

ESI Training Workshop Schedule

Day One

8:00 – 8:30	Registration and ESI Computer Registration
8:30 – 9:00	Introduction to the ESI
9:00 – 9:40	ESI administration procedures, Part 1
9:40 – 10:00	Break
10:00 – 10:50	ESI administration procedures, Part 2
10:50 – 11:00	Stand-up break
11:00 – 12:10	Overview of ESI scoring criteria and introduction to ESI items
12:10 – 1:10	Lunch
1:10 – 3:05	Case observation: Sam
3:05 – 3:25	Break
3:25 – 4:05	Discuss Sam
4:05 – 4:45	Validity & reliability

Homework: Read Chapters 4, 5, & 6 (Overview, Interview, and Performance analysis) and Review Chapter 7 (Scoring) and Appendix G (ESI skills)

- **Completion of scoring of all cases is required for rater calibration.**
- **Please be aware that people vary in the time they take to score the videotape cases. We ask that you be understanding of those who may take more time than you do.**
- **In order to obtain the information needed for rater calibration, it is critical that you plan your return home such that you can stay until the course has finished.**

Day Two

8:00 – 9:30	Introduction to rater calibration and case observation: Christopher
9:30 – 10:05	Break
10:05 – 10:40	Discuss Christopher
10:40 – 10:50	Stand-up break
10:50 – 11:45	Documenting results of an ESI observation and writing goals
11:45 – 12:45	Lunch
12:45 – 3:40	Case observation: Bill (two social exchanges)
3:40 – 4:00	Break
4:00 – 5:00	Discuss Bill

Homework: Continue reading the ESI Manual, especially Chapters 8 & 9 (ESI computer reports, Documentation, and Planning intervention)

Day Three

8:00 – 8:30	Interpreting the ESI Graphic Report and monitoring rater severity
8:30 – 10:00	Case observation: Jaime
10:00 – 10:20	Break
10:20 – 10:50	Discuss Jaime
10:50 – 11:35	Progressing from documentation of an ESI observation to planning intervention
11:35 – 11:45	Planning for the live observation
11:45 – 12:45	Lunch
12:45 – 2:30	Final case observation (two social exchanges)
2:30 – 2:50	Break
2:50 – 3:30	Discuss final case
3:30 – 4:00	Returning home and integrating ESI into Practice
4:00 – 4:30	Rater calibration requirements and final thoughts

ESI Rater Calibration Requirements



YOUR DATA IS DUE NO LATER THAN _____. All calibration requirements must be completed within 3 months of the last day of the course.



KEEP YOUR PASSCODE CONFIDENTIAL. Allowing others to use your Passcode is a serious violation of national and international client confidentiality laws.



REVIEW YOUR DATA FOR ACCURACY. It is your responsibility to make sure all data is entered correctly and accurately. Errors may result in your need to retake the course, test additional clients, and pay additional fees.



DO NOT ATTEMPT TO OPEN FILES. Doing so will corrupt the data and require you to reinstall and re-enter all evaluations.

❑ **STEP 1: DOWNLOAD ESI COMPUTER-SCORING SOFTWARE**

- A. Open your web browser to the ESI website, www.social-interaction.com.
- B. Follow the link for Install Software in the Software menu.
- C. You will be prompted to run the installation program. Click **Run**.
- D. A wizard will guide you through the installation of ESI 2009. Follow on-screen instructions to select the destination directory.
- E. See the ESI Installation and User Instructions handout for more information about installing and using ESI 2009.

❑ **STEP 2: ENTER COURSE SCORES**

- A. Gather all your course evaluation worksheets. ***Discarded or lost evaluation worksheets cannot be replaced — you will be required to take the course again.***
- B. Open the software using your assigned Passcode.

- C. Click *Course Scoring*.
- D. Select the correct person from the list. Be sure to match the correct name in the list to your evaluation worksheet. For example, choose *Bill — Observation 1* for his *first* social interaction and *Bill — Observation 2* for his *second* social interaction! Enter scores for the following observations:
- Christopher
 - Bill - Observation 1
 - Bill - Observation 2
 - Jamie
 - Live 1
 - Live 2
- E. Enter your scores and social interaction context information *exactly* as you completed them in the course. If the faculty changed some of your scores, you *must* use those revised scores — *do not* use your original ones.
- F. Click *OK* to save the data. A red checkmark will appear next to each completed social exchange.
- G. Repeat steps D, E, and F for each remaining course evaluation worksheet.



Using scores other than those your original scores, including those that were changed by the faculty, may result in the need for you to test additional persons, take a new training course, and pay additional fees.

❑ **STEP 3: TEST 10 ADDITIONAL PERSONS**

- A. Five or more must be healthy, well persons, at least 2 ½ years of age.
- B. You must test people under two different conditions.
- Type of social interaction must differ, and/or
 - Partner familiarity/relation must differ, and/or
 - Environment type must differ.
- C. At least two observations must be done on each person. The two observations must be within 48 hours of each other.
- D. The date of the evaluation is the date of the first observation.
- E. You must score live observations; the use of video tapes is *not* acceptable.

Note. The diagnosis code “child, at risk for developmental delay” is *only* appropriate for children under 10 years of age. Children 10 years or older with developmental or educational delays should be assigned relevant diagnoses from the ESI diagnostic categories.



The person’s age at the time of the evaluation will be calculated for you. It is critical that you enter accurately the person’s date of birth and the date of the ESI observation.

❑ **STEP 4: ENTER PERSON DATA (10 EVALUATIONS)**

- A. Open the software using your assigned Passcode — remember to keep it confidential.
- B. Click *Persons*.
- C. Click *Add New Person* and enter his or her demographic information.
- D. Click *Save*.
- E. Select the *EVALUATIONS* tab.
 - i. Click *Add New Evaluation* and enter the evaluation date.
 - ii. Enter types of social exchange, scores, and the contextual information for each social exchange observed.
- F. Repeat Steps C-E for each of your 10 clients.

❑ **STEP 5: EXPORT COURSE SCORES AND EVALUATION DATA**

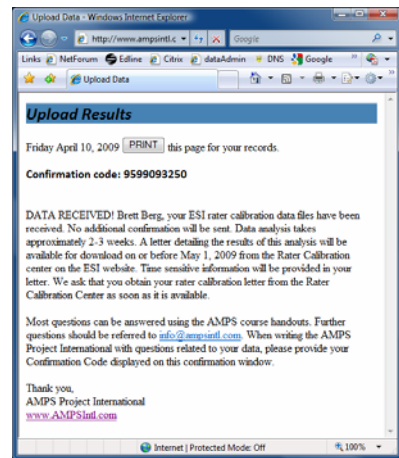
- A. Export course scores:
 - i. Open the software using your assigned Passcode.
 - ii. Click *Course Scoring*.
 - iii. Click *Export All Scores*. Follow the on-screen instructions to export data. *Export the data to a location (e.g., floppy disk, hard, network, USB flash or zip drive) where you can find them later.*
 - iv. Click *Exit*.
- B. Export the evaluation data for the ten clients:
 - i. Click *Export*.
 - ii. Follow on-screen instruction to export data to the same location you exported your Course Scores.

Note. If your data is incomplete the program will display a message about the problem. Correct the problem as reported by the software program, and export your data again.

❑ **STEP 6: SUBMIT EXPORTED DATA FILES TO AMPS PROJECT INTERNATIONAL**

- A. Open your web browser to www.Social-Interaction.com.
- B. Follow the Rater Calibration Center link in the Rater Calibration menu.
- C. Login to the Rater Calibration Center:
 - i. Select ESI as your course.
 - ii. Enter your ESI Passcode.
 - iii. Click **Login**.
- D. Either provide or confirm your contact information.
 - i. Enter a valid e-mail address two times. ***This is the e-mail address that AMPS Project International will use to communicate with you.*** Please add info@ampsintl.com to your “safe sender list” to ensure you receive e-mail from AMPS Project International. Contact your e-mail or IT administrator if you do not receive e-mail communications from AMPS Project International.
 - ii. Select the location (country) of your ESI training course.
 - iv. Click **Register**.
- E. Click **Upload Data**.
- F. Click **Browse** to locate the files exported in Step 4. The names of these four files are: course_scores.dbf, tskhist.dbf, therapist.dbf, and register.dbf. If you have already submitted course_scores.dbf, the course scores from your latest ESI course, then you are not required to submit course_scores.dbf again. If you have trouble finding these files, or if you see more than these four files in the directory, repeat Step 5, ensuring you remember the location (e.g., floppy disk, hard, network, USB flash or zip drive) of the exported data files. ***Files stored in your ESI computer-scoring software directory will not be accepted.***
- G. Click **Submit My Files!** to submit your data for analysis.

- H. If all data files are in order, you will immediately receive a confirmation code and a date on which you may acquire the results of your data analysis in the form of a Rater Calibration Letter. Data analysis takes approximately 3 weeks. Refer to Step 7 for downloading your Rater Calibration Letter.



If you do not receive immediate confirmation from the ESI Rater Calibration Center on your web browser that all data files were received, then we did not receive your data. Review your data entry for accuracy. It is your responsibility to make sure your data is entered correctly and accurately. Errors may result in having to retake the course, test additional clients, or pay additional fees.



Do not submit backup copies of your data — only exported data will be accepted.

❑ STEP 7: DOWNLOAD RESULTS OF THE DATA ANALYSIS

- A. Login to the Rater Calibration Center.
- B. Either Edit or Confirm your name and e-mail address as you did in Step 6.
- C. Click ***Check Results***.
- D. If the analysis of your data is complete, your Rater Calibration Letter will be available for download.

The letter will summarize the details of the results of your data analysis. If the analysis reveals that your scoring does not demonstrate valid and reliable scoring, you will be asked to test an additional 10 persons or, in the rare case of extreme (and invalid) rater severity, to take the course again.



It is your responsibility to download your results in a timely manner. Time sensitive information will be provided in your Rater Calibration Letter.

Submission of data for an additional 10 persons provides the potential ESI user with an additional opportunity to learn to administer and score the ESI in a valid and reliable

manner. Those who do not calibrate as valid and reliable raters with the second set of data must retake the course if they want to use the ESI in clinical practice or research.

SOME SUGGESTIONS FOR SUCCESSFUL CALIBRATION

- Do not change your severity — try to *score people after the course with the same overall severity that you had when you scored the cases during the course.*
- Be sure that the people you observe after the course perform social exchanges that will be challenging. Ideally, these will be social exchanges that the client identifies as ones they have had some difficulty performing. Remember, observing your client perform social exchanges that are too easy will result in error.
- Read the manual — be sure to match what you observed to the scoring examples in the manual. Also, do not forget to use the criteria in the manual for carefully rating the client's and the social partner's overall quality of social interaction.



If you need technical assistance, please contact AMPS Project International by e-mail: info@ampsintl.com.

Installation and User Instructions

ESI 2009 OVERVIEW: The ESI Computer-scoring Software, Version 2009 (ESI 2009) enables you to input a person's data and then generate ESI Graphic Reports or Progress Reports based on data that has been subjected to many-facet Rasch analyses. It is simple to use. Click the button or tab you want to use. There are menus and selections within each window. You may make your choices using either keystrokes or the mouse.

Data stored in the ESI computer-scoring software is only accessible to the occupational therapist who entered the data, even when more than one occupational therapist share a common program loaded on the same computer.



The ESI Computer-scoring software was designed to meet international standards for confidentiality and protection of personal information. To ensure confidentiality, it is the occupational therapist's responsibility to keep his or her personal passcode confidential. To further ensure confidentiality, do not enter social security or other national personal identification numbers into the program.

SYSTEM REQUIREMENTS: It is recommended to install the ESI 2009 on a computer with a Pentium-class process or higher, Microsoft Windows 2000 with Service Pack 3 or later operating system, 64 MB of RAM or higher, Super VGA 800 x 600 or higher resolution monitor with 256 colors. ESI 2009 was designed to run across a network with multiple, simultaneous users; however, actual network requirements will vary based on your network configuration.

CLOSE ALL OTHER SOFTWARE: You may experience problems if you have any other software running on your computer or network system when you are installing the ESI 2009. If you experience problems with the installation, close other software products (e.g., virus scanning software) before installing ESI 2009.

INSTALLATION: (Have your ESI Passcode ready before starting. Contact your computer's administrator for permission to install software.)

- Step 1: Download the ESI 2009 installer from the ESI website, <http://www.social-interaction.com/software/InstallESI2009.exe>.
- Step 2: Double-click the ESI 2009 installer to begin installation. The ESI software Setup Wizard will walk you through the installation process.
- Step 3: The software is preset to install in C:\ESI\. It is recommended that you use this default setting. If you want to change the destination directory to a network drive, alternate directory on your local hard drive, or USB Flash Drive, do so now.

Special note for IT administrators:

Do not attempt to separate the database (.../ESI/DATA) from the application. Once installed, all ESI 2009 files and subdirectories must remain in the same relative location to the ESI2009.exe application file. Click **Next** to begin installation and follow the prompts to finish installing the software and create a desktop icon.

Step 4: At the completion of installation, a window displays stating the software has been successfully installed. Click **FINISH**.

Step 5: Launch the new installation of the ESI 2009 using the ESI icon on your desktop. Follow the prompts to enter your name, date preference, and Passcode.

ENTERING COURSE DATA:

Step 1: Click **Course Scoring**. Select and enter the scores for each person/social exchange from your ESI Evaluation Worksheets. Be sure you are selecting the correct persons, social exchanges, and scores. A red check mark will appear by the client once you have entered and saved the social exchange scores.

Step 2: Once all social exchanges are entered, click **Export All Scores**. Follow the on-screen instructions to export your course data file (*course_scores.dbf*) to a location (e.g., floppy disk, hard, network, USB flash or zip drive) where you can find it later. Use the same location used to export your own clients' data. *See the section below, "Exporting Calibration Data"*. (For detailed instructions, please refer to the **Rater Calibration Requirements** handout.)

ENTERING INFORMATION FOR PERSONS EVALUATED AFTER THE COURSE:

Step 1: Click **Persons** on the main ESI menu bar.

Step 2: Click **Add New Person**. Enter demographic information about the person. Enter dates for the person's Date of Birth and Date of First Evaluation. The person's age at the time of the evaluation will be calculated for you, ***but it will only be accurate if the person's date of birth and each date of evaluation are entered accurately***. Use the ESI Diagnostic Categories from your ESI manual to select the most accurate person diagnoses.

ENTERING EVALUATIONS: Click the **Evaluations** tab. Click **Add New Evaluation**. Follow prompts to enter an evaluation date, intended purpose categories of the social interactions, scores, and context information for each social interaction. Scores may be entered by using the mouse or numbers on the keyboard. When finished entering evaluation data, click **Save**. All items must be completed to save the evaluation.

EXPORTING CALIBRATION DATA: Click **Export**. Follow the on-screen instructions to export data to a location (e.g., floppy disk, hard, network, USB flash or zip drive) where you can find them later. Do not export data to the same directory in which your ESI software is installed — doing so will corrupt your ESI software, require you to reinstall the software, and enter your data again. All valid data will be exported to the location you selected. Use the same location

that was used to export course data (see the “Course Data” section above). Please follow the *Rater Calibration Requirements* instructions on how to submit your data for analysis.

SETTING PREFERENCES: Currently, only the date format may be changed in the ESI 2009. To change the date format, click **Preferences** and then click the Down Arrow Box to the right of the Date Format field. Click the date format you prefer to use.

BACKING UP DATA: It is recommended that you frequently backup your ESI data. Create a backup of your ESI data in a location (e.g., floppy disk, hard, network, USB flash or zip drive) where you can find them later. Do not backup your data to the same directory in which your ESI 2009 is installed — doing so will corrupt your ESI software, require you to reinstall the software, and enter your data again.

IMPORTING DATA: Data may be imported from a backup of your ESI software. Click **Import** and follow the prompts to locate your ESI data backup files (see BACKING UP DATA, above).

REINDEXING THE DATABASE: Occasionally tables and files embedded within the software need to be re-organized to help the program run more efficiently. This utility does not change any data you have entered. It is recommended that you use this function periodically in order to enhance software performance.

TECHNICAL SUPPORT: Direct questions and concerns to info@ampsintl.com. Please be specific when describing any technical difficulties and include the text of any error messages.

ESI 2009 is currently only available in English. For free updates to this version of the software, please visit our website at www.Social-Interaction.com.

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Giving an ESI In-service

GENERAL CONSIDERATIONS

- Except for the ESI Score Form, please do *not* photocopy pages from the ESI manual.
- For presentation purposes, copying some pages of the manuals onto overheads is acceptable.
- You may photocopy and use any of the ESI handouts to assist you in your presentation.

TAILORING THE PRESENTATION TO SPECIFIC AUDIENCES

Occupational Therapy Clinicians

- Begin by providing an overview of the ESI.
- After providing an overview of the ESI, the use of a case example can be critical in communicating how the ESI is used in practice.
- Discuss how you interpreted the results, set goals, and planned your intervention.

Research Colleagues

- In addition to providing an overview of the ESI, it can be helpful to:
 - Hand out copies of the ESI reference list from the International ESI website (when available), www.social-interaction.com
 - Refer them to Chapter 2 & especially Chapter 3 — validity and reliability studies (offer to let them borrow your copy, but please do not photocopy the chapter).
 - Discuss limitations of existing assessments or lack thereof.

Academicians

- In addition to providing an overview of the ESI, it can be helpful to:
 - Explain that the ESI is a method of performance analysis that we can use in conjunction with other methods commonly used by OTs (e.g., activity analyses).

- Help students to understand that as a performance analysis, the ESI is *not* used to assess client factors or body functions.
- Point out that the ESI is a complex assessment and that students will need to take an ESI course to learn to administer and score it.
- If you have given several ESI evaluations, consider using a case example to demonstrate how ESI can be used in the intervention planning process.

Clinicians from Related Disciplines

- In addition to providing an overview of the ESI, it can be helpful to:
 - Include general information about the unique focus of occupational therapy.
 - Focus on what we can learn by giving an ESI that we cannot learn from other assessments.

Upgrade Policy and Information

At AMPS Project International, we are continually striving to provide ESI trained occupational therapists with the most technologically and professionally up-to-date assessment materials. Within this, we typically new versions of software every 2 to 3 years. Providing consistent updates has allowed us to provide a product that is compatible with the latest network and computer systems utilized by occupational therapists. Additionally, as new research is conducted and as new clinical demands arise, we are able to improve the clinical features and utility of the ESI software (e.g., update calibration values and develop new reports).

As with any assessment tool, AMPS Project International considers it the occupational therapist's personal and professional responsibility to remain informed of ESI manual and software updates. The best way to stay apprised of software updates is through the International ESI website (www.social-interaction.com), as announcements for new versions of the manual and software are posted there.

Those who do not stay current with the ESI may be required to take another course and complete the calibration process before they can receive the latest software.

Should you have specific questions regarding an upgrade, please contact us at your convenience at info@social-interaction.com.

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Letter of Informed Consent

DRAFT TEXT: This form is intended to be modified or translated as required by the therapist's workplace. An editable version of this form is available from the ESI website, www.social-interaction.com.

Dear _____:

I have recently taken a course where I learned how to administer and score an occupational therapy evaluation. The name of the tool is the Evaluation of Social Interaction (ESI), and it is used by occupational therapists to evaluate a person's ability to interact with other people as they engage in desired everyday activities. In order to complete my training, I am required to assess persons as they engage in tasks that involve talking to or interacting socially with others. I must observe each person during at least two different social exchanges and then score the quality of their performance based on the standardized criteria in the ESI test manual.

The administration of the ESI provides me with a tool for planning and implementing occupational therapy intervention. Therefore, I would like to use it as part of my routine occupational therapy evaluation. I would also like your permission to send your data to AMPS Project International for evaluation of the quality of my rating of your performance.

If you give me permission to send your data, you will in no way be identifiable. The only information that will be sent to AMPS Project International is the tasks you performed, your age (date of birth), your gender, and your diagnoses (if you have any). I will not send your name or personal identification. There is no way in which AMPS Project International can track whom I have assessed using the ESI. When my assessment data is sent to AMPS Project International, confidentiality of your ESI assessment results is ensured.

Your signature acknowledges that you have read the information stated and willingly signed this consent form. Your signature also acknowledges that you have received, on the date signed, your personal copy of this document.

Person's name – Printed

Person's name – Signature

Date

Therapist's – Signature

Date

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ESI Course Evaluation Form

Your feedback is very important to us as it provides us with important information we can use to plan future courses. As you respond to the following, please try to give us comments that will help us to learn what features to retain or how we should revise future courses.

Course location: _____ Date: _____

1. What was the best part of the course? Why?
2. What additional information would you have liked to have prior to attending the course?
3. What recommendations do you have to improve the design of the course?
4. Please comment on the quality of teaching of the course instructor.

Name (optional)

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