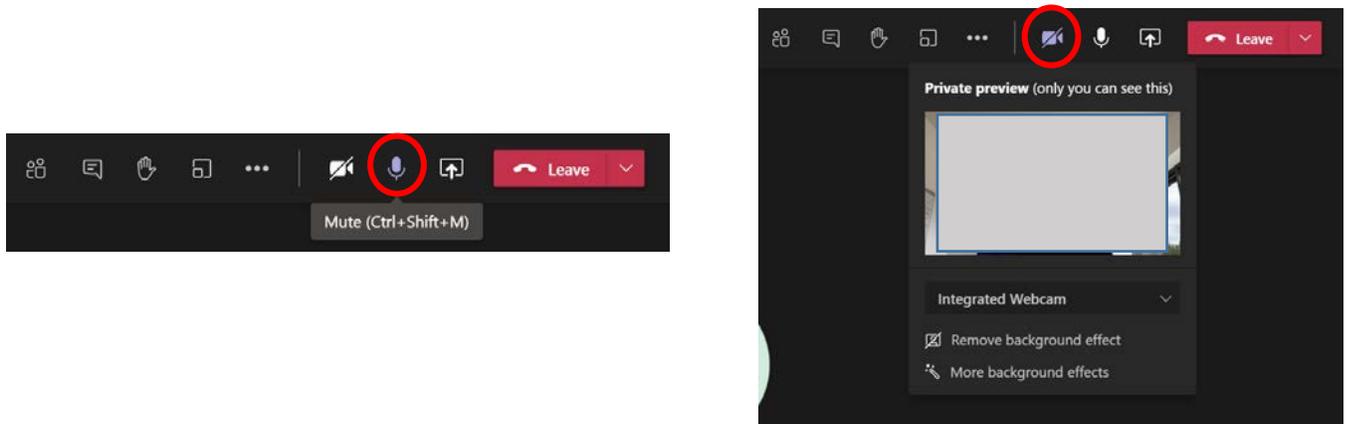
Google Meet

The third and final remote evaluation platform discussed in this guide is Google Meet. Similar to Zoom and Microsoft Teams, Google Meet can also be HIPAA and FERPA compliant, depending on the licensing agreement with your school district. A meeting link can be shared directly to an examinee via email, and unlike the previously discussed platforms, no one can join a meeting unless invited or admitted by the host.

Unlike Zoom and Microsoft Teams, Google Meet does not have the Remote Control and Annotation features.

Google Meet features

Screen sharing

As with the previously discussed platforms, Google Meet has a screen share feature, which allows the examiner to share testing stimuli on the computer screen.

The examiner can share an entire screen, a specific window, a specific tab or computer audio, which is important for audio tasks. In order to share audio, a user must select the audio player as the specific window to share.
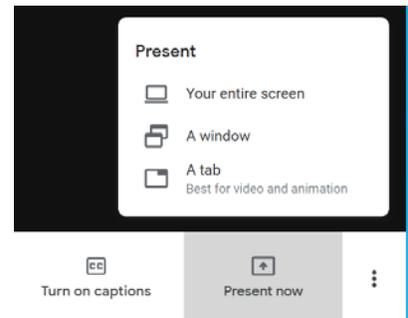
Breakout room

During an evaluation using Google Meet, an examiner can send a participant to another room through the Breakout Room feature. By clicking the icon in the toolbar with a triangle, square, and circle, circled in the image shown below, an examiner can access the Breakout Room options.
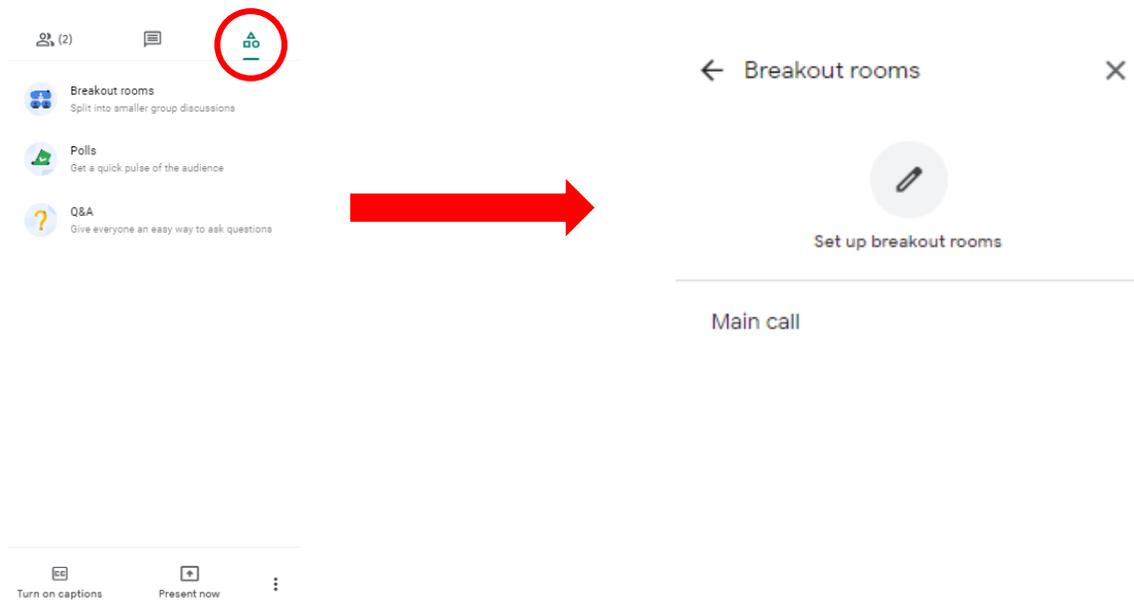
Chat

As with Zoom and Microsoft Teams, the Google Meet's Chat feature allows an examiner and examinee to communicate via text. This is helpful to improve accessibility and when experiencing audio or connectivity issues. The chat icon is circled in the image below.
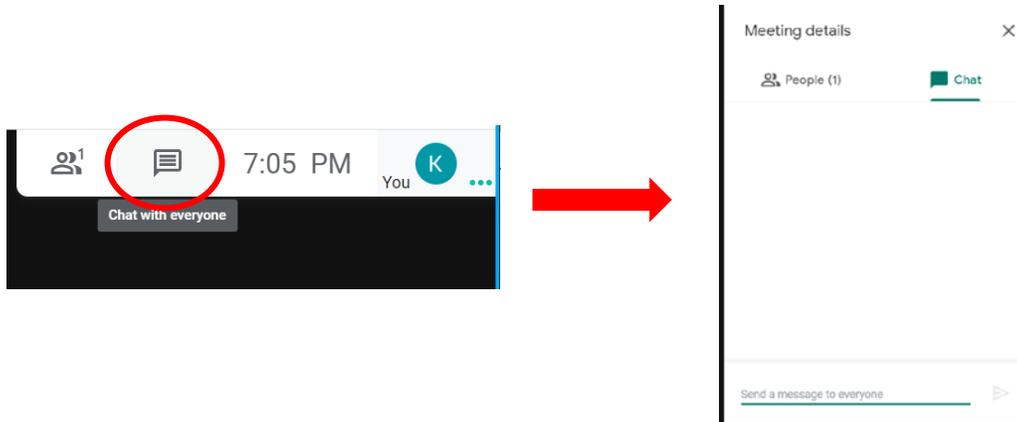

Closed captions

An examiner can access this feature by clicking on the vertical three dot icon (circled in the image below) and selecting "Turn on Captions". This feature can be enabled during a live Google Meet session. There is also a "Turn on Captions" button in the toolbar on the bottom of the screen.
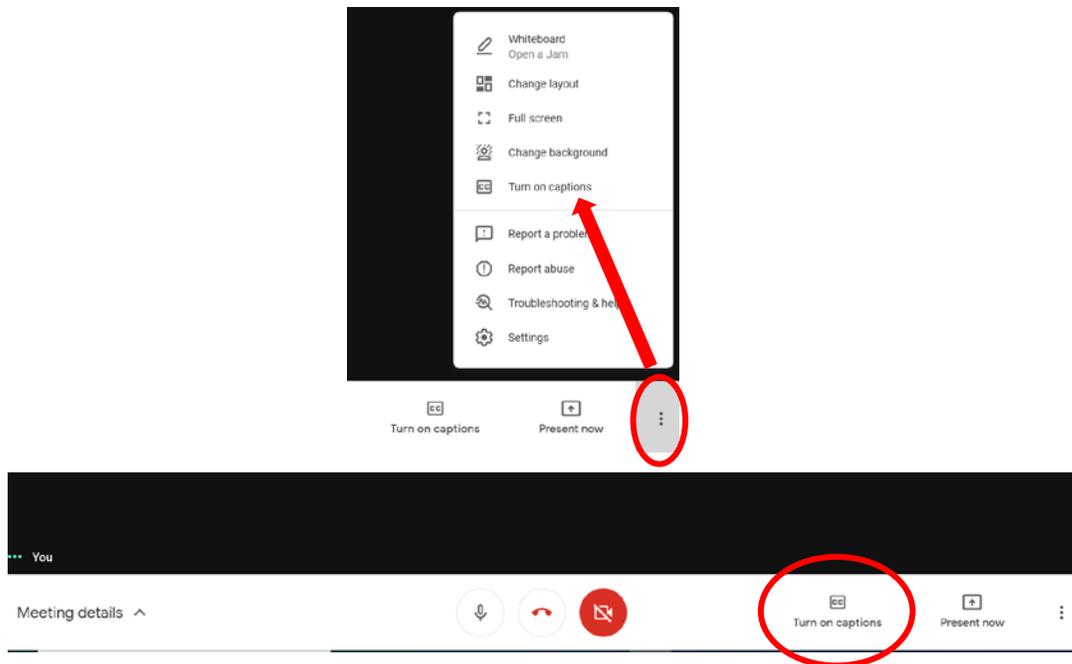
Audio and video settings can be set through the Toolbar or in the Google Meet Settings, as seen in the images below.
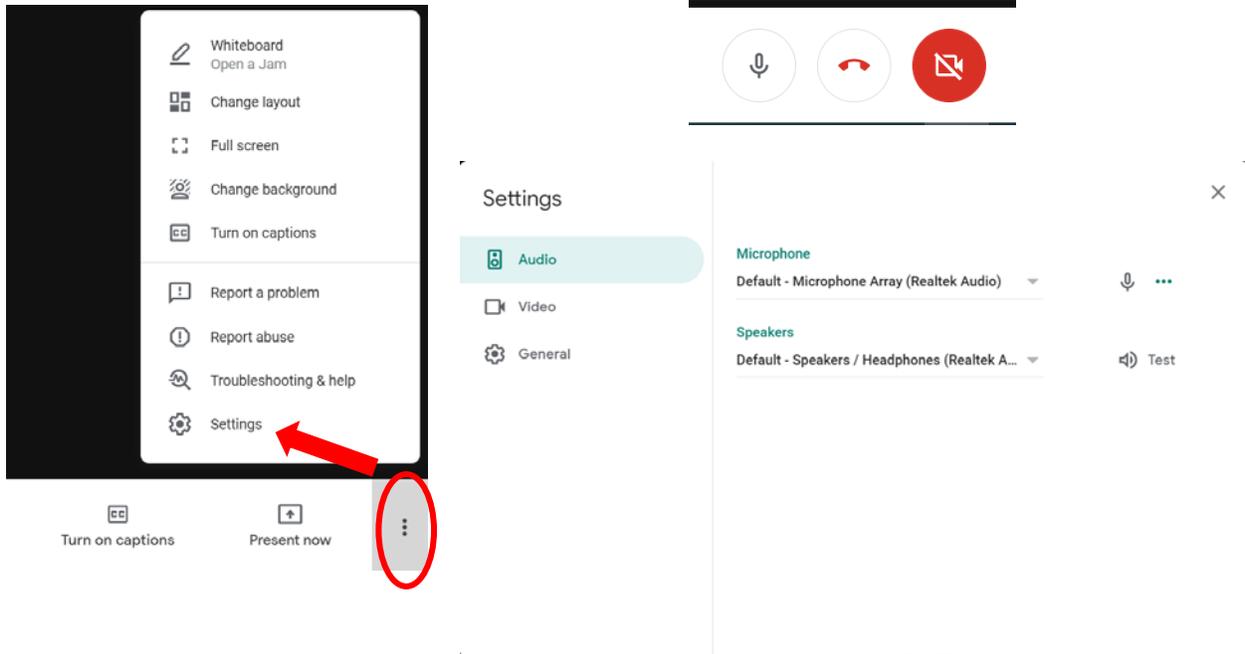
3. Digital Assessment Materials

Pearson's Q-Global

Pearson's digital platform, Q global, has an abundance of digital resources that examiners can purchase and store in their Q Global account resource library. Pearson has a variety of rating scales and questionnaires that users can administer digitally. Notably, the purchase of a digital administration includes scoring and report generation.

Additionally, examiners can purchase stimulus books, supplemental materials, administration manuals, audio files, and Normative and Technical guides for many of the mostly commonly used assessments. Examiners can opt to purchase individual uses of some record and response booklets or can continue to purchase and use paper record forms and response booklets to record responses.

Digital Resource Library

Examiners can purchase the assessments of their choice and store in their Q global digital resource library. Listed below are a portion of the assessments available in digital versions, including language and academic measures as well as cognitive assessments, like the WISC V and WISC V Integrated.

- Assessment stimulus books digitally available:
    - CELF 5
    - EVT 3
    - KTEA 3 Form A and B
    - PPVT 5
    - WAIS IV
    - WIAT III and WIAT 4
    - WISC V
    - WISC V Integrated
    - WMS IV
    - WRAT 5 (limited materials)

Navigating Digital Stimulus Books

To display the digital stimulus books appropriately, the examiner and examinee need to view the materials on a device with a screen size of 9.7 inches or more. Additionally, the stimulus books are purchased individually and must be allocated to a specific user within the Q Global account. Therefore, only one person can access the digital materials at one time. Examiner and examinee facing stimulus books are available for assessments that include examiner instructions on the back of the stimuli booklet, normally available to the examinee during in person administration. Show below as an example are the stimulus books for the KTEA-3.

Resource Library
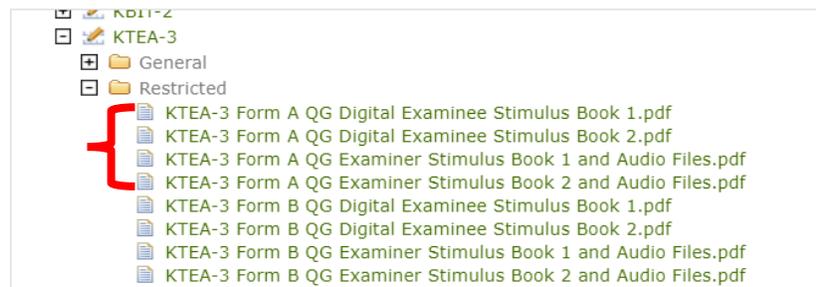
NCS Pearson Inc. (2021). *Q-global.* Retrieved from https://qglobal.pearsonclinical.com

Examiners have the option of maximizing the size of the stimulus book on their screen and can zoom in if needed. Pearson also allows some assets to be downloaded and saved to the examiner's computer, which can be convenient during administration.

The Q Global Resource Library lists all potential digital assessment materials in the library and even offers some assets for free with a Q Global account, such as sample score reports. However, materials that must be purchased, such as stimulus books and administration manuals, will only appear under the restricted tab for that particular assessment once they have been purchased for the account. Materials can be viewed by clicking the plus sign next to the assessment's name or tab name, as shown in the image below.

Resource Library
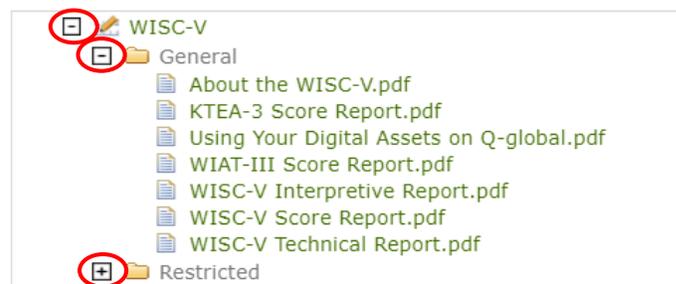
NCS Pearson Inc. (2021). *Q-global.* Retrieved from
https://qglobal.pearsonclinical.com

Pearson's Q-Global Account

Q global's rating scales and questionnaires available in a digital format include parent, teacher, and self-report forms. Links for remote administration of a form can be sent to a student, parent, or teacher via email, directly from the Q global account. Examiners can also display the questionnaire or rating scale using the screen share feature, and have the examinee complete the form using remote control and/or annotation features, when available. Examples of available rating scales and questionnaires are BASC , Vineland 3, and more.

Note: while the Pearson website states that Q global is compatible with both windows and mac operating systems, there is a disclaimer regarding the use of a smart phone to access Q Global assets (materials may not display properly on smaller screens).

Obtaining a Full Scale IQ Remotely

One big question we have been asked is how to do a full scale IQ battery remotely. Kennedy Krieger Institute was actually able to obtain information directly from Pearson to help answer this question.

To support an *immediate WISC–V "social distancing" administration option* in March 2020, authors Darren Lalonde and John Wiley & Sons granted permission to make available portions of the *Essentials of WISC–V Integrated Assessment* (2017), at no cost to Pearson or consumers.

Therefore, these portions are available within the Q-global Resource Library and located in the WISC V Integrated Restricted section, free to all Q Global users. *Essentials of WISC–V Integrated Assessment* (2017) outlines four Nonmotor Composites that can be calculated using subtests from the WISC V and WISC V Integrated, all of which can be administered remotely. Listed below are the 4 Essentials Nonmotor Composites:

1. Nonmotor Full Scale Score (NMFSS)
2. Nonmotor Visual Spatial Index (NMVSI)
3. Nonmotor Nonverbal Index (NMNVI)
4. Nonmotor General Ability Index (NMGAI)

Nonmotor Full Scale Score (NMFSS)

The Nonmotor Full Scale Score, or NMFSS, uses five of the seven WISC V subtests that make up the traditional WISC V Full Scale IQ.

The five subtests that can be administered via tele-assessment are:

1. Similarities
2. Vocabulary
3. Matrix Reasoning
4. Figure Weights
5. Digit Span

Because the traditional WISC V Block Design cannot be administered remotely, examiners can administer the WISC V Integrated Block Design Multiple Choice as a substitution. To obtain a measure of processing speed, examiners should administer the Naming Speed Quantity from WISC V rather than the Coding subtest.

Therefore, the Nonmotor Full Scale Score is comprised of seven subtests, six from the WISC V and one from the WISC V Integrated. In order to administer all of the subtests needed to calculate the NMFSS,

users will need to purchase the WISC V administration & scoring manual and stimulus books 1-3, in addition to the WISC V Integrated administration & scoring manual and stimulus book 2.

Essentials Composite Score	Acronym	Contributing Subtests
Nonmotor Full Scale Score	NMFSS	• Similarities* • Vocabulary* • Block Design Multiple Choice • Matrix Reasoning* • Figure Weights* • Digit Span* • Naming Speed Quantity* (converted from standard score to scaled score)

*= WISC-V subtest

Raiford, S.E. (2017). *Essentials for WISC V Integrated Assessment.* John Wiley and Sons, Inc.

Other Nonmotor Composites

The other nonmotor composites include the nonmotor visual spatial index, the nonmotor nonverbal index, and the nonmotor general ability index.

Shown below are the subtests that contribute to each of those composite scores. As with the Nonmotor Full Scale Score, the composites are a combination of WISC V and WISC V Integrated subtests which can all be done via tele-assessment.

Essentials Composite Score	Acronym	Contributing Subtests
Nonmotor Visual Spatial Index	NMVSI	• Visual Puzzles* • Block Design Multiple Choice
Nonmotor Nonverbal Index	NMNVI	• Block Design Multiple Choice • Visual Puzzles* • Matrix Reasoning* • Figure Weights* • Picture Span*
Nonmotor General Ability Index	NMGAI	• Similarities* • Vocabulary* • Block Design Multiple Choice • Matrix Reasoning* • Figure Weights*

Raiford, S.E. (2017). *Essentials for WISC V Integrated Assessment.* John Wiley and Sons, Inc.

PAR: PARiConnect

PARs digital platform, PARiConnect, has many rating scales and questionnaires available in a digital format for both administration and scoring. Like Q Global, links for remote administration of a form can be sent directly from the PARiConnect account to the examinee's email. Examiners can also display and complete a questionnaire or rating scale during a remote evaluation. Notably, PAR requires that users purchase digital administration usages and digital score reports separately for each assessment.

PARiConnect is also compatible with windows and Mac operating systems. Although the company states that examiners and examinees can access rating scales and questionnaires with a smartphone, this is not optimal as items and choices may not display properly and submission issues may arise.

The rating scales and questionnaires digitally available are referred as i-Admins. Also available for remote administration are the Reynolds Intellectual Assessment Scale, Second Edition (RIAS-2) and the Reynolds Intellectual Screening Test, Second Edition (RIST-2). These measures were created specifically for remote administration, so they are great options for remote evaluations. Listed below are some of the rating scale and questionnaires digitally available:

- o BRIEF
- o BRIEF 2 (including ADHD Form)
- o BRIEF Adult
- o BRIEF Preschool
- o PSI-4
- o PDDBI
- o RADS-2
- o RIAS-2 and RIST-2

WPS Online Evaluation System

Western Psychological Services' digital platform, WPS Online Evaluation System, has rating scales and questionnaires available in a digital format for both administration and scoring, including forms in Spanish. However, the assessments available digitally are limited at this time.

WPS is compatible with devices using both windows and mac operating systems, but displaying digital assessment materials on a smartphone can be difficult due to size. Like Pearson's Q Global system, if a user purchases the digital administration of a rating scale or questionnaire, scoring and report generation is included.

Listed below are some of the rating scales, questionnaires, and assessments available digitally through the WPS Online Evaluation System.

- Available rating scales include:
  - o ABAS 3
  - o DBC-2
  - o RCMAS 2
  - o SCQ
  - o SRS-2 (preschool, school, and adult)

- Assessments include:
  - Arizona-4
  - CASI-2
  - DP-3
  - OPUS
  - CAPs
  - SPM

MHS Assessment Center +

The final online assessment platform discussed in this guide is MHS Assessment Center +. MHS has also created an online assessment platform, compatible with windows and Mac operating systems. Similarly to the other platforms, smartphones are not recommended for display of rating sales and questionnaires, as the form may not display properly. Examinees may not be able to see the entire question or all response options when completing the form on a smartphone.

The administration and score report of a rating scale or questionnaire is all included in the purchase price.

Listed below are rating scales and questionnaires digitally available:

- Conners 3
- CBRS
- Conners Early Childhood
- CDI-2
- MASC 2
- And More!

4. General Assessment Administration Tips and Tricks

General Assessment Administration Tips

Lastly, this section will briefly examine the fourth and final objective, which is discussing a few administration tips and tricks we have learned over the last year at Kennedy Krieger Institute while administering assessments remotely.

Multiple choice response options

Many of the digital assessment materials with multiple choice response options conveniently have numbers or letters identifying the responses, allowing examinees to provide a response verbally. The image shown below is from one of the WISC V digital stimulus books. For other assessment materials that do not include a number or letter to identify the response, examiners can utilize the remote control feature to have the examinee point to their response. Using a proctor to help identify the examinee's choice can be a helpful option as well.
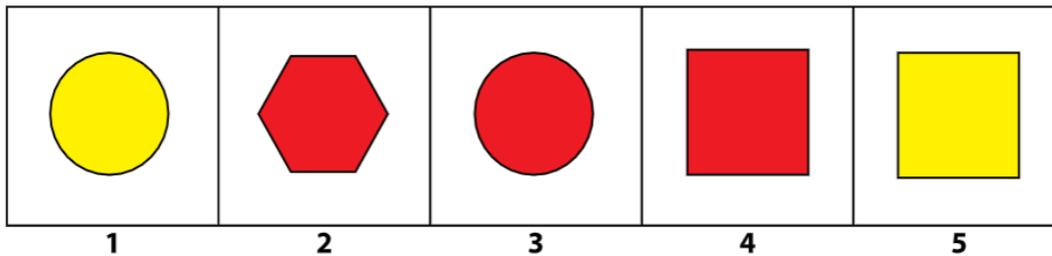
NCS Pearson Inc. (2021). *Wechsler Intelligence Scale for Children, Fifth Edition (WISC-V).* Retrieved from https://qglobal.pearsonclinical.com/

Aid in testing

Additionally, some academic measures assessing mathematics, writing, or spelling require examinees to write down their responses. Furthermore, students may attempt to use a calculator or other forms or technology to aid in testing. Thus, examiners should have the examinee hold their work up to the camera to be reviewed. Parents may be able to email a copy of the examinee's work as well.

Transposition errors

Transposition errors can be more common during remote as opposed to in-person administration. When in person, the patient would normally work directly on the response booklet. However, examiners may choose to purchase the digital response booklet to display during the remote evaluation. In that case, the student will be copying the problem to their own paper in order to determine an answer, which can increase the chance of a copying error. Having the student show their work will allow the examiner to view their answer, but also verify that the problem was copied correctly.

Mailing response booklets

One option for completing assessments that require a response booklet would be to mail the student the response booklets in a sealed envelope prior to the evaluation. Have the student open the envelope during the evaluation and provide a post marked return envelope. However, this procedure needs to be

approved by the publisher of the assessment in order to protect test security, so please check in advance prior to sending forms to a student.

Lastly, it is always important to note any changes or modifications to standardization.

Online Questionnaire Administration and Scoring

When setting up an examinee account within any of the online assessment platforms, it is important to minimize identifying patient information. Thus, we recommend using an ID# rather than first and last names. At Kennedy Krieger Institute, we back up the data from the online accounts to our Institute's shared drive and remove the information from the online platform.

As previously discussed, rating scales and questionnaires can either be completed remotely by the examinee or examiners can send the link through an encrypted email from the publisher to the student, parent, or teacher. It is important to prepare the examinee that this email will be sent so they can be on the lookout. Examiners can determine how long the link is active and have the choice to administer the rating scale or questionnaire on screen during a remote evaluation.

Acknowledgements

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