Carroll University  
Master of Occupational Therapy Program  
OTH 550 Evaluation and Assessment in Occupational Therapy  
Summer 2017

Course Offering  
3 Credit Hours

Prerequisites  
Admission to the MOT Program.

Format  
Lecture

Class Day/Time  
Thursday 8-11a.m.  
Lab  
Friday 8-9 a.m.

Class Location  
CGS-119

Faculty  
Professor April Doebert-Fischer, MOT OTR

Office  
Charles House 106

Office Hours  
Mondays 9-3; Fridays 12-3 by appointment only

Phone  
(262)951-3108

Email  
adoebert@carrollu.edu

Course Description  
This course will introduce students to a systematic approach to the evaluation process. It will guide them through the identification and selection of appropriate assessment tools in accordance with the practice models and theories identified through screening, observations and interviews. Students will become familiar with the data gathering methods including objective measurements and administration of different assessment tools including standardized and non-standardized tests. Students will also develop the ability to analytically interpret the data and document their findings as well as produce intervention plans encompassing goals and objectives as well as intervention methods.

Course Rationale  
The current health care environment rewards efficient care. This process is enhanced by a differential approach to the selection of appropriate evaluation and assessment tools. Students’ familiarity with some of the most common tools and their ability to research additional ones as dictated by their clients’ needs will optimize access to and support their proper utilization. In turn, the quality and relevancy of the data gathered will support and strengthen the resulting intervention recommendations.
Relationship to Curriculum Design
An efficient evaluation process rests on the ability to establish early the direction and purpose of the therapeutic interaction. Knowledge acquired from previous courses such as Models and Theories of Occupational Therapy as well as Occupations across the Life Span will assist students in the proper selection of assessment tools in accordance with identified frames of reference and support their evidence-based intervention selection.

<table>
<thead>
<tr>
<th>Student Learning Objectives</th>
<th>ACOTE Standards</th>
<th>Instructional Methods/ Learning Activities</th>
<th>Assessment Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>(At course conclusion, students are expected to:)</td>
<td></td>
<td>The following instructional methods/learning activities will be utilized throughout the course:</td>
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</tbody>
</table>
| 1. Develop an occupational therapy profile and evaluation | B.3.3, B.3.5, B.4.4 | ● Readings  
● Lecture  
● Videos  
● Lab/Experiential learning  
● Role play  
● Class Discussion  
● Case studies | ● Exams  
● Verbal and written feedback  
● Self-assessment  
● Practical Exams |
| 2. Select the most appropriate assessment (standardized and non-standardized) in accordance with the practice models and theories as well as the client’s age, needs and context | B.4.1, B.4.2 | ● Readings  
● Lecture  
● Class Discussion  
● Case studies  
● Role Play  
● Lab/Experiential Learning | ● Exams  
● Verbal and written feedback  
● Reference Binder |
| 3. Demonstrate the use of standardized and non-standardized assessments in the evaluation process | B.4.1, B.4.3 | ● Readings  
● Lecture  
● Videos  
● Demonstration  
● Lab/Experiential Learning  
● Class Discussion | ● Exams  
● Verbal and written feedback  
● Presentation  
● Reference Binder |
### ACOTE Standards Relating to Course Objectives

*This course meets or partially meets the following standards of education for the Accreditation Council for Occupational Therapy Education (ACOTE). The student will:*

<table>
<thead>
<tr>
<th>Objective</th>
<th>B.4.5, B.9.8</th>
<th>B.4.8, B.5.1</th>
<th>B.4.9, B.5.22</th>
<th>B.4.10, B.9.6</th>
</tr>
</thead>
</table>
| 4. Recognize the understanding of roles and responsibilities by identifying and demonstrating techniques and skills of collaboration and supervision with occupational therapy assistants during the OT process. | • Readings  
• Lecture  
• Lab/Experiential Learning  
• Collaboration Experience  
• Case Study  
• Participation | • Exams  
• Self-assessment | | |
| 5. Construct intervention planning that is client-centered, culturally appropriate, evidence-based, and reflective of current OT practice in a variety of settings based on interpretation of evaluation. | | • Exams  
• Lab Practical  
• Case Study Rubric | | |
| 6. Discuss the interprofessional role of care providers serving individuals, organization and/or populations. This includes understanding to when to refer to specialists within and/or outside the profession for consultation and intervention. | | • Exams  
• Case Study Rubric | | |
| 7. Demonstrate documentation of occupational therapy services for reimbursement while adhering to requirements of facility, state and federal guidelines | | | • Exams  
• Lab Practical  
• Case Study Rubric | |
• B.3.3 Use theories, models of practice, and frames of reference to guide and inform evaluation and intervention.
• B.3.5 Apply theoretical constructs to evaluation and intervention with various types of clients in a variety of practice contexts and environments to analyze and effect meaningful occupation outcomes.
• B.4.1 Use standardized and non-standardized screening and assessment tools to determine the need for occupational therapy intervention. These tools include, but are not limited to, specified screening tools; assessments; skilled observations; occupational histories; consultations with other professionals; and interviews with the client, family, significant others, and community.
• B.4.2 Select appropriate assessment tools on the basis of client needs, contextual factors, and psychometric properties of tests. These must be culturally relevant, based on available evidence, and incorporate use of occupation in the assessment process.
• B.4.3 Use appropriate procedures and protocols (including standardized formats) when administering assessments.
• B.4.4 Evaluate client(s)’ occupational performance in activities of daily living (ADLs), instrumental activities of daily living (IADLs), education, work, play, rest, sleep, leisure, and social participation. Evaluation of occupational performance using standardized and non-standardized assessment tools includes
  o The occupational profile, including participation in activities that are meaningful and necessary for the client to carry out roles in home, work, and community environments.
  o Client factors, including values, beliefs, spirituality, body functions (e.g., neuromuscular, sensory and pain, visual, perceptual, cognitive, mental) and body structures (e.g., cardiovascular, digestive, nervous, genitourinary, integumentary systems).
  o Performance patterns (e.g., habits, routines, rituals, roles).
  o Context (e.g., cultural, personal, temporal, virtual) and environment (e.g., physical, social).
  o Performance skills, including motor and praxis skills, sensory–perceptual skills, emotional regulation skills, cognitive skills, and communication and social skills.
• B.4.5 Compare and contrast the role of the occupational therapist and occupational therapy assistant in the screening and evaluation process along with the importance of and rationale for supervision and collaborative work between the occupational therapist and occupational therapy assistant in that process.
• B.4.8 Interpret the evaluation data in relation to accepted terminology of the profession and relevant theoretical frameworks.
• B.4.9 Evaluate appropriateness and discuss mechanisms for referring clients for additional evaluation to specialists who are internal and external to the profession.
• B.4.10 Document occupational therapy services to ensure accountability of service provision and to meet standards for reimbursement of services, adhering to the requirements of applicable facility, local, state, federal, and reimbursement agencies. Documentation must effectively communicate the need and rationale for occupational therapy services.
• B.5.1 Use evaluation findings based on appropriate theoretical approaches, models of practice, and frames of reference to develop occupation-based intervention plans and strategies (including goals and methods to achieve them) on the basis of the stated needs of the client as well as data gathered during the evaluation process in collaboration with the client and others. Intervention plans and
strategies must be culturally relevant, reflective of current occupational therapy practice, and based on available evidence. Interventions address the following components:

- The occupational profile, including participation in activities that are meaningful and necessary for the client to carry out roles in home, work, and community environments.
- Client factors, including values, beliefs, spirituality, body functions (e.g., neuromuscular, sensory and pain, visual, perceptual, cognitive, mental) and body structures (e.g., cardiovascular, digestive, nervous, genitourinary, integumentary systems).
- Performance patterns (e.g., habits, routines, rituals, roles).
- Context (e.g., cultural, personal, temporal, virtual) and environment (e.g., physical, social).
- Performance skills, including motor and praxis skills, sensory–perceptual skills, emotional regulation skills, cognitive skills, and communication and social skills.

- B.5.22 Refer to specialists (both internal and external to the profession) for consultation and intervention.
- B.9.6 Discuss and evaluate personal and professional abilities and competencies as they relate to job responsibilities.
- B.9.8 Explain and justify the importance of supervisory roles, responsibilities, and collaborative professional relationships between the occupational therapist and the occupational therapy assistant.

Required:


Recommended:


Grading and Course Requirements

Grading for this course will be based on a total possible accumulation of 1000 points, with letter grades applied to a percentage of this total as follows:

<table>
<thead>
<tr>
<th>Grade</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>A</td>
<td>93-100%</td>
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<tr>
<td>A/B</td>
<td>90-92.9%</td>
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<tr>
<td>B</td>
<td>83-89.9%</td>
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Progress will be evaluated through the following means

<table>
<thead>
<tr>
<th>EVALUATION</th>
<th>POINTS</th>
<th>LINKED STUDENT LEARNING OBJECTIVES</th>
<th>LINKED ACOTE STANDARDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXAMS (2)</td>
<td>250</td>
<td>1-7</td>
<td>B.3.3., B.3.5, B.4.1, B.4.3, B.4.4, B.4.5, B.4.8, B.4.9, B.4.10, B.5.1, B.5.22, B.9.6, B.9.8</td>
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<tr>
<td>(125 Points Each)</td>
<td></td>
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<tr>
<td>Final Exam</td>
<td>150</td>
<td>1-7</td>
<td>B.3.3., B.3.5, B.4.1, B.4.3, B.4.4, B.4.5, B.4.8, B.4.9, B.4.10, B.5.1, B.5.22, B.9.6, B.9.8</td>
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<tr>
<td>(Cumulative)</td>
<td></td>
<td></td>
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<tr>
<td>Lab Exams (2)</td>
<td>150</td>
<td>1, 5</td>
<td>B.3.3, B.3.5, B.4.4, B.4.8, B.5.1</td>
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<tr>
<td>(75 Points Each)</td>
<td></td>
<td></td>
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<tr>
<td>Connected to OTH565</td>
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<td></td>
<td></td>
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<tr>
<td>Reference Binder</td>
<td>40</td>
<td>2 &amp; 3</td>
<td>B.4.1, B.4.2, B.4.3</td>
</tr>
<tr>
<td>Presentation on QOLI &amp; ACIS (Assigned in OTH531)</td>
<td>50</td>
<td>2 &amp; 3</td>
<td>B.4.1, B.4.2, B.4.3</td>
</tr>
<tr>
<td>Presentation on Assessments</td>
<td>100</td>
<td>3</td>
<td>B.4.1, B.4.3</td>
</tr>
<tr>
<td>Case Study (2)</td>
<td>100</td>
<td>1-7</td>
<td>B.3.3., B.3.5, B.4.1, B.4.2, B.4.3, B.4.4, B.4.5, B.4.8, B.4.9, B.4.10, B.5.1, B.5.22, B.9.6, B.9.8</td>
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<tr>
<td>(50 Points Each)</td>
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<tr>
<td>Total</td>
<td>850</td>
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**Exams**: These include multiple choice questions, short essay questions as well as case studies to encourage integration of concepts introduced during the course and to strengthen the relationship between evaluation, intervention and documentation in practice. **The final exam will be cumulative.**

**Practical Exams**: These consist of assessment of practical skills introduced in this course. The practical exam will include the Intervention Application learned in OTH565. **All students must dress professionally, including name badge during lab practical exams.**
Reference Binder: A binder will be assembled with assessments and reference sheets to assist on clinical rotations.

Self-Assessment: Verbal and/or written reflection on personal performance with identification of strengths and areas of growth.

Case Study/Documentation reports: Students must demonstrate the ability to document services to ensure accountability of service, clear communication with other team members, as well as meet reimbursement standards.

Presentation on Assessment: Each student will present, in a group, on an assessment tool related to a particular practice model and theory.

Presentation on QOLI and ACIS: Students will present either the QOLI or ACIS after administration in OTH531.

Student Writing Guidelines
The MOT program requires that students follow APA (American Psychological Association) style for all written work. Papers submitted in a format other than APA will be returned ungraded. It is strongly recommended that students purchase the *Publication Manual of the American Psychological Association, 6th Edition.* Thus, all work submitted in written or presentation form (including references), must be APA style and format.

Student Responsibility:
Regular attendance is expected and required for successful completion of this course. Three or more unexcused absences and/or tardiness will be noted and will result in specific point deductions at the instructor’s discretion, because you will miss out on important interactions/classroom exercises. Students should come prepared for each class period by: 1) having reviewed the previous information from each unit and 2) having at least skimmed assigned readings and reviewed any materials provided. Because of the nature of this course, you should expect to spend a great deal of time in independent study and review outside of class; your Instructor can only do so much for you. Each student is responsible for material assigned and presented in class, whether the student is present or absent. Because of the nature of the course, NO MAKE UP EXAMS/quizzes will be given except under extraordinary circumstances and as approved PRIOR to the absence by the course Instructor (when possible). In the case of an unexpected absence (such as a medical emergency) written documentation (such as an explanation from the attending physician) will be required to sit for the exam. The scheduling of and format for any make-up exams/quizzes will be at the discretion of the Course Coordinator. Additional policies will be in accord with those outlined in the MOT Program Student Handbook. It should be re-emphasized that repeated tardiness or disruptive behavior, as well as any form of academic misconduct will not be tolerated in this course.

Academic Progression and Proficiency
Academic progression in the MOT program requires a grade of C or better in all MOT courses. A student receiving a D, F, or U on any assignment or exam in any course must remediate and be reassessed to
ensure competence. It is necessary for the student to demonstrate proficiency before progressing through the course. Successful remediation results in demonstration of competence NOT a change in the initial grade.
The minimum passing score for practical examinations and skill checks is 80%. If a student does not pass the exam in the initial attempt, remediation occurs and reassessment is performed to ensure competence. The recorded grade from the initial examination remains unchanged. The maximum number of attempts varies between courses/faculty and depends on examination content and faculty judgment. Failure to meet this standard results in a failing grade in the course and an inability to progress in the program.
In addition, students may be required to complete a learning contract in collaboration with faculty and MOT advisor. The learning contract is a method through which a student identifies potential barriers to learning and creates an action plan toward successful learning and performance.

Statement on Academic Integrity
The Carroll University Academic Integrity Policy is located in your student handbook on the University website at https://my.carrollu.edu/ICS/Departments/Student_Affairs/
Please familiarize yourself with it. If a student is found in violation of the Carroll University Academic Integrity Policy, I reserve the right to fail the student on the assignment/exam or even FAIL the student in the course.
Some examples of violations will be discussed on the first day of class. These will include:
(1) Plagiarism
   • Must use OWN words
   • If you copy more than two or three consecutive words from an author, then you are plagiarizing that author.
   • A student who uses an author’s words as her/his own will receive 0 points for that assignment. A second offense will result in failure in the course.
(2) Failure to return or removal of an exam
(3) Submitting work completed by another individual
   • A student who copies another student’s work and the student who allowed the other student to copy her/his work will each receive 0 points for that assignment. A second offense will result in failure in the course.
(4) Discussing quiz/exam questions with students who have not yet taken the quiz/exam.
(5) Any other forms of cheating

Core Professional Behaviors
We insist on student development of ethical and professional behaviors expected of practitioners according to standards, values, and attitudes of the occupational therapy profession. As a reminder, an expectation for MOT program graduation is the demonstration of appropriate behaviors consistent with professional standards as mentioned, as well as Carroll University and MOT Program policies.

1. PERSONAL RESPONSIBILITY
   • Student is punctual
   • Student completes assignments and tasks on time
   • Student attends all lecture and laboratory sessions
2. PERSONAL HONESTY & INTEGRITY
   - Student is honest in word and actions and is accurate in reporting all information
   - Student maintains positive learning environment
   - Student follows the University policies regarding academic integrity (i.e., cheating on exams, removal of an exam, passing exam information to peers)

3. RESPECT
   - Student gives full attention to lecturer, does not talk in class, treats others with dignity
   - Student refrains from the use of technology during class (cell phones, headphones, “surfing” the web on laptops)

4. TEACHABILITY/ADAPTABILITY
   - Student takes responsibility for own actions and understands consequences of inappropriate actions
   - Student behavior is appropriate during times of high stress

5. COMMUNICATION
   - Student properly formats emails to instructors and with respect (i.e., correct punctuation and salutations)
   - Student refrains from spreading rumors regarding instructors and course assessments
   - Student follows appropriate procedures for discussion of course issues and concerns
     - 1st → Student contacts their lecture or laboratory instructor
     - 2nd → Student communicates concerns to course coordinator (should the need arise, the coordinator will direct the student to the Departmental Chair)

6. RELATIONSHIP WITH PEERS
   - Student participates in class and small group discussions
   - Student demonstrates ability to function within a group (i.e. student respects the opinions of others and can work collaboratively to solve problems).

7. PERSONAL APPEARANCE
   - Student dresses appropriately for presentations and palpation

Disability/Illness:
Any student who feels s/he may need an accommodation based on the impact of a disability should contact the instructor privately to discuss the specific needs. Please contact the Office of Services for Students with Disabilities at 262-524-7335 in the Walter Young Center to coordinate reasonable accommodations for students with documented disabilities.

If you are ill and unable to attend a class, it is your responsibility to notify faculty in a timely fashion and before class/lab. In order to make up an assignment you must document that illness.

Extended illness may make it impossible for you to complete the class requirements.

Courtesy:
Course faculty will treat you with respect, while expecting the same in return. You are also expected to respect your fellow students. Therefore, please do the following:
1. Turn off your cell phone, beeper, or anything else that might make noise.
2. Do not converse while the teacher or a fellow student is speaking in class.
3. You are expected to arrive on time. If, because of some problem, you are forced to come in late, do come in. However, do so quietly and do not walk in front of the instructor while s/he is lecturing. **There is no excuse for chronic lateness.** Those who are routinely late will be invited to withdraw from the class and have points deducted from their class participation grade. If you have an emergency, please let me know.
4. Computer use policy: If you use a computer, it must be used ONLY for taking notes UNLESS specifically given permission otherwise. If you use a computer for any other purpose, you will permanently lose computer use privileges in the classroom.

**CONSEQUENCES (SHOULD STUDENT NOT MEET EXPECTATIONS)**

*At the discretion of the Instructor:*

- A deduction in course points (i.e., -10 pts for cell phone use)
- Removal from class
- Tardiness of required assignments, -5% per day late
- Multiple offenses may result in a full letter grade deduction

**Statement of the Right to Modify Course Content**

The instructor and the University reserve the right to modify, amend, or change the syllabus (course requirements, grading policy, etc.) as the curriculum and/or program require(s).