A Guide for Conducting Virtual Research Activities

Navigating Virtual Research Visits

Scheduling

- If possible, schedule a virtual test visit (video call) with the participant in order to troubleshoot any connection issues prior to the virtual research visit
- Confirm the use of all appropriate equipment needed in order to conduct the virtual visit (high speed internet, device with camera (desktop with web cam, laptop, tablet, smartphone)

Email

- A few days before the test visit: Email the participant confirming the day/time of the test visit, including all relevant information needed to join the video call. For example, the link (for computers), name of the app to download in the App Store, dial-in number, Meeting ID, etc.

Initial Connection

- Day of the test visit: Call the participant on the phone to guide them to the video call if needed
- On computers, instruct the participant to click on the link in your email
- On tablets and smartphones, instruct the participant to download the app and guide them to join the call

Audio Connection

- Assist the participant in joining audio via the video call platform to facilitate an easier hand-off to the investigator.
- If given the option, instruct the participant to join using computer audio (instead of phone). If on a tablet or smartphone, the option may read as use of internet audio
  - If this is not possible, continue using audio through the phone and have the investigator call the participant when necessary

Video Connection

- Help the participant join the call with video. This may have to be done manually by clicking a video icon or selecting Start Video.
  - For tablets and smartphones, participants may need to allow the app access to the phone's camera
- Ensure the participant does not have anything blocking or covering the camera lens (some laptops have a lens shutter), or that another application (IE. Skype) is not locking the camera.

Completing the Test Visit

- Complete any other required assessments during test visit
- Schedule participant's next research visit with investigator

Connecting for Research Visits

- Follow the above steps and help the participant connect to the video call 5-10 minutes before the virtual research visit to make sure there are no technical issues
- When the participant is ready, inform the investigator they may join the video call
- Confirm that participant and investigator can see/hear one another before leaving the video call.

Scheduling Virtual Research Visits –
  - ➢ When creating the invite, check the settings to enable participants to call-in prior to the meeting organizer/host, if possible
  - ➢ Under audio options, allow both phone and computer, if possible
  - ➢ Make sure to provide the link and any relevant information participants need to join, such as the dial-in number, meeting ID, participant ID, etc.

    ***Include link, call-in number, meeting ID, and all other relevant information in the email invitation

Troubleshooting Audio Issues –
  - ➢ If connecting to audio by computer/laptop, the participant may have to adjust the audio settings on their device.
  - ➢ Depending on the platform used to conduct the video conference, participants should be able to test the audio and mic functions and adjust sound settings as needed.
  - ➢ The computer may not be compatible for the audio feature. In this case, instruct the participant to dial in from their phone and use speaker to free up their hands.

    As a last resort, the investigator/coordinator can call the participant directly from a landline and not use the audio function of the conferencing software.

Troubleshooting Visual Issues –
  - ➢ If using a desktop computer, make sure the participant has a web cam.
  - ➢ If using a laptop, some laptops have a physical privacy slide/shutter over the camera. Instruct the participant to look for and open the shutter if needed.
  - ➢ Other things to consider:
    - • Is there anything blocking the camera?
    - • Is the correct camera selected (some programs like Skype may "hold" the camera – be sure to close any programs other than the conferencing platform)
    - • Instruct the participant to un-share then share again
    - • Instruct the participant to shut down and reboot their device

      ***In order to complete certain assessments, the participant may have to reposition the camera to change the field of view.

Troubleshooting Connection Issues –
  - ➢ Double check the wireless connection and have the participant's phone number available to call if disconnected suddenly.

Tips for Conducting Activities Remotely

Tips for Conducting MoCA Remotely –
  ➢ Guidance for performing MoCA remotely can be found on the MoCA Test Website. Alternative versions are available for completing a MoCA assessment either over the telephone or via audio-visual conference.
  ➢ All forms and instructions can be downloaded from www.mocatest.org
  ➢ If possible, email/mail the visual stimuli to the participant prior to the visit (alternating trail making, cube, clock, and animal naming)

Tips for Conducting MDS-UPDRS Remotely –
  ➢ The use of laptops, iPads, or tablets is preferred. Desktops tend to have a more limited range of web cam mobility and smartphones can be unstable and have a smaller field of view
    • Heel taps, toe taps, and gait assessment - Smaller, portable devices (laptops, iPads/tablets, smartphones) may be placed on the floor against a wall for optimal viewing
  ➢ The participant should be in a well-lit room, with minimum shadows or backlighting that could obstruct the investigator's visual
  ➢ Ideally, the participant should be seated with their full body in view on camera, however, this is rarely possible. Most likely, the participant will need to re-position the camera for performance of foot taps, heel taps, and gait assessment.
  ➢ If needed, a care partner can assist with camera re-positioning and/or hold the camera during the assessment.
  ➢ The quality of the participant's internet connection may interfere with being able to observe motor assessments; weaker connections may result in visual interruptions. This may be resolved by instructing the participant to try relocating to a different room (as an attempt to find an area with a stronger connection signal)

Tips for Obtaining Consent Remotely

Although the _process_ of consenting participants should adhere to all of the requirements of consent, there are various ways for collecting _documentation_ of informed consent (signed informed consent form). Consider the best mechanism for your protocol.

Options include:

➢ Signed consent collected via mail
- Consent process conducted remotely via phone/email/video call

    ***If by phone or video call, documentation of the discussion is required
- Informed consent form is either mailed/emailed to the participant to print (if emailed), sign, and return

➢ Signed consent collected electronically (eConsent)
- Use of certified electronic signature or data capture system

    ***Consult with the reviewing IRB

➢ Request to IRB for a waiver of documentation of consent

    ***This may also require a request for alteration of HIPAA authorization, if included in the institution's informed consent form template)

    ***Consult with the reviewing IRB for further guidance on this process, if needed