

Introduction to Occupational Therapy

Introduction to Occupational Therapy (OT) Assessment

Key concepts, purposes, and common tools

1. What Is an OT Assessment?

Aspect	Description
Definition	A systematic process used by occupational therapists to gather information about a client's abilities, challenges, environment, and goals.
Goal	Identify strengths and barriers to occupational performance so that a client-centered intervention plan can be created.
Scope	Covers physical, cognitive, emotional, social, and environmental factors that affect daily life activities (ADLs, IADLs, work, leisure, school).
Outcome	A documented clinical picture that guides treatment, tracks progress, and supports communication with clients, families, and other professionals.

2. Core Principles Guiding OT Assessment

Principle	Practical Implication
Client-Centred	The client's values, preferences, and goals drive the assessment focus.
Holistic	Consider body functions, activities, participation, and context (ICF model).
Evidence-Based	Use validated tools and current research to ensure reliability and validity.
Culturally Sensitive	Adapt language, materials, and interpretation to respect cultural background.
Dynamic	Reassess regularly as the client's condition, environment, or goals change.

3. The Assessment Process – Step-by-Step

1. Referral & Initial Information Gathering

- Review medical records, physician notes, previous OT reports.

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- Clarify the reason for referral and expected outcomes.

Assessment

2. Interview (Client & Significant Others)

- Open-ended questions about daily routines, priorities, perceived difficulties, and support systems.
- Use structured interview guides (e.g., Occupational Profile Interview).

3. Observation of Occupation

- Watch the client perform meaningful tasks in natural or simulated settings.
- Note motor patterns, cognitive strategies, environmental interactions.

4. Standardized / Non-Standardized Testing

- Choose tools that align with the client's age, diagnosis, and functional level.
- Record raw scores, convert to standardized scores, and interpret.

5. Analysis & Synthesis

- Map findings onto the Occupational Therapy Practice Framework (OTPF) domains:
Occupations, Performance Skills, Performance Patterns, Context & Environment.
- Identify performance deficits, strengths, and contributing factors.

6. Report & Feedback

- Write a concise assessment report (see Section 5).
- Discuss findings and next steps with the client and interdisciplinary team.

7. Plan Development

- Translate assessment data into measurable goals and intervention strategies.

4. Common Assessment Tools

Domain	Tool (Standardized)	Typical Use	Key Output
Motor & Sensory	<i>Jebsen Hand Function Test</i>	Hand function in ADLs	Time to complete tasks

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Domain	Tool (Standardized)	Typical Use	Key Output
Cognitive	<i>Nine Hole Peg Test</i>	Fine motor dexterity	Pegs placed/removed per time
	<i>Montreal Cognitive Assessment (MoCA)</i>	Global cognition	Score 0-30 (impairment level)
	<i>Executive Function Performance Test (EFPT)</i>	Executive function in daily tasks	Errors, prompts needed
ADL/IADL	<i>Katz Index of ADL</i>	Basic self-care independence	Level of assistance
	<i>Lawton IADL Scale</i>	Instrumental activities	Independence rating
Sensory Processing	*Sensory Profile		