

Collecting Self-Report Assessment Data via Telehealth

How you get self-report assessment data via telehealth depends on the technology available to you and your client and the platform you are using for your sessions.

The options we recommend are as follows:

1. Use an app if available.
2. Ask the client to download and complete a fillable PDF form that can be shared verbally or on screen.
3. Mail or e-mail blank forms ahead of time, and request scores at the start of each session.
4. Verbally administer the questionnaire via telephone or video conference.

Apps are great when they are available.

Several EBPs have apps associated with them; the PE Coach and CPT Coach, for example, have assessments built into them, along with the protocol tools and handouts that the client will use during treatment. If an app is available for the assessment you want to use, your client can download the app and complete the assessment on their own before your meeting. This will work even if your client is using the phone both to connect with you and to complete the assignments and assessments within the app.

Your client can use both the phone and the app simultaneously. This works best if the client has headphones, so they can take the phone away from their face and see the screen. Then they can talk to you on the phone, navigate to the app to start the session recording, if that is part of the protocol, and use the app to complete forms and assessments.

Note: Recording sessions using the app while on the telephone only captures the client's voice, but it works better than not recording at all. It is possible to record both voices in the PE Coach, but it requires the client connect with you on a separate device -- e.g., an iPad or computer. Let the sound come through the speakers of the second device and use the PE Coach as a recorder to pick up both voices, just as you would in a face-to-face session. In this case, check that the client has adequate privacy, since the session could be overheard without headphones to protect the sound.

The first time you administer the self-report this way, especially if the client hasn't seen the questions before, it may take a bit longer, because you or the client may stop to clarify items on the scale. Keep in mind though, that since this is normally done as a self-report, you wouldn't typically be involved in the administration, so you don't need to make this a semi-structured interview. Try to keep the interruptions to a minimum for the sake of consistency.

When using the telephone, it is useful to ask the client to write down the Likert scale options so she can refer to it as she answers the questions. For a video conference, have this typed ahead of time, so you can copy it to the chat or the whiteboard of the particular video conferencing platform you are using.

Email or mail-ahead hard copies are accessible to most people.

Another option is to send the self-report forms to your client by email or by mail ahead of time. If you will be sending them other materials anyway, this is a good option to keep everything together. With forms in hand, the client can complete them before the session, so there is no need to go through each item unless the client has a particular concern or question. In this case, just ask the client to share her total score from the written form just as she would if she were using the PE or CPT Coach app.

Fillable PDF forms provide more detailed data.

The fillable PDF forms allow you a couple of options. Your client can complete them before the session and report the score to you, or they can download it on the spot and share the form with you on screen while they fill it in. Not all clients are comfortable with technology, so you might need to walk them through the steps to download and share screens.

The advantage of this type of administration is that you, as the therapist, can quickly look over items to see what particular symptoms have changed. Another advantage is you don't need to send the client mail or email. Some providers have expressed concern about the privacy and safety of email, so this is a way to get around that. You can share the link via chat or, if necessary, spell it out on the phone, and the client can navigate to it on their own device.

If using the phone, of course you won't be able to see individual item responses unless you ask, but the PDFs are still worthwhile if you are concerned about email.

The steps to use the PDF forms are as follows:

1. Therapist gives the client the link to the assessment that will be administered.
2. Client navigates to website and downloads the form.
3. Client opens the downloaded form with any PDF reader.
4. Client shares their screen with you so you can see their answers.

Most platforms will work similarly. Practice beforehand with your client so you know how to help them.

We have a number of forms converted into fillable PDFs on our website for you to share and use with your clients. They are found here: <https://deploymentpsych.org/patientforms>