



Mary E. Samples, Assistant Superintendent

Occupational Therapy Evaluation

Name:	District:
Date of Birth:	School:
Chronological Age:	Report Date:
Grade:	Teacher:
Therapist:	Date of assessment/ observation:

Introduction: An educational occupational therapy evaluation was completed due to _____.

This evaluation will assist the IEP team in determining the need for special education services and/or accommodations within the classroom setting.

Under the current edition of the Guidelines for Occupational Therapy and Physical Therapy in California Public Schools, the use of functional, curriculum-based assessments is highly encouraged. Observations made by a qualified professional, interview with those who are familiar with the child (especially parents, teachers, and other professionals providing services), and work samples compared with age-equivalent peers are considered appropriate assessment tools.

Method of Evaluation: Clinical/Classroom Observation; Teacher Report; Review of Work Samples; The Beery Developmental Test of Visual-Motor Integration, the Visual Perceptual subtest and the Motor Coordination subtest; The Benbow's Observations of Hand Skills; The Handwriting Without Tears Print Tool; The Sensory Profile School Companion; The Sensory Profile Caregiver Questionnaire; The Short Sensory Profile

_____ was cooperative throughout the evaluation process and appeared to try his/her best during all activities. It is believed that testing and interview results provide an accurate picture of _____'s current level of function in the areas that were assessed; however, the results should not be given predictive value.

Health and development or medical factors which are relevant to this assessment are _____.

There are no environmental, cultural or economic disadvantages that are known to this assessor that are relevant to this assessment.

Findings:

- Fine Motor
- Gross Motor
- Self-Help
- Sensory Processing
- Visual Motor

Summary and Recommendations:

It is recognized that ... The recommendations are as follows: ... The decision regarding the provision of specific related services is the responsibility of the IEP Team; therefore, the purpose of this document is to provide information to assist in making that decision.

Occupational Therapist



Ventura County Special Education Local Plan Area

5100 Adolfo Road, Camarillo, CA 93012

(805) 437-1560 FAX (805) 437-1599

www.venturacountyselpa.com

Mary E. Samples, Assistant Superintendent

Optional Inserts for OT Assessment Report

(Additional Language that can be “cut and pasted” into Assessment Reports)

In alphabetical order:

The Beery-Buktenica Developmental Test of Visual Motor Integration, 5th Edition (VMI)

The VMI measures a student’s ability to reproduce shapes of increasing complexity following a developmental sequence. It is designed to assess the extent a student can integrate his visual and motor abilities (visual-motor integration). The visual and motor subtests respectively measure one’s ability to discriminate visual details and to draw lines in specific areas. _____ obtained the following scores:

	Standard Score	Scaled Score	Percentile
VMI			
Visual			
Motor			

These scores indicate that _____’s visual-motor integration, visual and motor skills are in the average range when compared with children the same age.

Benbow’s

The Benbow’s Observations of Hand Skills is an informal checklist of various fine motor components related to arm and hand muscles, coordination necessary for handwriting. In order to look more closely at X’s fine motor development in regard to coordination of arm and hand muscles, s/he was administered the Benbow’s.

Observations were as follows:

Supination	adequate
Forearm Stabilization	adequate
Wrist Extension	adequate
Isolation of Thumbs	inadequate
Separation of the 2 sides of the hand	emerging
Maintenance of Thumb Web Space	adequate
Individuation of Digits	adequate
Palmar Arching	emerging
Translation Movements of Digits	inadequate
Precision Rotation with Distal Fingertips	emerging

Please note that these fine motor skills are typically all in place usually by the end of first grade.

Infant/Toddler Sensory Profile

The Infant/Toddler Sensory Profile was administered as part of a comprehensive assessment to determine whether aspects of sensory processing might be contributing to performance challenges in the daily life of _____. The Infant/Toddler Sensory Profile is a measure of young children's responses to sensory events in daily life. The caregiver completes the Infant/Toddler Sensory Profile, a judgment-based questionnaire, by reporting the frequency with which _____ respond to various sensory experiences (Almost Always, Frequently, Occasionally, Seldom, or Almost Never.)

_____ obtained the following scores:

Quadrant Summary:	
Low Registration	Definite Difference (more than others)
Sensory Seeking:	Typical Performance
Sensory Sensitivity:	<i>Probable Difference (more than others)</i>
Sensation Avoiding:	Probable Difference (more than others)
Low Threshold:	Probable Difference (more than others)

Sensory Processing Section Summary:	
General Processing	No score can be obtained
Auditory Processing:	Definite Difference (more than others)
Visual Processing:	Definite Difference (more than others)
Tactile Processing:	Typical Performance
Vestibular Processing:	Typical Performance
Oral Sensory Processing:	Typical Performance

PART C

was referred to the school district as s/he turns 3 years old for a complete assessment in order to determine eligibility for special education services.

Peabody

The Peabody Developmental Motor Scales (PDMS-2) assesses related fine and gross motor abilities that develop early in life such as Stationary, Locomotion, Object Manipulation, Grasping, and Visual-Motor Integration. The most reliable scores for the PDMS-2 are the quotients.

_____ was administered the PDMS-2 to determine _____ developmental level regarding fine and gross motor skills. _____ obtained the following scores:

	Standard Score	Qualification	Percentile
Grasping			
Visual-Motor			
Fine Motor Quotient			

The Print Tool:

The Print Tool by Jan Z. Olsen, OTR and Emily Knapton, OTR/L is a complete assessment of capital and lower-case letters and numbers. The print tool assesses 8 areas (memory,

orientation, placement, size, start, sequence, control) and spacing. The following defines what each area means:

- Memory – Remembering and writing dictated letters
- Orientation – Facing letters in the correct direction
- Placement – Putting letters on the baseline
- Size – How big or small a child chooses to write
- Sequence – Where each letter begins
- Control – Neatness and proportion of the letter parts
- Spacing – Amount of space left between letters in words and words in sentences

Suggested Handwriting Expectations of a _____ year old according to *The Print Tool*.

	Memory	Orientation	Placement	Size	Start	Sequence	Control	Spacing Letters	Spacing Words
CAPITAL	100%	100%	95%	85%	95%	95%	95%	NA	NA
Lowercase	100%	100%	95%	85%	95%	95%	95%	100%	100%
Numbers	100%	100%	95%	85%	95%	95%	95%	NA	NA

Overall Score: _____

The following are _____ scores on *The Print Tool*, ___/___/2006. The bolded scores are areas that fall below the suggested expectations.

	Memory	Orientation	Placement	Size	Start	Sequence	Control	Spacing Letters	Spacing Words
CAPITAL	%	%	%	%	%	%	%	NA	NA
Lowercase	%	%	%	%	%	%	%	%	%
Numbers	%	%	%	%	%	%	%	NA	NA

Overall Score: _____

Summary of The Print Tool:

Memory –

Capitals: Lower case: Numbers:

Orientation –

Capitals: Lower case: Numbers:

Placement –

Capitals: Lower case: Numbers:

Size –

Capitals: Lower case: Numbers:

Start & Sequencing–

Capitals: Lower case: Numbers:

Control –

Spacing –

Attention/Behavior:

Scissor Skills:

Sensory Profile

The Sensory Profile was administered as part of a comprehensive assessment to determine whether aspects of sensory processing might be contributing to performance challenges in the daily life of _____. The Sensory Profile is a measure of children's responses to sensory events in daily life. The caregiver completes the Sensory Profile by assessing the frequency of the child's responses to certain sensory processing, modulation, and behavioral/emotional events as described in the 125 items. We know from research that the Sensory Profile can help identify the child's sensory processing patterns; then we can consider how these patterns might be contributing to or creating barriers to performance in daily life. _____ obtained the following scores:

Factor Summary:	
1. Sensory Seeking:	Typical Performance
2. Emotionally Reactive:	Definite Difference
3. Low Endurance/Tone:	Typical Performance
4. Oral Sensory Sensitive:	Definite Difference
5. Inattention/Distractibility:	Definite Difference
6. Poor Registration:	Typical Performance
7. Sensory Sensitivity:	Definite Difference
8. Sedentary:	Probable Difference
9. Fine Motor/Perceptual:	<i>Probable Difference</i>

Section Summary:	
Sensory Processing	
A. Auditory Processing:	Definite Difference (much more than others)
B. Visual Processing:	<i>Probable Difference (less than others)</i>
C. Vestibular Processing:	Typical Performance (similar to others)
D. Touch Processing:	Typical Performance (similar to others)
E. Multisensory Processing:	Typical Performance (similar to others)
F. Oral Sensory Processing:	<i>Probable Difference (less than others)</i>
Modulation	
G. Sensory Processing Related to Endurance/Tone:	Typical Performance (similar to others)
H. Modulation Related to Body Position and Movement:	Typical Performance (similar to others)
I. Modulation of Movement Affecting Activity Level:	Definite Difference (much less than others)
J. Modulation of Sensory Input Affecting Emotional Responses:	Typical Performance (similar to others)
K. Modulation of Visual Input Affecting Emotional Responses and Activity Level:	<i>Probable Difference (more than others)</i>
Behavior & Emotional Responses	
L. Emotional/Social Responses:	<i>Probable Difference (more than others)</i>
M. Behavioral Outcomes of Sensory	<i>Probable Difference (less than others)</i>
N. Items Indicating Threshold Response:	Typical Performance (similar to others)

Quadrant Summary:	
Registration	Definite Difference (much more than others)
Seeking	<i>Probable Difference (more than others)</i>
Sensitivity	Definite Difference (much more than others)
Avoiding	Definite Difference (much more than others)

According to Winnie Dunn's theoretical model of sensory processing, these scores indicate that _____ experiences

Short Sensory Profile

_____’s mother was contacted to fill out the Short Sensory Profile, which provides information about a child’s sensory processing abilities and the effect of sensory processing on functional performance. It is a judgment-based caregiver questionnaire. _____ obtained the following scores:

Tactile Sensitivity	Typical Performance (similar to others)
Taste/Smell Sensitivity	Typical Performance
Movement Sensitivity	Definite Difference (much more than others)
Underresponsive/Seeks sensation	Definite Difference
Auditory Filtering	<i>Probable Difference (more than others)</i>
Low Energy/Weak	Definite Difference
Visual/Auditory Sensitivity	Typical Performance
TOTAL	<i>Definite Difference</i>

The Sensory Profile School Companion

The Sensory Profile School Companion is a standardized assessment tool for measuring a student’s sensory processing abilities and their effect on the student’s functional performance in the classroom and school environment. It is a questionnaire consisting of 62 items organized in sensory groups: auditory, visual, movement, touch and behavior. The teacher scores each item by reporting the frequency with which the student responds to various sensory experiences (Almost Always, Frequently, Occasionally, Seldom, or Almost Never).

Quadrant Summary:	
Registration	Definite Difference (much more than others)
Seeking	Typical Performance
Sensitivity	<i>Probable Difference (more than others)</i>
Avoiding	<i>Probable Difference (more than others)</i>

School Factor Summary:	
School Factor 1	
School Factor 2	
School Factor 3	
School Factor 4	

Section Summary:	
Auditory	Definite Difference (much more than others)
Visual	Definite Difference (much more than others)
Movement	Typical Performance (similar to others)
Touch	Typical Performance
Behavior	Typical Performance

School Functioning Assessment (SFA)

The SFA is used to measure a student's performance of functional tasks that support his or her participation in the academic and social aspects of an elementary school program (grades K-6). It was designed to facilitate collaborative program planning for students with a variety of disabling conditions. The SFA is a judgment-based assessment that is completed by one or more school professionals who know the student well and have observed his or her typical performance on the school-related tasks and activities being assessed. This SFA was filled by X's classroom teacher, occupational and speech therapists.

The SFA was used in determining X's needs in his new educational setting. The form was filled by X's classroom teacher and by the occupational and speech therapists.

The **Part 1** of the SFA evaluates the student's participation in the regular classroom, at recess and on the playground, during transportation, bathroom use and toileting, transition and mealtime. A criterion score of ___ was obtained, while the cut-off score is 100. The only area of concern appeared to be in _____.

The **Part 2** of the SFA evaluates task support (i.e. the additional help or modifications that the student needs to perform school-related functional task). In the physical tasks section, a criterion score of ___ was obtained for both assistance and adaptations (the cut-off score is 100), no concerns were expressed. In the optional tasks, however, concerns were brought up in regard to _____. In the cognitive/behavioral tasks section, a criterion score of ___ was obtained for assistance needed (while the cut-off is 77) and a criterion score of ___ was obtained for adaptations needed (the cut-off is 91). Concerns were expressed regarding _____ (i.e. functional communication (the student giving complex directions), memory and understanding (following a series of 3 or more related instructions), compliance with adult directions (organization of own belongings), task behavior/completion (independent work habits, attention to task) and safety (around traffic areas).)

The **Part 3** of the SFA evaluates the student's functional performance. Two activities that appeared to be of concern for X were scored: written work and task behavior/completion. The criterion score for written work was ___, while the cut-off score is 73. The criterion score for task behavior/completion was ___ and the cut-off score is 72.

*Please note: the criterion cut-off scores were derived from the performance of students in the regular education population. The ones used to compare X's scores were in the kindergarten - 3rd grade range.

School Performance Checklist:

This checklist looks at a child's ability to function within the school environment in the areas of self-help, posture/ functional mobility, fine motor/ perceptual skills and sensory processing. Student's performance in each of the areas of the checklist was as follows:

- I. SELF HELP SKILLS: *The student's ability to manage personal needs within the educational environment.*
- II. POSTURE/FUNCTIONAL MOBILITY: *The student's ability to perform basic developmental motor skills, posture, and balance needed to function in and move throughout the educational environment.*
 - A. Posture
 - B. Mobility

- III. FINE MOTOR/PERCEPTUAL SKILLS: *The student's ability to manipulate and manage materials within the educational environment.*
 - A. Bilateral/Fine Manipulation Skills
 - B. Handwriting/Printing (motoric aspect; not content, spelling, grammar, etc.)
 - C. Visual Perceptual/Visual Motor
- IV. SENSORY PROCESSING: *The student's ability to process relevant sensory information and screen out irrelevant sensory information for effective participation within the educational environment.*
 - A. Tactile Processing
 - B. Movement/Vestibular Processing
 - C. Body Awareness/Proprioceptive Processing
 - D. Auditory Processing
 - E. Visual Processing



Mary E. Samples, Assistant Superintendent

Ventura County SELPA
School Performance Checklist
for students with Mild/Moderate Disabilities

The School Performance Checklist was completed by ____ (teacher's name) ____,
____ (Student)'s ____ classroom teacher. This checklist looks at a child's ability to
function within the school environment in the areas of self-help, posture/ functional
mobility, fine motor/ perceptual skills and sensory processing.

Teacher's concerns were _____.

Student Name: _____ Date: _____

D.O.B.: _____ Grade: _____ School: _____

Parents Name: _____ Phone: _____

Referred By (circle): Parent Classroom Teacher IEP Team SST

Person Completing Form: _____

Indicate any diagnoses, medical concerns/precautions and/or special considerations
(i.e. seizures, asthma, medications, etc.): _____

Type of Classroom;
____ Regular
____ Special Education Classroom
____ Other: _____

Current Services;
____ Specialized Academic Instruction
____ Speech/Language Therapy
____ Occupational Therapy
____ Physical Therapy
____ APE
____ Other: _____

*Occupational therapy in the public school setting is primarily concerned with the student's ability to **function within the school environment**. The tasks contained in this checklist are those that may typically be addressed by a school occupational therapist. Completion of this form is necessary so that the occupational therapist can determine the need for a formal evaluation or for continued OT intervention. Please complete this checklist based on your daily observations of this student. You, as the classroom teacher, are most familiar with the student and any difficulties he or she may be experiencing in the school environment. You may wish to get input from other team members familiar with this student, including the occupational therapist.*

WHY IS THIS STUDENT BEING REFERRED TO OCCUPATIONAL THERAPY?
(Please be as specific as possible)

1. _____

2. _____
3. _____
4. _____

Please use the following key when completing the checklist that follows:

[1] = A consistent problem (as compared to grade level peers)

[2] = An infrequent problem (as compared to grade level peers)

[3] = Not a problem (adequate skills or not applicable)

I. SELF HELP SKILLS: *The student's ability to manage personal needs within the educational environment.*

- | | | | |
|---|---|---|--|
| 1 | 2 | 3 | Has difficulty taking off or putting on coat, boots, etc. |
| 1 | 2 | 3 | Has difficulty manipulating fasteners (buttons, snaps, zippers) |
| 1 | 2 | 3 | Has difficulty tying shoe laces |
| 1 | 2 | 3 | Requires assistance for hand washing |
| 1 | 2 | 3 | Has difficulty eating/drinking independently |
| 1 | 2 | 3 | Has difficulty opening food containers (milk carton, bags, etc.) |
| 1 | 2 | 3 | Has difficulty selecting and/or transporting food in cafeteria |
| 1 | 2 | 3 | Has difficulty transitioning between activities |

Comments:

II. POSTURE/FUNCTIONAL MOBILITY: *The student's ability to perform basic developmental motor skills, posture, and balance needed to function in and move throughout the educational environment.*

A. Posture

- | | | | |
|---|---|---|---|
| 1 | 2 | 3 | Moves/fidgets excessively while at desk/table |
| 1 | 2 | 3 | Has difficulty maintaining posture at desk (slumps, head in hand, etc.) |
| 1 | 2 | 3 | Complains of or frequently appears fatigued |
| 1 | 2 | 3 | Has difficulty maintaining sitting position on floor |

B. Mobility

- | | | | |
|---|---|---|--|
| 1 | 2 | 3 | Has difficulty carrying school supplies/belongings in school environment |
| 1 | 2 | 3 | Trips or stumbles frequently |
| 1 | 2 | 3 | Has difficulty opening or closing doors |

Comments:

- [1] = A consistent problem (as compared to grade level peers)
 [2] = An infrequent problem (as compared to grade level peers)
 [3] = Not a problem (adequate skills or not applicable)

III. FINE MOTOR/PERCEPTUAL SKILLS: *The student's ability to manipulate and manage materials within the educational environment.*

A. Bilateral/Fine Manipulation Skills

- | | | | |
|---|---|---|--|
| 1 | 2 | 3 | Has difficulty cutting with scissors |
| 1 | 2 | 3 | Takes excessive amount of time/practice to learn new fine motor skills |
| 1 | 2 | 3 | Avoids/dislikes/appears to struggle with fine motor activities |
| 1 | 2 | 3 | Switches hands while writing, cutting, etc. |
| 1 | 2 | 3 | Has difficulty holding paper still while writing/drawing |
| 1 | 2 | 3 | Has difficulty using computer |
| 1 | 2 | 3 | Has difficulty using classroom tools: ruler, compass, stapler, etc. |
| 1 | 2 | 3 | Has difficulty with constructional tasks: art/science projects |
| 1 | 2 | 3 | Has difficulty manipulating small objects; frequently drops objects |

B. Handwriting/Printing (motoric aspect; not content, spelling, grammar, etc.)

- | | | | |
|---|---|---|--|
| 1 | 2 | 3 | Writing is frequently illegible |
| 1 | 2 | 3 | Forms letters poorly |
| 1 | 2 | 3 | Has difficulty writing on line |
| 1 | 2 | 3 | Letter/number size is inconsistent |
| 1 | 2 | 3 | Writing is excessively large |
| 1 | 2 | 3 | Writing is excessively small |
| 1 | 2 | 3 | Writing appears to require excessive effort/requires excessive time to write |
| 1 | 2 | 3 | Tends to press too hard on the pencil |
| 1 | 2 | 3 | Applies too little pressure on the pencil |
| 1 | 2 | 3 | Has difficulty spacing properly between words |

C. Visual Perceptual/Visual Motor

- | | | | |
|---|---|---|---|
| 1 | 2 | 3 | Has difficulty accurately copying information from books/papers |
| 1 | 2 | 3 | Has difficulty copying information from the board |
| 1 | 2 | 3 | Has difficulty aligning vertical columns; math problems, spelling lists |
| 1 | 2 | 3 | Has difficulty heading/setting up paper correctly |
| 1 | 2 | 3 | Frequently reverses letters/numbers |
| 1 | 2 | 3 | Is unable to recognize/identify shapes/letters/numbers |
| 1 | 2 | 3 | Has difficulty following directions involving terms such as up/down, left/right, etc. |

Comments:

- [1] = A consistent problem (as compared to grade level peers)
 [2] = An infrequent problem (as compared to grade level peers)
 [3] = Not a problem (adequate skills or not applicable)

IV. SENSORY PROCESSING: *The student's ability to process relevant sensory information and screen out irrelevant sensory information for effective participation within the educational environment.*

A. Tactile Processing

- 1 2 3 Has difficulty tolerating touch or other children in close proximity, i.e. in line, at circle time, during group work.
 1 2 3 Appears to dislike getting hands messy (art, glue, water, etc.)
 1 2 3 Has difficulty keeping hands to self in line, group activities
 1 2 3 Touches things/people constantly

B. Movement/Vestibular Processing

- 1 2 3 Appears hesitant/afraid of movement activities
 1 2 3 Appears to be in constant motion; unable to sit still for an activity
 1 2 3 Seeks quantities of movement (e.g. swinging, spinning, bouncing, and jumping)

C. Body Awareness/Proprioceptive Processing

- 1 2 3 Has difficulty negotiating through the school environment without bumping into others, knocking objects off desks, etc.
 1 2 3 Has difficulty respecting the personal space/boundaries of others, i.e. positions self too close to others, leans on others
 1 2 3 Appears to lack safety awareness/judgment
 1 2 3 Seeks quantities of jumping/crashing, hanging on people or furniture, deep pressure, runs or bumps into walls/doors/people

D. Auditory Processing

- 1 2 3 Appears overly sensitive to loud noises (e.g. bells, toilet flush)
 1 2 3 Becomes distressed during assemblies, lunch or other large gatherings
 1 2 3 Covers ears to protect them from sound
 1 2 3 Is distracted or has trouble functioning if there is a lot of noise

Comments: