

Getting Started Guide for Remote Services and Training National Research and Training Center on Blindness and Low Vision

Although the thought of remote training may be daunting, we can be a great support system for each other. Be sure you stay connected with your team and others in the field. Helen Keller said, "Alone we can do so little, together so much." We may have to social distance, but we do not have to isolate ourselves professionally.

Professionals in the field of blind rehabilitation services, vision rehabilitation therapists, orientation and mobility specialists, assistive technology instructors, social workers, and vocational rehabilitation counselors, usually provide services face to face with consumers who are blind or vision impaired. It is undoubtedly easier and more effective when services are provided in the face-to-face format. However, situations arise when remote training becomes necessary. Even when circumstances limit face-to-face interaction, consumers still have significant needs and goals related to independent living, mobility, and vocational rehabilitation. Assessment and provision of training will require an enhanced level of communication and creative solutions to be effective. This guide is designed to provide some examples of specific strategies to get you started. The below suggestions and resources are not intended to be comprehensive. We hope that these suggestions help you to think outside the box and find creative ways to serve consumers of all ages when face-to-face interactions are not possible.

- We have to recognize and acknowledge that we are all learning new things every day and that our consumers still need us, and we make a difference!
- A variety of remote options exist for providing services and training to individuals with visual impairments. These may include individual telephone calls, conference calls, use of FaceTime, or virtual platforms such as Zoom, Skype, or Google Hangouts, delivery of material through recorded or videoed medium, or through email or text-based messaging. Conference lines may have a feature that allows the professional to set up the call with designated phone numbers on a regular schedule, and all the consumer needs to do is answer the phone to participate. There are many options for remote training.
- Identify and use the most comfortable option for each consumer. Some individuals are comfortable with technology, while others are not. Remember, they might just need a few basic instructions to access technology.
- Providing remote training, whether via telephone, text/email, or use of a virtual conferencing platform, will provide a way to continue to interact with and, in many cases, provide the needed support and possibly on-going training to consumers with visual impairments. Contacting consumers individually or in groups can both be helpful.

- “Remote training is not new.” However, it may be new to some. Consider how important your communication skills now have to be. These were important before, but now we need to think about how to describe something even we as instructors cannot see. Listening skills and the use of specific terms will be of the utmost importance in phone or virtual training. In preparation for remote training, develop a clear lesson plan with specific, descriptive language to explain the technique or use of a device.

Anyone Can Provide Information and Referral

In a crisis, providing accurate and timely information and referral is the most effective and essential thing we can do. We all need to put on our social worker hat for our consumers. Find out what resources are still available in our communities for people who are older and those with disabilities. Identify important contact persons and phone numbers. If possible, provide a shortlist in large print or Braille to your consumers. 211 is an excellent resource in many areas. The United Way is another good resource. And, of course, the Area Agency on Aging is likely mobilizing many efforts to meet needs in each community. Individual states may have dedicated telephone numbers or websites where people can get up-to-date and accurate information about the current emergency or crisis. Also, many communities are forming groups, or using apps such as Nextdoor to get information out and offer assistance to the disabled and older individuals in their area.

Support groups or training groups via phone may help reduce feelings of isolation and fear among your consumers. If you are not able to facilitate a telephone or virtual group, or arrange a peer-led group, connect consumers to one of the existing phone or virtual groups. The OIB-TAC has compiled a list of [telephone support and activity groups](#).

Assessment

We all know that assessment is most effective when completed in a face-to-face environment. However, here are a few ideas to consider about conducting remote assessments.

- Can the consumer comfortably understand you on the phone? If not, can anyone else in the residence relay a message? If it is a struggle to communicate by phone, make a referral for an amplified telephone or program that can provide such a device. Do not attempt to conduct any further assessment or training by phone, unless the situation changes, e.g., the consumer agrees to wear their hearing aid during your call. You might identify an alternate communication method, video call, email, or text messaging.
- Consider safety questions to pose to consumers:
 - Do you have a way to get to the store or pharmacy?
 - Who is part of your support system?
 - Do you know how to call 911?
- What is the most pressing concern of the consumer? Even if it does not have to do with their vision loss, it is crucial to understand the primary concerns of the consumer.

- Conduct the assessment you generally use in person. Ask additional questions to fill in details that you may have gathered if you had been there in-person. Some examples of these questions might be
 - Do you feel that completing this task is a struggle?
 - Have you recently cut, bumped, burned, or injured yourself doing this task?
 - Can you describe how you do that task?
- When completing assessments by phone, be aware of fatigue and give the consumer the option to call back at another time to complete it.
- If you find a topic that needs to be addressed and you feel comfortable doing the instruction by phone, consider scheduling an appointment to do the instruction and returning to the assessment after one goal has been met.
- Remember that building rapport with consumers is still important. It might be more important if they have never met you in person. If something doesn't add up, make a note about it and continue to other areas. You may be able to follow up later in person or gain more information from a separate topic area. Don't press too hard. If you feel resistance, tell the consumer about the types of things of which you have helped others. Maybe even share a personal story or find a way to insert some humor. Ask about their family or support system. Everything you learn is part of the assessment and helps you build a picture of their needs and situation.

Assistive Technology Instruction

The assistive technology instructor can assist the other team members in helping connect virtually with consumers, as well as providing assistive technology instruction, which may become even more critical as consumers need to learn to use virtual platforms to access training. The ability to "remote" into a person's computer can be of great value to help "fix" things and do set-ups. The AT instructor can also facilitate individual or group training sessions.

Some access or assistive technology topics that could be completed through remote instruction might include:

- Computer familiarization
- Basic Windows accessibility keystrokes and set-up
- Keyboarding
- Review of websites to learn about access and assistive technology, such as Access World, AppleVis
- Smartphone training on various features, including the clock, calendar, weather, social media, and email.

Most smart devices have built-in or downloadable tutorial apps that can assist in this instruction.

Vision Rehabilitation Therapy/Teaching

The skills taught by a vision rehabilitation therapist are essential to helping individuals with vision impairments maintain their health and safety around the home. Whether the consumer is six or eighty-six, adaptive techniques and devices are an integral part of

daily life. No matter what else is happening in the world, they still need to complete daily activities in the home. Here are a few tips to consider regarding remote services.

- Teach skills that can be taught safely and effectively using a virtual environment.
- Keep the lessons short and specific. Do not overwhelm with too much content.
- Provide practical ways the techniques being taught or ideas suggested can be implemented.
- Provide “homework,” so each consumer has an opportunity to practice the skill.

Some topics for remote instruction might include:

- Telephone dialing with a specific goal to call 911 and other essential support system members
- Labeling
- Organization
- Over-lapping grid pattern and its many uses
- Eating skills (keeping food from falling off the plate)
- Pouring liquids without spilling
- Using the talking book player and getting books
- Setting the talking watch/clock
- Using contrast
- Self-advocating
- Understanding their eye condition and functional implications

Orientation and Mobility

It is not possible to teach many O&M skills remotely; however, with creativity, there are still many areas of instruction that can be very effective in a remote training session.

- Human/sighted guide technique
- Trailing and the protective technique
- Finding dropped objects or using search patterns
- Understanding cardinal directions
- Using visualization to mind-map a route
- Planning a route to a specific location. O&M instructors might use Google Earth to help plan or confirm a planned route.
- Researching transportation information for specific areas
- Completing an application for para-transit services
- Using technology to navigate, such as AIRA, GPS, or apps.
- Using clues and cues in the environment to navigate. FaceTime might be used to facilitate a lesson in the local area, such as getting to the mailbox where safety is not an issue)
- Review of the many transportation options, such as Rideshare, Go-Go Grandparent, taxis, personal drivers, para, and public transit.
- Asking for, declining, and accepting assistance/ self-advocacy when moving around.
- Using customer service in stores and restaurants.

Vocational Rehabilitation Counseling

Many VR counselors often interact with their consumers by telephone or email. However, during a national emergency, the focus of counseling and training may be slightly altered. The goal is still to ensure the individual gains the skills and knowledge needed to acquire and retain employment; however, in a national crisis, more emphasis is likely going to be placed on knowledge and skill gains rather than job development. The following are some areas that the VR counselor can provide counseling/instruction on either individually or in group sessions.

- Telephone and virtual conference interviewing practice
- Telephone and email etiquette
- Resume and personal data sheet review
- Impact your social media profile has on your job search
- Disability disclosure
- Identify assistive technology needed for target job/s
- Research jobs
- Complete online job searches
- Discuss the value of volunteering
- The importance of mentors and how to find a mentor
- Guest speakers who are successfully employed people who are blind
- Guest employers talking about what they are most looking for in an employee

Support or training groups can create a synergistic support system for those involved. If using a group call/video conferencing method, set rules that ensure all get to talk, and no one talks over the other participants. You might need to create “remote rules” on which all can agree. Here are a few to consider:

- Identify everyone who is participating in the remote training/session.
- Keep the calls or virtual meetings to a set amount of time, such as one hour. If using the free version of Zoom, the session will be limited to 40 minutes.
- Set a specific topic, curriculum area, or guest presenter and keep the conversation to that topic.
- Ask each individual who speaks to identify themselves each time they speak.
- To ensure each person gets a chance to speak, consider calling on individuals.
- Ask all to put the phone on mute unless they are speaking.

Additional Guidelines for Increasing Effectiveness

- Group consumers with similar interests, needs, and goals on the same call or virtual conference.
- Choose a subject or activities that are relevant and timely.
- If possible, check that the individual is performing the new skill safely and accurately. If using FaceTime or a virtual conferencing platform, then observe or ask a family member in the consumer’s home to observe.
- Ask the individual or one member of a group training session to teach the lesson back to the group in the next meeting, or at least review the new skill in the next lesson before starting a new skill.

- If possible, hold frequent sessions, such as two to three times a week, keeping these to 30-40 minutes.
- If available, provide information and referral about how to access more information on the new skill or information.

Examples of Topics for Remote Support Groups

- Self-advocacy
- Stress management
- Talking to family and friends about visual impairment
- Guest speakers, including individuals who have adjusted well to vision loss or who are working as people who are visually impaired. You may include speakers who have interesting hobbies they have adapted or a speaker from a local resource.

Aids and Devices

Aids and devices are an invaluable tool for individuals with low vision and blindness; however, training on their use is essential to ensure the aids and devices fulfill the purpose for which they were designed. The provision of aids and devices or technology and training on its use in a remote environment can be challenging. The following are basic suggestions:

- Mail or deliver any items that a consumer has previously demonstrated the ability to benefit from and use. A follow-up telephone call or a virtual session may be necessary to answer any questions and to ensure proper set-up and additional training.
- Provide only items that will meet an essential need in an emergency.
- Only have larger items and those that require extensive set-up/installation and training delivered if it is possible to perform these tasks safely due to the current situation. If not, these can be delivered and set-up at a later time.
- Consumers who are more “tech-savvy” or willing to practice on their own might benefit from having aids and devices or technology provided in an emergency, as they might be more willing to explore and have easier access to remote training.

Although “Free Matter for the Blind” is an option for mailing aids and devices (equipment, Braille, recorded, and large print materials), please note that this method may take longer to be delivered.

Conclusion

As noted earlier, remote training is not new; it is just not common practice in the field of blind rehabilitation and education. A national emergency, such as a global pandemic, can result in the need for those working in the field of blindness and low vision to utilize remote and virtual training. Today there are many options for providing remote and virtual training, and consumers are often much more able and willing to try these. As professionals, we must be creative, innovative, and adaptable. We must recognize that our consumers still need us and that what we do makes a significant difference in their lives.

Resources

Remote training and services tips composed by the OIB-TAC can be found on the Community of Practice's [resources page](#).

For additional information, resources, and curriculum, visit the [National Research and Training Center on Blindness & Low Vision](#) website or the [Older Individuals Who are Blind Technical Assistance Center Community of Practice](#).

Additional Resources

[Hadley](#) has many instructional tutorials on human guides as well as other O&M topics.

[Texas School for the Blind and Visually Impaired](#) and the [Washington State School for the Blind](#) also have good videos on the human guide technique.

[Hadley](#) has many resources available both for clients and professionals. "Practical Help for Low Vision" are free audio recordings you can order for clients related to all things Independent Living available on CD, talking book cartridge, or flash drive.

Many states and agencies have created videos on a variety of skills. For example, the [Nebraska Commission for the Blind & Visually Impaired](#) has instructional videos for Cooking, Shopping & Organizing the Kitchen, Cane Travel, Braille, Personal Information Management, and Techniques of Daily Living to help teach alternative techniques.