Level II Fieldwork Site Specific Objectives Checklist

For use with:
Department of Occupational Therapy
Eastern Washington University
College of Health Science and Public Health

The AOTA Fieldwork Performance Evaluation (for the Occupational Therapy Student)

Prepared by:
FLORIDA OCCUPATIONAL THERAPY EDUCATIONAL CONSORTIUM (FLOTEC)

Site: ___________________________ Date: ___________________________

Fieldwork Educator/Contact Person: ___________________________

Phone #: ___________________________ Fax #: ___________________________

E-mail: ___________________________

Please check one:

☐ As a fieldwork site for students from ___________________________ we currently utilize the goals as stated in the educational institutions fieldwork handbook and do not have additional site specific goals. Please proceed to page 19 and 20 of this form, complete and sign.

☐ As a fieldwork site for students from ___________________________ we currently utilize the goals as stated in facilities/corporation student fieldwork handbook and do not have additional site specific goals. Please attach facilities/corporations student fieldwork handbook, proceed to page 19 and 20, complete and sign.

☐ As a fieldwork site for students from ___________________________ we currently utilize the goal as stated in the educational institutions fieldwork handbook as well as the following site specific goals: Please complete this form in its entirety.

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FLOTEC, Level II Fieldwork Site Specific Objectives Checklist
Adapted from the New England Occupational Therapy Education Council, Inc. (NEOTEC). 2010
I. **FUNDAMENTALS OF PRACTICE**

**FWPE item #1**: Adheres consistently to AOTA Code of Ethics & Ethics Standards (AOTA 2010, draft) & site’s policies & procedures; including, when relevant, those related to human subject research as stated below:

- Demonstrates concern for well-being & safety of recipients of services (beneficence)
- Intentionally refrains from actions that cause harm (nonmaleficence)
- Respects right of individual to self rule (autonomy, confidentiality)
- Provides services in fair & equitable manner (social justice)
- Complies with institutional rules, local, state, federal, international laws & AOTA documents applicable to profession of occupational therapy (procedural justice)
- Provides comprehensive, accurate, & objective information when representing profession (veracity)
- Treats colleagues & other professionals with respect, fairness, discretion, & integrity (fidelity)

**FWPE item #2**: Adheres consistently to safety regulations. Anticipates potentially hazardous situations & takes steps to prevent accidents for clients & staff members throughout fieldwork related activities including:

- Record review
- Medication side effects
- Post-surgical
- Infection control
- Fall prevention
- Swallowing
- Food allergies
- Ambulation status
- Behavioral system/privilege level
  (e.g. locked area/unit, on grounds)
- 1:1 for personal safety/suicide precautions
- Sharps count
- Environment set up (no clutter, spills, unsafe items, etc.)
- OSHA/BBP
- I.V./Lines
- ER codes/protocols
- Restraint reduction
- HIPAA
- W/C locks/bedrails/call button
- Vital signs (BP, O2)
- Trach/Ventilator monitoring
- Fire/Evacuation/Lockdown
- CPR certification
- Communication re: change in status

Other: [ ]
FWPE item #3: Uses sound judgment in regard to safety of self & others during all fieldwork related activities:
- Adheres to facility policies & procedures
- Thorough chart reviews/checks MD orders/parent agreement for IEP
- Consistently analyzes space for potential hazards based on client risk factors
- Addresses anticipated safety concerns
- Provides safe supervision of client based on client status
- Accurately identifies ambulation needs/functional mobility status
- Uses safe transfer techniques/equipment according to protocols
- Determines wheelchair positioning needs (e.g. footrests, cushions, trays/supports, etc.)
- Correctly positions client (e.g. in chair/bed; at desk, for feeding, etc)
- Provides supervision of client based on client status to ensure safety
- Demonstrates proper splinting techniques such as
  - Correct selection of type
  - Correct selection of materials
  - Making adjustments as needed
- Operates equipment according to training protocols
- Attends to professional boundaries in therapeutic use of self-disclosure
- Effectively limit sets & redirects client(s)
- Establishes safe group climate (reinforce expectations/group rules or contract)
- Other:

II. BASIC TENETS

FWPE items #4 -6: Clearly, confidently, & accurately communicates values/beliefs of occupational therapy profession, occupation as method/outcome, roles of OT/OTA as collaborative team appropriate to setting, using examples & language consistent w/ OTPF:
- Verbally
- Via written material (e.g., handout, article, sample job description, etc.)

Communicates about these 3 tenets with:
- Client
- Families/ significant others
- OTA
- PT
- PTA
- SLP
- Teacher
- Aides
FWPE items #4-6 (cont): Clearly, confidently, & accurately communicates values/beliefs of occupational therapy profession, occupation as method/outcome, roles of OT/OTA as collaborative team appropriate to setting, using examples & language consistent w/ OTPF:

- Communicates about these 3 tenets in:
  - Client intervention/education
  - Meetings
  - Documentation/correspondence

- Communicates re: occupation using:
  - Examples of occupation-based assessment tools
  - Citations of literature/evidence base for use of occupation relative to person/context
  - Terms & examples specific to person, organization, population (facility mission/level of care/services delivery)
  - OTPF language (revised) verbally & in written work
  - Current AOTA official documents/fact sheets

- Communicates re: OT/OTA roles using:
  - Current AOTA official documents
  - Federal & state laws/practice acts governing evaluation/intervention
  - State laws/practice acts re: role of OT/OTA

Others:
FWPE item #7: Effectively collaborates with clients, family/significant others throughout occupational therapy process (evaluation, intervention, outcome):

- Seeks & responds to client feedback
- Maintains client focus in sessions
- Respectfully engages in discussion when conflict arises to address concerns
- Provides written documentation of collaborative plan (e.g., home program)
- Incorporates client/family priorities & interests
- Tailors client/family education to individual need

Other:

III. EVALUATION AND SCREENING

FWPE item #8: Articulates clear & logical rationale for evaluation process:

- Describes reasoning based on client, condition, context, FOR/EBP
- Explains choice of occupation-based &/or client factors
- Discuss psychometric properties (validity & reliability) of assessment tool

Other:

FWPE item #9: Selects relevant screening/assessment*methods (*see assessment chart):

Selects assessments according to:

- Future context
- Evidence
- Psychometric properties/validity/reliability
- Client condition
- Client priorities
- Current context

Selects assessment based on Theories/Frames of reference pertinent to setting such as:

- PEEP
- Biomechanical
- Acquisitional
- Psychodynamic
- Cognitive behavioral
- DBT
- Sensory Processing
- Sensory Integrative
- NDT
- Functional Group Model
- MOHO
- Developmental
FWPE item #10: Determines occupational profile & performance through appropriate assessment methods (see assessment chart on last page for specific tools/competency expectations)

FWPE item #11: Assesses client factors & context that support or hinder occupational performance (see assessment chart for specific tools/competency expectations)

FWPE item #12: Obtains sufficient/necessary information from relevant resources such as client, families, significant others, service providers, & records prior to & during evaluation process via:

- Thorough record/chart review
- Client interview
- Observation of client performance in areas of occupation (ADL/IADL, education, work, play, leisure, social participation, rest/sleep)
- Assessment instruments addressing occupational performance (see assessment chart)
- Observation of client person performance skills (motor & praxis, emotional regulation, cognitive, communication/social, sensory/perceptual)
- Assessment instruments addressing client performance skills
- Observation of client performance patterns (roles, routines, rituals, habits)
- Assessment instruments addressing client performance patterns (see assessment chart)
- Assess of client factors (see assessment chart)
- Observation in current context(s) (personal, physical/environment, social, cultural, temporal, virtual)
- Gathering information re: anticipated future context(s)
- Gathering input from family/significant others/service providers (PCA, nursing, teachers, team members, referral source)
- Discussion of psychosocial factors that effect performance/disposition (e.g., motivation, adjustment, anxiety, self-concept, participation, etc.)
- Assessment instruments that address psychosocial factors that affect performance/disposition (see assessment chart)

Occupational profile addresses
- Who is client?
- Client problems
- Client values/interests/needs
- Why seeking services?
- Occupational history
- Client successes/ strengths
FWPE item #13: Administers assessments in uniform manner to ensure valid/reliable results:
- Adheres to assessment tool protocols/procedures (format, script, item use, scoring, etc.)

FWPE item #14: Adjusts/modifies assessment procedures based on client’s needs, behaviors, and cultural variables such as:
- Fatigue
- O2 sat/respiration rate
- BP/heart rate
- Frustration tolerance
- Anxiety
- Cultural beliefs, values, customs, expectations
- Cognitive status
- Pain
- Language
- Attention
- Inability to perform task
- Refusal
- Vision Acuity
- Hearing Acuity
- Concerns re: safety (please specify):
- Other:

FWPE item #15: Interprets evaluation results to determine client’s occupational performance strengths & challenges by integrating quantitative & qualitative information such as:
- Standardized assessment results
- Information re: client condition/dx
- Subjective/objective impressions
- Verbal reports of others (team, family/caretakers, etc.)
- Observation of client’s performance
- Client’s stated values, beliefs/motivations
- Identified problems/needs
- Other:
FWPE item #16: establishes accurate & appropriate plan based on evaluation results, integrating factors such as client’s priorities, context(s), theories & evidence-based practice:

- Integrates information with client priorities to create plan relative to setting/scope of practice
- Incorporates client’s present and future context(s) (personal, cultural, temporal, virtual, physical, social) in clinical reasoning/intervention planning
- Utilizes summarized evidence from Critically Appraised Topics/Papers (CATs/CAPs) to guide decision-making/reasoning (http://www.otcats.com/index.html)
- Uses EBP approach (e.g., PICO question: Person, Intervention, Comparison, Outcome) to search for/find relevant evidence according to client priorities & frame of reference
  - Critically appraises findings (e.g., CAT: http://www.otcats.com/template/index.html; or CanChild (www.canchild.ca/en/canchildresources/educationalmaterials.asp#CriticalReview))
  - Uses structures method to review evidence (journals, case studies, consensus of experts)
  - Creates realistic plan reflective of accurate understanding of client abilities and potential
  - Sets goals consistent with client priorities, theory/frame of reference, evidence & setting

Other:

FWPE item #17: documents results of evaluation process in manner that demonstrates objective measurement of client’s occupational performance:

- Records observed performance in areas of occupation (ADL/IADL, education, work, play, leisure, social participation, rest/sleep) as per setting’s policies & procedures/scope of practice
- Accurately reports standardized assessment data (raw scores/results) as applicable
- Formulates goals that are specific, measureable, realistic, attainable, time-limited
- Utilizes outcome measurement methods when available or per setting policies

Other:

IV. INTERVENTION

FWPE item #18: articulates a clear and logical rationale for intervention process:

- Verbally in supervision sessions
- Via written assignments (journal, case study)
- Via sharing EBP article reviews
- In rounds/team meetings
- Other:

- Verbally in client sessions
- In pt education materials
- In written documentation
- Via in-services
FWPE item #19 (part 1): Utilizes evidence from published research & relevant resources to make informed decisions with supervisor/client/team/caregiver/agency (as appropriate) using:

- Articles from peer reviewed journals (e.g., AJOT, OTJR, etc.)

FWPE item #19 (part 2): Utilizes evidence from published research & relevant resources to make informed decisions with supervisor/client/team/caregiver/agency (as appropriate) using:

- Discussion/sharing of material learned via other sources (textbooks, OT Practice, coursework, association website searches, conferences, etc.) in supervision
- Other:

FWPE items #20 & 21: Chooses relevant occupations that motivate & challenge clients to facilitate meeting established goals based on clients’:

- Condition/Status
- Progress
- Stated interests
- Beliefs & values
- Other:

FWPE items #22 & 23: Implements client & occupation based intervention plans considering areas of occupation/outcomes such as:

- Role competence
- ADL
- Play Work
- IADL
- Sleep/rest
- Social participation
- Education
- Other:

FWPE item #24: Modifies task, approach, occupations & environment to maximize client performance by:

- Adapting sequence of activity & objects used
- ↑↓ Sensory input
- ↑↓ Visual/verbal cues
- ↑↓ Amount of physical assistance provided
- ↑↓ Social demand (1:1 vs. group, family vs. peer(s), rules/norms)

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☐ ↑↓ Amount of emotional/behavioral support provided
☐ Changing length/frequency/timing of sessions
☐ ↑↓ Cognitive demand
☐ ↑↓ Physical requirements

☐ Promoting ↑ safety (↑ awareness, education/feedback, environmental modifications, removing potential sources of injury, etc.)
☐ Creating adaptive device(s)
☐ Reviewing/revising expectations with client(s) relative to desired occupations, role(s) & context

FWPE item #25: Updates, modifies, or terminates intervention plan based upon careful monitoring of client’s status:
☐ Accurately represents client progress verbally & in documentation
☐ Accurately reports change in client status (e.g., illness, affect) affecting performance
☐ Frequently re-evaluates effectiveness of intervention based on goal achievement and/or outcome measurement
☐ Subjective data consistent with objective data reported verbally or in documentation

FWPE item #26: Documents client’s response to services in a manner that demonstrates efficacy of interventions via:
☐ Progress reports with quantitative data (goal attainment scaling, excel charts/graphing, re-assessment, score comparison, outcome measurement results)
☐ Narrative summary with qualitative descriptors according to problems identified/goals achieved

FWPE item #27: Demonstrates through practice or discussion ability to assign appropriate responsibilities to the occupational therapy assistant & occupational therapy aide:
☐ Describes or assigns duties commensurate to educational level, assessed competency, federal & state laws regulating use of supportive personnel
☐ Considers number of clients, complexity of needs, type of setting, safety
☐ Describes or provides type of supervision required (close, direct, line of sight)
☐ Provides reference for state statutes/regulations governing performance or services & definitions of supervision (www.aota.org/Practitioners/Licensure/StateRegs/Supervision/36455.aspx)

V. MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES
FWPE item #28: Demonstrates through practice or discussion ability to actively collaborate with occupational therapy assistant:

- Describes &/or engages in tasks with OTA relative to job description &/or scope of practice as defined by state guidelines (e.g., soliciting contributions to evaluation process &/or delegating implementing & adjusting intervention plan) in accordance with AOTA Official Guidelines for Supervision, Roles & Responsibilities (www.aota.org/Practitioners/Official.aspx)
- Completes alternate assignment to meet objective (please describe or attach):

FWPE item #29: Demonstrates understanding the costs and funding related to occupational therapy services at this site:

- Discusses political issues/policy decisions that affect funding
- Outlines how services are regulated and funds allocated pertaining to local and/or federal laws such as IDEA, ADA, Medicare/Medicaid, etc.
- Describes agency billing/payment system (grant funding, types of insurance, private pay, cost-share, state/federal funding)
- Describes eligibility criteria for reimbursement and discharge
- Identifies possible resources available (grants, community partnerships, sources for donations, fundraising ideas, etc.)
- Demonstrates awareness of risk management and liability as part of costs and quality care
- Demonstrates awareness of budgetary implications when procuring/using supplies

Other: ____________________________

FWPE item #30: Accomplishes organizational goals by establishing priorities, developing strategies, and meeting deadlines:

- Articulates setting’s mission & values
- Schedules meetings/sessions according to facility expectations
- Begins & ends sessions on time
- Attends meetings on time
- Reports meetings in concise manner
- Meets paper work deadlines per policy & procedures
- Prioritizes workload according to policies & caseload demands
- Uses time management strategies (checklists, templates, to-do list)

Other: ____________________________
FWPE item #31: Produces the volume of work required in the expected time frame:

☐ Is self directed in managing schedule to meet workload/caseload

☐ Gathers necessary evaluation data within allotted amount of time – specify:

/ ______ per day / ______ per week / ______ per month

☐ Completes evaluation write-up with documentation co-signed & in chart/record within:

☐ 8 hrs ☐ 24 hrs ☐ 1 week ☐ other: ___________________

☐ Conducts (specify number) of evaluations:

/ ______ per day / ______ per week / ______ per month

☐ Serves caseload commensurate with entry-level therapist (please specify # of clients/groups):

/ ______ per day / ______ per week / ______ per month

☐ Completes progress note documentation within expected time period of:

☐ Completes (specify number) of progress notes: / ______ per day / ______ per week / ______ per month

☐ Other: ___________________

VI. COMMUNICATION

FWPE item #32: Clearly & effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public:

☐ Uses language appropriate to the recipient of information, including but not limited to funding agencies & regulatory agencies

☐ Gauges use of terminology to level of understanding of person with whom communicating

☐ Utilizes examples to illustrate meaning/intent

☐ Uses active listening strategies (restates/paraphrases) to ensure both parties have shared understanding of information/plan

☐ Uses multiple modes of communication (verbal, written, nonverbal)

☐ Makes eye contact when appropriate

☐ Attends to physical boundaries/body space

☐ Demonstrates professional presentation/demeanor in facial expression, posture, grooming affect, & attire

☐ Utilizes setting’s services for translators of translation of written materials when indicated/available

☐ Other: ___________________
FWPE item #33 – 34: Produces clear and accurate documentation according to site requirements. All written communication is legible, using proper spelling, punctuation, and grammar:

- Completes computerized &/or hand-written documentation per setting protocols/formats
- Uses approved institutional terminology/abbreviations
- Uses technology when available to check work (grammar, spelling)
- Uses strategies such as proof reading, reading aloud, checking against template, asking colleague/peer to proof if feasible
- Other: ___________________________

FWPE item #35: Uses language appropriate to the recipient of the information, including but not limited to funding agencies & regulatory agencies:

- Writes in a manner conducive to being read by recipients of services & other disciplines, free of jargon, retaining language consistent with OTPF-Revised (client profile, analysis of occupational performance, areas, skills/patterns, influence of context(s), client factors)
- Gauges use of terminology to level of understanding of person with whom communicating
- Utilizes examples to illustrate meaning/intent (verbal/demonstration)
- Takes into account cultural differences, providing handouts in client’s first language, when available, providing illustrations with written content
- Adjusts content (verbal/nonverbal) in response to clients/family/caregivers colleagues’ response
- Provides clear & concise instructions
- Other: ___________________________

VII. PROFESSIONAL BEHAVIORS

FWPE item #36: collaborates with supervisor(s) to maximize the learning experience:

- Asks supervisor for specific feedback
- Consistently checks in to clarify expectations
- Shares information about learning style with supervisor and asks for help as needed to adjust
- Utilizes structures in setting to support learning (e.g., student manual, reviews expectations, tracks own caseload/workload)
- Asserts need to schedule supervision meetings
- Discusses concerns & identify possible avenues for changes or improvements
Discusses &/or negotiates need for adjustments to supervisory relationship, performance expectations, caseload, & learning environment to improve quality of experience (e.g., reviews AOTA Fieldwork Experience Assessment Tool)

Other:

FWPE item #37: Takes responsibility for attaining professional competence by seeking out learning opportunities & interactions with supervisor(s) & others:

- Comes to supervision w/ list of questions/concerns & possible options for how to address them
- Takes initiative to meet w/ other members of team to understand their role/perspective
- Reviews testing materials/manuals on own prior to observing or administering
- Seeks out, reviews & shares reading materials/articles on frames of reference/EBP, client conditions, public law/policy, etc.,
- Pilots new program ideas/improvements (e.g., assessment tools, outcome measures, groups, new forms or procedures, etc.,) when feasible/available
- Collaborates in research design or data collection with others (per IRB approval)
- Exercises good judgment when choosing to attend in-services or other continuing education opportunities (e.g., based on workload management, caseload focus, scope of practice)

Other:

FWPE item #38: Responds constructively to feedback:

- Engages in mutual feedback exchange (e.g., listen, clarify, acknowledge feedback &/or redirection, provide examples, ask “How can I improve?”; discuss ways to make active changes, identify what would be helpful, discusses options)
- Demonstrates commitment to learning by identifying specific goals/actions to improve behavior/performance in collaboration with supervisor
- Processes feedback & seeks support from supervisor appropriate to context of supervisory relationship & learning opportunity
- Utilizes tools to reflect on own performance or variables affecting performance (e.g., self-assessment on FWPE, journaling, FEAT)
- Takes initiative to contact academic program resource persons for support if needed

Other:
FWPE item #39: Demonstrates consistent work behaviors including initiative, preparedness, dependability, and work site maintenance:

- Takes initiative to address workload management
- Demonstrates consistent work behaviors in both task & interpersonal interaction
- Attends to site cleanliness, safety & maintenance of supplies as appropriate to role
- Comes prepared for meetings/sessions
- Takes responsibility to address areas of personal/professional growth
- Proactively plans for & requests appropriate supports or accommodations in manner consistent with federal law & site resources (e.g., open in communication, provides appropriate documentation, requests reasonable accommodation if indicated)

Other:  

FWPE item #40: Demonstrates effective time management:

- Monitors, maintains & adapts own schedule in accordance w/ site’s priorities
- Organizes agenda or materials for meetings & sessions
- Conducts evaluation &/or intervention sessions w/in allotted time, inclusive of set-up/clean-up
- Completes documentation/paperwork in timely manner
- Completes learning activities by due dates

FWPE item #41: Demonstrates positive interpersonal skills including but not limited to cooperation, flexibility, tact, and empathy in social interactions w/ clients/patients, peers & colleagues:

- Communicates concerns in 1st person manner (e.g., “I statements”)
- Remains calm when conveying point of view when conflict arises
- Compromises as needed when negotiating workload
- Demonstrates flexibility to support own learning or department mission (e.g., extra effort, stay late if needed, etc.)
- Demonstrates ongoing awareness of impact of own behavior on others
- Displays positive regard for others
- Demonstrates effective use of self disclosure (e.g., moderate)/therapeutic use of self to build rapport, establish alliance(s) & motivate others (peers/colleagues/clients)
- Provides timely & specific feedback
- Sets limits to maintain safety & support positive behavior/performance improvement
FWPE item #42: Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices:

- Demonstrates awareness of own background and sensitivity to worldviews of others (clients, family, colleagues)
- Refrains from imposing own beliefs & values on others
- Maintains clients’ dignity
- Gathers information about clients’ cultural values &/or spiritual beliefs
- Incorporates clients’ values & beliefs into therapeutic interactions & interventions
- Considers clients socioeconomic & community resources & lifestyle when designing intervention plans & discharge planning
- Demonstrates tolerance for differences in others & willingness to work w/ all clients

Other expectations not noted above:

_____________________________

_____________________________

_____________________________

_____________________________

Print Name

Signature                                      Date
### Assessment Checklist (attach to Level II FW Site Specific Objectives)

<table>
<thead>
<tr>
<th>Formal Assessment Tools</th>
<th>Expected to gain Proficiency</th>
<th>Expected to gain familiarity</th>
<th>Expected to gain awareness/observe</th>
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<td>The Model of Human Occupation Screening Tool (MOHOST)</td>
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<td>The Occupational Circumstances Assessment Interview &amp; Rating Scale (OSCAIRS)</td>
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<td>Others : (Please list below)</td>
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