SPEF-R examples for Telehealth Services

The examples and information included in this document have been developed in collaboration with professional practice educators across Australia as facilitated by ACU in April 2020. You are welcome to distribute and modify at your own discretion. We would respectfully request that you acknowledge the collective efforts from Occupational Therapists across Australia that contributed to the development of this document.

Please refer to the SPEF-R Practice Educator Guide for information on how to add and edit customised templates.

For further information on telehealth services, please refer to OT Australia resources and guidelines: https://www.otaus.com.au/member-resources/covid-19/telehealth

SPEF-R Item	Student Expectations / Examples relating to telehealth
Domain 1: Professional Behaviour	
1.1 Respects rights, values, beliefs and needs of service users and staff	Use of non-discriminatory and non-judgemental language when communicating during meetings / client appointments Respects rights of clients to decline telehealth services
1.2 Adheres to privacy and confidentiality requirements	Is aware of and abides by national privacy principles in relation to technology and telehealth services Uses approved telehealth mediums / programs Maintains a private and confidential telehealth service – eg. use of private room, headphones, identifies all participants in the telehealth meeting Clearly explains and provides information to the client / participant on roles and responsibilities, privacy and data security methods Recording sessions – clearly explains purpose, obtains consent, explains and adheres to data security and storage requirements Sets up telehealth services using approved programs and protocols – i.e. secure meeting invitations, use of passwords Obtains and documents client consent

SPEF-R Item	Student Expectations / Examples relating to telehealth
1.3 Ensures personal, co-worker and service user safety	Informs and educates participants on risks and limitations of telehealth services. Obtains information on participants' knowledge and confidence in using telehealth. Informs and educates participants on how optimally set up a telehealth session. e.g. room set up, lighting, position of device/camera, speakers/audio Establishes 'back up' communication systems if the technology is not optimal or fails. Inform participant on everyone's roles and responsibilities for managing their own health and safety if completing a requested task. e.g. right to decline, need to stop a task if requested Completes a risk screening prior to instructing participants to complete a task or activity. e.g. identifies potential risks in pre-session interview; discuss functional ability and risks prior to instructing participant to attempt a task; engages other carers/family members in session to assist with managing risks and safety; observe clients complete a sit to stand with support Provides clear and safe instruction if participant required to 'show' the home environment (e.g. bathroom, access/stairs, bedroom) e.g. not to walk with device or walk whilst being distracted using the device.
1.4 Adheres to workplace procedures and expectations	Aware of and follows organisations policies, procedures and requirements for telehealth practice. e.g. wearing the appropriate clothing, uses appropriate rooms and technology. Completes orientation and training on telehealth program.
1.5 Represents Occupational Therapy in an appropriate manner	Adapts the definition of occupational therapy for a telehealth service Uses and explains OT role i.e. in a coaching role

Domain 2: Self Management Skills

2.1 Demonstrates effective time management skills	Uses digital schedules and calendars to book clinical and non-clinical services and resources (e.g. computers, consult rooms, other staff) Starts and finishes telehealth services on time Completes a detailed session plan – timeframes for tasks and activities are adjusted to telehealth pace. Is aware of timelines and allows adequate time to finalise session for participants. Ensures telehealth room and resources are available and set up appropriately ready for the time of appointment (e.g. documents, forms, therapy equipment, computer) Ensures appointment meetings / invitations are sent to clients in a timely manner. Adheres to agency policy and procedures regarding time frames for "did not attend" Has all resources and activities ready for time of session. Allows adequate time to 'test' telehealth systems prior to session. Completes all preparation and follow up tasks in a timely manner. Completes documentation in a timely manner.
2.2 Assumes responsibility for own learning	Uses organisations resources and materials relating to telehealth services. e.g. orientation resources, OT Australia, local resources and guidelines, webinars Identifies own level of skill and comfort with using telehealth as a medium for service delivery. Seeks and completes additional learning opportunities to increase skills and confidence in this area of practice. Allocates time to familiarise self with telehealth technology eg. computers, camera, audio, settings, video, screen sharing, document sharing Completes 'practice' telehealth sessions with student peer / supervisor as available Able to share appropriate electronic documents effectively.

	Seeks feedback from clients regarding the effectiveness of the telehealth intervention and potential improvements.
	Includes telehealth skills in self-reflections
	Seeks information on effectiveness of telehealth for their area of practice / client
2.3 Demonstrates initiative and takes responsibility for actions	Seeks and uses other services and resources as required e.g. IT assistance, administration staff, training guides and resources
	Discusses with supervisor opportunities for improvement of telehealth delivery
	Clear expectations are outlined for student / OT / family / client prior to and during the session.
2.4 Demonstrates appropriate stress management skills	Responds appropriately when technology does not work / does not work effectively / presents challenges for service delivery
	Responds appropriately if clients/participants digital skills are presenting challenges for service delivery
	Aware of changes to service delivery style and 'contact hours' and how this may be different to what was expected.
	Clearly communicates with supervisor and relevant others regarding the complexities of telehealth service delivery
2.5 Responds to the supervision and constructive feedback appropriately and modifies practice appropriately	Seeks and uses telehealth appropriately for debriefing, getting support and accessing supervision
	Utilises supervision to reflect on service delivery and consider opportunities to improve care provision
	Identifies and utilises effective resources and strategies to improve skills in telehealth

Domain 3: Co-Worker Communication

3.1 Negotiates, collaborates and co-operates with co-workers as appropriate to the workplace	Uses appropriate verbal and non-verbal skills whilst communicating using telehealth. e.g. use of multiple views, appropriate body position, eye contact, minimising distractions, appropriate use of screen sharing, professional background, maintains a private and confidential environment
	Uses respectful language and clearly articulates messages via digital means i.e. avoids 'text talk'; emojis', etc.
	Effectively uses email, digital calendars, invitations and schedules to negotiate and engage with colleagues / MDT / etc.

	Collaborates with co-workers on how to use the telehealth platforms, and which platforms the team needs to use to deliver the service. Explains reasoning of use of one platform over another. Actively contributes to online team meetings Adheres to documentation tasks as required e.g. offering to take minutes Invites appropriate and relevant members of the health care team to meetings and intervention sessions.
3.2 Actively participates in workplace communications	Engages in work 'chat rooms' appropriately, uses informal means to be able to check in with supervisor and other team members, using the appropriate medium to be able to get support - email for formal input vs chat room for quick questions with less confidentiality; meeting invitations are sent in a timely manner. Actively contributes to online team meetings Raise any issues and ask for support/feedback. Has all resources and activities ready for time of meeting. Provides supervisor with digital access to resources / session plans / documents in a timely manner to allow adequate time to review and provide feedback. Completes all preparation and follow up tasks or research in a timely manner.
3.3 Effectively explains information to others	Clearly introduces OT role and sets clears expectations for all participants in the telehealth sessions Avoids using 'technical' jargon Uses relevant written materials / screen sharing to support communication with co-workers e.g. treatment plans, assessment outcomes, professional reasoning, project plans
Domain 4: Communication Skills	
4.1 Develops, maintains and closes collaboration relationships appropriately with service users	Clearly explains telehealth services, risks and scope of service Clearly introduces OT role and sets clears expectations and roles for all participants in the telehealth sessions Monitors tone and speed of voice relevant to the client within a telehealth session

	Demonstrates the flexibility to adapt communication style (verbal and nonverbal) to suit telehealth modality (telephone or video conferencing) e.g. tone of voice, level of formality, pace, volume
	Adapts non-verbal communication to enable therapeutic rapport and engagement
	Positions self, camera and environment (background / distractions / lighting / privacy) to ensure adequate visual contact and presence is achieved and maintained
	Explains to service user if they are using multiple screens or needing to look / work elsewhere during the session
	Takes into consideration cultural considerations for communicating via telehealth
	Uses relevant written materials / screen sharing to support communication with service users e.g. treatment plans, assessment outcomes, professional reasoning, project plans
4.2 Communicates effectively with significant others as appropriate	Uses a range of technology to engage with clients e.g. phone, email, videoconference
	Acknowledges and introduces all participants involved in the telehealth service.
	Ensures client and support person have the ability to continue engagement with the service with use of telehealth and email
	Maintains privacy of the client e.g. asks permission from the client before suggesting going onto speaker phone to include family members / other participants in the session
	Monitors tone of voice; uses respectful language
	Avoids using 'technical' jargon and 'text-talk'
	Clearly explains telehealth services, risks and scope of service
	Clearly introduces OT role and sets clears expectations and roles for all participants in the telehealth sessions
	Uses relevant written materials / screen sharing to support communication with service users e.g. treatment plans, assessment outcomes, professional reasoning, project plans
	Written resources and materials are developed suitable to use in a telehealth medium
4.3. Demonstrates responsiveness to service users/ significant others	Emphasise importance of rapport building with effective communication to suit telehealth (e.g. rate of speech, turn taking, small talk)

	Acknowledges and responds to clients' challenges or apprehension with engaging with technology. Demonstrates empathy and provides support as relevant to agency / context. Ends session appropriately and in a timely manner Manages client/family expectations within the running of the session
4.4 Expresses reasoning/ recommendations clearly, ascertains service user's understanding and modifies communication as necessary	Uses appropriate micro-counselling / communication skills (e.g. check-in / paraphrasing) to confirm and reaffirm clients understanding and content of communication
4.5 Shows an awareness of, and/ or manages group dynamics as required	Demonstrates flexibility to adapt communication to use appropriate questioning skills, turn taking and clear instructions on how to participate in group session via telehealth Adjusts session activities to ensure session timeframes and flow is adhered to

Domain 5: Documentation

5.1 Adheres to formal workplace documentation requirements	Completes and documents relevant screening questions re: telehealth capacity, telehealth interest, telehealth consent, COVID-19 screening *(or other relevant workplace screening protocols)* Includes documentation of specific COVID-19 service parameters e.g. method of delivery F2F / telehealth; location of service provider / client; PPE used Maintains digital security of information, uses agency only technologies, storage and email systems
5.2. Writes documents in an objective manners with interpretation and recommendations supported by relevant information	*Nil changes to current practice*
5.3. Targets documents appropriately to audience	Uses relevant written materials / screen sharing to support communication with service users e.g. treatment plans, assessment outcomes, professional reasoning, project plans

	Written resources and materials are developed suitable to use in a telehealth medium

Domain 6: Information Gathering

6.1 Identifies own knowledge/ skills needs in preparation for service provision	Identifies own skills and knowledge using telehealth for service delivery e.g. telehealth platform, policies, procedures, practice guidelines (note: a*wareness of the specific telehealth platform (technology) could be different for each health agency)*
6.2 Identifies and obtains information required to prepare for service provision	Uses agency file system / database / CRM as required to obtain information

Schedules meetings with service providers / relevant others in time to obtain required information (*as informal discussions with others may be limited or not available if remote service delivery or others are working remotely / from home)*

Uses email / phone / telehealth to obtain required information |
| **6.3 Selects appropriate methods and sources of information gathering** | Chooses the appropriate option to use e.g. phone, email or telehealth

Decides when it is appropriate to do a pre consult phone call prior to a telehealth consult

Selects the appropriate assessment to use with a telehealth format and adapts assessments to telehealth format

Articulates how telehealth format may change / impact the quality of the information gathered

Aware of factors that may influence on clinical interaction / engagement with client e.g. client's vision, hearing, cognition, attention, anxiety, mood, digital literacy etc. |
| **6.4 Implements appropriate information gathering methods/ processes** | Uses relevant written materials / screen sharing to support obtain information from others e.g. assessments, project plans

Positions self, camera and environment (background / distractions / lighting / privacy) to ensure adequate engagement and observations are achieved and maintained

Provide clear and suitable instruction (before / during session) for participants regarding position, camera and environment (background / lighting / privacy) to ensure quality observations and engagement can be achieved

Maintains privacy and confidentiality of telehealth sessions

Interpreters are involved in telehealth sessions when required |

6.5 Observes service user response / performance during information gathering processes	*NOTE: Telehealth may limit the ability for observing the wider environment, the 'full' client and their context. e.g. client may only be visible from shoulders up, unable to see lower limbs / foot tapping / out of camera distractions, unable to 'smell' client's environment* Identifies participants performance during telehealth session e.g. signs of anxiety, dysregulation; disengagement; fatigue; confusion; attention; difficulty hearing / seeing instructions
6.6 Analyses and interprets appropriately the information gathered	Recognises impact that telehealth format has on quality and range of information gathered

Domain 7: Service Provision

7.1 Collaborates with service users, significant others, and other service providers to establish/ support priorities	Considers service users / others needs and preferences for telehealth Prioritises interventions based on telehealth opportunities and capacity
7.2 Defines goals in objective terms	*Nil changes to current practice however goals may need to be defined within parameters of telehealth e.g. goals of self-management may be prioritises as they may need to be able to manage their home program or session more independently, or more reliant on others etc*
7.3 Selects and/ or coordinates service provision methods/ programme (individual/ group) in response to established goals	Identifies suitable resources for telehealth session e.g. what clients have at home in order to assist their therapy vs what we would normally have in the clinic
7.4 Makes adequate preparation for direct service provision	Has an identified back up plan i.e. if video / audio / connection isn't working effectively, what plans to you have in place e.g. phone Knows how to access technical support if required Ensures participant / client has received all information and resources in a timely manner e.g. sends things ahead on time; provides adequate time for client to get resources required; sends appointment invitations in a timely manner; copy of assessments / intervention plans

	Sends participant / client information on 'how to use telehealth' and contact details if technology does not work effectively Ensures other people involved in session are adequately prepared and sends information as required e.g. carers; other MDT members; support staff
7.5 Implements/ manages planned service provision effectively	Complies with eSafety - confidentiality, risk management, home safety, falls prevention, privacy of session Adjusts session activities to ensure session timeframes and flow is adhered to
7.6 Engages significant others and other service providers to support service provision	Ensures other people involved in session are adequately prepared, aware of their roles, and sends information as required e.g. carers; other MDT members; support staff
7.7 Prepares adequately for handover/ completion of service provision	Uses relevant written materials / screen sharing to support handover / finalisation of service provision with others e.g. reports, intervention plans, project summaries Schedules and completes handover / discharge appointments in a timely manner

Domain 8: Service Evaluation

8.1 Identifies need to evaluate personal service provision/ organisational processes and identifies appropriate evaluation strategies	Selects appropriate formal or informal evaluation methods relevant to a telehealth context i.e. Can discuss how service is delivered and adapted in the context of telehealth Seeks feedback from clients / service users about their experience with and the effectiveness of telehealth Identifies all stakeholders involved in telehealth services Selects relevant evaluation tools or methods in context of telehealth delivery medium
8.2 Implements evaluation strategies during and following service provision	Uses agency telehealth evaluation checklist Describes positive and negative aspects of working in a telehealth setting. Able to critique the effectiveness of telehealth service provision Uses technology to track outcomes and progress e.g. apps, photos, online surveys Following Quality Assurance process or determining evaluation method based on project type e.g. resource development

8.3 Interprets evaluation information accurately	Recognises impact that telehealth has had on service provision outcomes and information gathered Understands the context and impact of telehealth on service users and stakeholders Clear understanding of how telehealth impacts service, orientation to ethos, values of service and delivery to improve specific measures of evaluation
8.4 Adapts service provision in response to ongoing collaboration and new/ evaluation information	Students adapt to a telehealth environment. e.g. able to adapt assessments / interviews / note taking to a telehealth environment, able to navigate noise/distractions on telehealth; knows when to finish the conversation / task? Reviews current service provision and suggests modification based on best practice and professional reasoning. Reflects on service / project outcomes and performance i.e. telehealth (lateral thinking, on spot evaluation with client being able to adapt and modify intervention) Thinks of strategies that are innovative using telehealth mediums with an evaluation process in mind