

# Occupational Therapy Evaluation Checklist

Patient information					
Name:		Age:			
Gender:		Date of evaluation:			
Contact information:					
Physician name:					
<p><i>This comprehensive occupational therapy evaluation is based on a theoretical model and follows the Occupational Therapy Practice Framework (OTA, 2020). A top-down approach identifies occupations that are challenging and important to the client and then assesses related performance skills, client factors, environments and context, and performance patterns. In pediatric practice, it is important to take into account the developmental skills expected for the age of the child.</i></p>					
Occupational profile					
<p>Each element of the occupational profile is considered from the client's perspective.</p> <ul style="list-style-type: none"> <li>• Client's concerns</li> <li>• Successful occupations               <ul style="list-style-type: none"> <li>• Strengths                      Barriers</li> </ul> </li> <li>• Occupational history               <ul style="list-style-type: none"> <li>• Birth history                      Developmental history</li> </ul> </li> <li>• Interests &amp; values</li> <li>• Contexts: environment &amp; personal</li> <li>• Performance patterns               <ul style="list-style-type: none"> <li>• Habits                      Routines                      Roles                      Rituals</li> </ul> </li> <li>• Client factors               <ul style="list-style-type: none"> <li>• Values/beliefs                      Body function                      Body/structure</li> </ul> </li> <li>• Client goals/priorities</li> </ul>					
Analysis of occupational performance					
	<b>Addressed?</b>	<b>Priority?</b>		<b>Addressed?</b>	<b>Priority?</b>
Occupations					
Dressing			Education		
Bathing			Sleep		
Grooming (hair/teeth)			Health management		
Feeding/eating			IADLs/chores		
Toileting			Play		

	Addressed?	Priority?		Addressed?	Priority?
<b>Occupations</b>					
Leisure					
<b>Performance skills</b>					
Psychosocial/behavior skills			Social skills/peer interactions		
<b>Client factors—In addition to areas identified while addressing ADLs and IADLs (e.g., motor, sensation, pain)</b>					
Fine motor			Language/communication		
Gross motor			Functional cognition		
Sensory processing			Praxis		
<b>Performance patterns</b>					
Habits, rituals & roles (family dynamics, sibling relations)			Daily routine		
<b>Environment &amp; contexts</b>					
Safety screen (physical space, family needs)			SDOH (transportation, food security, housing, financial)		
Language barriers			Parent/caregiver mental health screen		
Caregiver learning style			Home environment		
Assistive technology used in home			Assistive technology used in the community or at school		
<b>Additional considerations</b>					
<ul style="list-style-type: none"> <li>• Interprofessional team members:</li> <li>• Previous services:</li> <li>• Previous goals/assessment results:</li> </ul>					
<b>Additional notes</b>					

American Occupational Therapy Association. (2020). *Occupational therapy practice framework: Domain and process (4th ed.)*. American Journal of Occupational Therapy, 74(Supplement 2), 7412410010. <https://doi.org/10.5014/ajot.2020.74S2001>