



# TRIBAL EVALUATION INSTITUTE

Supporting Community Decision Making by  
Strengthening Data Collection and Use

## Transitioning to Virtual and Remote Screenings

As programs transition their services to virtual visits during the COVID-19 pandemic, many are grappling with the challenge of conducting screenings, assessments, and observations with children and families within this new context. Now, more than ever, it is crucial for service providers to support the health and well-being of children and families, stay aware of their needs, and connect them to services.

This tip sheet provides examples and considerations for adapting the administration of a screener in a virtual setting.





## Key Questions to Consider When Adapting the Administration of a Screener

Before making any changes to your screening process, it is important to consider the following questions.

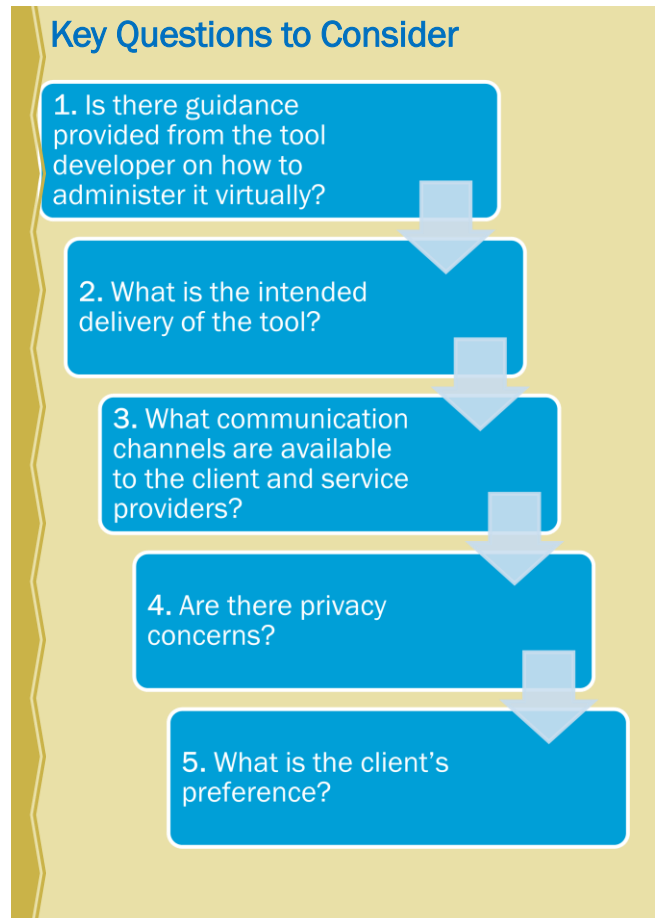
### Key Question #1. Is there guidance provided from the tool developer on how to administer it virtually?

Some tool developers and publishers have released online versions of their tools and guidance for administering tools in various formats. To see if a developer has released guidance, check their website or contact them directly. Also check the literature for any published articles on how the tool has been administered in a different format to understand how that has worked in the past and any lessons learned.

You should also find out if the tool is copyrighted. If so, it may be a copyright infringement to change the format of the tool without permission.

### Key Question #2. What is the intended delivery of the tool?

If the tool developer or publisher has not released guidance for administering the tool virtually, then consider how the tool was intended to be delivered. Was it meant to be completed by the client or service provider? Is the service



provider supposed to gather verbal information from the client to complete the tool (i.e., is it an interview)? Or is the service provider meant to watch the client interact with their child (i.e., is it an observational assessment)? Changing the delivery of the tool may affect the validity and reliability of the responses—specifically, the degree to which the tool consistently measures what it claims to measure. For example, the Ages and Stages Questionnaire (ASQ) is intended to be completed by the client, which means the validity and reliability of responses are strongest when it is completed this way. A client may respond differently to the same question when asked by a service provider in an interview and may not give the most accurate response, so it is important to keep the same delivery format when adapting it for virtual use.

### Key Question #3. What communication channels are available to the clients and service providers?

Consider the following:

- ◆ Does the client have a reliable internet connection?
- ◆ Are virtual meetings a possibility?
- ◆ If the screening can be done over the phone, will the client have enough minutes or data on their phone plan to complete it?
- ◆ Does the client have email access?
- ◆ Can the client safely receive documents through the mail? Do they have a mailing address, and would they be able to access their mail while still following social distance and safety measures?

### Key Question #4. Are there privacy concerns?

The content of some screeners may require the client to complete it in privacy. For sensitive screeners (intimate partner violence, substance use, mental health), consider whether someone else in the home could view or hear the client's responses. First, look at the questions being asked and determine whether the client needs privacy to complete the screener. Then consider whether the client could complete it in private within their current environment:

- ◆ Could the client use headphones if it is a virtual interview?
- ◆ Could the client step outside the home or sit in their car to complete the screener?
- ◆ Is there a risk that someone in the home could see the client's browser history, sent emails, or text messages?

Another aspect of privacy concerns the information once it is collected. Once the client completes the screener, how are the responses stored? How secure is the data if it is entered into a web-based survey or shared through a messaging platform? Are the completed screeners stored in a password-protected computer or locked file cabinet in the service provider's home?

### Key Question #5. What is the client's preference?

Among the feasible options for delivering the tool, consider which one is most comfortable for the client. It is helpful to have consistent procedures, but given the unique context of the COVID-19 pandemic, you may want to consider tailoring the format for the client. Communicate with the client ahead of time and ask which format they are most comfortable with or would prefer.



## Options for Virtual/Remote Screenings

Key Question #2 asks how the tool is intended to be delivered. Depending on the original format, there are various options for adapting it for virtual/remote settings (table 1).

*Table 1. Alternative Formats for Screenings*

Intended format	Virtual/remote format options	
Interview	<ul style="list-style-type: none"><li>• Phone interview</li></ul>	<ul style="list-style-type: none"><li>• Virtual meeting</li></ul>
Client completes	<ul style="list-style-type: none"><li>• Fillable PDF</li><li>• Paper version</li><li>• Online survey</li></ul>	<ul style="list-style-type: none"><li>• Phone interview</li><li>• Virtual meeting interview</li></ul>
Observation	<ul style="list-style-type: none"><li>• Virtual meeting</li></ul>	<ul style="list-style-type: none"><li>• Client recording</li></ul>

Once the virtual/remote format has been decided, you should think about how the screening will be delivered to clients and how responses will be submitted (table 2). Again, final decisions at this stage should be tailored based on each client’s context, comfort, and preference.

*Table 2. Delivery and Submission Options for Various Formats*

Virtual/remote format	Mode of delivery for service providers	Mode of submission for clients
Fillable PDF	<ul style="list-style-type: none"><li>• Email to client</li></ul>	<ul style="list-style-type: none"><li>• Email completed screener back</li></ul>
Paper version	<ul style="list-style-type: none"><li>• Mail to client</li><li>• Drop off screener at the client’s home</li><li>• Text/email a photo of screener to client</li></ul>	<ul style="list-style-type: none"><li>• Mail completed screener</li><li>• Email/text a photo of completed screener</li></ul>
Online survey (e.g., existing online platform designed by tool developer or a self-programmed system like Survey Monkey)	<ul style="list-style-type: none"><li>• Email or text survey link to client</li></ul>	<ul style="list-style-type: none"><li>• Enter responses into online survey</li></ul>

Phone interview	<ul style="list-style-type: none"> <li>• Complete the screener over the phone as interview</li> </ul>	<ul style="list-style-type: none"> <li>• Allow service provider to enter responses into online survey, fillable PDF, or paper copy</li> </ul>
Virtual meeting (e.g., Zoom, Google Hangout)	<ul style="list-style-type: none"> <li>• Look at the screener together using screen share</li> <li>• Observe client during a virtual visit in real time and record, if permissible/possible (for observational assessments only)</li> </ul>	<ul style="list-style-type: none"> <li>• Allow service provider to enter client's responses into document being shared, online survey, or paper copy</li> <li>• Allow service provider to observe during a virtual visit</li> </ul>

\* If virtual meetings are not available for observational assessments, a client may record themselves and send it to the service provider for scoring.



## Conclusion

Services may look very different during the COVID-19 pandemic, but you can find new ways to continue conducting valuable screenings and assessments for the families you serve. Screening offers an opportunity to gather important information about families' needs during a critical and potentially fragile time and provides partners with valuable and appropriate referrals.

There is a lot to consider in terms of what will work best for your program and families. This guide can support you in making timely decisions about adapting your screening instruments for virtual and remote settings. For more support, please review the resources on the following page and reach out, if needed, to: [info@tribaleval.org](mailto:info@tribaleval.org).

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## Related Resources

These resources were developed to support service providers in making critical decisions about adapting the administration of their screeners and documenting the changes.



### [Virtual Screenings Decision Flow Chart](#)

This flow chart guides you through the key questions to determine which format is the best fit for each tool and client. It is intended to be a starting point to consider how each screening could be conducted virtually. Use your own judgement and consider client preference.



### [Virtual Screening Plan](#)

This worksheet provides a space for you to document your team's responses to the key questions and your decisions for adapting a tool to a virtual or remote format.



### [Virtual and Remote Screening Info-Session](#)

This recorded presentation explains the key questions presented in this tip sheet and provides an overview of the options to adapt screening tools for virtual and remote settings.

