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# Stepping into a New Era – Fundamentals and Efficacy of Telehealth in Occupational Therapy

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TelehealthShare, CEO & Director of Professional Development



# Disclosures

Jana Cason, DHSc, OTR/L, FAOTA

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## Financial

- Full Professor, Auerbach School of Occupational Therapy at Spalding University in Louisville, KY
- CEO & Director of Professional Development of TelehealthShare LLC ([www.telehealthshare.com](http://www.telehealthshare.com))

## Non-financial

- Member of the American Occupational Therapy Association and the Kentucky Occupational Therapy Association



# Learning Objectives

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Define key telehealth terms (telemedicine, telehealth, synchronous, asynchronous, hybrid, originating site, and distant site).

Identify 3 telehealth practice guidelines, official documents, and resources to guide ethical use of telehealth in occupational therapy.

Describe 3 evidence-based clinical applications of telehealth in occupational therapy.

# How my telehealth journey began...

- Personal experiences as a pediatric OT
- Grant funding/early research (published in 2009)
- Practice via telehealth
  - Early intervention & school-age populations



INTERNATIONAL JOURNAL OF TELEREHABILITATION • TELEREHAB.PITT.EDU



## A PILOT TELEREHABILITATION PROGRAM: DELIVERING EARLY INTERVENTION SERVICES TO RURAL FAMILIES

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Article available at: <http://telerehab.pitt.edu/ojs/index.php/Telerehab/article/view/6007/6178>

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# Telehealth Key Terms & Definitions

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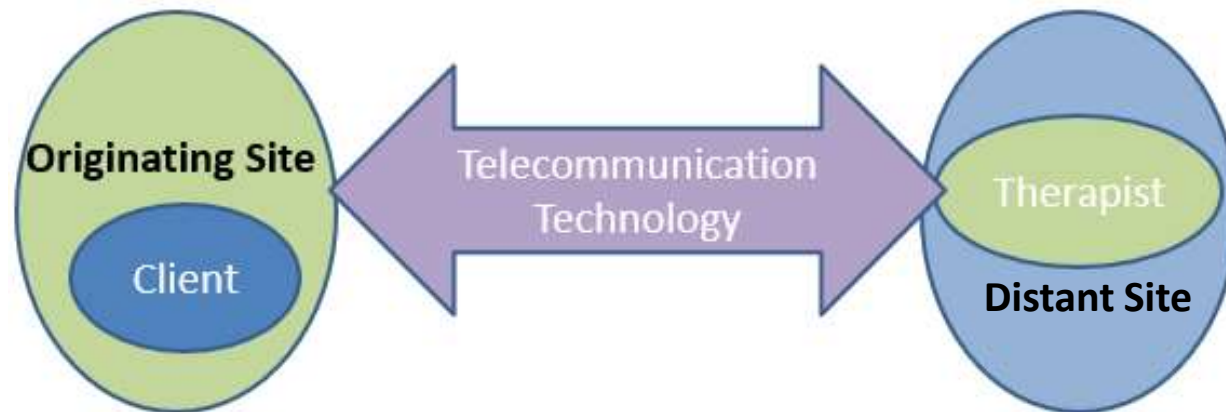


# WFOT Telehealth Definition

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“**Telehealth** is the use of information and communication technologies (ICT) to deliver health-related services when the provider and client are in different physical locations.”

(WFOT, 2014, p. 1)



[Link to WFOT Telehealth Position Statement \(2014\)](#)

# AOTA'S Telehealth Position Paper

## Definition of telehealth

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“...the application of evaluative, consultative, preventative, and therapeutic services delivered through information and communication technology” (AOTA, 2018)

### Areas addressed in AOTA Telehealth Position Paper

Telehealth Models  
of Care and  
Applications

Technology

Practitioner  
Qualifications and  
Ethical  
Considerations

Funding and  
Reimbursement

[Link to AOTA Telehealth Position Paper \(2018\)](#)

# Key Terms

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**Telemedicine = telehealth** (the terms are often used interchangeably)

**Telehealth** includes clinical services, health information, and education delivered through information and communication technologies (ICT).

**Originating site** - where the patient is located

**Distant site** - where the provider is located

**Synchronous** - live, interactive communication

**Asynchronous** –store and forward communication

**Hybrid** – most often used to describe a combination of in-person and telehealth services



# Telehealth Service Delivery Models: Synchronous vs. Asynchronous

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## **Synchronous Telehealth** - “Live/Real-time interactions”

Phone

Videoconferencing

Real-time monitoring devices

## **Asynchronous Telehealth** - “Store-and-Forward”

Recorded video/Digital photographs

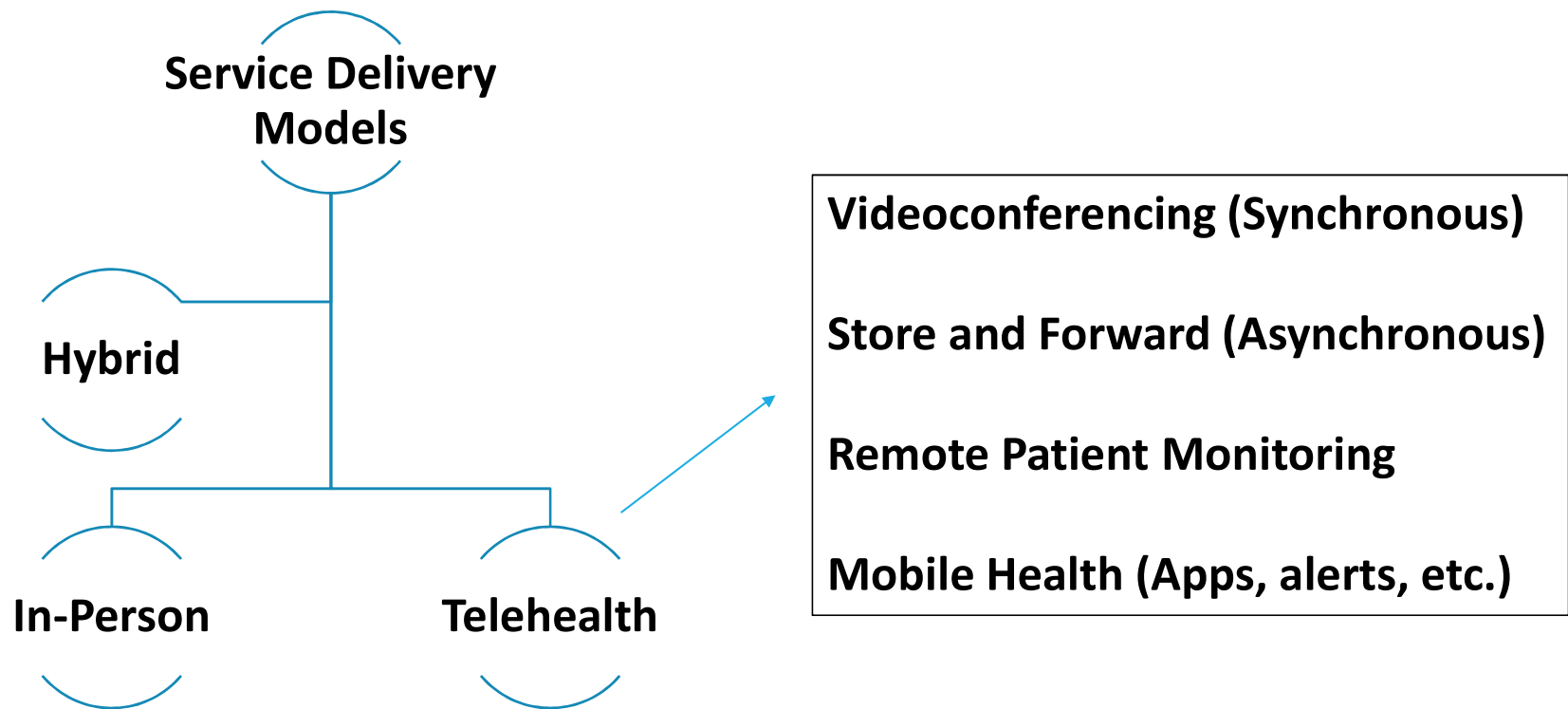
Questionnaire-based assessment in an online portal

Recorded data from apps (e.g., pedometer/steps, sleep, mood)

Electronic communication (email, messaging, etc.)

# Telehealth Service Delivery Models

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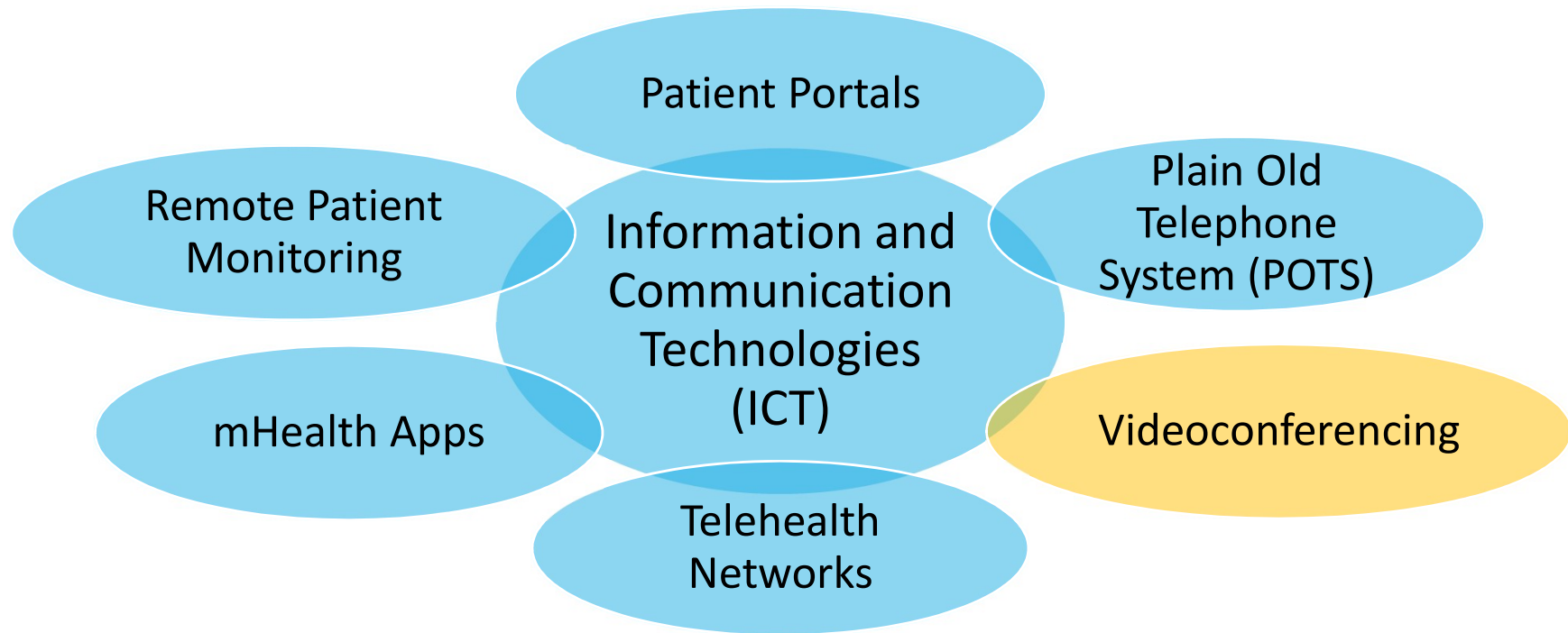
# Telehealth Technologies

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# Telehealth Technologies

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# Technology Access for Home-based Services

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Use existing technology in the home environment

Loan equipment to the clients/caregiver(s)

A provider supplies technology to support consultation/collaboration with a remote provider

Leverage existing technology infrastructure within the community

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# Telehealth Guidelines and Resources

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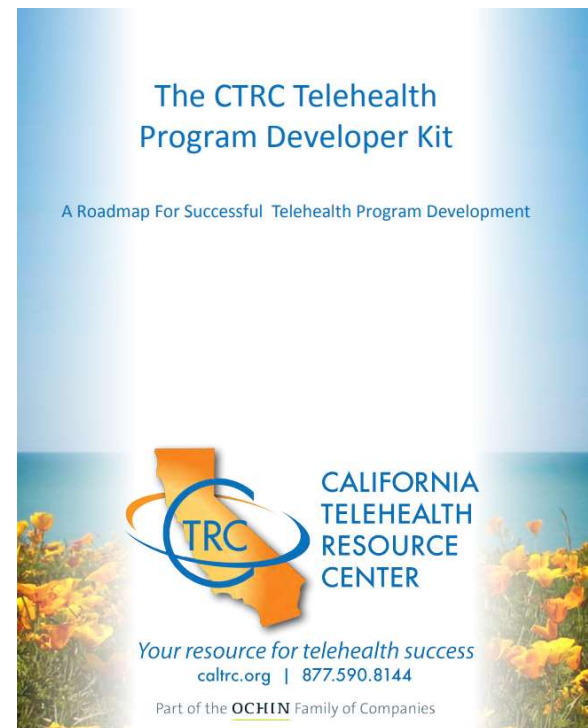


# Telehealth Program Development Resource

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***Telehealth Program Developer Kit***, California  
Telehealth Resource Center (FREE)

<https://www.caltrc.org/wp-content/uploads/2019/05/Complete-Program-Developer-Kit.pdf>



# Interdisciplinary Resource

***Principles for Delivering Telerehabilitation Services***, American Telemedicine Association  
<https://telerehab.pitt.edu/ojs/index.php/Telerehab/article/view/6232>

International Journal of Telerehabilitation • [telerehab.pitt.edu](http://telerehab.pitt.edu) 

## AMERICAN TELEMEDICINE ASSOCIATION'S PRINCIPLES FOR DELIVERING TELEREHABILITATION SERVICES

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### ABSTRACT

Telehealth is a broad term used to describe the use of electronic or digital information and communications technologies to support clinical healthcare, patient and professional health related education, and public health and health administration. Telerehabilitation refers to the delivery of rehabilitation and habilitation services via information and communication technologies (ICT), also commonly referred to as "telehealth" technologies. Telerehabilitation services can include evaluation, assessment, monitoring, prevention, intervention, supervision, education, consultation, and coaching. Telerehabilitation services can be deployed across all patient populations and multiple healthcare settings including clinics, homes, schools, or community-based workplaces. This document was adapted from the American Telemedicine Association's (ATA) "A Blueprint for Telerehabilitation Guidelines" (2010) and reflects the current utilization of telerehabilitation services. It was developed collaboratively by members of the ATA Telerehabilitation Special Interest Group, with input and guidance from other practitioners in the field, strategic stakeholders, and ATA staff. Its purpose is to inform and assist practitioners in providing effective and secure services that are based on client needs, current empirical evidence, and available technologies. Rehabilitation professionals, in conjunction with professional associations and other organizations are encouraged to use this document as a resource for developing discipline-specific standards, guidelines, and practice requirements.

**Keywords:** American Telemedicine Association, Habitation, Rehabilitation, Telehealth, Telepractice

### INTRODUCTION

The ATA Telerehabilitation Special Interest Group (SIG) is comprised of healthcare practitioners and technology specialists who are engaged in applying information and communication technologies (ICT) in practice to improve access to rehabilitation and habilitation services. This document was developed collaboratively by members of the Telerehabilitation SIG, with input and guidance from other practitioners in the field, strategic stakeholders, and ATA staff. This document was adapted from the American Telemedicine Association's (ATA) "A Blueprint for Telerehabilitation Guidelines" (2010) and reflects the current utilization of telerehabilitation services. Key updates in this

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# AOTA Telehealth Resources

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[AOTA Telehealth Resource Webpage](#)

[State-by-State Chart of Telehealth Laws](#)

[COVID-19 State Updates: Summary of Telehealth, Insurance, and Licensure Developments and Comprehensive State-by-State Chart](#)

[Telehealth Position Paper \(2018\)](#)

[Telehealth Ethics Advisory \(2017\)](#)

[Occupational Therapy Code of Ethics \(2020\)](#)

[AOTA Occupational Therapy Telehealth Decision Guide](#)



# AOTA Telehealth Decision Guides for School-Based Practice

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Legal, Ethical,  
and Procedural  
Considerations

Embedding IEP  
Goals in Daily  
Routines

Virtual Group  
OT Services

Evaluation  
Considerations

School-based  
OT  
Interventions

Progress  
Monitoring and  
Documentation

OT Services for  
Young Children  
via Telehealth

Collaborating  
with School  
Team Members

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# Telehealth Ethical Considerations

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# HIPAA-Compliant Telehealth Platforms

## [Telehealth Videoconferencing Platforms Infographic](#)

Available **FREE** from TelehealthShare



# OT Evaluation via Telehealth



[OT Evaluation in Telehealth](#)  
on the [TelehealthShare YouTube Channel](#)



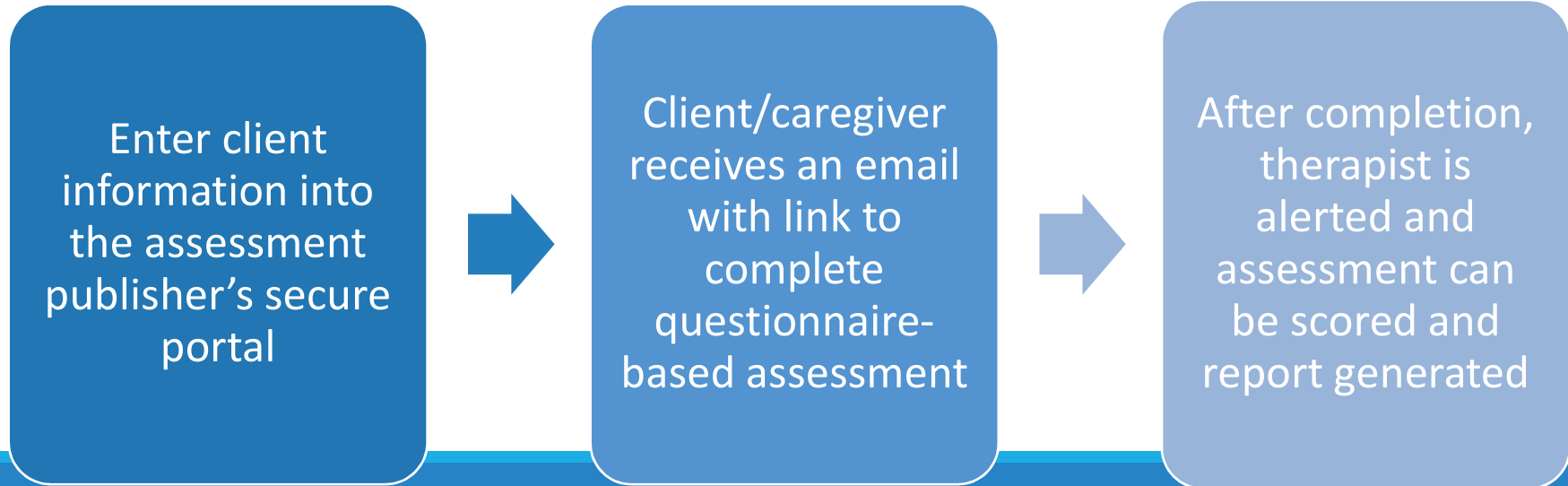
[OT Assessment via Telehealth](#)

# Online Assessment Options

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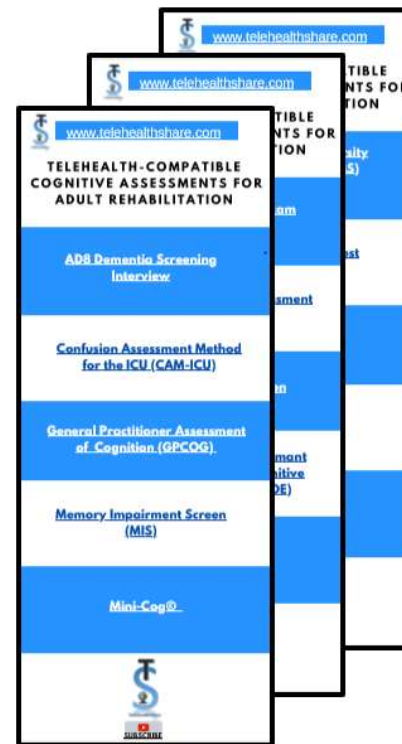
[Q-global](#) (Pearson's web-based system for test administration, scoring and reporting)

[WPS Online Evaluation System](#) (Western Psychological Services web-based system for test administration, scoring, and reporting)



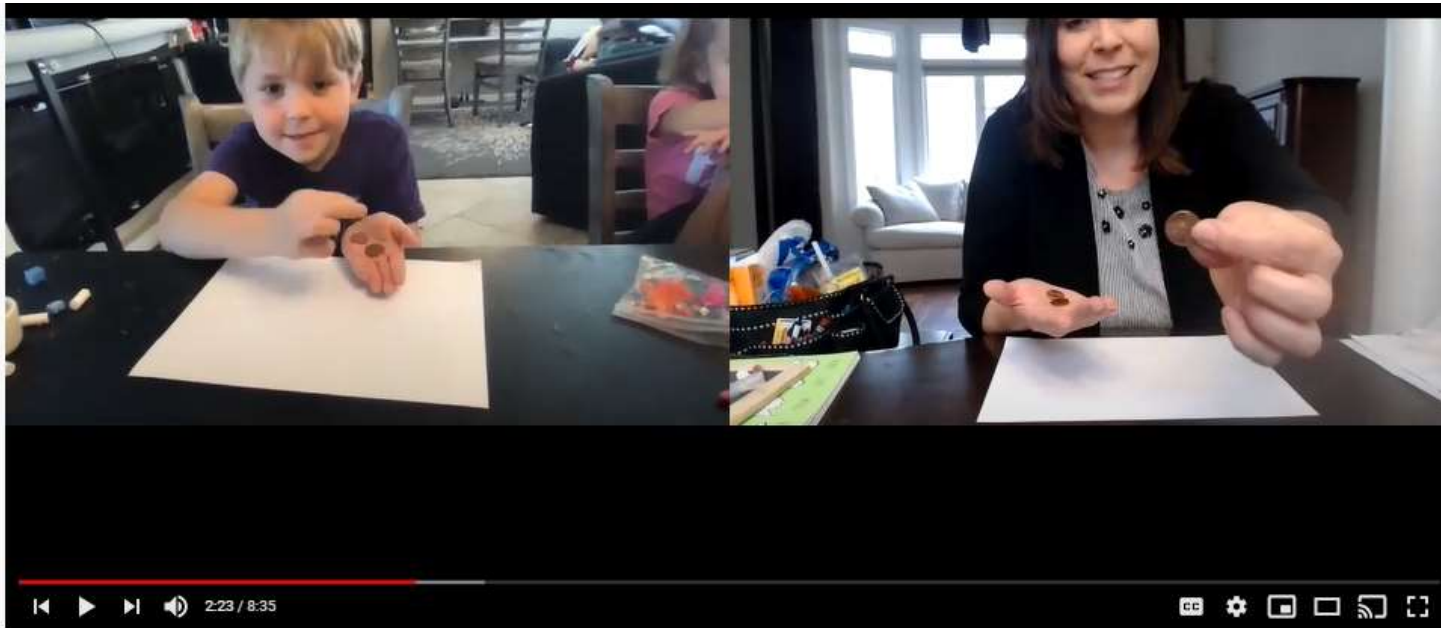
# Examples of Telehealth-Compatible Assessments – Free infographics

- Telehealth-compatible cognitive assessments for adult rehabilitation
- Telehealth-compatible life skills assessments
- Telehealth-compatible pediatric OT assessments for school-aged children
- Telehealth-compatible assessments in early intervention (IDEA Part C)



# OT Pediatric Evaluation Demonstration

[TelehealthShare YouTube Channel Assessment Playlist](#)



Functional Fine Motor Assessment (Preschool)



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# Telehealth Ethical Considerations

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INTERVENTION



# Informed Consent

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There are state-specific requirements related to informed consent, including content and documentation (i.e., written/verbal)

Informed consent often includes information about:

- Benefits and risks
- Organizational policies related to privacy and security efforts
- Financial responsibility
- Client rights and responsibilities

Adaptable **FREE** informed consent available at this [LINK](#).

# Important Telehealth-Specific Ethical Consideration

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From the AOTA Telehealth Position Paper (2018)

*“Due to the intimate nature of some occupational therapy services (e.g., interventions related to dressing, bathing, toileting), special consideration should be made to avoid exposure of the client on camera in an undressed or otherwise compromised state” (p. 5).*

# Client Safety

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- ✓ Alternate means to connect
- ✓ Verify physical address
- ✓ Consider the need for an e-helper, especially if there are client safety concerns (e.g., fall risk, etc.)
- ✓ Minimize fall risk associated with pets and other objects in the immediate environment if engaging client in physical activity.

# Billing and Documentation

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- Confirm reimbursement for services provided through telehealth with the insurer BEFORE initiating use of telehealth.
  - Insurers billing requirements may include: a modifier with regular CPT codes; change in place of service code
- Follow the documentation procedures of your organization.
  - The therapy note should document use of telehealth.
- The content of the note will be very similar to in-person session.

# Telehealth Ethical Considerations: Licensure

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The “**Location of Service**” is deemed where the client is located.

- This generally means that a therapist must be licensed in the state where the client lives/is located.
- AOTA/NBCOT are working on a professional license compact

**Bottom line:** Consult the state practice act, and if clarification is needed, contact the OT licensing board to assure compliance with all licensing requirements.

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# Telehealth Etiquette

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PREPARATION, VIDEO PRESENCE, AUDIO TIPS



# Technical Instruction for Clients/Caregivers

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**Record a video demonstration of basic troubleshooting or provide written instructions with images/screen shots**

- Access patient portal
- Enter videoconferencing session from invite/link
- Turn on camera
- Turn on microphone (or change audio used by computer)

**Send client a reminder for session preparation, including session date, time, and link as well as any materials needed for the session.**



# Telehealth Etiquette: Preparation

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- Practice with technology (hardware and software)
- Log in/turn on equipment prior to session start (to avoid unanticipated delays with system updates, etc.)
- Be prepared with materials gathered and ready to start session
- Clothing (professional, non-distracting, contrast with background)
- Assure space is quiet (close door, “do not disturb”, pets, competing environmental noises)
- Flow of session (beginning, middle, end/wrap up)
- Check camera placement, lighting, and background

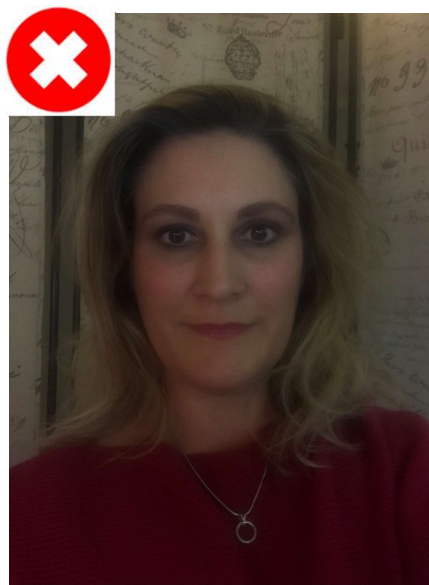
(Telehealth Resource Center, n.d.)

# Comparison of Lighting

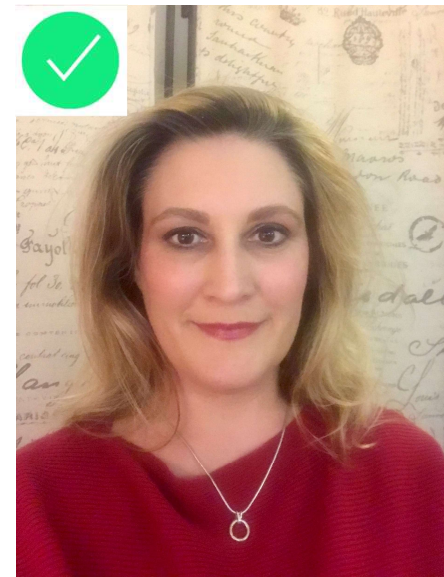
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Harsh directional lighting



Inadequate lighting



Diffused lighting is optimal

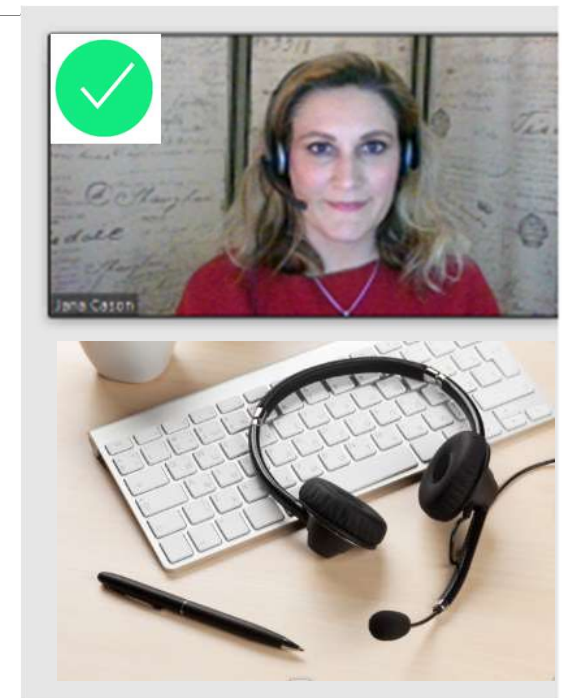
(CTRC, 2014)

# Background Visual Examples



# Telehealth Etiquette: Audio Tips

- Check microphone and speaker prior to starting session
- Eliminate competing environmental sounds (fan, air conditioning/heater, open window, silence mobile phone)
- Speak with normal voice
- Minimize competing sounds in the client's environment (e.g., request radio and t.v. be turned off)

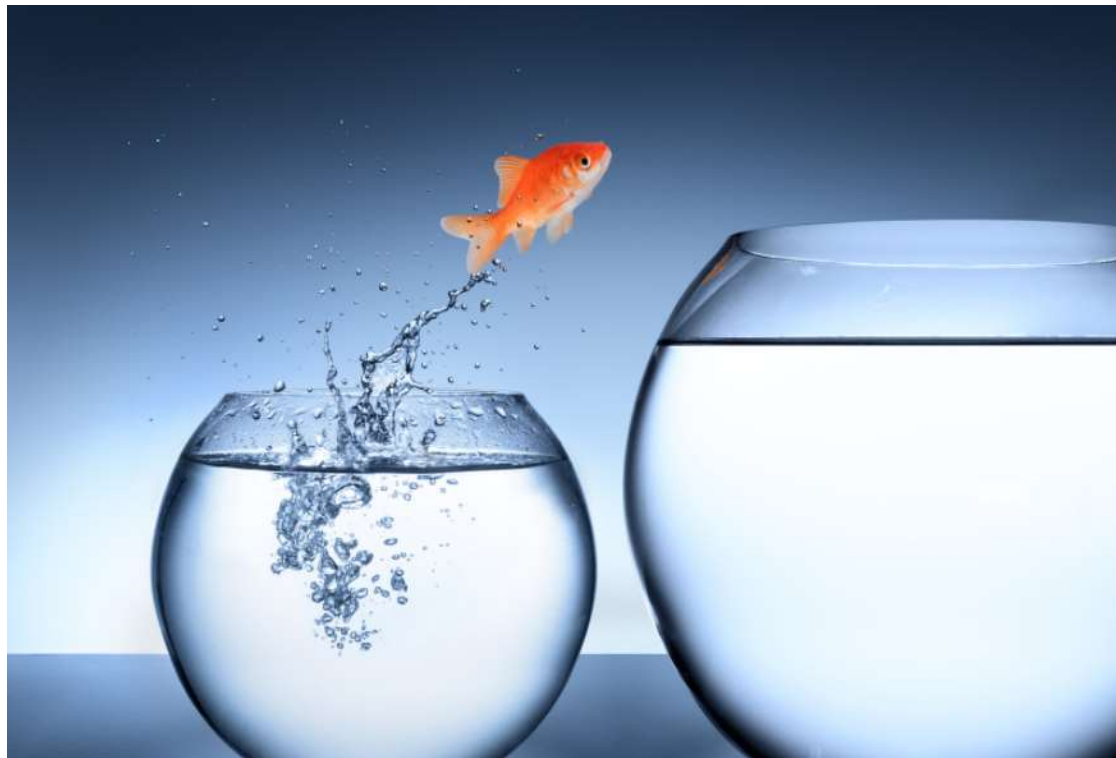


Headsets can improve sound and voice quality.

Telehealth Resource Center. (n.d.)

# Summary

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# References

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