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Foundations for School Readiness:

*Early OT Exposure (eOTe)
A Mindful OT Screening & Intervention
for the Young Child*



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Community-Based OT Consultant

Learning Outcomes

After this course, participants will be able to:

- Identify how to complete observation of spontaneous and second-natured skills of the occupational performance components of preschool and primary-aged children.
- Describe how to conduct an occupational analysis of toys, play activities, and educationally-related skills of preschool and primary-aged children.
- Recognize how to complete a fact-finding engagement process with the preschool and primary-aged child.



Story behind the eOTe

- As a school-based practitioner & educator, a need for a mindful occupation-based OT screening tool for younger child (preschool-primary).
- Screening tool that is helpful to OT Practitioners or the OTA/OT student during a FW I/II experience in assessing the strengths and needs of a child - based from the *OT Practice Framework, 3rd Edition (2014)* and *PEOP Model (2005)*.
- The desire to assist educators, parents, caregivers, and student-learners with educationally-related activities, tools, and modalities – *grounded in occupational performance, engagement in meaningful occupation & participation*.
- To present a portfolio of occupation-based activities for the teacher & caregivers to utilize with children and/or child...soon after I spent time with the child(ren).

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Dovetailing the Evidence with Practice

Conceptual Framework for the eOTe

- Therapeutic Use of Self
- Mindfulness
- PEOP Model
- OT Practice Framework
- Occupational Profile
- Engagement in Occupation



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continued

The Core of Occupational Therapy *Therapeutic Use of Self*

...Use of self as a therapeutic agent is integral to the practice of occupational therapy and is used in all interactions with all clients (OTPF, 2014).



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continued

Mindfulness in OT Practice



*If you want to know me, then you must know my story,
for my story defines who I am.*
McAdams, 2003

Website - <http://www.pasturepause.com>

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continued



Operationalizing the OTPF within the eOTe Portfolio Process

The OT Practice Framework was developed to articulate occupational therapy's contribution to promoting health & participation of people, organizations, and populations through engagement in occupation (p.625).

The overarching statement – supporting health & participation in life through engagement in occupation – describes the domain of occupational therapy in its fullest sense (p.626)

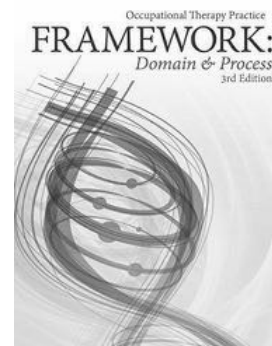
Global **areas of occupation** will be:

- Education
- Play
 - Exploration
 - Participation
- Social Participation

Client factors of focus will include, but may not be limited to:

- Mental Function: Affective, Cognitive, Perceptual function
- Sensory Functions
- Neuromusculoskeletal & Movement-Related functions

The **activity demands** will depend upon the task.



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The **performance skills**, which are the abilities of the child to engage in the meaningful occupation of work & play as a student, may include:

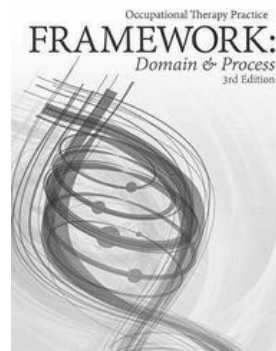
- Motor & praxis skills
- Sensory-perceptual skills
- Emotional regulation skills
- Cognitive skills
- Communication & social skills

The **performance patterns** of the child will focus on:

- Habits
- Routines
- Rituals
- Roles

Focus on the **contextual and environmental** strengths & challenges that impact involvement:

- Cultural
- Personal
- Temporal
- Virtual
- Physical
- Social



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Further Operationalizing eOTe within the OTPFramework (2014, p. S10)

▪ **EVALUATION & SCREENING**

- Occupational Profile
- Analysis of Engagement in Occupations & Occupational Performance

▪ **INTERVENTION**

- Intervention Plan
- Intervention Implementation
- Intervention Review

▪ **OUTCOMES**

- Supporting health & participation - of the child- in Life through Engagement in Occupation

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MORE DISTINCT AREAS OF OCCUPATION & PERFORMANCE ADDRESSED with the CHILD

- | | |
|--|--|
| ▪ ADL & IADL's | ▪ Organization of space, time & material management |
| ▪ Positioning & Mobility | ▪ Social interaction |
| ▪ Play within Environment | ▪ Limited fine-motor & <i>pre/handwriting, coloring, scissoring, etc.</i> |
| ▪ Learning everyday occupations in the educational environment | ▪ Emotional Regulation Skills <i>expressing emotions or interpreting social cues</i> |
| ▪ Regulation of physical sensory input/output | |

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Occupational Profile



The occupational profile provides...an understanding of a client's perspective and background...During the process of collecting this information, the client, with the assistance of the occupational therapy practitioner, identifies priorities and desired targeted outcomes that will lead to the client's engagement in occupations that support participation in life.

Only clients can identify the occupations that give meaning to their lives and select the goals and priorities that are important to them. By valuing and respecting clients' input, practitioners...can more efficiently guide interventions. (AOTA, 2014, p. S13)

Website - <https://www.aota.org/Practice/Manage/Reimb/occupational-profile-document-value-ot.aspx>

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Engagement in Occupation

OTPF, 2014, p.S4



Performance of occupations as the result of choice, motivation, and meaning within a supportive context and environment. Engagement includes objective and subjective aspect of clients' experiences and involves the transactional interaction of the mind, body, and spirit.

Occupational therapy intervention focuses on creating or facilitating opportunities to engage in occupations that lead to participation in desired life situations (AOTA, 2008).

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PEOP MODEL allows for MINDFUL VIEW of CHILD in the EDUCATIONAL ENVIRONMENT

- **Person**
 - Child
- **Environment**
 - School/Classroom
- **Occupation**
 - Student
- **Performance & Participation**
 - What does the child need to do?
 - How is the child engaging – mind, body & spirit?
 - How can we assist performance & participation?



Christiansen, Baum & Bass-Haugen, 2005

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Relation to MTSS and RTI

Tier 1: Research-based Core Instruction

Tier 2: Targeted Interventions

AOTA The American Occupational Therapy Association, Inc.

HOME • PRACTICE • CHILDREN & YOUTH • SCHOOL-BASED PRACTICE • RTI

Response to Intervention

Response to intervention (RTI) is one example of the different multi-tiered systems of support (MTSS) that are described in early intervening services (EIS) under the Individuals with Disabilities Education Improvement Act (IDEA, 2004). When a serious multi-tiered approach is applied to behavioral interventions, it is usually referred to as positive behavioral supports (PBS) or positive behavioral intervention systems (PBIS). RTI is a multi-tiered approach to service delivery that encompasses general and special education. It is a result of the growing evidence on how to identify and address the needs of students with and at risk for learning disabilities. AOTA has developed a collection of RTI resources (e.g., consumer brochure, practice delivery, PDI) to advocate for and articulate the OT role within this approach.

RTI Resources for Practitioners

- [2016 Practice Address on Occupational Therapy to Response to Intervention](#) - pdf
- [Practitioner Response to Intervention for Student-Based OTs and OTAs](#) - pdf
- [Transforming Classrooms to Workplaces in School-Based and Early Intervention OT Services](#) - pdf

RTI Resources for Consumers

- [Occupational Therapy and Universal Design for Learning](#) - pdf 1000 kb
- [Response to Intervention consumer brochure](#) - pdf 1 mb

RTI Resources from Other Organizations

- [National Research Center on Learning Disabilities Building the Legacy IDEA, 2004](#)
- [National Center on RTI's Center](#)
- [RTI Action Center](#)
- [Association of American School Boards](#)
- [National Center for Learning Disabilities](#)
- [National Dissemination Center for Children with Disabilities on RTI](#)
- [National Dissemination Center for Children with Disabilities on Models of Early Intervention and RTI](#)

Website - <https://www.aota.org/Practice/Children-Youth/School-based/RTI.aspx>

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eOTe Components

- eOTe Portfolio Activity Sheets (PDF Included)
- eOTe Box with Object-Performance Grid (PDF Included)
- AOTA Occupational Profile (PDF & link included)
- OTPF & PEOP Ponder-Points ...pause with the information.
- Collection of Artifacts from Teacher(s)
- *SwiftteOTe* Project Box (intervention, examples provided)



AOTA OCCUPATIONAL PROFILE TEMPLATE

"The occupational profile is a summary of a client's occupational history and experiences, patterns of daily living, interests, values, and needs" (AOTA, 2014, p. S13). The information is obtained from the client's perspective through both formal interview techniques and casual conversation and leads to an individualized, client-centered approach to intervention.

Each item below should be addressed to complete the occupational profile. Page numbers are provided to reference a description in the Occupational Therapy Practice Framework: Domain and Process, 3rd Edition (AOTA, 2014).

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eOTe Portfolio Activity Sheets

(PDF Included)



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Early OT Exposure (eOTe) A Mindful OT Screening & Intervention

Occupation Based Portfolio of Performance for the Preschool to Primary Age Student

I. Consideration of Student Factors (Review of Chart, Consultation with School Personnel)

Date: _____ 2008 _____ Age: _____ Grade: _____
Student Name: _____
Comments: _____

II. AOTA Occupational Profile (Complete in attached PDF)

III. Pre-writing Shapes

- Start with a request for each shape on plain paper
- Side-by-Side Copy (Sheet A)

IV. Handwriting Performance

- Spontaneous Sample (Collected from teacher)
- Memory & Copying (Sheet B)
- Pencil Management (Observe during completion of Sheet B)
 - Grip: efficient _____ inefficient _____
 - Hand dominance: right _____ left _____
 - Pencil Pressure: efficient _____ inefficient _____

V. Cutting (Sheet C)

Task	Minimal Effort	Moderate Effort	Maximum Effort
Initial Handling of Scissors with Comments:			
Strip on Scissors with Comments:			
Between-Handling of Paper			
Cut-Line Errors			

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VI. Coloring

- Spontaneous Sample (Collected from teacher)
- Observed Sample (Sheet D)

VII. Visual Perceptual Tests

- Manipulative Sampler
- Visual Motor Integration Test (Sheet E)
- Visual Figure Ground Test (Sheet F)
- Environmental Sample – Visual Memory & Scanning

VIII. Functional Materials Management in Classroom Checklist (Sheet G) – General Organization of Materials

IX. Activities of Daily Living (ADL's)

- Bathroom Skills
- Clothing Management
 - Shoes
 - Coat
- Eating, Management &/or Prep
- Positioning & Postural Control @ Desk
- Functional Seating

X. Activity Demands of the Classroom Environment

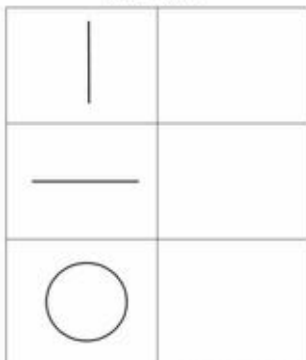
(General assessment for all students in classroom; then note specific observations for student as needed)

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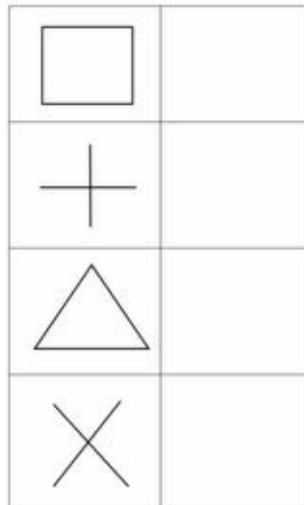


Sheet A: PRE-WRITING SHAPES

The following are typical age equivalents associated with the ability to copy or imitate the following pre-writing shapes: a vertical line (2-3), a horizontal line (3-4), a circular pattern (3-4), a cross design (4-5), a square (4-5), an X (4-5), and the triangle (5-6). Mastering these shapes will help to elucidate the frustration of writing letters before the student is developmentally ready.



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continued

SHEET B: HANDWRITING SAMPLE

- Write name (no arrows yet)
- Copy Words and/or Sentence (no arrows yet)
- Print Upper & Lower Case Alphabet to best of ability
Note: Alphabet is 2 copies of alphabetical or 2 mixed case letters.

NAME _____

WORDS AND/OR SENTENCE _____

UPPER CASE ALPHABET _____

lower case alphabet _____


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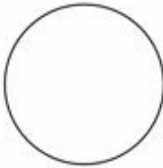

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SHEET C: COLORING/CUTTING/TRACING SAMPLE

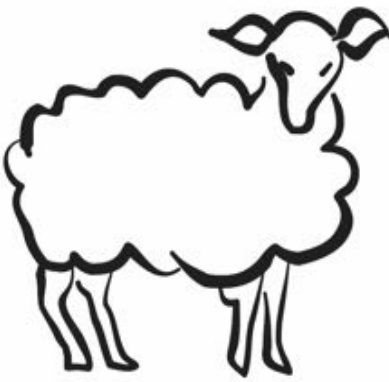


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SHEET D: COLORING SAMPLE

Have child select 2 crayons - from box or pile of 5 or 10: red, yellow & green

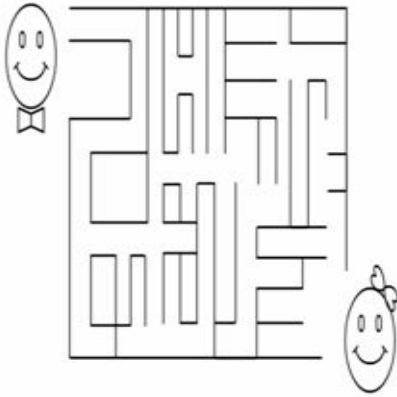


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SHEET E: VISUAL MOTOR INTEGRATION TASK



10. Student use a Sharpie or Crayon
10. Record Time: _____
o Do not exceed 2 minutes

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SHEET F: VISUAL FIGURE GROUND TASK

Give directions to student: Find all of the primates and A's. Use a yellow highlighter or green crayon to circle them.

THE DOG AND THE CAT
TRAND WERE BEST FRIE
NDS AND AND THEY IN
VITED THE COW AND
ALLIGATOR TO COME
EAT WITH THEM TO CE
LEBRATE THE FALL OF
THE FIRST SNOW. OH HO
WHAPPY IT WILL BE ALL

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continued



FUNCTIONAL MATERIALS-MANAGEMENT
OCCUPATIONAL THERAPY CHECKLIST
*If yes or no need to fill and a descriptor if necessary
*Some of these may or may not be applicable to age of student - consider grade up/down options

1. Open/Close the following containers:
 - Flip-top box
 - Screw-lid
 - Small container lid
 - Stick Glue
 - Regular Glue
 - Zipper
2. Turn pages in a book one @ a time
3. Take off and replace cap on marker
4. Insert paper into folder pocket
5. Able to sort 20 cards into 5 separate piles in _____ seconds
6. Use a stapler to fasten two or more sheets together
7. Secure paper with paper clip
8. Sharpen a pencil utilizing a hand held sharpener
9. Pull off piece of tape and secure two pieces of paper together
10. Scissor Use: Pencil Top: _____ Hand held: _____

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11. Desk Organization & Materials Management
12. Play Area Organization & Materials Management
13. Snack and/or Lunch Materials Use
14. Clothing Management
15. Backpack Management
16. Observation(s) of other Material Management Moments:

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continued **My Current eOTe Box**
Flowing & Changing through the years...




pup not included...☺

continued **eOTe Box with Object-Performance Grid**
 (PDF Included)



OBJECT	PERFORMANCE SKILLS What does the child do with it?	OTHER OBSERVATIONS
12" longhorn tail		
Magnetic Open Case Letters		
Magnetic Closed Case Letters		
Small aluminum baking sheet		
Shedded lunch tray, bowl, cup, spoon, fork & knife		
Assorted rubber bands		
Large glass disk		
Small glass disk		
Small bottle glue		
Ruler		
Small copper penny with 50 words of value		
Hard lunchbox with flip top		
Chubby numbers		

This includes:		
Box of regular crayons		
Box of triangular crayons		
2 pencils		
For the hour game		
Kiddie jumbo deck of cards		
Regular jumbo deck of cards		
Series of different game cards		
1 top snap game cards - jumbo deck		
Mini chapter & chapter		
1 dozen of pencil sharpeners		
Scratch paper		
Kiddie books		
Eraser		
Primary journal		
Folder with torn-out designs		
Plain folder		
Twelve Toy		
Additional Observations:		



continued

Tier I – Core Instruction

Example

- Kindergarten classroom(s)
- 1 hour session for 6 weeks.
- Work through paper-based **eOTe Portfolio Activity Sheets**
- Allow students to explore through the eOTe Box and use **eOTe Object-Performance Grid** with them individually and/or in small groups



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continued

Tier 2 – Targeted Intervention

Example

3 students from kindergarten class of 50. You want to work more closely with these students who demonstrate need for further exposure to occupational therapy.



ACTA OCCUPATIONAL PROFILE TEMPLATE

"The occupational profile is a summary of a client's occupational history and experiences, patterns of daily living, interests, values, and needs" (ACTA, 2014, p. 513). The information is obtained from the client's perspective through both formal interview techniques and casual conversation and leads to an individualized, client-centered approach to intervention. Each item below should be addressed to complete the occupational profile. Page numbers are provided to reference a description in the Occupational Therapy Practice Framework: Domain and Process, 2nd Edition (ACTA, 2014).

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continued^{ed} The SwifteOTe Project Box

*Based on the outcome of the Screening, the OT Practitioner puts together a **SwifteOTe Project Box** for the student(s).*



Kinder SwifteOTe



Sensory-Lunch SwifteOTe



Open/Close SwifteOTe



MotorFingers SwifteOTe



MindBender SwifteOTe



Write4Me SwifteOTe

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continued^{ed}

In Brief: The Purpose of Creating the Early OT Experience (eOTe) Portfolio

- 1) **Link Skills to Occupationally-Relevant Activities** the Student Engages in within the Educational Environment
- 2) **In-depth View of Student's Occupational Performance**
Actual and perceived perspective(s) of the student.
- 3) **Outcomes: Intervention Implementation** (OTPF, 2014, p.S15)
Ongoing actions taken to influence & support improved student performance.



Bottom-line

OTPF-Based Outcomes: eOTe Screening

Can be used to plan future actions with student(s) & to evaluate OT Delivery-of-Service



- Occupational Performance
- Adaptation
- Health & Wellness
- Participation
- Occupational Justice
- Quality of Life
- Role Competence
- Self Advocacy
- Prevention

(OTPF, 2014, pp.S34-35)

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Presentation References

- American Occupational Therapy Association. (2014). Occupational therapy practice framework: Domain and process (3rd ed.). *American Journal of Occupational Therapy*, 68, S1–S48. <https://doi.org/10.5014/ajot.2014.682006>
- AOTA Practice Advisory on Occupational Therapy in Response to Intervention (2012). *American Occupational Therapy Association, Inc.* Retrieved from: <https://www.aota.org/~media/Corporate/Files/Practice/Children/Browse/School/Rtl/AOTA%20Rtl%20Practice%20Adv%20final%20%20101612.pdf>
- Christiansen, C.H., Baum, C.M. & Bass-Haugen, J. (Eds). (2005). *Occupational therapy. Performance, participation, and well-being (3rd ed)*. Thorofare, NJ: Slack.
- *Note: All images on powerpoint and handouts were retrieved from Unsplash which has a free-use policy OR created by Angie.*

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continued



My hope is that this teaching-learning session, based upon the conceptual framework and artifacts of the eOTe...is helpful for your day-to-day school-based practice.

Feel free to contact me anytime – anh1@psu.edu

Namaste.



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continued

It's elementary: Foundations for school readiness Virtual Conference

Mon 8/6	Sensory Regulation and Yoga Britt Collins, MS, OTR/L
Tues 8/7	Visual and Fine Motor Skills Emily Dassow, OTR/L
Wed 8/8	Executive Functioning in the Classroom Cara Koscinski, MOT, OTR/L
Thurs 8/9	Early OT Exposure (EOTE), A Mindful OT Screening & Intervention Angela Hissong DEd, OTR/L, CMCP, CMMF, CIR
Fri 8/10	Embedding School Based OT into Elementary Melanie Wheeler, OTD

continued