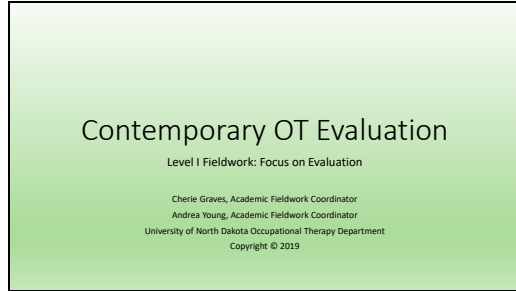


Slide 1

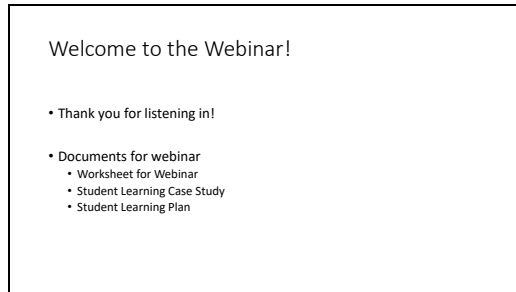


Contemporary OT Evaluation

Level I Fieldwork: Focus on Evaluation

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Slide 2

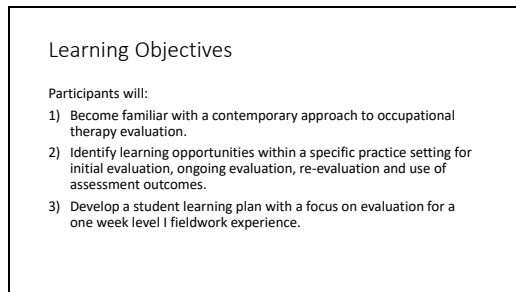


Welcome to the Webinar!

- Thank you for listening in!
- Documents for webinar
 - Worksheet for Webinar
 - Student Learning Case Study
 - Student Learning Plan

On the worksheet for webinar, take a moment and write down how you would currently describe your evaluation process at your setting.

Slide 3



Learning Objectives

Participants will:

- 1) Become familiar with a contemporary approach to occupational therapy evaluation.
- 2) Identify learning opportunities within a specific practice setting for initial evaluation, ongoing evaluation, re-evaluation and use of assessment outcomes.
- 3) Develop a student learning plan with a focus on evaluation for a one week level I fieldwork experience.

Slide 4

What is contemporary OT evaluation?

- Process is not diagnosis or age specific
- Process can be applied in any practice setting
- Occupation-based evaluation leads to occupation-based OT services
 - Occupation as primary means
- Occupation is the end goal
 - Achieving health, well-being and participation in life

Top-down approach to assessment – first focus on clients occupational performance issues rather than the underlying performance limitations.

Occupation is the central focus of OT services

OTs customize the process

Slide 5

UND approach to teaching OT Evaluation

- Throughout OT Process
 - Initial Evaluation
 - Intervention (ongoing)
 - Re-evaluation
 - Outcomes
- Evaluation occurs:
“During the initial and all subsequent interactions with a client” (AOTA, 2014, p. S13).

“...it is not possible to ever fully separate evaluation from intervention because practitioners maintain an evaluative view of clients through the OT process (screening to discharge)” (Shotwell, 2019, p. 370).

Students will be learning about evaluation throughout the OT Process (initial evaluation, intervention (ongoing), re-evaluation, outcomes)

Initial Evaluation – occupational profile, analysis of occupational performance, assessment of client factors, performance skills, performance patterns, contexts

Intervention/ongoing - Where do you see ongoing evaluation at your site? Within functional tasks/occupations? When addressing specific skills?

Re-evaluation - At what points do you update your treatment plan/plan of care? How does re-evaluation occur at your site

Outcomes - How do you use assessment outcomes to make decisions about client plan of care (ie. discontinue or continue services, change level of services, referral to other services)?

Slide 6

Primary question across OT process

- **Initial Evaluation**
 - Primary Question – Does my client need OT services?
- **Intervention (ongoing)**
 - Primary Question – What OT interventions can best help my client?
- **Re-Evaluation**
 - Primary Question – How has OT affected my client's performance?
- **Outcomes**
 - Primary Question: Does my client continue to need OT services?

Invite participants to look at worksheet – think about how you can engage students in these four processes

Initial Evaluation

- Primary Question – Does my client need OT services?
- As a therapist, what are your goals for initial evaluation? (learn about the client, learn about their meaningful occupations, what supports are in their life, what barriers do they experience, what contexts do they engage in occupations in, what are their goals for treatment, what challenges do they perceive being present)
- What methods do you use?

Intervention (ongoing)

- Primary Question – What OT interventions can best help my client?
- As a therapist, what are your goals for ongoing evaluation? (evaluating clients satisfaction with treatment, evaluating clients progress toward goals, modifying intervention approaches and goals if needed, evaluating clients challenges with occupational performance)
- What methods do you use?

Re-Evaluation

- Primary Question – How has OT affected my client's performance?
- What are your goals for re-evaluation? (evaluating clients progress toward goals, identifying what next steps are appropriate, need for referrals, need for continued therapy, discharge recommendations, need for

additional supports, evaluating clients satisfaction with treatment)

- What methods do you use?

Outcomes

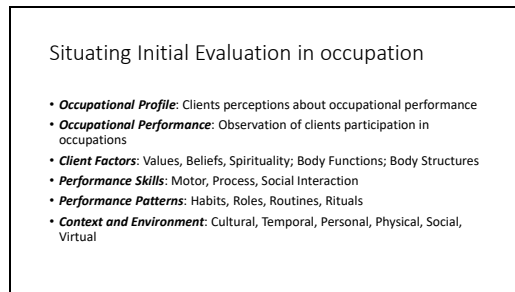
Primary Question: Does my client continue to need OT services?

Outcomes: Continue or Discontinue

Slide 7



Slide 8



Language from the occupational therapy practice framework, currently in its 3rd edition with the 4th edition in the works. If you are an AOTA member you have access to the framework free of charge by accessing it through its publication in AJOT. If you are not an AOTA member it can be purchased for \$100. It would be helpful to review the language in the OTPF to think about what aspects are included in client factors, what aspects are included in performance skills.

We want to help students understand that choices of assessment will have a

positive and big impact on interventions and outcomes (AOTA, 2014; Bass, 2014) for clients.

Approaching assessments with a Top Down perspective, with the client, their chosen occupations, and the contexts that are a part of the clients' world will impact their occupational performance.

Slide 9

Occupational Profile: Subjective Data

- Client's perceptions
- Collection and organization of subjective data
- Description of the occupational life of a person
 - Including:
 - "Occupational history
 - Occupational experiences
 - Patterns of daily living
 - Interests
 - Values
 - Needs"

AOTA, 2014, p. 513

AOTA has a template that can be downloaded free of charge for completing the occupational profile.

The Occupational Profile is what you think it is: the beautiful picture of a client, and what makes them who they are. According to AOTA (2014), it includes a person's *occupational* history, and a description of their roles, habits and routines. An occupational profile also takes an account of people's "...interests, values, and needs" (AOTA, 2014, p. S13). The occupational profile is at the heart of choosing assessments. Occupational therapists who consider each aspect of an occupational profile will find this instrumental in including the client in the therapy process, and be able to use good clinical reasoning for assessment choice, and intervention planning. Referring to a client and their occupational profile will also guide occupational therapy students, as well as new and seasoned occupational therapists, in the dynamic and iterative process of ongoing re-evaluation and assessment of clients to follow the OT process in

such a way that a clients' needs are met with an effective approach, and efficiently managed for quality care that allows the client to achieve the goals they have chosen.

Slide 10

Insights from the Occupational Profile

- Client's needs/goals for occupational engagement & performance
- What is limiting success with occupational engagement and performance?
- What does the client think may be helpful to address these needs?
- What strengths are present in the client's profile that will facilitate progress toward the client's needs/goals?
- What is the client anticipating to gain from occupational therapy?

The occupational profile provides information as to why the client needs occupational therapy services or what problems with occupational engagement a client wants help with. Barriers or problems that limit occupational performance may be identified by the client. The client's occupational experiences and history, as well as their interests, values, and roles are important to understand. Habits, routines, and patterns of occupational engagement are important for assessment of the client and are an important element of the occupational profile. Through development of the occupational profile, the occupational therapist should learn about what a client finds most important, what they are striving for, and in what areas therapy services must be geared. For example, is there a need for advocacy? Does the person just want to remediate their problems and restore health? Are their particular life roles the individual is experiencing occupational loss in? (AOTA, 2014, S13)

***Again, these considerations will inform and drive assessment choice,

as well as effective and efficient therapy (Bass, 2014).

Slide 11

Means to Obtain Occupational Profile

- Everyday conversation
- Client self-report
- Semi-structured interview
- Formal assessment
- Example assessments
 - Canadian Occupational Performance Measure (COPM)
 - Occupational Performance History Interview II
 - Activity Card Sort

Slide 12

Occupational Performance: Objective Data

- Addresses the collection, organization, and synthesis of primarily objective data regarding the client's occupational performance
- Based on actual observation of performance
- Clients perform selected activities important to their occupations
- Ideally represent the client's real-life situation

This is your objective performance information.

Slide 13

Areas of Occupation	Sample Assessment Tools
Activities of Daily Living (ADL)	Quality Measures, Role Evaluation of Activities of Life (REAL), Barthel Index
Instrumental Activities of Daily Living (IADL)	Kohman Evaluation of Living Skills, Performance Assessment of Self-care Skills (PASS)
Education/Work	School Function Assessment, Worker Role Interview
Play/Leisure	Leisure Assessment Inventory*
Social Participation	Assessment of Communication and Interaction Skills
Rest/Sleep	Occupational Profile of Sleep*, NIH Activity Record (ACTRE), Fatigue Inventory

All examples of assessments, except those marked with an asterisk (*) are summarized in the Asher (2007) text.

* Leisure Assessment Inventory (Hawkins et al., 2002) and Occupational Profile of Sleep (Pierce & Summers, 2011): See References

Slide 14

Why Occupation-based Evaluation?

- ✓ Evaluations that do not focus on occupations that clients find problematic do not communicate well the purpose of OT
- ✓ Evaluation of performance skills/client factors (ie. motor skills, cognition, sensory, etc.) may lead to focus of intervention on skills/factors rather than occupations
- ✓ Improvements in performance skills/client factors does not always translate into improved occupational performance

Slide 15

APPLICATION TO YOUR SETTING

Slide 16

Worksheet Part A: Occupational Profile and Occupational Performance

- How do you find out about the occupational lifestyle of your clients?
- What occupations are typically addressed at your site?
- What assessment methods (tools, observation, interview, etc.) do you use to complete occupational analysis?

Part A: Occupational Profile & Evaluation of Occupational Performance

Refer to first question on Worksheet for Webinar document.

Begin to consider how these things may facilitate how you integrate assessment into the Student Plan for FW students.

Slide 17

Situating Evaluation in Occupation

- **Occupational Profile:** Clients perceptions about occupational performance
- **Occupational Analysis:** Observation of clients participation in occupations
- **Client Factors:** Values, Beliefs, Spirituality; Body Functions; Body Structures
- **Performance Skills:** Motor, Process, Social Interaction
- **Performance Patterns:** Habits, Roles, Routines, Rituals
- **Context and Environment:** Cultural, Temporal, Personal, Physical, Social, Virtual

We have talked about occupational profile and occupational analysis, now we will talk about how these remaining areas impact occupational performance.

Slide 18

Evaluation of Client Factors

- Values, beliefs, spirituality
- Body functions
 - Mental functions: global and specific
 - Sensory functions
 - Neuromusculoskeletal and movement related functions
 - Cardiovascular, hematological, immunological, and respiratory system functions
 - Voice and speech functions; digestive, metabolic, and endocrine system functions; genitourinary and reproductive functions
 - Skin and related structure functions
- Body structures
 - Not typically evaluated by an OT, but info found in client records

Our Level I and Level II fieldworks will be organized around the client factors of mental functions, sensory functions, and neuromusculoskeletal and movement related functions. We want to think about, How do body functions translate into skills and performance over time? When body functions, body structures, and skills are combined they underlie the ability for an individual to participate in desired occupations.

Client factors *include* (1) values, beliefs, and spirituality; (2) body functions; and (3) body structures that

reside within the client that **influence the client's performance in occupations.**

Values, beliefs, spirituality – what is important to the client?

Mental functions – refers to affective, cognitive, perceptual

Global – consciousness, orientation, temperament, etc.

Specific – higher level cognitive, attention, memory, perception, etc.

Sensory functions – vision, hearing, vestibular, pain, etc.

NMSMR functions – joint mobility, muscle power, motor reflexes, etc.

Body structures – structures related to all of the above functions

Slide 19

Evaluation of Performance Skills and Patterns

- Performance Skills
 - Motor skills
 - Process skills
 - Social interaction skills
- Performance Patterns
 - Habits
 - Roles
 - Routines
 - Rituals

Performance skills and patterns - Overall picture of skill performance in functional tasks

Performance skills *are observable elements of action that have an implicit functional purpose; skills are considered a classification of actions, encompassing multiple capacities (body functions and body structures) and, **when combined, underlie the ability to participate in desired occupations and activities.***

Performance patterns *are the habits, routines, roles, and rituals **used in the process of engaging in occupations or***

activities; these patterns can support or hinder occupational performance.

Slide 20

Evaluation of Context and Environment	
Aspects Considered	Interview/Observation strategies
Cultural	Do you engage in special rituals?
Personal	Where do you live and work?
Physical	Tell me about your home.
Social	With whom do you live or get social support?
Temporal	What is the best/worst time of day for you and your family?
Virtual	Do you use internet/email, cell phone? For what purpose?

Commonly we will gain information about a persons home, social supports, etc.

Slide 21

APPLICATION TO YOUR SETTING

Slide 22

Worksheet Part B: Evaluation of client factors/performance skills/contexts

- How do you evaluate *values, beliefs, spirituality* in your setting?
- What *client factors/performance skills/contexts* are typically assessed at your facility?
- What assessment methods (tools, observation, interview, etc.) do you use?

Take a look at the next questions on your Worksheet for Webinar document and take a few minutes to jot down your thoughts to the following questions.

Part B: Evaluation of Client Factors/Performance Skills/Contexts

Slide 23

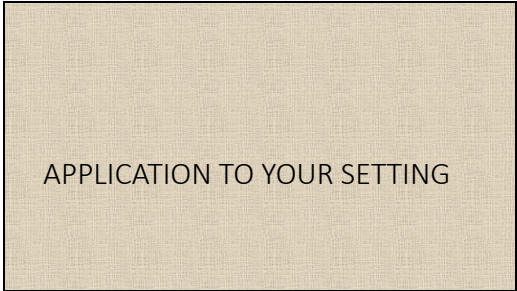
Ongoing Evaluation (Intervention)

Slide 24

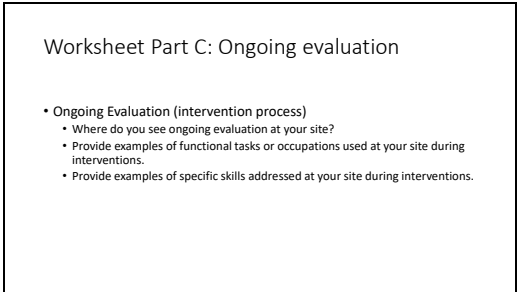
Ongoing Evaluation (Intervention)

- Occurs throughout the intervention process
- Client domains (occupation, context, performance skills, etc.) are interrelated and influence one another
- Dynamic interrelationship among client domains creates need for evaluation and intervention planning to continue throughout the intervention process (AOTA, 2014, p. S15).
- Monitoring client's response to interventions is ongoing evaluation of his/her progress toward goals.

Slide 25



Slide 26



Part C: Ongoing Evaluation at your Site

Slide 27



Slide 28

Re-evaluation

- Monitoring response to interventions and progress toward goals
- Continuous process of re-evaluating and reviewing the intervention plan, effectiveness of delivery, and progress toward outcomes
- Re-evaluation and intervention plan review may lead to change in the plan
- Determining need for continued OT services or referral needs to other services

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APPLICATION TO YOUR SETTING

Slide 30

Worksheet Part D: Re-Evaluation

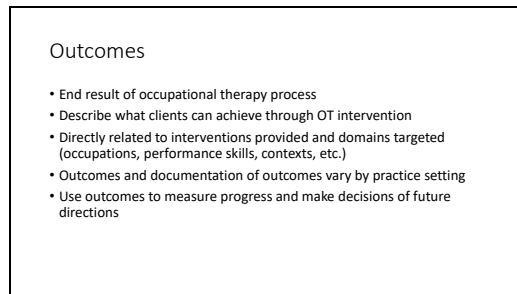
- Re-evaluation
 - At what points do you update your treatment plan/plan of care?
 - How does re-evaluation occur at your site?

Part D: Re-Evaluation at your Site

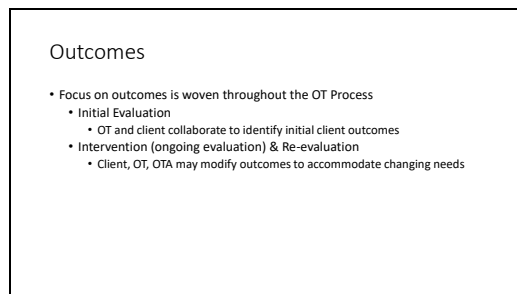
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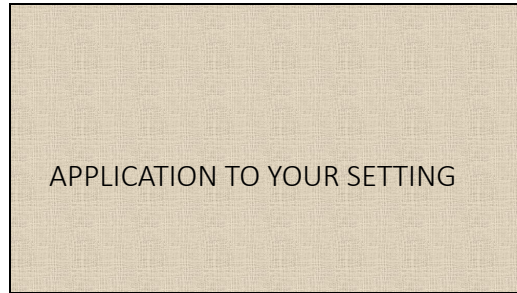
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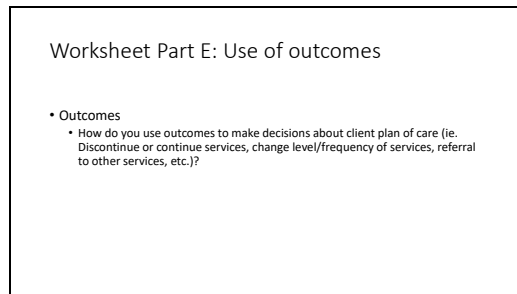
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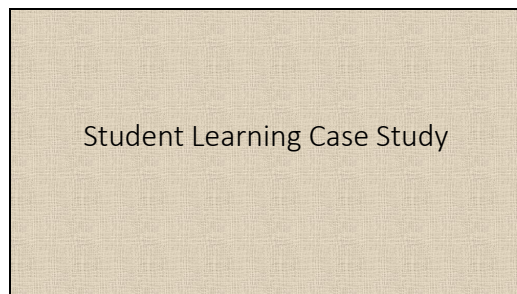
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Slide 35



Slide 36



Participants may use case study to work on their own student learning plan. Case study provides examples of how fieldwork educators can involve students in the evaluation experience throughout the OT process.

Slide 37

Student Learning Case Study

- Review student learning case study
- Provides examples to engage student in learning experience
- Make changes to case study to adapt to your site

Slide 38

Student Learning Plan

Participants may use case study to work on their own student learning plan. Case study provides examples of how fieldwork educators can involve students in the evaluation experience throughout the OT process.

Slide 39

Student Learning Plan:
General Considerations

- Providing orientation to your site
 - What does student need to know about evaluation at your site?
- Sequencing learning activities
 - Grading tasks - observation to hands-on practice
 - Grading complexity – straight-forward to complex clients
 - Short, intermittent or frequent client contact
- Generalization of student learning
 - Clients across the life span
 - Clients across settings
 - (ie. inpatient rehab to nursing home, school to outpatient pediatric clinic)

Slide 40

Student Learning Plan

- Student Orientation
- Initial Evaluation
- Intervention (ongoing)
- Re-evaluation
- Outcomes

Use the learning activities template as a resource for developing your own plan.

Slide 41

Feedback on Student Learning Plan

- UND is able to offer an additional one hour of continuing education credit for completion of a formal student learning plan!
- Steps for completion
 1. Fill out the student learning plan worksheet
 2. Send to Cherie.graves@und.edu
 3. Upon receipt, you will receive continuing education certificate (2 hours)
 4. After review by UND faculty, you will receive feedback on your learning plan

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Thank You for your Participation!

Without invested fieldwork educators like yourselves, true student learning does not happen. We thank you and count ourselves blessed to have the opportunity to collaborate with you!

- Quote from Margaret Mead: "Never doubt that a small group of thoughtful, committed citizens can change the world: indeed, it's the only thing that ever has".

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