Providing Quality Services Remotely and Online

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Due to the COVID-19 pandemic, day and employment service providers have had to quickly determine how best to provide supports for people they serve. For many this means transitioning to services and supports that can be provided remotely. This brief is one in a series developed to help community providers continue to provide services to those who are currently working, seeking employment, or engaged in community-based day supports.

During this time, we are all learning how to best support the people we serve. We welcome your feedback and ideas as we all work together to provide services that help people to continue to work towards their goals while staying safe and healthy.

ICI COVID-19 resources: covid19.communityinclusion.org

This brief outlines strategies for provision of services remotely and online, including considerations in setting up remote services, and how services can be successfully delivered.

Maintain a strong focus on core values

When providing services remotely and online, keep in mind that our field's core values have not gone into isolation through physical distancing. Inclusion, flexibility, being individual-driven, and offering maximum self-direction continue to be our main focus for everyone we serve.

We must continue to meet each individual where they are at and provide individualized services that meet their specific needs, especially during a time of crisis. For example, some individuals and families are determined to not let the current challenging circumstances prevent job development from moving ahead. Others may need to take a step back to reflect and to take care of more critical personal matters. Service providers and staff should analyze each individual's situation and preferences, and offer support and services that will respect their desires during this time.

Understand individual's technology access

A first step in remote service delivery is exploring and understanding the technology that each individual has access to. Spending hours researching wonderful apps and virtual meeting programs is not a good use of your time if the person does not have a smartphone, reliable internet service, or access to a computer or tablet.

Once you are well informed about what devices they can use from their home, set up a plan of communication and connection. Work with family, residential staff, and housemates to get input and support in securing technology individuals can use during their sessions with you. Learn what days and times of day technology will be available to them. Other family members might be using the only home computer to work from home or go to school, and flexibility in meeting with individuals outside your usual work hours might be needed.

Individuals might need assistance to use a computer or a smartphone to meet with you virtually. You may need to get the commitment of other household members to assist the individual to log on to a computer, or accept the phone call from you. Find out how well each individual can navigate through different forms of technology and programs so you can set up the appropriate tools for each person. (See companion brief *Using Technology to Provide Quality Remote and Online Services*, for more details regarding considerations with technology.)

Understand and respect individual's preferences

Before jumping ahead and assuming that the technology available can be used to provide services remotely, as with all services, make sure you understand and abide by the individual's choices and preferences.

- Before beginning remote services, have a conversation with the participant to explain what remote service delivery is all about, the options available, and what they prefer.

- Ask the individual what their preferred schedule is for services in terms of frequency, days, and times of day.

- Get a sense about their preferences regarding how long they prefer to be online or on the phone with staff and with others. Some individuals may be fine with an hour or more; for others 15 minutes at a time may be their limit.

- Find out what their preferred communication method is. Just because a piece of technology is available, does not necessarily mean that is preferred by the individual. For example, some individuals may be more comfortable using the phone rather than an online video platform. Try out different methods and see what works best.

- Over time, be sure to regularly check with the individual regarding how they feel remote service delivery is going, and whether they are interested in making any changes.

Recognize that particularly under what are highly challenging circumstances for everyone, it may take time for a person to transition and adjust to remote services. The process may be gradual, both in terms of the amount of time the person is willing to spend with staff remotely, and their willingness and ability to try different communication methods. The bottom line is that as always, one size does not fit all in terms of services, and it is important to individualize how services will be provided, driven by the individual's choices and preferences.

Find a workable setting for remote services

The physical setting for both individuals and staff are critically important to success in providing services remotely. Staff and individuals should deliver and participate in remote service delivery in locations that are quiet, and where they will not be interrupted. As part of initial delivery of remote services, work with the individual on identifying a location, as well as times, that are as ideal as possible.

Maintain confidentiality

Regardless of whether you will be connecting with an individual via phone, text, or online, it is important to maintain confidentiality and assist the people on

your caseload to make informed decisions about how and when they communicate with you.

- Use a private space to provide services, and encourage individuals to find a private location also. For example, even if they share a small apartment, they may be able to go into a bedroom and close the door.

- Ensure that everyone knows if a conversation or meeting will be recorded before the session starts.

- Make a rule that everyone participating in a group session has to introduce themselves when they join, so all participants know who is listening and their role.

- Ensure individuals continue to have a say in who joins their meetings and other service gatherings, just as they do when these are held in-person.

- Check with your funding agency on federal or state requirements regarding confidentiality and remote service delivery.

- If you are required to abide by HIPPA requirements, be sure the technology and platform you are using is HIPPA compliant. CMS has provided added flexibility that allows additional platforms such as FaceTime and Zoom to be used to provide services remotely.

Abide by state/funder guidance

Before you start providing remote services, talk to your funding agencies to find out what they allow and will pay for. Different agencies may have different guidelines, so you may need to adapt what you are doing for each individual. Communicate this information to the individual and all their team members so everyone is on the same page and understands what you are able to provide for services.

Get family and guardian support

If an individual is living with family members or has a legal guardian, get support from those people for remote provision of services:

- Explain why services are being provided in this way and the importance of keeping the individual engaged in services.

- Explain specifics of how services will be provided. Review how the individual's safety and security are being addressed, as well as confidentiality issues.

▶ Particularly if the individual has clearly expressed interest in receiving ongoing services, including continuing to work, emphasize the importance of respecting the individual's preferences and choices.

▶ Determine what types of official permissions are required from family members or guardians to provide services remotely. In terms of non-family guardians, understand the parameters of their role, and whether or not their official permission is required. Check with your funding agency regarding any requirements.

Keep an eye on the long-term positives

While the current COVID-19 pandemic is creating major challenges and impacting people's lives in all kinds of ways, it is also providing an opportunity to rethink service provision for the long term. Through being forced to discover new ways of service delivery, we may find ways to provide services more flexibly and effectively.

Service providers, staff, and individuals are learning to use technology in new and different ways and expanding their skill sets in use of technology and providing services remotely, which will have long-term benefits. As we go through this disruptive time, consider lessons being learned along the way, and how we can incorporate these ideas and strategies into a new normal after the pandemic is over.

Customize your approach

There are many options for providing employment services and related supports to individuals during this time. As always, all services should be individualized and customized for each person, taking into account their preferences, access to technology, and ability to use various platforms. Devise a service plan that keeps the funder's guidelines in mind, and also provides support, skill building, and knowledge to the individual at a pace that is comfortable for them.

Use Principles of Universal Access and Universal Design for Learning

In provision of services, keep individuals engaged and interested in the work you are continuing to do with them. Keep in mind the CAST principles of universal design for learning: multiple means of engagement, multiple means of representation, and multiple means of action and expression.

Use different learning methods such as activity-oriented (giving tasks for the individual to complete), peer-to-peer conversations, use of tools by individuals (taking videos, pictures, etc.) and time for reflection to process what they have learned and apply it to their service goals. Specific strategies include the following:

▶ **Explore the wide variety of technology available via the internet, smartphones, and other platforms.** Work with individuals to figure out which methods will be most effective and beneficial for them.

▶ **For many people, the use of video platforms such as FaceTime or Zoom allows for a stronger connection than voice only.** If you are using a video platform, put your camera on, and encourage the same of participants. If you are on video, be sure that your background is as simple as possible, and not distracting. Ideally, a solid color background is best. Dress professionally to set the right tone.

▶ **During live video meetings, limit the time for lectures by staff and have facilitated discussions instead.** If you are using an online platform, take advantage of its features to share documents, websites, videos, and use chat rooms. Go online together to do research, do video modeling of tasks, and have individuals demonstrate their performance of tasks.

▶ **Use live meetings only for activities that require interaction.** Individuals can do a lot of things outside of live meetings. Provide information prior to meetings for them to review and look at, and work with them on identifying activities that they can do to complement and support the work being done in live meetings. Examples include taking pictures of things that interest them, doing research online, looking at videos, practicing tasks, and completing interest inventories.

▶ **Use a variety of technology platforms, and avoid overreliance on a single type of platform** (such as video meetings) for learning and support. For example, you can use Zoom for a live meeting, and then use a private online discussion group for exchange of information, ideas, and visuals before or afterwards.

Successfully Delivering Services Remotely

▶ **Explain why services are being delivered remotely.** Individuals may have a lot of questions and concerns about why in-person services are not taking place. As remote service delivery is instituted, explain why this is necessary, the ways that services and supports will be provided, and that this may even provide opportunities to learn new things.

▶ **Have clear service objectives.** Don't start with, "What can we do with this technology?". Instead, start with "What is the service objective?", ensure that the objective aligns with the individual's goals and preferences, and let that be the driver.

▶ **Set a schedule.** Set up a weekly meeting schedule with each individual. This predictability and routine is valuable during this time of uncertainty. In creating a weekly schedule, make sure to consult with and inform whoever is assisting or supporting the individual (family, residential staff, housemates) about the schedule in advance, to ensure the times work for necessary supports, and access to technology and space in the home.

▶ **Have a clear agenda.** While an agenda is always important, it is even more so with remote services. Outline the objectives for each session, the planned activities, and the time frames, and review with participants at the beginning of each session.

▶ **Links and passwords:** For online meetings, make sure individuals and their at-home supports have the correct link and password ahead of time, and that staff phone numbers and emails are provided in case there any issues in connecting online.

▶ **Explain how to use technology.** Teach and review with individuals how to use technology, its various features, rules (mute when not speaking, etc.), and safety and security.

▶ **Make decisions about individual vs. group interactions.** At times, it might be appropriate to bring individuals together (virtually) for a service such as job search counseling group or job club. Providing opportunities for individuals to connect with their peers and provide support to each other is effective in moving the job search along. A basic support group can also provide some much-needed socialization. At the same time, recognize that group activities, particularly online, may not be for everyone.

▶ **Providing 1:1 services.** How might you provide effective individual counseling online? As much as possible, continue using all the best practices of basic counseling such as active listening techniques. See *Important Active Listening Skills and Techniques* from The Balance Careers. It is optimal if you can do a video meeting so you can observe an individual's facial expressions and body language, as well as hearing what the person is saying.

▶ **Embrace the values of self-determination and self-direction:** Rather than staff deciding on the activities on behalf of an individual or group, discuss with them their service goals, and work with them to create activities and services in support of those goals in a way that maximizes opportunities for individual choice and control.

▶ **Set time limits and schedule frequent breaks.** It is difficult for many of us to sit on the phone or be live on a video chat for an hour or more with no breaks. Discuss with participants how long they feel comfortable in live online meetings or on the phone, and how often they need breaks. Consider shorter sessions, or building in 5-minute breaks at least every 30 minutes. Encourage individuals to stretch, get a drink or snack, etc. during meetings. Also consider having multiple short interactions during a day, with activities that can be done between calls, rather than one long call.

▶ **Frequent check-ins.** Check-in with individuals regularly, even beyond your scheduled meeting times, and make yourself easily available via email and phone. To protect your own personal and professional boundaries, let clients know what hours you will not be responding to messages, and as appropriate, give them emergency services numbers to call during those times if needed.

▶ **Maintain ongoing communication with in-home supports.** Within the parameters of what the individual is comfortable with and permits, check in with the individual's in-home supports on a regular basis to discuss how service delivery is going, the individual's support needs, the schedule of services and upcoming plans, and to address any issues or concerns that have arisen.

▶ **Be flexible.** Flexibility is key as we navigate multiple changes. For example, it might work better for a family member to talk with you later in the evening if they are now working from home full time and also managing their children.

▶ **Acknowledge and address the current situation.** We are all struggling to adjust to the coronavirus pandemic, and most of us have heightened levels of anxiety and stress as a result. When working with individuals, spend time acknowledging what is happening with the pandemic, give them the opportunity to express their feelings and concerns if they wish, and have them share what they have been doing with their time. Develop strategies for staying active and healthy and for dealing with stress and anxiety.

▶ **Address concerns of going to work and going back to work.** Individuals and their families may express fears about going to work, whether the individual is currently working, unemployed, or has never worked in the community. Listen to and acknowledge these fears and concerns, and then address them. For individuals currently working, ensure they are taking all necessary precautions, and guide them through making a fully informed choice about whether to go to work or not. Individuals not currently working can be reassured that this is a temporary situation. Emphasize the benefits of working, and continue to move forward on career exploration and job search activities. Also discuss the steps that are being taken to ensure everyone's safety and health as limits on social interactions are reduced.

▶ **Communicate with fellow team members:** With more staff than ever working virtually and not seeing each other in person, make sure you are maintaining ongoing communication among team members to ensure services are being provided consistently, and that everyone is on the same page in supporting each individual.

▶ **Don't be afraid to experiment:** Not everything with remote service delivery is going to work well, or proceed as expected. This is new for everyone. Try different strategies and techniques, and if they don't work, try something else. This is a challenging time but it's also a great time to be innovative and learn.

▶ **Recognize this will be an evolving process.** On so many levels, the process of providing services remotely is one that will evolve over time. At first there are likely to be glitches and a lack of comfort with this new way of providing services and supports. However, things will improve, as both staff and individuals get more comfortable with remote service delivery and more adept at using technology, in-home supports get more comfortable in their roles, and staff get more skilled at providing services remotely. Also, what is happening in the larger world in terms of the pandemic is evolving over time, and that will certainly have impact in terms of everyone's perspectives and how services are delivered.

RESOURCES

Providing Supports Remotely

- ▶ [Webinar: Strategies for Providing Remote Employment Supports](#) (APSE)

- ▶ [Resources for Distance Service Delivery](#) (Workforce Innovation Technical Assistance Center)

- ▶ [Working with Support Staff During COVID-19](#) (Green Mountain Self-Advocates)

Staff Resources

- ▶ [COVID-19 Toolkit for Direct Support Professionals](#) (National Alliance for Direct Support Professionals)

Universal Design for Learning

- ▶ [UDL Guidelines (CAST)](#)

Health Insurance Portability and Accountability Act Information

- ▶ [HIPAA for Dummies (The HIPAA Guide)](#)

- ▶ [Letter from CMS on application of HIPAA to Medicaid Home and Community Based Services](#)

- ▶ [HIPPA: CMS (COVID-19) Partner Toolkit](#)

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