



**American  
Red Cross**

# **Utilization of Remote Technology for Competency Assessments**

**Leveraging Technology for Remote Assessments**

**November 7<sup>th</sup> 2024**

# Speakers



**Michele Klawitter**  
American Red Cross  
Vice President,  
Quality Systems



**Andrea Noon**  
American Red Cross  
Director,  
Training Strategy



**Richard Redman**  
Computer Generated Solutions  
Practice Leader,  
Human Capital Initiatives

# Agenda

---

- Objective
- Red Cross Journey
- Important Considerations for Virtual Training and Assessments
- RealWear Wearable Technology & Virtual Competency Assessment
- Advantages of Leveraging Technology for Assessments
- Common Questions and Concerns
- Summary

# Objective

- We request CMS to consider technology as direct observation for Competency Assessment.
- CFR 42 Part 493.1451(b)(8)(i) states “Direct observations of routine patient test performance, including patient preparation, if applicable, specimen handling, processing and testing” and 493.1451(b)(8)(iv) states “Direct observation of performance of instrument maintenance and function checks;”
- We are aware that CMS’s current thinking of “Direct” is the individual performing the assessment is in-person.
- Today we will demonstrate the successful use of technology in our operation.
- <https://vimeo.com/user82190953/review/939716490/64b8760009>



# The Red Cross Journey

## Embracing Technology to Unlock the Value of Human Potential

### Strategic Intents

- Deliver best-in-class training with technology-enabled, blended learning
- Increase knowledge retention and skill development
- Improve experience of workforce to drive job satisfactions and staff retention

### XR



Collaborative immersive digital environments where the instructor teaches and learners practice procedure simulations.

### Video



Multimedia-based content that supports topic within the learning journey used in vILT, WBT, VR, and AR experiences.

### Virtual Instruction



Learning experiences facilitated by a virtual instructor using Teams and in the metaverse.

### Web-Based Training



Interactive digital learning consumed during virtual instruction or on-demand.

### OJT & Comp. Assessment



Training & competency assessment facilitated in person and virtually using fit for purpose technology.

# Sea of Technologies that Theoretically Could Be Used

## Wearables



Smart Glasses



Smart Watch



Head Mounted  
AR Device



VR/mR Headset



Action Cam

## Non-Wearables



Webcam



Laptop



Tablet



Camcorder



Smartphone

# Important Considerations

## For Using Technology in Clinical Settings for Competency Assessment & Training



### Form Factor

- Wearable and handsfree
- Compatible with PPE
- Can be used without interfering with work tasks
- Does not cause disruption to others
- Withstands cleaning/sanitization (e.g., IPA)



### Functionality

- Stream high-definition video (minimum 720p) and high-quality voice
- Toggle between noise cancellation and sound pass through
- Adjustable camera and mic position
- Optical zoom for best ergonomic experience
- User authentication and security



### Connectivity

- Wireless connectivity to the internet – no physical connection
- Bluetooth capable for peripheral hardware such as earphones



### xR/AR Capable

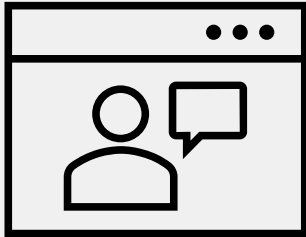
- Capture digital artifacts for compliance and record retention
- Annotate/augment video capture with directions/guidance

# Assisted Reality (AR) - Realwear Navigator

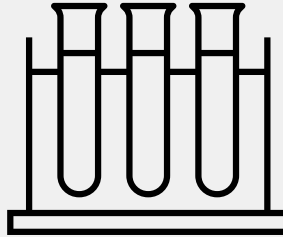




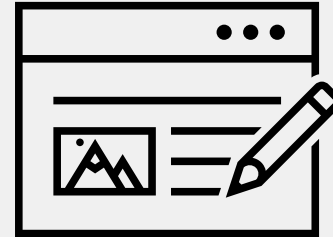
# Overview of the Competency Assessment



Connect  
with your  
Assessee



Complete Direct  
Observation

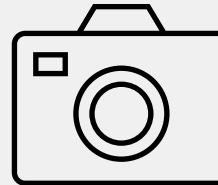
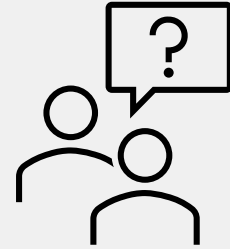
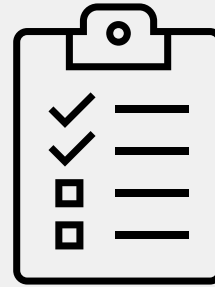


Document  
ACA  
Completion

The acceptable performance method of *Direct Observation* can be achieved with this device, including the observing the following procedures: [routine patient test performance](#); [monitoring the recording and reporting of test results](#); [performance of instrument maintenance and function checks](#). ARC SOP REF-0001548

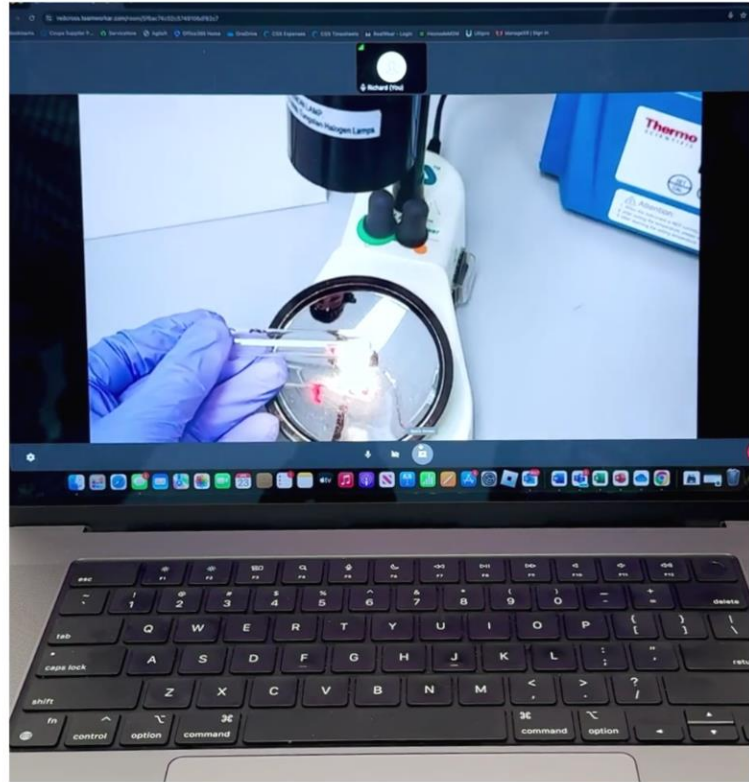
# Assessor Responsibilities – During the vACA

- 1. Invite the Assessee** to the session using their email address (the PIN is sent by the system to the session).
- 2. Complete Direct Observation** of the assessee performing required procedures and processes for the designated checklist(s).
- 3. Capture documentation** required for CLIA assessments produced by the assessee during the ACA for record retention.



# Advantages of Leveraging Technology for Assessments

A less intrusive, first-person view is a significant benefit



# Common Questions and Concerns



**Q: What if the technology doesn't work or has poor connectivity?**

*A: Enough time should be scheduled before due date to account for unexpected situations, to troubleshoot and can always be completed in-person.*

**Q: How do you confirm the identity of assessee?**

*A: Connection is established via secure PIN delivered within the framework of single sign-on (SSO) network/email.*

**Q: How clear is the visibility for the assessor?**

*A: There are network bandwidth requirements to ensure strong connection and streaming capacity. The camera can zoom in / out and has a light.*

**Q: Can you document steps/tasks being observed?**

*A: The device being worn and the session for the assessor can capture video and screen images for documentation as needed.*

**Q: How would virtual assessments account for the day-to-day disruptions that staff experience?**

*A: The assessee remains in the live environment and are immersed in the typical lab experience. The assessor can be in a more focused setting without disruptions.*

# Summary

We would like to thank you for taking the time to allow us to present this topic.

The Red Cross is eager to partner with CMS to lead the way in leveraging technology to ensure conformance with CLIA regulations.

Thank you



**American  
Red Cross**