

# Occupational Therapy Evaluation Example

Community Occupational Therapy Services  
Gwasanaethau Therapi Galwedigaethol yn y Gymuned



## OCCUPATIONAL THERAPY ASSESSMENT

### PART 1: PERSONAL DETAILS

Person's Name:		L.A. No:	
Address:			
Date of Birth:		Tel No:	
GP:			
NOK/First Contact:			
First Language:		Communication needs:	
Is Person Continuing Health Care Funded		Yes/No	

Is an advocate required?	Yes/No	Is an advocate present?	Yes/No
Name and Contact details			

Does the Person appear to have any Capacity issues relevant to this Assessment?	Yes/No
If yes, please complete the Community Occupational Therapy Service Capacity Assessment before completing Assessed Needs section in the person's best interests.	

Occupational Therapy Worker Details			
Name:		Telephone:	
Referral Date:		Assessment Date & Time:	

As Occupational Therapy Workers, in accordance with the Social Services and Well-Being act 2014, we will work with you to identify your goals and who or what can help you to achieve them.

Person's Name:  
COT Ax Ver. MOTOM Apr 16.1

L.A. No.:

**Occupational therapy evaluation example** is a critical process in the field of occupational therapy, aimed at assessing a client's needs, capabilities, and the specific challenges they face in their daily life. This evaluation serves as a foundation for developing an individualized treatment plan that addresses the client's unique goals and promotes their independence. In this article, we will explore the components of an occupational therapy evaluation, provide a detailed example, and discuss how the information gathered is utilized to create an effective intervention strategy.

## Understanding Occupational Therapy Evaluation

Occupational therapy (OT) evaluations are designed to gather comprehensive information about a client's physical, cognitive, emotional, and social abilities. The evaluation process

typically involves several steps and utilizes various assessment tools and methods to paint a complete picture of the client's needs.

## **Purpose of Occupational Therapy Evaluation**

The primary purposes of an occupational therapy evaluation include:

1. **Identifying Strengths and Weaknesses:** Understanding the client's capabilities and limitations in performing daily activities.
2. **Setting Goals:** Collaborating with the client to establish realistic and meaningful goals for therapy.
3. **Developing Treatment Plans:** Creating a customized intervention strategy based on the client's unique needs and objectives.
4. **Measuring Progress:** Establishing baseline measurements to track improvements over time.

## **Components of an Occupational Therapy Evaluation**

An occupational therapy evaluation generally consists of several key components:

1. **Referral and Background Information:** Gather information about the client's medical history, previous therapy experiences, and the reasons for the referral to occupational therapy.
2. **Client Interview:** Engage the client in a conversation to understand their perspectives, priorities, and specific goals related to their daily activities.
3. **Standardized Assessments:** Administer standardized tools to objectively measure the client's abilities in various domains, including motor skills, cognitive function, and sensory processing.
4. **Observational Assessments:** Observe the client during functional activities to assess their performance in real-life contexts.
5. **Environmental Assessment:** Evaluate the client's environment to identify barriers and facilitators to their participation in daily activities.
6. **Analysis and Interpretation:** Analyze the information gathered to identify patterns, strengths, and areas that require intervention.

# Example of an Occupational Therapy Evaluation

To illustrate the evaluation process, let's consider an example involving a 65-year-old woman named Mary, who has recently undergone hip replacement surgery. Mary's primary concerns include difficulty with mobility and performing daily self-care activities.

## Step 1: Referral and Background Information

Mary was referred to occupational therapy by her orthopedic surgeon. Her medical history includes osteoarthritis, hypertension, and a previous hip fracture. The referral notes that Mary has expressed concern about her ability to return to her previous level of independence.

## Step 2: Client Interview

During the initial interview, the occupational therapist (OT) engages Mary in a discussion about her daily routine prior to surgery and her current challenges. Key points from the interview include:

- Daily Activities: Mary enjoys gardening, cooking, and attending social gatherings.
- Concerns: She feels anxious about her ability to navigate stairs and fears falling.
- Goals: Mary's primary goal is to return to gardening and cooking independently.

## Step 3: Standardized Assessments

The OT administers several standardized assessments to evaluate Mary's functional abilities:

1. Functional Independence Measure (FIM): Assesses Mary's ability to perform activities of daily living (ADLs) such as bathing, dressing, and mobility. Mary scores a 60 out of 126, indicating moderate assistance is needed.
2. Timed Up and Go (TUG) Test: Measures Mary's mobility and balance. Mary takes 18 seconds to complete the test, which suggests an increased risk of falls.
3. Berg Balance Scale: Evaluates balance through a series of tasks. Mary scores a 35 out of 56, suggesting she has a moderate risk of falls.

## Step 4: Observational Assessments

The OT observes Mary as she attempts to perform self-care tasks, such as dressing and transferring from a seated position. Observations include:

- Dressing: Mary struggles to put on her pants due to limited hip range of motion.
- Transferring: She requires assistance to get in and out of a chair, indicating a need for adaptive strategies or equipment.

## **Step 5: Environmental Assessment**

The OT conducts a home assessment to identify potential barriers to Mary's independence. Key findings include:

- Stairs: The presence of a steep staircase with no handrails poses a significant safety risk.
- Bathroom: The bathroom lacks grab bars and a shower chair, which could facilitate safer bathing.

## **Step 6: Analysis and Interpretation**

After gathering all relevant information, the OT analyzes the results. Key insights include:

- Mary has significant challenges with mobility and self-care tasks, making her at risk for falls.
- There are environmental barriers in her home that contribute to these challenges.

## **Developing an Intervention Plan**

Based on the evaluation findings, the OT collaborates with Mary to develop an individualized intervention plan that targets her specific goals and needs.

## **Setting Goals**

Goals are established using the SMART criteria (Specific, Measurable, Achievable, Relevant, Time-bound):

1. Goal 1: Mary will independently dress herself with adaptive equipment within 4 weeks.
2. Goal 2: Mary will safely navigate the stairs using a handrail within 6 weeks.
3. Goal 3: Mary will complete a 30-minute gardening session with minimal assistance within 2 months.

## **Intervention Strategies**

The OT outlines several intervention strategies, including:

1. Adaptive Equipment Training: Introduce tools such as a dressing stick, long-handled reacher, and adaptive clothing to promote independence.
2. Home Modifications: Recommend installing grab bars in the bathroom, using a shower chair, and improving stair safety with handrails.
3. Therapeutic Exercises: Engage Mary in strength and balance exercises to enhance her mobility and reduce fall risk.
4. Education: Provide education on safety strategies, energy conservation techniques, and fall prevention measures.

## **Conclusion**

In conclusion, the occupational therapy evaluation is a vital component in identifying a client's needs and formulating an effective treatment plan. Through a comprehensive assessment process, as demonstrated in Mary's example, occupational therapists can develop targeted interventions that promote independence, enhance quality of life, and foster meaningful participation in daily activities. By understanding both the individual and their environment, OT practitioners can make a significant impact on their clients' overall well-being and functionality.

## **Frequently Asked Questions**

### **What is an occupational therapy evaluation?**

An occupational therapy evaluation is a systematic process where an occupational therapist assesses a client's abilities, challenges, and goals in order to develop a personalized treatment plan.

### **What are the key components of an occupational therapy evaluation?**

Key components include client interviews, standardized assessments, observations of daily activities, and review of medical history to gather comprehensive information about the client's needs.

### **Can you provide an example of a standardized assessment used in occupational therapy evaluations?**

One common standardized assessment is the Occupational Performance History Interview (OPHI), which helps gather qualitative data about a client's occupational performance and life history.

## **How does an occupational therapy evaluation differ from a medical evaluation?**

An occupational therapy evaluation focuses on a client's ability to perform daily activities and engage in meaningful occupations, while a medical evaluation typically assesses physical health and medical conditions.

## **What role does client involvement play in the evaluation process?**

Client involvement is crucial; it ensures that the evaluation reflects the client's perspectives, priorities, and goals, leading to a more tailored and effective treatment plan.

## **What types of clients might benefit from an occupational therapy evaluation?**

Clients with various conditions, including developmental delays, physical disabilities, mental health issues, and age-related challenges, can benefit from an occupational therapy evaluation.

## **How do therapists use the results of an occupational therapy evaluation?**

Therapists use the evaluation results to identify specific areas of need, set achievable goals, and develop an individualized intervention plan that addresses the client's unique challenges.

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