

The Occupational Therapy Assistant's Role in the Evaluation Process

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I am an occupational therapy assistant (OTA) who recently accepted a position with a new employer. At my previous workplace, I routinely participated in evaluations and re-evaluations by administering standardized assessments, such as the Motor-Free Visual Perception Test. However, my new supervisor said that participating in the evaluation process is not within an OTA's scope of practice. Does AOTA have a resource that I can share to support my role in this area?

This is a question that often arises in practice and is addressed in the AOTA official document *Standards of Practice for Occupational Therapy*.¹ Despite these standards, there is still confusion regarding the involvement of an OTA in the evaluation process.

Standards of Practice for Occupational Therapy describes the role of the occupational therapist (OT) as initiating and directing the evaluation process as well as analyzing and interpreting the data in a manner consistent with state and federal law, regulatory requirements, and AOTA official documents. The role of the OTA is described as contributing to the process through implementing assessments delegated by the OT and providing reports of the client's abilities and the OTA's observations in a manner consistent with state and federal law, regulatory requirements, and AOTA official documents. Practice acts may differ from state to state, and they supersede AOTA official documents, so occupational therapy practitioners should check their state practice act for what role the OTA may take in the evaluation process in their state. In addition, OTA involvement in the evaluation process is limited when using assessments such as the Sensory

Integration Praxis Test or the Assessment of Motor and Process Skills, which require training to administer that is available only to OTs. So it is true that evaluating the client is the primary responsibility of the OT, and that analyzing and interpreting all evaluation data must be carried out by the OT. However, if permitted by the relevant state practice act, the OTA may provide additional information on the client's performance or administer some standardized assessments once service competency has been demonstrated.

Service competency of the OTA for elements of the evaluation process is established within the supervision process. Service competency is defined as "the ability of the OTA to obtain the same or equivalent results as the supervising OT in evaluation and treatment" (p. 292).² OTA students are given general exposure to a variety of standardized and nonstandardized assessments in their academic preparation. However, it should not be assumed that an entry-level OTA is competent in administering standardized assessments until he or she can successfully demonstrate the ability to follow protocols correctly and obtain consistently accurate information for the OT. Even when an experienced OTA is assigned to work with an unfamiliar OT, the process of establishing service competency in assessments must be completed again. This can be accomplished in several ways, including jointly reviewing the assessments that are used at the facility, having the OTA observe the OT during administration of the assessment, having the OTA practice administering the assessment to the OT, and videotaping a practice assessment for the OT/OTA team to review.

In the AOTA official document *Guidelines for Supervision, Roles,*

and Responsibilities During the Delivery of Occupational Therapy Services, additional guidance is given regarding the level of supervision required by an OTA while participating in the evaluation process.³ The type and amount of supervision depends on several factors: the type of setting, the severity of the client's condition, and the level of experience the OTA has in that setting, to name a few. Sometimes even the OT supervisor's level of experience working with OTAs in the evaluation process can have a bearing on the frequency of supervision. For example, situations in which the OT has had little to no experience working with OTAs may require more frequent communication to ensure positive outcomes for clients.

Once the time has been taken to establish service competency in assessments and determine the appropriate level of supervision, the OTA can become a valuable team member in the evaluation process. ■

References

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