Quality of Occupational Performance

Administration Manual

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Participation in a QOP training course is highly recommended. Occupational therapists who have completed training report increased understanding of administration procedures and greater confidence in the validity of results.

QOP training courses are offered in locations worldwide and will be announced on the official QOP website as they become available. Training fees are determined by course instructors. Optional printed copies of the QOP manual may be provided by instructors at cost for printing, binding, and if applicable, shipping and handling.

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Introduction

Quality of Occupational Performance (QOP)

The *Quality of Occupational Performance* (QOP) is a suite of three evaluation tools designed for implementing **standardized performance analyses**:

- ***QOP: ADL*** – used to evaluate the quality of a person's ADL task performances based on the ratings of 16 ADL motor skills and 20 ADL process skills,
- ***QOP: Schoolwork*** – used to evaluate the quality of a student's schoolwork task performance based on the ratings of 16 schoolwork motor skills and 20 schoolwork process skills, and
- ***QOP: Social Interaction*** – used to evaluate the quality of a person's social interaction based on the ratings of 27 social interaction skills.

A **performance analysis** is an evaluation of the quality of a person's occupational performance. It involves observing a person as they are engaged in a meaningful, relevant, and prioritized task performance and evaluating the **quality of the smallest observable actions** that comprise occupational performance.

- When administering the ***QOP: ADL*** or the ***QOP: Schoolwork***, the occupational therapist observes the person as they **bend** forward, **reach** for, and **grasp** task objects (e.g., glass, scissors). At the same time the occupational therapist observes the person as they **search** for and **locate**, **choose**, and **gather** the task objects to the workspace.
- When administering the ***QOP: Social Interaction***, the occupational therapist observes the person as they **approach** their social partner(s), **start** social interaction, **turn toward** and **look** at the social partner(s), and **reply** to the social interaction without interrupting a social partner (**times response**).

Each QOP tool provides a **standardized, valid, and reliable** method for evaluating the quality of a person's occupational performance. Each is **occupation-focused** – they focus on *occupation itself*, the quality of performance of client-prioritized, meaningful tasks that people of all ages need and want to do – not on underlying body functions.

When administering the QOP tools, the occupational therapist observes a person engaging in two relevant task performances in their natural contexts, making the QOP truly **occupation-based** and **ecologically-relevant**. The QOP is also **client-centered**, because the client identifies which task performances they are most concerned about and which they want to prioritize for evaluation and intervention. The *client* may be an individual (e.g., a person, a student), a client constellation (e.g., a student and their teacher, a worker and their supervisor), a client group (e.g., a group of individuals with similar occupational concerns), or representatives from within a community or an organization. In this way, the QOP supports **authentic occupational therapy**

practice and highlights the profession's unique contribution to health care and human service teams.

Text Box 1. Characteristics of Valid Performance Analyses

- **Client-centered**: We recognize our clients as equal partners. We actively involve them in shared decision-making throughout the occupational therapy process and respect their right to make choices and take reasonable risks that reflect their personal goals and values.
- **Occupation-focused**: The proximal focus of our evaluation is the client's quality of occupational performance – not their body functions.
- **Occupation-based**: We observe the client while they perform meaningful, everyday tasks that are personally relevant to them.
- **Ecologically-relevant**: We ensure that task performances are authentic – they are carried out in *real* contexts, with *real* objects, and involving *real* people.

The QOP tools provide **practical**, **accessible**, and **user-friendly** alternatives to three standardized performance analyses:

- *Assessment of Motor and Process Skills* (AMPS; Fisher, 1989; Fisher & Jones, 2012, 2014),
- *School Version of the Assessment of Motor and Process Skills* (School AMPS; Fisher, Bryze, & Hume, 2002; Fisher, Bryze, Hume, & Griswold, 2005), and
- *Evaluation of Social Interaction* (ESI; Fisher & Griswold, 2009, 2018).

While the QOP tools are **fundamentally different** from the AMPS, School AMPS, and ESI, they build on our earlier work with these predecessor tools. That is, we have designed the QOP tools to be more **flexible** and more **readily applicable** to the people we evaluate. They also are more **readily accessible** because the tasks and scoring criteria have been simplified. Finally, formal training in the use of the QOP tools is not required, but it is strongly recommended. With training, the validity and reliability of the evaluation results are better ensured.

The extensive research supporting the validity and reliability of the AMPS, School AMPS, and ESI provides the **psychometric foundation** for the validity, reliability, and interpretation of each of the QOP tools. Each QOP tool has an associated **scoring program** that is used to generate **adjusted scaled scores** (0–100) that can be interpreted from both criterion-referenced and norm-referenced perspectives.

The **occupational performance skills** evaluated using the QOP are included in a variety of key professional resources, including the *Occupational Therapy Practice Framework* (American Occupational Therapy Association, 2020), *Willard & Spackman's Occupational Therapy* (Fisher &

Griswold, 2019), and *Powerful Practice: A Model for Authentic Occupational Therapy* (*Powerful Practice*; Fisher & Marterella, 2019).

The administration of the QOP is best understood by placing it in the context of the ***Occupational Therapy Intervention Process Model*** (OTIPM; Fisher, 1998, 2009; Fisher & Nyman, 2007, 2011; Fisher & Marterella, 2019). Referring to the text, *Powerful Practice* (Fisher & Marterella, 2019) will enhance your theoretical understanding of the QOP and strengthen your implementing performance analyses that are both occupation-focused and occupation-based.

Occupational therapists who have used standardized performance analyses to evaluate the quality of real occupational performances frequently report a **profound sense of professional pride**. They have especially valued incorporating standardized performance analyses into their practice because they affirm occupational therapy's unique role and strengthen their ability to provide authentic, meaningful, and evidence-based services. Their enthusiasm and encouragement inspired us to develop the QOP – a new, psychometrically sound suite of tools designed to promote excellence in **occupational therapy practice, education, and research**.

A Vision for the Profession

Our goal has been to make these resources **freely available** to occupational therapists, educators, and students – those who carry forward the heart and purpose of our profession. We seek not only to ensure access, but to **empower occupational therapists to illuminate the power of occupation** – to enhance the daily life functioning and meaningful participation for all people.

As occupational therapy continues to grow across continents, we hope this vision reaches those just beginning their journey – **inspiring them to embrace authentic, occupation-centered practice** and to bring its transformative potential to life.

Administration

In this chapter, we will present how occupational therapists administer a standardized performance analysis. As we proceed, we will address the **key characteristics** of a valid performance analysis and the **step-by-step procedures** for implementing a QOP performance analysis. But first, we need to consider who the client is.

Text Box 2. Who Is the Client?

We define the **client** as the person referred to occupational therapy and, when relevant, others whose *own* occupational performance is affected by supporting or interacting with that person. For example, if a parent experiences occupational challenges of their own related to supporting their child, that parent is considered part of a **client constellation**.

By contrast, when a parent provides information about their child but does not experience occupational challenges of their own, the parent serves as an important **informant** and is not a client nor a member of a client constellation. Although most parents do experience child-related occupational challenges, we use this example to clarify the distinction between a member of a client constellation and an informant.

Clients may also be members of a **client group** – that is, a group of individuals who share similar occupational challenges, but who are not otherwise related. Finally, the client may be a **community** or an **organization**. However, within the context of conducting performance analyses, the client consists of representative members of that community or organization.

When administering a QOP performance analysis, the occupational therapist focuses on the quality of a person's occupational performance. This person may be the individual referred to occupational therapy, a member of a client constellation or client group, or a representative member of a community or organization.

In this text, we will use the term ***person*** to refer to the individual whose occupational performance is directly observed. We will use the term ***client*** when who we might be referring to could be the person referred to occupational therapy, a client constellation, a client group, or representatives of a community or organization. For example, the occupational therapist may interview a client constellation or client group but observe the performance of one or more of those persons.

Overview of the Administration of the QOP

Performance analyses based on using the QOP are administered in three phases. **Phase 1** begins with an occupational therapy interview, during which the occupational therapist gathers information about the client's self-reported strengths and challenges with occupational performance. **Phase 2** focuses on preparing for the performance analysis observation. **Phase 3** concludes the process by implementing the actual performance analyses, including observing, rating, and interpreting a person's quality of occupational performance. The Phases and Steps are described in more detail in the following sections.

Text Box 3. Phases of a QOP Performance Analysis

Phase 1. Gather initial information

- Client-reported occupational strengths and challenges
- Client-prioritized occupations for further evaluation
- Situational contexts of those occupations

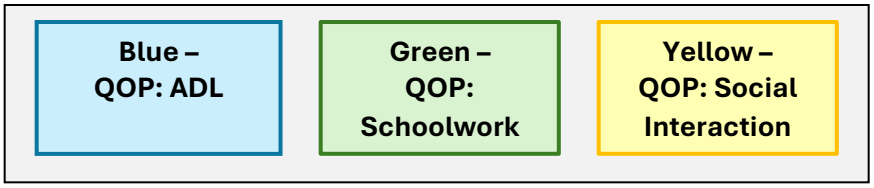
Phase 2. Prepare for the QOP performance analysis observation

- Step 1: Introduce the performance analysis
- Step 2: Identify specific task performances to observe
- Step 3: Prepare for the observations

Phase 3. Implement the performance analysis

- Step 1: Observe and take observational notes
- Step 2: Rate the quality of the person's occupational performance
- Step 3: Enter the ratings into the QOP Scoring Program
- Step 4: Interpret the results

Because the QOP consists of a suite of three evaluation tools, each with a distinct focus, some of the performance analysis procedures may vary depending on which QOP tool the occupational therapist plans to administer. To enhance clarity and ease of use, we present these **tool-specific procedures** separately. More specifically, to help make tool-specific information readily accessible, we will use color coding throughout this chapter to indicate the relevant evaluation tool: **blue** for QOP: ADL, **green** for QOP: Schoolwork, and **yello**w for QOP: Social Interaction.



Phase 1. Gather Initial Information

The administration of a standardized performance analysis always begins with a conversation with the client – an occupational therapy interview. During this conversation, it is essential for the occupational therapist to gather the client's perspective on which occupations they see as **strengths** and which they experience as **challenges**. Tool-specific considerations regarding who to interview are shown in Table 1.

Table 1. Gather Information from the Client

QOP: ADL
Typically, the client is the person or persons who will be observed. With very young children or persons who have challenges reporting, information may *also* need to be gathered from others (e.g., parents, teachers, caregivers) whether they are part of a client constellation or serve as informants.
QOP: Schoolwork
In school settings, the client typically includes both the student and the teacher. Because teachers often identify concerns about a student's performance and seek occupational therapy support regarding how to best meet the student's needs, information is most often gathered from the teacher. Whenever possible, however, it is ideal to *also* interview the student and/or the student's parents or guardians.
QOP: Social Interaction
For evaluations of social interaction, information may be gathered from the person or persons to be observed, as well as from others who may be part of a client constellation or who are informants familiar with the individual's performance in relevant contexts. These may include teachers (for students observed in classrooms) or parents, guardians, caregivers, or employers (for individuals observed in other situational contexts). The person(s) observed may be members of a client group, a community, or an organization. When discussing social interaction skills with clients, feel free to use phrases like, *"How does it go when you are talking or working together with others?", or "How about playing with your friends? How does that go? Is it sometimes hard?"* The use of such phrases that avoid direct reference to social interaction skills can be both more easily understood and less threatening to the client.

Phase 2. Prepare for the QOP Performance Analysis Observation

Once the occupational therapist has gathered this critical initial information from the client, they are ready to prepare for the performance analysis observation. The three steps of Phase 2 are as follows:

Step 1: Introduce the Performance Analysis

Introducing the client to the idea of completing a performance analysis is generally straightforward. Using the occupational challenges identified during the initial conversation, the occupational therapist explains for the client (a) what is a performance analysis and (b) the benefits of observing the client as they engage in two task performances.

When explaining performance analyses to clients, we recommend that you include the following ideas:

- We observe how people do everyday tasks that matter to them and that they find challenging.
- We want people to perform the tasks the way they normally would do them in their daily lives.
- Watching people perform tasks helps us understand what supports their task performances and what may be making them more difficult.
- This information can help us to work together to find ways to make task performances more effective.

Suggested tool-specific procedures for each QOP evaluation tool are presented in Table 2.

Table 2. Introduce the Performance Analysis

QOP: ADL
Introduce the client to the benefits of being observed while performing prioritized ADL tasks. Explain that observing a person performing tasks allows the occupational therapist to see both which aspects of the task are easier and which are more difficult – understanding both is important for planning effective intervention. For example, you might say, *"Sven, the best way for me to figure out how to help you is to watch you doing some of the tasks you want to do. I can see which parts are easier and which parts are harder. Once I understand what is happening, we can work together to come up with strategies for making your life easier."* Provide concrete examples, such as, *"You mentioned that you feel unsafe when making coffee. Watching you make a pot of coffee will help me see which parts of the task go smoothly for you and which parts are more challenging. Afterward, we can work together to find ways for you to make coffee as safely as possible."* Be sure to let the client know that you would like to observe the person performing at least two prioritized and relevant ADL tasks, and that you want to observe the person performing these tasks as they would complete them in their natural setting. For example, *"When I observe your son, it is important for me to see him perform two different ADL tasks. In addition to putting on his shoes, you also mentioned that brushing his teeth and putting on his jacket are challenging. Which of these three tasks are you most concerned about?"* (continued)

Table 2. (continued)

QOP: Schoolwork
Explain to the teacher and/or student why it is useful to observe the student carrying out schoolwork tasks that have been identified as important. For example, you might say, *"By watching Clara while she is performing schoolwork tasks that you are concerned about, I can better understand which aspects of the work are difficult for her. Once I see where the challenges lie, I will be able to suggest ideas and strategies that could help both you and Clara manage her schoolwork more successfully."* Confirm that you want to observe the student performing two relevant and prioritized schoolwork tasks as they are usually completed in her natural classroom setting, with other students present. For example, *"When I observe Clara, it is important for me to observe her complete two different schoolwork tasks. You mentioned that writing and computer tasks are both challenging for her. Are there specific writing and computer tasks that Clara is having the most difficulty performing and that you would like me to observe? I would like to observe her in the classroom where she routinely completes these tasks."*
QOP: Social Interaction
Explain to the client why observing people while they interact with others will enable you to get a better idea of their strengths and challenges in interacting with others. Using the social interactions the client has identified as challenging, you might say, *"Charlie, you mentioned concerns about interacting with your wife and with your neighbors. If I can watch you while you are talking with and interacting with your wife or with a neighbor, I can gain a better understanding of which parts of social interaction are easier and which are more difficult. Afterward, we can review what I observed and explore strategies together that may help make these kinds of situations easier for you."*

Step 2: Identify Specific Task Performances to Observe

In Phase 1, the client identified the occupations that are of greatest concern and that they want to prioritize for further evaluation. Thus, after the occupational therapist has explained what a performance analysis is, the occupational therapist and client are ready to work together to determine the specific task performances to be observed.

For example, a person may report that making breakfast is difficult, a teacher or student may identify writing as challenging, or members of a client group may express concerns about talking and working together with colleagues. Each of these concerns suggests the use of a different QOP tool, QOP: ADL, QOP: Schoolwork, and QOP: Social Interaction, respectively.

Because each QOP tool includes a variety of tasks, the occupational therapist works together with the client to identify **two task performances** that are **relevant** to the person(s) to be observed and that align with the client's **prioritized** occupational concerns. This process requires that the occupational therapist be familiar with the range of tasks included in each

QOP tool. We suggest that the occupational therapist focuses on the tasks in each QOP tool that may be relevant for the variety of clients with whom they work.

The descriptions of the various tasks included in each tool are found in the following Appendices:

- **Appendix 1**. Index of ADL Tasks Included in the QOP: ADL
- **Appendix 2**. QOP: ADL – Task Descriptions and Challenges
- **Appendix 3**. QOP: Schoolwork – Task Descriptions and Challenges
- **Appendix 4**. QOP: Social Interaction – Social Exchange Descriptions and Challenges

Text Box 4. Be Prepared for Determining Specific Task Performances to Observe

You must be familiar with the QOP: ADL – Task Descriptions and Challenges, QOP: Schoolwork – Task Descriptions and Challenges, and the QOP: Social Interaction – Social Exchange Descriptions and Challenges **before** determining what specific task performances to observe.

When reviewing task descriptions, the occupational therapist should carefully note the **specific components and expectations** of each task. Because many tasks appear similar, familiarity with these details is essential for asking focused questions and determining which specific task performances to observe.

Being familiar with the QOP task expectations further enables the occupational therapist to clarify important details about what the task involves and to ask specific questions to **confirm that the client-described task matches one of the task descriptions for the relevant QOP tool**. Doing so ensures that the selected task is appropriate for observation, the QOP performance analysis will be valid, and the QOP results will be meaningful to the client.

When selecting the two task performances to be observed (i.e., either two ADL tasks, two schoolwork tasks, or two social exchanges), the occupational therapist balances three key considerations:

- The person's **comfort and willingness** to be observed while engaging in prioritized occupations;
- The need to ensure that the selected tasks reflect the occupations the client identified as **challenging and prioritized** for further evaluation; and
- The requirement that the client's prioritized occupations **align with the task descriptions in the manual**.

Together, these considerations are essential for conducting a **valid evaluation**. **Tool-specific examples** of how to guide clients in selecting two relevant task performances are provided in Table 3.

Table 3. Identify Specific Occupational Performances to Observe

QOP: ADL
Once the client has identified what two tasks, in general terms, the person will perform, you can begin by summarizing their decision, *"You indicated that when I observe you, you would make coffee and prepare your breakfast."* Then proceed directly to asking follow-up questions that enable you to determine the **specific ADL tasks** the person will perform. For example, since you will observe the person prepare coffee, you must have in mind the specific details of the four potentially relevant coffee-making tasks included in Appendix 2, QOP: ADL – Task Descriptions and Challenges: – **Prepare hot or cold beverage** (includes making instant coffee or using a single cup espresso or coffee maker) – **Prepare pot of brewed beverage** (includes [a] making a pot of brewed coffee using an electric coffee maker, pour-over drip coffee maker, or French press; or [b] preparing boiled coffee [common in northern parts of Europe and North America]) – **Prepare stove-top espresso coffee** (requires the use of a "caffettiera") – **Prepare pot of brewed beverage served with snack** (includes making a pot of boiled or brewed coffee and serving the coffee with a snack [biscuits, nuts, or similar dry snacks]). Your follow-up questions might then proceed as follows: **OT**: *"Tell me more about making coffee. What type of coffee do you make, instant, brewed, or espresso?"* **Sven**: *"I make brewed coffee."* **OT**: *"Since you make brewed coffee, do you usually prepare a single cup using a single cup espresso machine like a Keurig, or do you brew a pot of coffee?"* **Sven:** *"I usually make a pot of coffee."* **OT:** *"After you make your coffee, do you drink your coffee with a small snack like biscuits or cookies, or might you prepare your breakfast before drinking your coffee?"* **Sven:** *"No, I never eat a snack. I always get up and make myself a pot of coffee and sit down with my coffee and read the news. Then I make my breakfast."* Because of Sven's response, you now know that you can consider making coffee and preparing breakfast to be two separate tasks. Moreover, you now know that you will observe Sven performing the task: **Prepare pot of brewed beverage**. You are now ready to proceed to identify the **specific** breakfast task that best matches the type of breakfast Sven usually prepares, including if he also drinks coffee or another beverage with his breakfast. This will require that you are familiar with the details in the descriptions of the following **culturally-relevant** breakfast tasks in the QOP manual (Appendix 2): (continued)

Table 3. (continued)

- **Prepare cold cereal with milk/yogurt and beverage** (includes preparing dry cereal served with milk, yogurt, "fil", or "kefir", and pouring a pre-made beverage [e.g., coffee, juice])
- **Prepare cooked cereal and beverage** (includes preparing a single serving of hot cereal served with milk or cream, and pouring a pre-made beverage)
- **Prepare cooked cereal, cheese sandwich, and beverage** (includes preparing a single serving of hot cereal served with milk or cream, preparing an open-faced cheese sandwich, and pouring a pre-made beverage)
- **Prepare toast and hot instant or brewed beverage** (includes preparing toast with a spread and preparing hot instant, brewed, or boiled coffee)
- **Prepare boiled eggs served in egg cups** (includes boiling two eggs in a pan of water on the stove)
- **Prepare eggs, meat/toast, and coffee or other beverage** (includes frying or scrambling eggs or making an omelet, preparing toast and/or breakfast meat [ham, bacon, sausage], and a beverage – either pre-made or prepared during the observation)
- **Prepare French toast and beverage** (includes preparing two servings of French toast and pouring a pre-made beverage)
- **Prepare American-style pancakes and beverage** (includes making pancakes and pouring a pre-made beverage)
- **Prepare European-style pancakes and beverage** (includes making pancakes and pouring pre-made beverage)

As you can see, there are a wide variety of potential tasks. To determine which specific task Sven will perform, you can start with an open-ended question:

OT: *"When you have your breakfast, what do you usually eat?"*

Sven: *"I always have cereal."*

OT: *"Do you like to eat cold cereal like Corn Flakes or muesli, or do you prepare hot cereal?"*

Sven: *"I eat muesli."*

OT: *"Great. When you prepare your muesli do you usually add milk, yogurt, or 'fil'? Do you use sugar? And when you eat your cereal, do you also serve yourself more coffee or another beverage?"*

Sven: *"I use either yogurt or 'fil', depending on what I have in the refrigerator, and I usually pour myself a glass of juice. I never add sugar."*

OT: *"That's perfect. If you agree, I can watch you prepare a pot of coffee and then I can watch you prepare yourself breakfast with cereal, yogurt or 'fil', and glass of juice.*

(continued)

Table 3. (continued)

QOP: Schoolwork
Once the teacher and/or student have confirmed two types of schoolwork tasks that are challenging for the student to perform, you will continue your discussion and determine the **specific schoolwork tasks** the student will perform during the observation. Generally, this part of the conversation is with the teacher because it is the teacher who determines what tasks the students will be performing and when. In Clara's case, because the teacher identified writing and computer tasks as being of most concern, you will need to read Appendix 3, Schoolwork – Task Descriptions and Challenges and be familiar with the expectations for each of the various **paper-based writing tasks** and **computer-based tasks** included in Appendix 3. You will then ask the teacher questions related to the teacher's task expectations to determine the two specific tasks you will observe. The paper-based writing tasks include two options: **Circle and connect** and **Writing tasks: copying, short answers, and composition**. The writing tasks are most relevant to Clara's challenges. Reading the description of the writing tasks informs you of the following: – The task the student is expected to perform can vary from copying individual letters, words, or numbers to writing two to three paragraphs totaling more than half a page – The specific writing demands are specified by the teacher This means that you will need to ask the teacher questions to determine exactly what the teacher will be expecting the students to do. For example: **OT:** "*You said Clara has difficulty when writing. Tell me about the types of writing tasks your students are expected to do. Do the students copy words, write one- or two-word answers, write short sentences, or do they write longer paragraphs? Do you expect Clara to do the same things the other students do?*" **Teacher:** *"A common activity in my classroom is to read about or discuss a topic and then I ask the students to write sentences to describe what they learned or what they liked. Clara is expected to do all the same things as my other students."* This information informs you that you will observe Clara as she is writing sentences. Importantly, the teacher's expectations for Clara are the same as the other students. ***Note***. If the teacher's expectations differ for the student you will observe, you will use those expectations when you later observe and rate the student's quality of schoolwork task performance. From there, you will proceed to ask questions about the teacher's specific task expectations, including the following: (continued)

Table 3. (continued)

- *"Do the students usually write sentences or do you have them write paragraphs?*
- *Do you tell them how many sentences to write? Will you tell the students the number of sentences you expect them to write when I come to observe Clara?"*
- *"What tools and materials do you expect the students are to use for writing? Do they use pencils or a pen, or does it matter? Are they allowed to use felt-tipped markers to write?"*
- *"Do you expect them to write on lined paper, on a worksheet, or perhaps in a workbook? What if they make a mistake? Do they have erasers or something else to fix their mistakes?"*
- *"Where are the tools and materials stored or where do your students get the things they need? Are they in their desks, do you hand them out, or do you have a special place where they go and get them?"*
- *"What do you expect your students to do with their finished work? For example, do they put their writing in a basket on your desk, do they put it in their own desk, or do you have somewhere else you expect them to put it?"*
- *"What do you expect the students to do with their pens, pencils, and other tools when they are done? Are they to put them away, or leave them out? Where are they to put them?"*

You will need this information when you later rate the student's quality of schoolwork performance. Keep in mind that information regarding task expectations, tools and materials, and putting things away (restoring) is often understood by the students as part of the normal classroom culture and the teacher might not specify the information again when giving instructions to the students about what they are to do. Moreover, you may also learn new details about the specific task expectations when you listen to the teacher give directions to the students.

You will extend the conversation to identify the specific computer-based task the teacher will expect Clara to perform. Details to consider as you talk with the teacher about computer-based tasks may include:

- What the student is to do: play a school-related computer game, type text, complete a graphic design task, complete an animation task
- The type of input device the student will use (e.g., mouse, keyboard, touch pad, touch screen)
- Whether the student is expected to print and/or save a document
- Whether the student is expected to turn off the computer

(continued)

Table 3. (continued)

QOP: Social Interaction
After the client has identified two social interactions that are challenging, you will ask questions to collaboratively determine two **specific types of social exchange** to observe. Begin by summarizing the social interactions the client has already identified as challenging and that they have prioritized. Sometimes, you will need to start with a broad question, such as: – "*You indicated that you are concerned about interacting with your wife and with your neighbors.*" In this case, you will proceed to ask questions to find out more about what types of social exchange are challenging, as follows: – *"Tell me more about these two social interactions. Let's discuss interacting with your wife first. Are there particular times that you and your wife have more difficulty? For example, are you just talking together or are you planning something or doing something together?"* – *"Now tell me more about interacting with your neighbors. What kinds of things do you do together that concern you or you find challenging?"* At other times, the client already may have identified more specific information about the types of social exchange they are concerned about. In this case, your initial summary will contain those details: – *"You indicated that you are most concerned about planning weekend activities with your wife and deciding when each of you will use the car. You also mentioned concerns about talking with your neighbors when planning neighborhood projects – things like what to plant in your neighborhood garden."* Whether you start more broadly or start by focusing on more specific social interactions, you must listen to what the client says and consider the types of social exchange listed in Appendix 4, QOP: Social Interaction – Social Exchange Descriptions and Challenges that best describe the social interaction the client has just identified. If the client has not specified who would be the social partner, you will need to ask further questions to gather that information. It is essential that you are familiar with the details of the different types of social exchange listed in Appendix 4. The key characteristics of each type of social exchange are as follows: – **Collaborating with others**: involves the use of tangible objects to jointly implement a prespecified or preplanned project – **Engaging in casual conversation:** involves engaging in "small talk" with no preplanned topic or agenda (continued)

Table 3. (continued)

- **Planning and decision-making:** involves discussing, negotiating, or jointly planning a shared future activity or outcome
- **Sharing information with others:** involves providing others with information
- **Asking others for information**: involves asking others for information
- **Selling goods or providing services to others**: involves one of the following: taking orders, serving goods, providing services, accepting payments, selling products, or providing assistance to others
- **Acquiring goods or services from others**: involves either ordering and/or paying for goods or services from others, or requesting assistance or support from others

It should be clear that (a) planning when Charlie and his wife will each use the car over the weekend and (b) talking with his neighbors when planning neighborhood projects would both be examples of **Planning and decision-making**.

Conclude the discussion by verifying the two social interactions you will observe, "*Great, if it is okay for your wife and for your neighbors, I would like to observe you make plans about using the car and as you make plans about your neighborhood projects.*"

Step 3: Prepare for the Observations

General Considerations for Ensuring a Valid QOP Observation. Regardless of the QOP tool the occupational therapist plans to administer, the following are core requirements for planning a valid performance analysis:

- The person must perform tasks that are **relevant** to the person and **prioritized** by the client for the evaluation.
- QOP observations must take place in **real situational contexts** that include the availability of needed tools and materials and, if relevant, appropriate social partners (see Table 4).
- Real situational contexts also take into account the **time** the task performance usually would occur (i.e., when during the day does the person usually perform the task or when is the task performance usually scheduled in classrooms, workplaces, or institutional settings with staff-controlled schedules). Of course, this means that **it is the occupational therapist who may need to be flexible with their schedule** so as to ensure that the QOP observations are ecologically-relevant and support valid assessment.
- The person should perform the tasks in their **usual manner**.
    - The person may use **adaptive equipment** or **adaptive strategies** they already are familiar with and currently are using when performing tasks.
    - When preparing for a QOP observation, the occupational therapist should ensure that **no changes are introduced** before the observation that could enhance the person's

quality of task performance, such as compensatory strategies, adaptive equipment, or coaching.

- If the person typically receives support from others to perform a task (e.g., verbal cueing, hand-over-hand assistance, or completing part of the task for the person), **ask those who provide support to step back** during the observation and allow independent performance, intervening only in cases of imminent safety risk or clearly necessary assistance.
- Both the occupational therapist and the person must have a **clear and shared understanding of the expectations and outcomes of the task the person plans to perform** (see Table 4).

Table 4. Definitions of Real Situational Contexts and Example Task Expectations That Must Be Mutually Understood by the Person and the Occupational Therapist Before Initiating the Observation

QOP: ADL
Real situational context: Ideally, ADL tasks should be observed in the real-life situational context where and when the person usually performs them. If the person is currently in a clinical setting but lives at home – or previously lived at home and plans to return – the home remains the preferred context for observation. When it is not possible to observe the person at home, the occupational therapist must ensure that the observation occurs in a real situational context that includes real tools and materials. For example, tasks should take place in a real kitchen or real bathroom with typical cupboards, drawers, appliances (e.g., refrigerator, stove, dishwasher), and fixtures (e.g., sink, shower, bathtub, toilet); or in a real outdoor space (e.g., lawn, garden, patio). The required tools and materials for the ADL task(s) to be performed also need to be available. **Shared understanding**: Based on the task description in Appendix 2 for **Rake or weed outdoors** and what the person agreed to do for this observation, **the person is expected to** use a rake to remove leaves from a specified area until the area is free of large leaves and other debris, put the leaves in a garbage container or the compost pile, and put tools away.
QOP: Schoolwork
Real situational context: A student's quality of schoolwork performance should be observed in the classroom where the student normally completes schoolwork tasks, with the teacher and other students present. This may be a typical classroom with approximately 25–30 students or a smaller classroom with only a few students and a teacher. The most important consideration is that the setting is the student's usual learning environment. The tools and materials required for the schoolwork task(s) must also be available. Ideally, the observation should be scheduled at a time when the teacher has planned the relevant task performances as part of the regular classroom routine. (continued)

Table 4. (continued)

Shared understanding: Based on the task description in Appendix 3 for **Cut and paste shapes** and what the teacher specified the students are to do, **the student is expected to** make a Valentine's Day card that requires the student to cut along predrawn curved lines of three figures (three pink hearts), use a glue stick to paste them onto a piece of red colored paper, put the completed project on the teacher's desk, put the scissors and glue stick back into the supply cabinet, and put the paper scraps in a garbage container.
QOP: Social Interaction
Real situational context: The ideal situational context is based on key elements of the context in which the person is experiencing challenges with social interaction. This may include the usual location, the usual people present, and the usual expectations of the social interactions that are challenging for the person (e.g., real workplace, real work colleagues, and engaging in job-relevant collaborating or decision-making exchanges). When it is not possible to observe the person in the actual situational context, the occupational therapist should create a context that retains as many of the critical elements contributing to the person's challenges with social interaction as possible. For example, if the challenges are associated with interactions with a particular person, the social partner selected for the observation should have **similar interaction characteristics** (e.g., a social partner who communicates very quickly, provides limited feedback, or dominates the interaction). If the challenges are related to a type of exchange, rather than the social partner, the nature of that exchange should be preserved. **Shared understanding**: Based on the social exchange description in Appendix 4 for **Selling goods or providing services to others**, the situational context, and the specific social interaction prioritized by the client, **the person is expected to** take coffee orders from unfamiliar customers at the order counter of a busy, fast-moving coffee shop, determine the type and size of each drink and whether customers want sugar, milk, or cream, and receive payment by cash, credit card, or debit card.

Considerations for Determining the Timing of the Two QOP Observations. Whenever possible, observing **two tasks consecutively** is ideal, provided both tasks are relevant and prioritized for observation. Often prioritized tasks are performed in a natural sequence, back-to-back. In the example of Sven (see Table 3), the occupational therapist planned to observe Sven perform two tasks, one after the other: prepare a pot of coffee then prepare cereal and yogurt or "fil" and serve it with a glass of juice. Both tasks were relevant and prioritized, and Sven stated he performs these tasks separately in his morning routine.

In contrast, the occupational therapist planned to observe Clara (Table 3) performing a writing task and a computer task. If the occupational therapist determines that these two tasks are regularly scheduled back-to-back, the occupational therapist can plan to observe one and then the other. If, however, they occur at different times of the day, the occupational therapist will need to make two separate visits to Clara's classroom. While this is obviously an inconvenience

for the occupational therapist, it would be potentially even more disruptive to the teacher and the student's classroom routine for the occupational therapist to expect the teacher to accommodate the occupational therapist's schedule.

Tool-Specific Preparation Procedures for QOP Observations. The final details of preparing for a QOP observation depend upon the QOP tool the occupational therapist plans to administer. We present the relevant preparation procedures for each of the QOP tools in Table 5. As you review these procedures, you may need to refer back to the more overarching details we presented above. In Table 5, we present the procedures as a step-by-step process.

Table 5. Prepare for Tool-Specific QOP Observations

QOP: ADL

– **Prior to meeting the person in the location where the ADL task observation will occur, ensure that needed tools and materials will be available.**
  o **In clinic settings**, confirm that any tools or materials that may be required will be on hand (e.g., pots, pans, cutlery, cleaning solutions, buckets, brooms, vacuum, planting soil). If needed, arrange to acquire supplies in advance or request that a family member bring the person's personal tools or materials (e.g., clothing, grooming items) to the clinic.
  o **In homes or other community settings**, consider carefully if you need to provide any needed tools or materials or if they will already be on hand when you implement the observation. For example, you may need to provide some of the needed items for persons on a limited budget who may be hesitant to purchase perishable food supplies that will not be used.
– **Just prior to initiating the QOP observation, in the location where the ADL task performance will occur**:
  o **Review what the person has prioritized** and agreed to do – in general terms (e.g., *"You said you were going to prepare a pot of coffee and then prepare your breakfast with muesli, 'fil' or yogurt, and a glass of juice."*).
  o **Collaborate with the person to simultaneously** (a) ensure that all needed tools and materials are actually available, (b) ensure that you and the person are familiar with the location of all needed tools and materials, (c) ensure that the person has the opportunity to try out operating all needed electrical appliances, and (d) finalize specific task expectations. The following apply in all potential locations – clinic, home, community – and are not dependent on the person's prior familiarity with the environment:
(continued)

Table 5. (continued)

- Either **show the person or have the person show you** where all needed tools and materials are located. If they are not currently in locations where the person would usually store them, have the person put them where they want them. In this process, **ensure that the person – not the occupational therapist – opens and closes all doors and drawers**.
- Ensure that **items commonly stored in drawers or on shelves in cupboards or closets are placed in those usual locations.** Do not leave them out in the open on counters or similar surfaces unless specified in the ADL task descriptions in Appendix 2.
- If the person **clearly needs assistance to obtain tools and materials from usual storage locations, assist the person in moving them to more accessible places**. Make note of the task actions with which the person clearly needed your assistance and **consider that assistance in your final ratings**.
- As the person either shows you where items are located or puts items away, **verify which of the available options the person will use** – this applies **only** to items that become part of the **final task expectations**. For example, if you or Sven have both muesli and Corn Flakes available, you would ask Sven, *"I see we have both muesli and Corn Flakes, which one will you use today?"* If Sven changes his mind and chooses to use Corn Flakes <u>before</u> he performs the task, just make note of it. Corn Flakes is now part of the **final task expectations**.
- As you and the person are finding out where all the tools and materials are located, you and the person will also **learn if any needed tools or materials are missing** and if changes in the planned task expectations are needed. For example,

  "Sven, you said you usually drink juice with your cereal. I see that there is no juice. There is milk and you made that pot of coffee. For today, would it be okay for you to pour yourself a glass of milk or a cup of coffee? Which one would you prefer to serve today?"
- **Do not** verify what specific glass, plate, utensils, or other tools will be used – just ensure that the ones the person needs are available and that the person knows where they are located.
- If a needed tool includes an **electrical appliance** (e.g., electric coffee maker, vacuum, dishwasher, stove, iron), either (a) ask the person to show you how it works or (b) explain how it works and then have the person try it. Also ensure the person can put together the parts of the appliance (e.g., vacuum, electric mixer, coffee maker) and can turn it on and turn it off. These requirements are critical, whether it is an appliance the person usually uses or one they have never used before.

(continued)

Table 5. (continued)

- Similarly, if the task performance includes the use of **multipart or mechanical equipment** (e.g., ironing board, wet spray mop), either (a) ask the person to show you how it works or (b) explain how it works and then have the person demonstrate that they can operate it correctly.

  Note. As needed, you can always "feign ignorance" as to how the person's appliance works so as to encourage them to show you how it works – **it is critical that you ensure they demonstrate they can use it correctly prior to the actual task observation**.

- **Open and reclose any new, unopened containers** (boxes, jars). This does not apply to unopened cans that the person is to open during the task observation.
- If the person is going to perform yard work, sweep, mop, or vacuum, collaborate to **determine the specific boundaries** of the area to be raked, weeded, swept, mopped, or vacuumed. It is acceptable to use either natural boundaries (e.g., the living room, the outdoor porch) or to use tape or string to delineate the boundaries of an area.

- **Confirm**, based on Appendix 2, QOP: ADL – Task Descriptions and Challenges, the **specific task the person will perform**. Also clarify that the person is to **clean up or restore the workspace** – restoring often includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container. However, the specific criteria for restoring varies among the ADL tasks included in the QOP.
- Ask if the person has any **questions**.
- Review with the person what they have agreed to do (e.g., *"You agreed to prepare a bowl of muesli served with yogurt, and to pour yourself a glass of milk. When you are done, be sure to clean up your workspace and wipe up any spills. If you have any opened containers, be sure to reclose them, and put everything back to where they belong. You can put any dirty utensils in or beside the sink and throw any unwanted items into the garbage container."*). ***Note***. In this case, the final task expectations (**shared understanding,** see Table 4) are that Sven prepares a bowl of muesli with yogurt, a glass of milk, and restore or cleanup.
- Let them know that you prefer not to talk so that you do not interrupt their performance but that you are available for help if needed.
- Tell the person that you will quietly take notes as you observe them and they can pretend you are not there.
- Ask the person to begin and let you know when they are finished.

(continued)

Table 5. (continued)

QOP: Schoolwork

– Preparing to observe schoolwork tasks begins near the end of the initial conversation with the teacher, when the specific schoolwork tasks that the teacher wants to prioritize have been determined.
– The next step is to discuss with the teacher the best way for you to enter the classroom, minimize the impact of your presence on the ongoing classroom routine, and minimize the risk for unneeded teacher intervention. This may include the following:
  o Discussing the best time for you to enter the classroom. Often this is when there is a natural break in the classroom routine such as when the students return to the classroom after another activity (e.g., after recess, lunch, physical education).
  o Discussing with the teacher how your presence will be explained to the students. Often the teacher can simply state, *"We have a visitor here today who wants to see our classroom and how we all work."* Ensure that the students are not informed that you are there to observe a specific student so as to avoid risk to the student's personal integrity.
  o Informing the teacher that you prefer sit or stand to the side of the classroom and that you will be taking observational notes. Also let the teacher know that you may need to move to different locations to better observe the student's schoolwork performance, but that you will be careful to do so without disrupting the students.
  o Discussing with the teacher that it is best if the teacher does not provide the student with any assistance, verbal or physical, unless they feel it is absolutely needed.
– Preparation is finalized when the teacher gives directions to the students in the classroom. Because the instructions given to the students may differ from what the teacher identified during your initial conversation, you must be present and listen as the teacher gives the final directions to the students.
– The final task expectations (**shared understanding**, see Table 4) are based on a combination of what the teacher discussed during the initial conversation and the directions the teacher gives to the students. Where there are differences, the final directions given to the students determine the final task expectations.

QOP: Social Interaction
– Preparing to observe a person engaged in a social exchange begins near the end of the initial conversation with the client, once the specific social interactions, social partners, and context for the observations have been determined. – The next step is to discuss with the person how they would like your presence to be handled during the social interaction. This may include discussing the following: (continued)

Table 5. (continued)

- Whether the person wants their social partner(s) to know you are observing; if yes,
- How would the person like to introduce you to the social partner(s) (e.g., as the occupational therapist, as a friend), and also,
- If and how the person prefers to explain the reason for your presence.

– Clarify that you will not participate in the social interaction. Instead, you will sit or stand to the side and take observational notes.

– If the observation will take place in a public setting, confirm the location, where to meet, and whether you will travel to and from the site together.

– Preparation is complete when all arrangements have been finalized.

Phase 3. Implement the Performance Analysis

Step 1: Observe and Take Observational Notes

After you have prepared for the tool-specific QOP observations, your next step is to observe the person and take observational notes. Additional **tool-specific details** are presented in Table 6.

– **Observing**: It is critical to observe the person's performance **as unobtrusively as possible** to avoid influencing their ongoing occupational performance. You may need to change your location as you observe; however, do so in a way that does not interfere with the person's performance. This means that the occupational therapist:

- **Remains silent** and does not engage in dialogue with the person,
- **Stands back** and lets the person's performance unfold naturally, and
- **Only intervenes and provides verbal or physical assistance if there is <u>imminent</u> risk** to the person or task objects, or there is breakdown of the task performance.

– **Taking observational notes**: Tips for taking observational notes are discussed in Appendix 5. Critical requirements include:

- **Be familiar with and practice the various note-taking strategies** presented in Appendix 5 **before** implementing your first few QOP performance analyses.
- **Do not attempt to rate the person's quality of performance while you are observing**. Whether the observation is brief (e.g., 2–3 minutes) or more prolonged, there are many details to notice and remember for later rating. If important details are missed, the results of the QOP performance analysis will not be valid. Results become invalid when the person's quality of performance is not rated accurately because the occupational therapist:
  - Misses key aspects of the task performance while trying to rate during the observation,

- Does not record sufficient observational notes to recall performance details later, and/or
- Does not carefully compare what was observed with the rating examples in Appendix 6.

We will discuss how to accurately rate the person's quality of performance when we discuss Step 2: Rate the Quality of the Person's Occupational Performance below.

Table 6. Observe and Take Notes

QOP: ADL

– The observation begins immediately after you say, "*Go ahead and begin, and let me know when you are finished*."
– Step back, become an unobtrusive observer, and begin to take observational notes (see Appendix 5, Tips for Observing Occupational Performance and Taking Notes).
– **If the person asks a question**, use the following guidelines to respond:
  o If the question is related to **information** that you addressed during the final phase of preparing for the observation and establishing a **shared understanding** (see Table 5), respond with a neutral comment that does not answer the question – keep in mind that the person was aware of the answer before starting their task performance.
  ▪ **Person**: "*Where is the broom?*" **Occupational therapist**: *"See if you can find it."*
  ▪ **Person**: *"Was I supposed to put the leaves somewhere?"* **Occupational therapist**: *"Do what you said you were going to do."*
  ▪ Be sure to record in your observational notes that the person asked an "**information question**" (e.g., *Q – broom?*; see Appendix 5).
  ▪ If the person **continues to experience challenges and clearly needs assistance**, provide the needed assistance and record the need for assistance in your observational notes (e.g., *Cued – where is broom*).
  o Most **other questions** should be responded to by telling the person to do the task the way they typically would.
  ▪ **Person**: *"I don't remember, what do I do next?"* **Occupational therapist**: *"Do it the way you usually do it."*
  ▪ Again, if the person **continues to experience challenges and clearly needs assistance**, provide the needed assistance and record the need for assistance in your observational notes.
– **If the person asks for help** use the following guidelines to respond:
(continued)

Table 6. (continued)

- If the person requests help with an action that **does not pose a safety risk** (e.g., opening a jar), ask them to attempt the action independently. If it is clear that the person has made a genuine attempt and still requires assistance, provide the needed help and record it in your observational notes (e.g., *Help – open jar*; see Appendix 5).
- If the person requests help and the person is at **imminent safety risk** (e.g., at risk of falling while carrying a bottle of juice to the counter), **intervene immediately, provide the necessary assistance**, and record it in your observational notes (e.g., *Help – unstable, carry juice*; see Appendix 5).

– **If at any time the person demonstrates an imminent safety risk** (e.g., while vacuuming, the cord becomes wrapped around the person's feet and it is clear that taking another step would likely result in a fall), **intervene immediately to ensure safety** and document the need for assistance due to imminent risk in your observational notes (e.g., *Help – cord, fall risk*; see Appendix 5).

– **If at any time the person demonstrates task breakdown** (e.g., the person is no longer able to continue the task independently and performance begins to fall apart or comes to a stop), **intervene and end the observation** by saying, "*I think that is enough, you can stop now*," or a similar statement.

QOP: Schoolwork

– The observation begins immediately after the teacher gives directions to the students and/or when the student starts to perform the schoolwork task.

– Be an unobtrusive observer and begin to take observational notes (see Appendix 5, Tips for Observing Occupational Performance and Taking Notes).
  - Be sure to record the teacher's directions to the students in your observational notes.
  - Be sure to record any verbal cues or assistance the teacher provides to the student (see Appendix 5).

– **Note-taking when observing back-to-back schoolwork task performances:** Students commonly perform two or more schoolwork tasks in sequence (e.g., draw a house and then write a sentence about the picture). For this reason, it is essential to clearly track which task you are observing as you record your observational notes. You will need this information later when rating the student's quality of schoolwork performance.
  - **When the student performs two tasks consecutively:** The simplest approach is to write the name of Task 1 and Task 2 at the top of separate pages or sections of your notes (e.g., *Draw house*, *Write sentence*). Alternatively, draw a line across the page to mark when Task 1 ends and Task 2 begins.
  - **When the student alternates between two tasks:** If the student begins Task 1 (e.g., draws and colors a house), shifts to Task 2 (e.g., writes a sentence about the house),

(continued)

Table 6. (continued)

and then returns to Task 1 (e.g., adds details such as flowers), clearly document each transition. This can be done by drawing a line across the page and noting whether the student is performing Task 1 or Task 2.
QOP: Social Interaction
– The observation begins as the person and the social partner(s) enter a shared space, one where they would typically greet each other and/or initiate social interaction. – Step back, become an unobtrusive observer, and begin to take observational notes (see Appendix 5, Tips for Observing Occupational Performance and Taking Notes). – **If at any time, the person demonstrates an imminent safety risk, risk to the personal integrity of the person or the social partner, or task breakdown** (e.g., the person is no longer able to sustain the social interaction independently and becomes stuck, disorganized, or stops altogether), **intervene and bring the social interaction to an end** in a manner that is safe and appropriate to the situation.

Text Box 5. A Note About Satisfaction Ratings

Although **satisfaction ratings** are not part of QOP performance analyses, we strongly recommend that the occupational therapist ask the person about their satisfaction with each **ADL task performance** or each **social exchange** immediately after completing the QOP observation. The person's self-reported level of satisfaction may be entered into the QOP: ADL and QOP: Social Interaction Scoring Programs as **Not reported, Satisfied, Minimally dissatisfied, Moderately dissatisfied,** or **Markedly dissatisfied.** Guidance on asking about satisfaction and other occupational experiences is presented in more detail in *Powerful Practice: A Model for Authentic Occupational Therapy* (Fisher & Marterella, 2019).

Step 2: Rate the Quality of the Person's Occupational Performance

After observing the person performing two prioritized tasks and taking observational notes, the occupational therapist rates the person's quality of occupational performance for each observed task. When rating, the occupational therapist will use their observational notes and Appendix 6, Rating Scale, Tips, and Rating Examples for the QOP Performance Skills to fill in the tool-specific Rating Form found in the following Appendices:

– **Appendix 7.** Quality of Occupational Performance: ADL Rating Form

– **Appendix 8**. Quality of Occupational Performance: Schoolwork Rating Form

– **Appendix 9**. Quality of Performance Social Interaction Rating Form

Overall Quality of Performance Ratings. The occupational therapist begins by rating the person's overall quality of performance for each task observed. The criteria for making these ratings are presented in Table 7.

Text Box 6. Rationale for Rating Overall Quality of Performance
The Overall Quality of Performance ratings provide a global view of the person's quality of performance and guide the rating of the occupational performance skills. More specifically, **the performance skill ratings should align with the Overall Quality of Performance ratings**. Effort primarily reflects motor skills, Efficiency primarily reflects process skills, and Safety and Frequency of Assistance may reflect motor skills, process skills, or both. The same overall logic applies to the QOP: Social Interaction ratings.

Table 7. Criteria for Rating the Person's Overall Quality of Performance

QOP: ADL
– As shown in Figure 1, the occupational therapist rates overall Effort, Efficiency, and Safety as **No**, **Mild**, **Moderate**, or **Marked**. The occupational therapist rates Frequency of assistance: **No need**, **Occasional**, **Frequent**, or **Constant**. When making these overall quality ratings, consider the following descriptions of what each overall quality rating reflects: ○ **Effort**: did the person effectively move oneself and tangible task objects without evidence of extra effort or clumsiness. If not, did the person, overall, demonstrate mild, moderate, or marked extra effort or clumsiness. ○ **Efficiency**: did the person effectively select, interact with, and use tangible task objects in an efficient manner, one that was well organized, timely, without unnecessary steps, pauses, or spatial disorganization. If not, did the person, overall, demonstrate mild, moderate, or marked inefficiency. ○ **Safety**: did the person perform the task safely. If not, did the person, overall, demonstrate a mild, moderate, or marked safety risk. When considering safety, use the following criteria: ▪ **Mild**: performance that suggested a **mild <u>potential</u>** for unsafe occupational performance, but the person and task objects were at **<u>no imminent risk</u>** during the observation ▪ **Moderate**: performance that suggested a **moderate <u>potential</u>** for unsafe occupational performance, but the person and task objects were at **<u>no imminent risk</u>** during the observation (continued)

Table 7. (continued)

▪ **Marked:** performance with an **imminent risk** of damage of a task object or danger to the person – the damage or danger will happen if no one intervenes ○ **Frequency of assistance**: did the person perform the task without assistance. If not, did the person need occasional, frequent, or constant assistance. When considering need for assistance, ▪ Only consider assistance that was **needed and provided**. Do not base your rating on assistance you believe *should* have been provided. ▪ Do **not** consider assistance **provided but not needed** when making this rating; keep in mind that others may assist the person even though the person demonstrated no need for assistance (i.e., a helper offers unneeded assistance).
QOP: Schoolwork
– Use the same criteria for rating a student's Overall Quality of Performance as presented above for QOP: ADL. – When rating Frequency of assistance, keep in mind that teachers may assist the student even when the student demonstrated no need for that assistance.
QOP: Social Interaction
– As shown in Figure 2, the occupational therapist rates the person's Overall Quality of Social Interaction as **Effective, no disruption**; **Minor disruption**; **Moderate disruption**; or **Substantial disruption**. – When making these overall quality ratings consider if the person effectively communicated and interacted with their social partner(s) in a manner that was **mature, polite, respectful, timely, and socially appropriate**. – If, at any time, a **social partner provides cues or other forms of assistance** to the person, consider carefully whether the assistance was given because the person's level of maturity, politeness, respectfulness, timeliness, or social appropriateness was causing a **moderate or substantial disruption** in the interaction.

Occupational Performance Skill Ratings. Detailed step-by-step procedures for rating the motor, process, and social interaction performance skills are presented in Appendix 6, Rating Scale, Tips, and Rating Examples for the QOP Performance Skills, the section titled **Tips for Rating the Quality of Each Occupational Performance Skill**. The performance skills are rated **No** (None, no problem observed), **Mi** (mild problem observed), **Mo** (moderate problem observed), or **Ma** (marked/substantial problem observed). When making these ratings, base them on the **Rating Scale** and the **Tips for Rating** sections of Appendix 6.

Overall Quality of Performance Ratings Instructions: Check the rating that best matches the client's overall quality of performance.				
Effort	No increase____	Mild increase_X_	Moderate increase____	Marked increase____
Efficiency	Well organized and timely____	Mild problems____	Moderate problems_X_	Marked problems____
Safety	No risk____	Mild risk_X_	Moderate risk____	Marked risk/ Unsafe____
Frequency of assistance	No need_X_	Occasional____	Frequent____	Constant____

Figure 1. An example of the QOP: ADL Overall Quality of Performance Ratings.

Overall Quality of Social Interaction Rating Instructions: Check the rating that best matches the client's overall quality of social interaction.				
Social effectiveness	Effective, no disruption ____	Minor disruption ____	Moderate disruption _X_	Substantial disruption ____

Figure 2. An example of the QOP: Social Interaction Overall Quality of Social Interaction Rating.

Further guidelines are as follows:

- When recording your ratings on the tool-specific Rating Form, **circle the rating** and, if you observed diminished occupational performance skill, **record a brief description** of what you observed that supports your reasoning (see Figures 3 & 4).
- When you have finished rating all tool-specific occupational performance skills, **compare** your performance skill ratings with your Overall Quality of Performance ratings — **there should be a match**.
  - The overall **Effort** rating reflects motor skills, whereas the overall **Efficiency** rating reflects process skills.
    - When the overall **Effort** or overall **Efficiency** ratings is **None,** a few motor and a few process skills, respectively, will be rated as **Mi** – even healthy, well adults commonly demonstrate subtle, but observable problems with occupational skill performance.
    - When the overall **Effort** or overall **Efficiency** ratings is **Mild,** several motor and several process skills, respectively, will be rated as **Mi** or **Mo**; there should be no ratings of **Ma**.
    - When the overall **Effort** or overall **Efficiency** ratings is **Moderate**, several motor and several process skills, respectively, will be rated as **Mo**; while ratings of **Ma** are uncommon, there may be up to two ratings of **Ma**.

- When the overall **Effort** or overall **Efficiency** ratings is **Marked**, many motor and many process skills, respectively, will be rated as **Mo** and there will be more ratings of **Ma**.

Motor and Process Skill Ratings

Instructions: Circle the rating that best matches the observed quality of performance. Also record the observed performance/rationale for each rating.

Rating (based on level of observed problems): **No** = none, **Mi** = mild, **Mo** = moderate, or **Ma** = marked

Motor skills – within the context of performing a chosen and ecologically-relevant task, observable task actions related to effectively moving self and tangible task objects; task actions are performed without extra effort or clumsiness

Skill name	*Rating*				*Observed performance/rationale*
Stabilizes	*No*	*Mi*	*Mo*	*Ma*	Unstable
Aligns	*No*	*Mi*	*Mo*	*Ma*	
Positions	*No*	*Mi*	*Mo*	*Ma*	Awkward body position, elbow up
Reaches	*No*	*Mi*	*Mo*	*Ma*	Effort reaching shoes on floor

Figure 3. An example of a QOP: ADL Rating Form with performance skill ratings and reasons for the diminished skill item ratings.

Social Interaction Skill Ratings

Instructions: Circle the rating that best matches the observed quality of social interaction. Also record the observed performance/rationale for each rating.

Rating (based on level of observed problems): **No** = none, **Mi** = mild, **Mo** = moderate, or **Ma** = marked

Social interaction skills – observable actions related to effectively communicating and interacting with others within the context of engaging in ecologically-relevant daily life task performances that involve social interaction; social interaction skill performance was mature, polite, respectful, timely, and socially appropriate

Skill name	**Rating**				**Observed performance/rationale**
Approaches/ Starts	No	Mi	Mo	Ma	
Concludes/ Disengages	No	Mi	Mo	Ma	Ends abruptly
Produces speech	No	Mi	Mo	Ma	Mumbles, unclear

Figure 4. An example of a QOP: Social Interaction Rating Form with performance skills ratings and reasons for the diminished skill item ratings.

- The overall **Safety** and overall **Frequency of assistance** ratings may reflect motor skills, process skills, or both.
- When considering **Safety**,
  - If you rated any motor or process skill **Mi** because you observed a **mild potential** for unsafe occupational performance, the overall **Safety** rating will be **Mild**.
  - If you rated any motor or process skill **Mo** because you observed a **moderate potential** for unsafe occupational performance, the overall **Safety** rating should be **Moderate**.
  - If you rated any motor or process skill **Ma** because you observed an **imminent risk** of damage of a task object or danger to the person, the overall **Safety** rating should be **Marked**.
- When considering the overall **Frequency of assistance** rating,
  - Consider **how often** during the task performance the person needed and was provided with assistance: **No need**, **Occasional**, **Frequent**, or **Constant**.
  - All occupational performance skills that were associated with the provision of this needed assistance are rated **Ma**.
  - The overall frequency rating may not be related to the number of performance skills that were rated **Ma**, especially if the person needed and received assistance on several occasions for a limited number of occupational performance skills.
- When considering the overall **Quality of Social Interaction** rating, there should be a match between overall ratings of **Effective, Minor disruption**, **Moderate disruption**, or **Substantial disruption**, and the number of social interaction performance skill ratings of **No**, **Mi**, **Mo**, and **Ma**. The more social interaction ratings of Mo or Ma, the lower the overall **Quality of Social Interaction** rating.

Step 3: Enter the Ratings into the QOP Scoring Program

The process of entering your ratings for the person's two observed task performances are described in Appendix 10, Quality of Occupational Performance (QOP) Scoring Programs – User Guide. These directions provide information about how to download and open the tool-specific program as well as general guidelines and precautions.

Step 4: Interpret the Results

Detailed information for interpreting the tool-specific results are included in the following:

– **Appendix 11**. Quality of Occupational Performance: ADL – Results Report – Interpretation Criteria

– **Appendix 12**. Quality of Occupational Performance: Schoolwork – Results Report – Interpretation Criteria

- **Appendix 13**. Quality of Occupational Performance: Social Interaction – Results Report – Interpretation Criteria

Each Appendix includes the following:

- A summary of the **evidence supporting the validity, reliability, and interpretation** of the respective QOP tool,
- The criteria for making both **criterion-referenced** and **norm-referenced interpretations** of the QOP adjusted scaled scores, and
- The criteria for determining if an **observable or significant change** occurred between two different QOP results for the same person (i.e., Time 1 vs. Time 2) – the basis for determining change is based on the standard error (***SE***), which is the preferred index for reliability of a tool.

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Appendix 1. Index of ADL Tasks Included in the QOP: ADL

ADL tasks organized by category	Motor challenge*	Process challenge*
Personal ADL		
Groom		
Comb or brush hair	Very easy	Very easy
Perform single grooming task	Much easier	Much easier
Groom upper body	Easier	Easier
Shower		
Shower in shower stall or bathtub	Average	Average
Dress		
Put on and tie shoes	Easier	Very easy
Put on socks and shoes – lace-up or slip-on	Easier	Very easy
Put on shirt or blouse	Easier	Much easier
Put on front-zip garment	Easier	Much easier
Dress upper and lower body	Average	Easier
Groom and dress		
Groom and dress upper and lower body	Average	Average
Eat snack or meal		
Eat snack – with/without beverage	Very easy	Very easy
Eat meal with beverage – cutlery or chopsticks	Much easier	Much easier
Beverages and breakfasts		
Beverage with/without snack		
Pour beverage	Easier	Much easier
Prepare hot or cold beverage	Easier	Easier
Prepare pot of brewed beverage	Average	Average
Prepare stove-top espresso coffee	Average	Average
Prepare mate	Average	Average
Prepare pot of brewed beverage served with snack	Average	Average
Cereal or toast with beverage		
Prepare cold cereal with milk/yogurt and beverage	Average	Easier
Prepare cooked cereal and beverage	Average	Harder
Prepare cooked cereal, cheese sandwich, and beverage	Average	Harder
Prepare toast and hot instant or brewed beverage	Average	Harder
Eggs		
Prepare boiled eggs served in egg cups	Average	Average
Prepare eggs, meat/toast, and coffee or other beverage	Average	Harder
Prepare Spanish omelet	Harder	Much harder
French toast and pancakes		
Prepare French toast and beverage	Average	Harder
Prepare American-style pancakes and beverage	Average	Much harder
Prepare European-style pancakes and beverage	Harder	Much harder

(continued)

ADL tasks organized by category (continued)	Motor challenge*	Process challenge*
Salads, soups, and sandwiches		
Salads		
Prepare cottage cheese and canned fruit salad	Average	Average
Prepare fresh fruit salad	Average	Harder
Prepare green salad	Average	Harder
Soups		
Prepare miso soup	Harder	Harder
Prepare gazpacho	Harder	Harder
Prepare vegetable soup	Harder	Much harder
Sandwiches – open or closed		
Prepare sandwich with one or two spreads	Average	Average
Prepare sandwich with meat/cheese	Average	Average
Prepare salad sandwich – tuna, chicken, crab	Average	Harder
Prepare grilled cheese sandwich and beverage	Average	Harder
Prepare open-faced sandwich and brewed beverage	Average	Harder
Other meal and food preparation		
Heat-and-eat dishes		
Prepare instant meal from a package	Average	Average
Heat frozen or precooked food in microwave	Average	Average
Prepare canned heat-and-serve dish with toast or crackers	Average	Harder
Pasta or rice dishes		
Prepare pasta – "pre-made" sauce and beverage	Average	Harder
Prepare pasta – meat sauce/salad and beverage	Harder	Much harder
Prepare rice, soup, and side dish	Harder	Harder
Prepare fried rice	Harder	Much harder
Prepare Asian dish(es) with bowl of rice	Harder	Much harder
Meatballs		
Prepare meatballs, side dishes, and beverage	Much harder	Much harder
Food preparation and baking		
Prepare vegetables to be used or eaten later	Harder	Average
Prepare tomato sauce for pasta	Average	Harder
Pack a lunch	Average	Harder
Prepare Nordic lunch plates and set the table	Average	Harder
Prepare fried ripe plantains	Average	Average
Prepare fried green plantains ("tostones")	Average	Harder
Bake cake, muffins, or brownies from mix	Harder	Much harder
Prepare pizza from a dry pizza dough mix	Harder	Much harder
Outdoor grilling		
Grill meat/vegetable on outdoor gas grill	Average	Average
Grill meat/vegetable on charcoal/wood grill	Harder	Much harder

(continued)

ADL tasks organized by category (continued)	Motor challenge*	Process challenge*
Cleaning and laundry		
Floor cleaning		
Sweep floor	Average	Easier
Dry mop or wet spray mop floor	Average	Average
Wet mop floor	Harder	Average
Vacuum floor	Harder	Average
Vacuum two rooms on different levels	Much harder	Harder
Bathroom cleaning		
Clean entire bathroom	Harder	Harder
Window washing		
Wash inside of windows	Average	Average
Laundry		
Fold laundry	Easier	Easier
Load and start washing machine	Easier	Easier
Hand wash laundry	Average	Easier
Hang laundry to dry	Average	Easier
Iron shirt or blouse – board already set up	Easier	Average
Iron shirt or blouse – set up board	Average	Average
Iron and put away three garments	Harder	Harder
Other routine household tasks		
Table setting		
Set table – standard style	Easier	Easier
Set table – Swedish style	Average	Average
Wash and/or put away dishes		
Hand wash dishes	Easier	Easier
Hand wash and put away dishes	Average	Average
Unload and put away dishes from dishwasher	Easier	Average
Feed pets and change water		
Feed dog or cat dry food and change water	Easier	Easier
Feed dog or cat moist food and change water	Average	Easier
Bed tasks		
Lay out bedding on floor – Japanese style	Average	Much easier
Make bed	Average	Easier
Change sheets on bed	Harder	Average
Plant care		
Water houseplants and remove dry leaves	Easier	Easier
Repot small houseplant	Average	Average
Outdoor and community tasks		
Outdoor maintenance		
Sweep outdoors – debris or snow	Average	Average
Rake or weed outdoors	Harder	Average
Repair bicycle tube puncture	Harder	Average

(continued)

ADL tasks organized by category (continued)	Motor challenge*	Process challenge*
Outdoor maintenance (continued)		
Clean inside of car	Harder	Harder
Wash car	Much harder	Much harder
Shopping		
Shopping – four to six items	Average	Average

* The task challenges gradually increase, as follows: **Very easy**, **Much easier** than average, **Easier** than average, **Average**, **Harder** than average, and **Much harder** than average.

Appendix 2. QOP: ADL – Task Descriptions and Challenges

Task description	Motor challenge*	Process challenge*
Personal ADL		
Groom		
Comb or brush hair. Performing this task involves combing or brushing one's hair using a comb or brush that has been placed in easy reach. If desired, the person may use water when combing or brushing their hair. The task observation begins with the person sitting at bedside or standing or sitting in front of a sink. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, and (e) throwing away any used or unwanted items into a garbage container.	Very easy	Very easy
Perform single grooming task. Performing this task involves doing <u>one</u> of the following: (a) brushing teeth or dentures, (b) washing and drying face, (c) washing and drying hands, or (d) shaving face with an electric razor. If the person chooses shaving, they may also choose to apply aftershave. The task observation begins with the person sitting at bedside or standing or sitting in front of a sink. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, and (e) throwing away any used or unwanted items into a garbage container.	Much easier than average	Much easier than average
Groom upper body. Performing this task involves doing <u>at least four</u> of the following: (a) brushing teeth or dentures, (b) washing and drying face, (c) shaving the face with manual or electric razor, (d) washing and drying the upper body (neck, underarms, and upper trunk), (e) combing or brushing the hair, (f) putting on deodorant, and (g) putting on makeup. If the person chooses shaving, they may also choose to apply aftershave. If desired, the person may use water if they choose to comb or brush their hair. The task observation begins with the person sitting at bedside or standing or sitting in front of a sink. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, and (e) throwing away any used or unwanted items into a garbage container.	Easier than average	Easier than average
Shower		
Shower in shower stall or bathtub. Performing this task involves taking off all clothing, washing the entire body with water and soap or body wash, drying off, and putting on something to cover the body (e.g., towel, robe). The person may sit or stand when	Average	Average

showering. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing removed garments back to where they belong (e.g., closet, dirty laundry), and (f) throwing away any used or unwanted items into a garbage container.		
Dress		
Put on and tie shoes. Performing this task involves putting on a pair of lace-up shoes (i.e., shoes with shoelaces) and tying the laces. The task observation begins with the shoes placed a short walking distance away from the person. Restoring is rated **None** because it is not observed.	Easier than average	Very easy
Put on socks and shoes – lace-up or slip-on. Performing this task involves putting on socks and a pair of shoes, which may be slip-on shoes, lace-up shoes, or shoes with Velcro or buckled closures. If the person puts on lace-up shoes they are expected to tie them. The task observation begins with the socks and shoes placed a short walking distance away from the person. Restoring is rated **None** because it is not observed.	Easier than average	Very easy
Put on shirt or blouse. Performing this task involves taking off an upper body garment and putting on another one that is either slip-on or front buttoned and easy to reach. If the garment has buttons, the person is to button all but the top button. The task observation begins with the shirt or blouse placed within easy reach of the person. Restoring is rated **None** because it is not observed.	Easier than average	Much easier than average
Put on front-zip garment. Performing this task involves putting on and zipping a front-zip garment (e.g., jacket). The task observation begins with the front-zip garment placed a short walking distance away from the person. Restoring is rated **None** because it is not observed.	Easier than average	Much easier than average
Dress upper and lower body. Performing this task involves taking off one set of garments and then putting on (a) a shirt or blouse; (b) slacks, jeans, shorts, or skirt; (c) socks; and (d) shoes or slippers. The clothes to be put on may either be set out in clear view or remain in their usual storage places. The task observation begins with the person sitting or standing a short walking distance from where the clothes are located. Restoring includes placing removed garments back to where they belong (e.g., closet, dirty laundry).	Average	Easier than average
Groom and dress		
Groom and dress upper and lower body. Performing this task involves performing both (a) ***Upper body grooming*** and (b) ***Dress upper and lower body*** (see details above). For this task, the grooming options may also include washing and drying the lower body (including groin and genital area). The task observation begins with the person sitting or standing a short walking distance away	Average	Average

from where the clothes are located. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing removed garments back to where they belong (e.g., closet, dirty laundry), and (f) throwing away any used or unwanted items into a garbage container.		
Eat snack or meal		
Eat snack – with/without beverage. Performing this task involves eating a snack (e.g., cookies, toast, cake, ice cream, cereal) that has been served in the usual manner on a table in front of the person. The person may eat using their fingers or a utensil, as appropriate. The task observation begins with the person either sitting up in bed or seated at a table. Restoring includes (a) wiping visible food off the hands and face, and (b) placing the napkin and eating utensil on or next to the serving dish.	Very easy	Very easy
Eat meal with beverage – cutlery or chopsticks. Performing this task involves eating a meal that has been served in the usual manner on a table in front of the person. The type of meal determines the eating utensils used: (a) a meal requiring the use of cutlery must be one that requires a knife to apply a spread or cut the food, and (b) a meal requiring chopsticks must include a bowl of rice and one to three Asian-style dishes (e.g., vegetable, fish, meat). The task observation begins with the person either sitting up in bed or seated at a table. Restoring includes (a) wiping visible food off the hands and face, and (b) placing the napkin and eating utensils on or next to the serving dish.	Much easier than average	Much easier than average
Beverages and breakfasts		
Beverage with/without snack		
Pour beverage. Performing this task involves taking a container of a cold "pre-made" beverage (e.g., juice, milk, water) from the refrigerator, pouring it into a glass, cup, or mug, and serving. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, and (d) putting unneeded items back to where they belong.	Easier than average	Much easier than average
Prepare hot or cold beverage. Performing this task involves preparing and serving one or two glasses, cups, or mugs of a prechosen beverage. Appropriate beverages include (a) instant coffee, tea, powdered chocolate, powdered soup, or powdered fruit drink prepared with hot or cold water or milk; or (b) coffee or tea prepared using a single-cup espresso or coffee maker (e.g., Nespresso, Keurig, Senseo). If the chosen beverage is a hot instant drink, the water or milk must be preheated and stored in a thermos or pitcher before the task observation begins. If hot coffee or tea is prepared, they may be served with a spoon, a small dish, sweetener, and/or a small container of milk or cream. Restoring includes (a)	Easier than average	Easier than average

cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.		
Prepare pot of brewed beverage. Performing this task involves making a pot of hot boiled or brewed coffee or tea and serving one or two cups of the chosen beverage. If coffee is chosen, it must be made with preground coffee and served with milk or cream. Brewed coffee must be made using an electric coffee maker, pour-over drip coffee maker (with cloth or paper filter), or French press. If tea is chosen, it must be made in a teapot using tea bags or loose tea and served with a second pot of hot water. Sweetener may also be served with either drink. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container. Emptying the coffee grounds and turning off the coffee make are not required.	Average	Average
Prepare stove-top espresso coffee. Performing this task involves using a stove-top espresso coffee maker (e.g., “caffettiera”) to prepare a cup of espresso coffee for one to four persons. The coffee must be made using preground coffee, and served in espresso cups along with a spoon, a container of sweetener, and small pitcher of milk or cream. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container. Emptying the coffee grounds is not required.	Average	Average
Prepare mate. Performing this task involves: (a) heating water and storing it in a thermos or kettle until ready to be used, (b) putting “yerba” (herbs) into a mate container (i.e., glass, cup, mug, or “calabaza” [gourds]), (c) pouring hot water over the “yerba,” and (d) serving the mate container along with a “bombilla” (straw) and the thermos or kettle of hot water. If desired, the person may add cold water to the mate container before pouring in the hot water. Sweetener or flavored powder may be added either to the hot water or directly to the mate. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Average
Prepare pot of brewed beverage served with snack. Performing this task involves: (a) preparing a pot of boiled or brewed coffee or tea for two to four people; and (b) serving it in cups or mugs, along with	Average	Average

cookies, biscuits, or a similar dry snack placed in a serving dish or basket. If coffee is chosen, it must be made with preground coffee using an electric coffee maker, pour-over drip coffee maker (with cloth or paper filter), or French press. If tea is chosen, it must be made in a teapot using tea bags or loose tea. The coffee or tea may first be poured into a thermos and then served into individual cups or mugs. The coffee or tea must be served with a small pitcher of hot or cold milk or cream and a container of sweetener. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.		
Cereal or toast with beverage		
Prepare cold cereal with milk/yogurt and beverage. Performing this task involves: (a) preparing a bowl of dry cereal with milk, yogurt, sour milk ("fil"), or kefir; (b) pouring a "pre-made" beverage (e.g., coffee, juice, milk, water) into a glass, cup, or mug; and (c) serving both the cereal and the beverage along with an appropriate eating utensil. The person may choose to serve coffee or tea prepared using a single-cup machine (e.g., Nespresso, Keurig, Senseo), provided that adding water to the machine is part of the preparation. If desired, the cereal may be served with a sweetener, and coffee or tea may be served with milk or cream and a sweetener. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Easier than average
Prepare cooked cereal and beverage. Performing this task involves: (a) preparing a single serving of hot cereal ("regular" or "quick," not instant cereal) and serving it with cold milk or cream; (b) pouring a "pre-made" beverage (e.g., coffee, juice, milk, water) into a glass, cup, or mug; and (c) serving both the cereal and the beverage along with an appropriate eating utensil. The person may choose to serve coffee or tea prepared using a single-cup machine (e.g., Nespresso, Keurig, Senseo), provided that adding water to the machine is part of the preparation. If desired, the cereal may also be served with a sweetener, and coffee or tea may be served with milk or cream and a sweetener. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Harder than average

Prepare cooked cereal, cheese sandwich, and beverage. Performing this task involves: (a) preparing a single serving of hot cereal ("regular" or "quick," not instant cereal) and serving it with cold milk or cream; (b) preparing an open-faced cheese sandwich using presliced hard or soft bread and cheese that must be sliced with a knife or cheese slicer; (c) pouring a "pre-made" beverage (e.g., coffee, juice, milk, water) into a glass, cup, or mug; and (d) serving the cereal, sandwich, and beverage along with an appropriate eating utensil. The person may choose to serve coffee or tea prepared using a single-cup machine (e.g., Nespresso, Keurig, Senseo), provided that adding water to the machine is part of the preparation. If desired, the cereal may also be served with a sweetener, and coffee or tea may be served with milk or cream and a sweetener. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Harder than average
Prepare toast and hot instant or brewed beverage. Performing this task involves preparing two slices of toast with one spread (e.g., butter, jam, peanut butter) and a cup or mug of either (a) a hot instant beverage (e.g., instant coffee or tea, instant soup, hot cocoa), or (b) boiled or brewed coffee or tea. The toast must be made using presliced soft bread and a toaster or countertop toaster oven. If an instant beverage is chosen, the person must heat the milk or water used to prepare it. If boiled or brewed coffee is chosen, it must be made with preground coffee and served with milk or cream. Brewed coffee must be prepared using an electric coffee maker, pour-over drip coffee maker (with cloth or paper filter), or French press. If tea is chosen, it must be made in a teapot using tea bags or loose tea. If desired, it may be served with an extra pot of hot water. Sweetener may be provided with either drink. The food and beverage must be served along with appropriate eating utensils. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Harder than average
Eggs		
Prepare boiled eggs served in egg cups. Performing this task involves: cooking two eggs in a pan of water on the stove, placing the cooked eggs in egg cups, opening the top of one egg in preparation of eating it from the shell, and serving the eggs along with appropriate eating utensils. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing	Average	Average

dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.		
Prepare eggs, meat/toast, and coffee or other beverage. Performing this task involves preparing a breakfast that includes eggs, toast and/or meat, and a beverage. The person must cook one to three eggs by frying, scrambling, or making an omelet. Additional ingredients (e.g., cooked potatoes, cheese, onions, peppers, mushrooms, ham) may be added to the eggs provided they have been prechopped or grated before the start of the task observation. Along with the eggs, the person must prepare two slices of toast with one spread (e.g., butter, jam, peanut butter) and/or two to three pieces of meat (e.g., ham, bacon, breakfast sausage). Toast must be made using presliced soft bread and a toaster or countertop toaster oven. Meat must be cooked either in a skillet or in a microwave. The beverage may be either a boiled or brewed cup of coffee or tea, or a "pre-made" beverage (e.g., coffee, juice, milk, water) poured into a glass, cup, or mug. If brewed coffee is chosen, it must be made with preground coffee and prepared using an electric coffee maker, a pour-over drip coffee maker (with cloth or paper filter), or a French press. If tea is selected, it must be made in a teapot using tea bags or loose tea. Alternatively, a single-cup machine (e.g., Nespresso, Keurig, Senseo) may be used if adding water to the machine is part of the preparation. Coffee must be served with milk or cream, and sweetener may be served for either coffee or tea. The food and beverage must be served together with appropriate eating utensils. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Harder than average
Prepare Spanish omelet. Performing this task involves preparing an omelet for two persons, using three to four eggs, three to four potatoes, and two or three additional ingredients (e.g., onions, peppers, mushrooms, zucchini, garlic, ham) that are chopped, sliced, or grated by the person during the task observation. All ingredients must be cooked in a skillet on a stove and served in appropriate dishes along with appropriate eating utensils. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Harder than average	Much harder than average
French toast and pancakes		
Prepare French toast and beverage. Performing this task involves: (a) preparing two servings of French toast; (b) pouring a "pre-made" beverage (e.g., coffee, juice, milk, water) into glasses, cups, or mugs;	Average	Harder than average

and (c) serving the French toast along with a topping (e.g., butter, jam, syrup, honey, chocolate, pre-cut fruit), the beverage, and appropriate eating utensils. The person must prepare the egg mixture for coating the bread, using eggs and any desired liquids, during the task observation. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.		
Prepare American-style pancakes and beverage. Performing this task involves (a) preparing one to three servings of American-style pancakes; (b) pouring a "pre-made" beverage (e.g., coffee, juice, milk, water) into glasses, cups, or mugs; and (c) serving the pancakes with a topping (e.g., butter, jam, syrup, honey, chocolate, pre-cut fruit), the beverage, and appropriate eating utensils. The person must prepare the pancake batter, using dry ingredients and any desired liquids, during the task observation. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Much harder than average
Prepare European-style pancakes and beverage. Performing this task involves: (a) preparing one to three servings of European-style pancakes (e.g., "crêpes," "pannkakor," "blini"); (b) pouring a "pre-made" beverage (e.g., coffee, juice, milk, water) into glasses, cups, or mugs; and (c) serving the pancakes with a topping (e.g., butter, jam, syrup, honey, chocolate, pre-cut fruit), the beverage, and appropriate eating utensils. The person must prepare the pancake batter, using dry ingredients and any desired liquids, during the task observation. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Harder than average	Much harder than average
Salads, soups, and sandwiches		
Salads		
Prepare cottage cheese and canned fruit salad. Performing this task involves preparing a single serving of cottage cheese and canned fruit. The person must open the can of fruit during the task observation, and the dish must be served along with appropriate eating utensils. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Average

Prepare fresh fruit salad. Performing this task involves preparing a fruit salad in a large bowl, transferring it into two smaller bowls, and serving the smaller bowls along with appropriate eating utensils. The person must use four different fresh fruits, with no more than one type of berries, and peel or cut the fruit as needed or desired. If desired, lemon juice or sweetener may be added. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Harder than average
Prepare green salad. Performing this task involves preparing a tossed green salad using either head or packaged lettuce, combined with three or four additional ingredients that the person must peel, slice, or chop during the task observation (e.g., radishes, tomato, cucumber, carrots, red or green pepper, avocado). Once prepared, the salad must be served along with appropriate serving utensils. The person may choose to put dressing on the salad before serving or serve the salad with dressing on the side. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Harder than average
Soups		
Prepare miso soup. Performing this task involves: (a) preparing one or two servings of miso soup using miso paste, soup broth, or bouillon and water, and one or two ingredients that the person cuts or slices during the observation (e.g., vegetables, tofu, meat); (b) cooking the soup in a pan or pot on the stove; and (c) serving the soup in appropriate serving dishes along with appropriate eating utensils. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Harder than average	Harder than average
Prepare gazpacho. The task involves: (a) preparing gazpacho using three or four tomatoes and three or four additional ingredients (e.g., cucumber, onions, garlic, red or green pepper, bread); (b) blending the vegetables with a liquid (e.g., broth, bouillon and water, vegetable juice) using a blender, immersion blender, or mixer; and (c) pouring the mixture into a large bowl and putting it in the refrigerator to chill. All ingredients must be chopped, sliced, grated, or cubed during the task observation. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong,	Harder than average	Harder than average

(e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.		
Prepare vegetable soup. Performing this task involves: (a) using four to five vegetables, at least three of which need to be peeled, cut, or sliced (e.g., potatoes, onions, carrots, parsnips, rutabaga [swedes], celery root, green beans); (b) combining the vegetables with broth or bouillon and water; and (c) cooking the soup in a pan or pot on the stove. The person may sauté some or all the vegetables before adding broth or bouillon and water to make the soup. When the soup is ready, the person must transfer two to four servings into individual dishes and serve them along with appropriate eating utensils. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Harder than average	Much harder than average
Sandwiches – open or closed		
Prepare sandwich with one or two spreads. Performing this task involves making one sandwich using (a) presliced soft bread or hard crispbread, and (b) one or two spreads (e.g., butter, jam, honey, peanut butter, chocolate-hazelnut spread, liver paste, soft cheese). The person may choose to prepare the sandwich closed or open-faced and may add one or two presliced vegetables (e.g., cucumber, tomato, pickles). If the sandwich is made with presliced soft bread, it must be cut in half before serving. The sandwich must be served on a plate along with appropriate eating utensils, consistent with cultural expectations. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Average
Prepare sandwich with meat/cheese. Performing this task involves preparing a sandwich using (a) presliced or unsliced soft bread or hard crispbread, (b) presliced meat (e.g., ham, salami, beef) and/or presliced cheese (e.g., Cheddar, Provolone), and (c) one or two spreads (e.g., butter, mayonnaise, mustard). The person may choose to prepare the sandwich closed or open-faced and may add one or two presliced vegetables (e.g., cucumber, tomato, pickles). If the person uses unsliced soft bread, the person must slice the bread during the task observation. If the sandwich is made with presliced soft bread, it must be cut in half before serving. The person must serve the sandwich on a plate along with appropriate eating utensils, consistent with cultural expectations. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong,	Average	Average

(e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.		
Prepare salad sandwich – tuna, chicken, crab. Performing this task involves preparing a closed sandwich using canned meat (e.g., tuna, chicken, crab), one spread (e.g., mayonnaise), one chopped ingredient (e.g., celery, onion, pickle), and presliced soft bread. During the task observation, the person must open the can of meat, chop the vegetable or pickle, cut the sandwich in half, and serve the sandwich on a plate along with appropriate eating utensils, consistent with cultural expectations. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Harder than average
Prepare grilled cheese sandwich and beverage. Performing this task involves: (a) preparing one closed or two open-faced grilled cheese sandwich(es) using two slices of presliced soft bread and presliced cheese (e.g., Cheddar, Provolone); (b) pouring a "pre-made" beverage (e.g., coffee, juice, milk, water) into a glass, cup, or mug; (c) cutting the sandwich(es) in half; and (d) serving the sandwich(es) on a plate along with appropriate eating utensils, consistent with cultural expectations. The person may choose to either (a) grill one closed sandwich in a skillet on the stove, or (b) grill two open-faced sandwiches under an oven broiler or oven grill (not a counter-top toaster oven). If preferred, the person can combine the two open-faced sandwiches into a closed sandwich before cutting the sandwich in half. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Harder than average
Prepare open-faced sandwich and brewed beverage. Performing this task involves: (a) preparing one or two sandwiches using hard crispbread or unsliced soft bread, (b) brewing or boiling a pot of coffee or tea, (c) serving the brewed beverage in a cup or mug, and (d) serving the sandwich(es) on a plate along with appropriate eating utensils, consistent with cultural expectations. The person must prepare the sandwich(es) using butter or margarine and one of the following: unsliced hard cheese (e.g., Cheddar, Provolone), unsliced meat (e.g., sausage, salami, cooked meat), or liver paste. If the person uses unsliced soft bread, hard cheese, or meat, the person must slice them during the task observation. If coffee is chosen, it must be made with preground coffee and served with milk or cream. Brewed coffee must be made using an electric coffee maker, pour-over drip coffee maker (with cloth or paper filter), or French press. If	Average	Harder than average

tea is chosen, it must be made in a teapot using tea bags or loose tea. Sweetener may also be served with either drink. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.		
Other meal and food preparation		
Heat-and-eat dishes		
Prepare instant meal from a package. Performing this task involves preparing one serving of either (a) instant noodles, soup, or beans that require adding boiling water, waiting for 3 to 5 minutes, then serving in the original container or another bowl; or (b) quick noodles (e.g., "ramen") cooked in a pot for 3 to 5 minutes and then adding seasoning and serving in a bowl. The food must be served along with appropriate eating utensils. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Average
Heat frozen or precooked food in microwave. Performing this task involves using a microwave to heat either (a) a prepackaged frozen meal or dessert or (b) a precooked refrigerated one. The food may be heated in the original container or transferred to another dish for heating. The food can be served in the same dish used for heating or moved to a different one before serving. The person must apply and remove all food coverings during the task observation. The food must be served along with appropriate eating utensils. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Average
Prepare canned heat-and-serve dish with toast or crackers. Performing this task involves opening either (a) a can of heat-and-serve food (e.g., soup, stew, pasta, beans, or vegetables) or (b) a can of condensed soup, transferring it to a suitable bowl or pan, heating it in a microwave or on the stove, and serving along with appropriate eating utensils. The heat-and-serve dishes must be served with one or two slices of toast made from presliced soft bread and toasted in a toaster or countertop toaster oven. The condensed soup must be of a type that is prepared by adding water or milk before heating it, and it may be served with crackers or presliced bread. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to	Average	Harder than average

where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.		
Pasta or rice dishes		
Prepare pasta – "pre-made" sauce and beverage. Performing this task involves: (a) cooking two servings of pasta in a pot of boiling water on a stove; (b) adding "pre-made" sauce; (c) pouring a "pre-made" beverage (e.g., coffee, juice, milk, water) into glasses, cups, or mugs; and (d) serving the beverage and pasta in appropriate serving dishes along with appropriate serving utensils. The sauce may come from a can or jar, thawed from frozen, or freshly prepared, and it must be opened and heated prior to starting the task observation. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Harder than average
Prepare pasta – meat sauce/salad and beverage. Performing this task involves: (a) cooking two servings of pasta in a pot of boiling water on a stove; (b) heating a "pre-made" sauce (from a can or jar, thawed from frozen, or freshly prepared prior to the task observation) in a pan on the stove or in a microwave; (c) browning meat to add to the sauce, preparing a tossed green salad, or both; and (d) pouring a "pre-made" beverage (e.g., coffee, juice, milk, or water) into glasses, cups, or mugs. If the sauce comes from a can, jar, or storage container, it must be opened by the person during the task observation. The salad must be made using either head or packaged lettuce, and three additional ingredients that the person must peel, slice, or chop during the task observation (e.g., radishes, tomato, cucumber, carrots, red or green pepper, avocado). Dressing may be put on the salad before serving or served on the side. The meat must be browned in a skillet on the stove before adding it to the sauce. The food must be served in appropriate dishes along with needed serving utensils. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Harder than average	Much harder than average
Prepare rice, soup, and side dish. Performing this task involves preparing and serving a single portion of the following: (a) a precooked side dish from the refrigerator, (b) soup stored in a large bowl or container, and (c) precooked rice stored in a rice cooker. Each item may be heated in its original container or transferred to another dish for heating. Food may be served in the same dish used for heating or transferred to a different one. All items must be	Harder than average	Harder than average

served in appropriate individual dishes with appropriate utensils (e.g., chopsticks, fork, spoon). Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.		
Prepare fried rice. Performing this task involves frying precooked rice in a wok or skillet with one of the following: (a) two vegetables and one protein (e.g., beef, chicken, seafood, imitation crab, fried tofu); (b) one vegetable, one protein, and one egg; or (c) three different vegetables. The vegetables and protein must be sliced or cut into small pieces before they are added to the precooked rice along with soy sauce or another bottled seasoning sauce. The fried rice mixture must be served in appropriate serving dishes along with appropriate eating utensils (e.g., chopsticks, spoon). Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Harder than average	Much harder than average
Prepare Asian dish(es) with bowl of rice. Performing this task involves: (a) preparing pan-cooked (i.e., fried, sautéed, or lightly braised) protein (e.g., beef, chicken, ham, tofu) and one or two pan-cooked vegetables along with soy sauce or another bottled seasoning sauce, (b) preparing a bowl of rice (e.g., serving pre-cooked rice, heating packaged rice, or cooking rice in an electric rice cooker), and (c) serving the rice and the protein and vegetable dish(es) in appropriate serving dishes along with appropriate eating utensils. The vegetables and protein must be sliced or cut into small pieces before they are pan-cooked. They may be pan-cooked together or separately, and if pan-cooked separately, they may be served together or separately. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Harder than average	Much harder than average
Meatballs		
Prepare meatballs, side dishes, and beverage. Performing this task involves preparing two to four servings of meatballs, boiled potatoes, and a boiled vegetable, along with heating a “pre-made” sauce, and serving them with a bottle or pitcher of a “pre-made” beverage (e.g., coffee, juice, milk, water) and appropriate serving utensils. The meatballs must be made with ground (minced) meat, chopped onions, and, if desired, optional ingredients (e.g., egg, flour, breadcrumbs, milk) and they must be cooked in a skillet on the	Much harder than average	Much harder than average

stove. The potatoes must be boiled in water, and they can be peeled before or after cooking. The vegetable must be sliced or chopped during the task observation and then boiled or microwaved. The "pre-made" sauce (e.g., tomato, mushroom, pepper) can be from a can or jar, thawed from frozen, or freshly prepared prior to the task observation, and must be heated during the task observation. The meatballs, potatoes, vegetable, and sauce may be served in the pans or dishes they were cooked in, or they may be transferred to other appropriate serving dishes. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.		
Food preparation and baking		
Prepare vegetables to be used or eaten later. Performing this task involves peeling and/or cutting two types of fresh vegetables for two to four persons, placing them in appropriate containers to store for cooking later. At least one of the vegetables must be covered with water for storage. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Harder than average	Average
Prepare tomato sauce for pasta. Performing this task involves: (a) using preserved whole, diced, crushed, or pureed tomatoes, whole onions, and olive oil; (b) chopping the onions; (c) adding garlic or other seasonings as desired; and (d) cooking the ingredients in a skillet or saucepan. The person must open the container of tomatoes during the task observation. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, (f) throwing away any used or unwanted items into a garbage container, and (g) setting the pan with the sauce aside to cool.	Average	Harder than average
Pack a lunch. Performing this task involves preparing one or two open-faced or closed sandwiches made with presliced soft bread and either (a) two spreads, (b) one spread and a presliced meat, or (c) presliced cheese (with or without one spread); wrapping the sandwiches; and placing them with a beverage (carton, can, bottle, thermos) and one additional lunch item (e.g., fruit, yogurt, crackers) into a portable lunch container. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Harder than average

Prepare Nordic lunch plates and set the table. Performing this task involves: (a) preparing three plates of sandwich ingredients including (1) one or two types of presliced meats, (2) one or two types of unsliced cheese, and (3) one or two types of presliced vegetables; (b) setting a table for two to four persons, including plates, glasses, napkins, eating utensils, butter, butter knife, and basket of presliced soft bread; and (c) serving the plates of meat, cheese, and vegetables at the table. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Harder than average
Prepare fried ripe plantains. The task involves peeling, slicing, and frying one or two ripe plantains in hot oil in a skillet on the stove; removing the plantains from the oil; and serving them in an appropriate serving dish. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container. The oil may be left in the skillet on the stove to cool.	Average	Average
Prepare fried green plantains ("tostones"). Performing this task involves peeling, slicing, and frying one or two green plantains in hot oil in a skillet on the stove; mashing the pieces of plantain; refrying the mashed pieces; removing the plantains from the oil; and serving them in an appropriate serving dish. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container. The oil may be left in the skillet on the stove to cool.	Average	Harder than average
Bake cake, muffins, or brownies from mix. Performing this task involves preparing and baking a packaged cake, muffin, or brownie mix that requires (a) the addition of at least two additional ingredients (e.g., liquid, oil, eggs) and (b) baking in an oven. The person must remove the baked item from the oven, set it aside to cool, and turn off the oven. The person must also hand wash, dry, and put away the bowls and utensils used during the task observation. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, and (e) throwing away any used or unwanted items into a garbage container.	Harder than average	Much harder than average
Pizza from a dry pizza dough mix. Performing this task involves (a) preparing pizza dough from a packaged pizza dough mix that requires the addition of water, (b) allowing the dough to rise for 10–	Harder than average	Much harder

20 minutes, (c) using the hands to spread the dough onto a baking sheet or pizza stone, (d) placing a pre-made sauce, two toppings, and grated and/or sliced cheese on the spread dough, and (e) baking the pizza in an oven. The pizza dough mix must be one that does not require rising for more than 20 minutes. The dry pizza dough mixture must be mixed with water using a fork, not an electric mixer. The temperature of the water must be as specified in the directions (e.g., cold, warm, hot). If specified in the directions, yeast must be added to the dough mix and/or the dough must be kneaded before it is placed in a covered bowl to rise. Oil must also be used as specified in the directions (e.g., spread over the dough before it is left to rise, spread on the baking sheet before the dough is spread out). The "pre-made" sauce may be from a can or jar, thawed from frozen, or freshly prepared prior to the task observation. If desired, the person may add seasonings (e.g., oregano, salt, pepper, red pepper flakes) to the sauce or on top of the spread dough. Examples of appropriate toppings include precooked meats (e.g., Italian sausage, pepperoni ["salamino picante"], ham) and chopped vegetables (e.g., onion, mushrooms, fresh tomatoes, sweet peppers). The vegetables must be chopped, as appropriate, during the task observation. One or more types of cheese may be used (e.g., mozzarella, parmesan, goat cheese) and at least one type of cheese must be sliced or grated during the task observation. The person must remove the baked pizza from the oven, set it aside, and turn off the oven. The person is not expected to serve the pizza. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.		than average
Outdoor grilling		
Grill meat/vegetable on outdoor gas grill. Performing this task involves grilling meat (e.g., beef, lamb, chicken, fish) and one or two vegetables on a gas grill. The meat and vegetables must be prepared in advance so they are ready to be placed on the grill. The person is expected to (a) preheat the grill until it reaches cooking temperature; (b) clean the grates with a grill brush and, if desired, lightly oil them; (c) arrange the meat directly on the grates and place the vegetables either on the grates or in a grill basket; and (d) turn the food as needed to ensure even cooking. The meat must be cooked to the specified doneness (e.g., rare, medium, well-done), and the vegetables must be cooked until tender and lightly charred. A sauce may be applied to the meat or vegetables during cooking or before serving. When finished, the meat and vegetables must be transferred to one or more serving dishes and served with appropriate utensils. Restoring includes (a) turning off the gas burners and gas supply, (b) brushing the grates after they have cooled slightly (if desired), (c)	Average	Average

wiping up spills, (d) closing any open containers and returning unneeded items back to where they belong, and (e) disposing of any used or unwanted items in a garbage container, provided they are not hot enough to cause a fire.		
Grill meat/vegetable on charcoal/wood grill. Performing this task involves grilling meat (e.g., beef, lamb, chicken, fish) and vegetables over a charcoal or wood fire. The meat and vegetables must be prepared in advance, so they are ready to be placed on the grill. The person is expected to (a) start the fire using a charcoal chimney, fire starters, lighter fluid, or kindling and an electric starter, fuel operated quick starter, or matches, depending on preference; (b) allow the charcoal or wood to burn until the coals are partially covered with white ash and the fire is at cooking temperature; (c) clean the grates with a grill brush and, if desired, lightly oil them; (d) arrange the meat directly on the grates and place the vegetables either on the grates or in a grill basket; and (e) turn the food as needed to ensure even cooking. The meat must be cooked to the specified doneness (e.g., rare, medium, well-done), and the vegetables must be cooked until they are tender with light char. A sauce may be applied to the meat or vegetables during cooking or before serving. When finished, the meat and vegetables must be transferred to one or more serving dishes and served with appropriate utensils. Restoring includes (a) brushing the grates after they have cooled slightly (if desired), (b) wiping up spills, (c) closing any open containers and putting unneeded items back to where they belong, (d) throwing away any used or unwanted items in a garbage container, provided they are not hot enough to cause a fire, and (e) ensuring the fire is fully extinguished or that the grill is left in a safe location to cool.	Harder than average	Much harder than average
Cleaning and laundry		
Floor cleaning		
Sweep floor. Performing this task involves: (a) using a broom or short-handled brush to sweep a bare floor in one room until no visible debris remains, (b) moving lightweight furniture to clean underneath, and (c) using a dustpan to collect the debris. If a small throw rug is present, it must be cleaned by sweeping or shaking it. Restoring includes (a) cleaning up the workspace, (b) putting unneeded items back to where they belong, (c) returning any moved furniture back to its original position, and (d) throwing away the debris and any used or unwanted items into a garbage container.	Average	Easier than average
Dry mop or wet spray mop floor. Performing this task involves: (a) using either a dry floor dust mop or a wet spray mop with a removable mop pad to clean a bare floor in one room until no visible debris remains, and (b) moving lightweight furniture to clean underneath. If a small throw rug is present, it must be cleaned by shaking it. If the person chooses to dry mop, they may use a short-	Average	Average

handled bristle brush to sweep debris into a dustpan. Restoring includes (a) shaking debris from the dry mop (if used); (b) removing the current mop cover and, if disposable, throwing it into a garbage container, and if reusable, setting it aside to be cleaned later; (c) cleaning up the workspace, (d) wiping up spills, (e) putting unneeded items back to where they belong, (f) returning any moved furniture back to its original position, and (g) throwing away any debris or used or unwanted items into a garbage container.		
Wet mop floor. Performing this task involves using soap, water, and a wet mop (e.g., string mop, sponge mop, or rag wrapped around a broom or T-shaped bar) to (a) clean a bare floor in one room until no visible debris remains; and (b) moving lightweight furniture to clean underneath. If a small throw rug is present, it must be cleaned by shaking it. Restoring includes (a) emptying the dirty water, (b) rinsing out the mop, (c) cleaning up the workspace, (d) wiping up spills, (e) putting unneeded items back to where they belong, (f) returning any moved furniture back to its original position, and (g) throwing away any used or unwanted items into a garbage container.	Harder than average	Average
Vacuum floor. Performing this task involves vacuuming a bare or carpeted floor in one room until no visible debris remains, either moving lightweight furniture to clear underneath or vacuuming around furniture. Restoring includes (a) putting unneeded items back to where they belong, (b) returning any moved furniture back to its original position, and (c) throwing away any used or unwanted items into a garbage container.	Harder than average	Average
Vacuum two rooms on different levels. Performing this task involves: (a) vacuuming bare or carpeted floors in two rooms on different levels until no visible debris remains; (b) moving lightweight furniture to clean underneath; and (c) cleaning the stairs of all visible debris using a vacuum, broom, or wet or dry cloth. If a small throw rug is present, it must be cleaned by sweeping or shaking it. The person is expected to carry the vacuum cleaner up and down the stairs. Restoring includes (a) putting unneeded items back to where they belong, (b) returning any moved furniture back to its original position, and (c) throwing away any used or unwanted items into a garbage container.	Much harder than average	Harder than average
Bathroom cleaning		
Clean entire bathroom. Performing this task involves cleaning the sink, mirror, toilet, bathtub or shower, and floor of a bathroom until no visible debris or grime remains. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, and (e) throwing away any used or unwanted items into a garbage container.	Harder than average	Harder than average

Window washing		
Wash inside of windows. Performing this task involves cleaning the inside of three or four windows using a premixed window cleaning solution until no visible grime or streaks remain. The person must move plants, lightweight furniture, or other objects that are in front of the window. Restoring includes (a) cleaning up the workspace; (b) wiping up spills; (c) closing any open containers; (d) putting unneeded items back to where they belong; (e) returning any plants, furniture, or other objects that were moved to their original positions; and (f) throwing away any used or unwanted items into a garbage container.	Average	Average
Laundry		
Fold laundry. Performing this task involves folding approximately 20 items (excluding bed sheets) until they are neatly folded and edges aligned. Restoring includes (a) sorting socks into pairs, (b) placing items into logical piles, and (c) placing the laundry in a basket or on a nearby flat surface.	Easier than average	Easier than average
Load and start washing machine. Performing this task involves putting a load of laundry (excluding bed sheets) into the washing machine, measuring and adding the soap or detergent, and setting and starting the machine. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, and (e) throwing away any used or unwanted items into a garbage container.	Easier than average	Easier than average
Hand wash laundry. Performing this task involves: (a) hand washing three to five laundry items (excluding bed sheets) in a sink, using soap and water; and (b) hanging them to dry on a nearby clothesline or drying rack. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, and (e) throwing away any used or unwanted items into a garbage container.	Average	Easier than average
Hang laundry to dry. Performing this task involves hanging 10 to 12 washed and spin-dried clothing items or towels (excluding bed sheets) on a clothesline or drying rack that has already been set up and is located at least 3 m (10 ft) from the washing machine or laundry basket. Restoring includes (a) cleaning up the workspace; (b) wiping up spills; (c) closing any open containers; (d) putting unneeded items back to where they belong, and (e) throwing away any used or unwanted items into a garbage container.	Average	Easier than average
Iron shirt or blouse – board already set up. Performing this task involves ironing a shirt or blouse until it is free of visible wrinkles and hanging it on a hanger. Before the task observation begins, the ironing board must be set up and the iron must be plugged in (but left switched off). During the observation, the person must turn on the iron and dampen the shirt or blouse using either a steam iron or a spray bottle. If a steam iron is used, it must be filled with water	Easier than average	Average

before starting the task observation. Restoring includes turning off or unplugging the iron and placing it in a predesignated location to cool safely. If a spray bottle is used, it must be put back to where it belongs.		
Iron shirt or blouse – set up board. Performing this task involves setting up the ironing board, plugging in and turning on the iron, ironing a shirt or blouse until it is free of visible wrinkles, and hanging it on a hanger. During the observation, the person must dampen the shirt or blouse using either a steam iron or a spray bottle. If a steam iron is used, it must be filled with water before starting the task observation. Restoring includes (a) turning off or unplugging the iron and placing it in a predesignated location to cool safely, and (b) folding the ironing board and putting it back to where it belongs. If a spray bottle is used, it must also be put back to where it belongs.	Average	Average
Iron and put away three garments. Performing this task involves setting up the ironing board, plugging in and turning on the iron, ironing three garments until they are free of visible wrinkles, and hanging the garments on hangers. At least one of the garments must be a long-sleeved blouse or shirt. During the observation, the person must dampen the garments using either a steam iron or a spray bottle. If a steam iron is used, it must be filled with water before starting the task observation. Restoring includes (a) turning off or unplugging the iron and placing it in a predesignated location to cool safely, (b) hanging the garments in a closet or wardrobe, and (c) folding the ironing board and putting it back to where it belongs. If a spray bottle is used, it must also be put back to where it belongs.	Harder than average	Harder than average
Other routine household tasks		
Table setting		
Set table – standard style. Performing this task involves setting a table or counter for one or two persons, including a plate, glass, cup, or mug, eating utensils, and a napkin for each person. If desired, a placemat may also be included in each place setting. Restoring includes returning any extra items to their original places; if no extra items need to be put away, restoring is rated **None** because it is not observed.	Easier than average	Easier than average
Set table – Swedish style. Performing this task involves setting a table for four persons, including a plate, glass, napkin, knife, and fork for each person, as well as butter, a butter knife, and hard or soft bread that is served in an appropriate serving container. Restoring includes returning any extra items to their original places; if no extra items need to be put away, restoring is rated **None** because it is not observed.	Average	Average

Wash and/or put away dishes		
Hand wash dishes. Performing this task involves washing, rinsing 10 to 15 dishes (excluding large pots) and placing them in a dish drainer or on a counter to dry. Restoring includes draining the water from the sink, wiping the counters dry, wringing out the dishcloth or sponge (if used), and cleaning the sink strainer basket.	Easier than average	Easier than average
Hand wash and put away dishes. Performing this task involves washing, rinsing, drying, and putting away 10 to 15 dishes (excluding large pots). Restoring includes draining the water from the sink, wiping the counters dry, wringing out the dishcloth or sponge (if used), hanging up the towel used to dry the dishes, and cleaning the sink strainer basket (if needed).	Average	Average
Unload and put away dishes from dishwasher. Performing this task involves putting away, into their usual storage places, all of the clean dishes (at least 25) and utensils (at least 20) from a front-loading dishwasher. Dishes that still have visible food residue may be set aside or put back into the dishwasher. Dishes that are still wet may be dried off before putting them away. Restoring includes returning the silverware basket or other organizers to the dishwasher (if removed), closing the door, turning off the dishwasher (if needed), wringing out the dishcloth or sponge (if used), and hanging up the towel used to dry the dishes (if used).	Easier than average	Average
Feed pets and change water		
Feed dog or cat dry food and change water. Performing this task involves: (a) preparing a meal for one dog or cat using dry food from a container (e.g., bag, carton) and placing it in the usual food dish, and (b) rinsing the water bowl and filling it with fresh water. The task observation must be done in the animal's usual feeding location, with the animal present in the residence. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Easier than average	Easier than average
Feed dog or cat moist food and change water. Performing this task involves: (a) preparing a meal for one dog or cat using moist food obtained from a can opened by the person during the task observation and placing it in the usual food dish, and (b) rinsing the water bowl and filling it with fresh water. The task observation must be done in the animal's usual feeding location, with the animal present in the residence. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) placing dirty utensils in or next to the sink, and (f) throwing away any used or unwanted items into a garbage container.	Average	Easier than average

Bed tasks		
Lay out bedding on floor – Japanese style. Performing this task involves laying out a Japanese-style futon ("shiki-futon") on the floor; spreading a quilt, comforter, or "kake-futon" over the futon; and arranging one or two pillows on the futon so that the bedding looks neat and orderly. All bedding items must be obtained from a closet or "oshiire" during the task observation, and the futon must already have a fitted sheet on it when the bedding is obtained from the closet. Restoring is rated **None** because it is not observed.	Average	Much easier than average
Make bed. Performing this task involves pulling up and smoothing top and bottom sheets, one or two additional coverings (e.g., blanket, bedspread, duvet), and arranging one or two pillows so that the bed looks neat and orderly. The bed may be a standard frame bed or a mattress on the floor, and it may be freestanding or placed against a wall. Restoring is rated **None** because it is not observed.	Average	Easier than average
Change sheets on bed. Performing this task involves: (a) removing all bed coverings and pillowcases; (b) putting on clean sheets, pillowcases, and/or a duvet cover; and (c) replacing any blankets, bedspreads, or duvets so that the bed looks neat and orderly. The bed may be a standard frame bed or a mattress on the floor, and it may be freestanding or placed against a wall. Restoring includes placing dirty bedding into a laundry container.	Harder than average	Average
Plant care		
Water houseplants and remove dry leaves. Performing this task involves watering four or five houseplants using a watering can or similar container, filled by the person during the task observation, and removing any yellow or dried leaves or flowers. Restoring includes (a) emptying the water container, (b) cleaning up the workspace, (c) wiping up spills, (d) putting unneeded items back to where they belong, and (e) throwing away any used or unwanted items into a garbage container.	Easier than average	Easier than average
Repot small houseplant. Performing this task involves transplanting a small houseplant from a 10 to 13 cm (4 to 5 inch) pot into a larger 15 to 20 cm (6 to 8 inch) pot, adding potting soil, and watering the plant using a watering can or similar container, filled by the person during the task observation. Restoring includes (a) emptying the water container, (b) cleaning up the workspace, (c) wiping up spills, (d) closing any open containers, (e) putting unneeded items back to where they belong, (f) placing the old pot and dirty tools in appropriate places, and (g) throwing away any used or unwanted items into a garbage container.	Average	Average
Outdoor and community tasks		
Outdoor maintenance		
Sweep outdoors – debris or snow. Performing this task involves using a broom or bristle brush, obtained from a storage shed or	Average	Average

garage, to sweep an area between approximately 5 m x 7 m (15 ft x 20 ft) and 7 m x 8 m (20 ft x 25 ft) (e.g., a driveway, walkway, patio, garage, or deck) until it is free of visible debris or snow. Restoring includes returning the broom or bristled brush to where it belongs. If the person chooses to collect the debris into a dustpan, restoring also includes throwing away the debris into a garbage container.		
Rake or weed outdoors. Performing this task involves using a rake or tools for weeding, obtained from a storage shed or garage, (a) to rake an area between approximately 5 m x 7 m (15 ft x 20 ft) and 7 m x 8 m (20 ft x 25 ft) until it is free of all large pieces of leaves and other debris (small fragments of the raked leaves are expected to remain), or (b) to remove weeds from an area approximately 3 m x 3 m (10 ft x 10 ft) until it is free of visible weeds. Restoring includes (a) putting unneeded items back to where they belong, and (b) throwing grass cuttings, leaves, or weeds into a garbage container or the compost pile.	Harder than average	Average
Repair bicycle tube puncture. Performing this task involves: (a) removing the tire from the rim of the bicycle wheel, (b) separating the tube from the tire, (c) finding and patching the puncture, (d) reinserting the tube into the tire, (e) replacing the tire onto the rim of the bicycle wheel, and (f) inflating the tire. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, and (e) throwing away any used or unwanted items into a garbage container.	Harder than average	Average
Clean inside of car. Performing this task involves: (a) removing loose objects from the car (e.g., maps, clothing, food or drink containers), (b) removing all floor mats and shaking or vacuuming them until they are free of visible loose debris, (c) vacuuming the interior of an automobile until it is clean of visible loose debris, and (d) wiping the dashboard until it is free of visible dust. Restoring includes (a) cleaning up the workspace, (b) wiping up spills, (c) closing any open containers, (d) putting unneeded items back to where they belong, (e) returning the floor mats and loose objects back to the car, and (f) throwing away any used or unwanted items into a garbage container.	Harder than average	Harder than average
Wash car. Performing this task involves: (a) rinsing the car to remove loose dirt, (b) washing the exterior with soapy water, (c) scrubbing the wheels and tires, (d) cleaning the windows, and (e) rinsing thoroughly and drying to prevent streaks. The car must be cleaned and dried so that no visible dirt, grime, or streaks remain. While the needed supplies may vary, they typically include one or two buckets (one for soapy water and one for rinsing), a car-wash mitt or sponge, a wheel brush, microfiber towels or a chamois for drying, and glass cleaner with a clean cloth for windows. Access to an outdoor faucet (with or without a hose attached) is required. Restoring includes (a)	Much harder than average	Much harder than average

emptying dirty water from the buckets and rinsing them as needed, (b) rinsing out sponges and cloths, (c) placing wet items in a prespecified location to dry, (d) closing any open containers and returning tools and materials back to where they belong, and (e) disposing of any used or unwanted items in a garbage container.		
Shopping		
Shopping – four to six items. Performing this task involves: (a) shopping for a variety of four to six preplanned items, one of which must weigh 2.5 to 5 kg (5 to 10 lbs), (b) paying for the selected items, and (c) taking the purchased items approximately 30 m (100 ft) outside of the store. Restoring includes (a) putting unneeded items back to where they belong; and (b) placing change, checkbook, credit card, mobile phone in a secure place (e.g., purse, pocket, backpack).	Average	Average

* The task challenges gradually increase, as follows: **Very easy**, **Much easier** than average, **Easier** than average, **Average**, **Harder** than average, and **Much harder** than average.

Appendix 3. QOP: Schoolwork – Task Descriptions and Challenges

Some notes about teacher expectations and task selection (applies to all tasks):

- Before observing a student, the occupational therapist must consult with the teacher to confirm that the **teacher's expectations** for the planned task performances **align with the task descriptions** in this test manual. Expectations include the (a) tools and materials to be used, (b) the specified task criteria or outcome, and (c) expectations for restoring (e.g., putting things away, saving work on a computer). Therefore, the occupational therapist must confirm with the teacher that these expectations will be **clearly understood by the student**, either because they are explicitly included in the teacher's instructions or because they are part of the established classroom routine. Tasks may be used for observation only when these conditions are met.
- Keep in mind that several of the **task descriptions provide** teachers with **flexibility** in specifying task criteria. For example, when performing writing tasks, a student may be asked to write or copy letters, words, sentences, or paragraphs. When observing and later rating the student's quality of performance, **the occupational therapist must rate the student based on what the teacher specified in the instructions**, not what the student actually did. Thus, if the teacher specified that the student was to write two sentences, but the student wrote only some words or a single sentence, the student's performance would be rated as ineffective on the relevant motor or process skills.
- Many teachers ask students to perform complex tasks that may be viewed as consisting of several smaller tasks. A common example is when students are asked to create large art projects (e.g., posters, collages). As part of the large art project, the students may be asked to cut or paste objects, color objects, draw objects, or write words or sentences. In these situations, the occupational therapist must consider each component (e.g., cutting and/or pasting, coloring, drawing, writing) as a separate task, ones that match the task descriptions below. The occupational therapist then chooses which tasks to rate.

Definitions needed to rate task performances that require paper- or computer-based writing:

- **A letter** is defined as a single alphabetic letter, a single phonetic character (e.g., Korean hangul: ㄱ, ㅏ, 학; Japanese hiragana: あ, う), or a single symbolic Chinese character (e.g., kanji or hànzì: 人, 愛).
- **A word** is defined as a series of one or more "letters" that together convey recognizable meaning (e.g., paper, dog; 종이, 강아지; かみ, いぬ; 紙, 犬, 飞机). Words that contain minor errors are considered recognizable when the intended word can be readily inferred (e.g., *paper* → papr or pApur; 강아지→ 강지 or 가아지; かみ → かゐ or か み; 紙 → 糸氏).

- A **sentence** is defined as a series of three or more recognizable words that terminates with a full stop (period). Words written with alphabetic letters must be separated by spaces. If the student writes more than one sentence, the end of one sentence and the beginning of the next must be delineated by a full stop, an uppercase letter at the beginning of the next sentence, or both. Examples of a series of recognizable sentences (with intended minor errors) include the following:
  - I are an Pilot. Arplans are big. I like toflie in them.
  - 나느 조종사이다. 비행기느 크다. 나느 그거들 조종하느거 좋아한다.
  - 私わパイロトです。飛行きは大きいです。私はそれ飛ばすのすきです。
  - 我是飞行员。飞机很大。 我喜欢开它门。
- An **action** is defined as writing a single "letter" or "word" – the action of **writing**.
- A **step** is defined as a recognizable unit of performance to be completed – to write a "letter" or to write a "word."
- A **task** is defined as the assignment given to the students, but not including restoring (e.g., to copy five letters, to write three words, to write two sentences, to create four bulleted text slides with at least three words after each bullet).

Task description	Motor challenge*	Process challenge*
Computer-based tasks		
Select and drag on-screen choices. Performing this task involves completing a school-related computer activity or game, with the specific actions specified by the teacher. The student may be asked to (a) select answers from multiple on-screen options and/or (b) select and drag items to different on-screen locations. The student may use a mouse, keyboard, touch pad, or touch screen to complete the task. The task observation **begins after** the student or the teacher has started the computer, logged in, and opened the program. The task observation **ends before** the student exits the program. Unless the student has other tools or materials to restore, restoring is rated **None** because saving one's work is not part of the task observation.	Much easier than average	Easier than average
Computer writing or slide creation. Performing this task involves completing written schoolwork on a computer with the specific activity specified by the teacher. The student may be asked to (a) type or copy a small amount of text (numbers, words, short	Easier than average	Average

phrases), (b) type or copy a longer passage comprised of several recognizable sentences (approximately one-third to one-half of a page), or (c) create three to five bulleted text slides with each bullet point comprised of three or more recognizable words. The student may use a mouse, keyboard, touch pad, or touch screen to complete the task. For **short writing tasks**, the observation **begins after** the student or teacher has started the computer, logged in, and opened the program. The observation **ends before** the student saves the file (if not automatically saved by the program), prints the work or exits the program. For **longer writing or slide-creation tasks**, the task observation **begins after** the student or teacher has started the computer and logged in, but **before** the student opens the program. The task observation **ends before** the student saves the file (if not automatically saved by the program), prints the work and/or exits the program. Unless the student has other tools or materials to restore, restoring is rated **None** because saving one's work is not part of the task observation		
Graphic design. Performing this task involves completing a school-related graphic design activity, with the specific design requirements specified by the teacher. The student may be asked to (a) create simple shapes, (b) create tables or graphs, or (c) create a visual organizer such as a word web, and to add recognizable text. The student may use a digital writing or pointing tool (stylus, digital pen, digital pencil), mouse, keyboard, touch pad, or touch screen to complete the task. The task observation **begins after** the teacher or student has started the computer and logged in, but **before** the student opens the program. The task observation **ends after** the student has saved the file (if not automatically saved by the program) and has exited the program. If the student is asked to print the document or turn off the computer, these actions are included in the task observation. Based on the teacher's expectations, restoring may include cleaning up the workspace, returning unneeded items to their proper places, and disposing of used or unwanted items in a garbage container. Restoring also includes saving one's work, if needed, before exiting a computer program.	Average	Harder than average

Animation – text, shapes, or photographs. Performing this task involves completing a school-related animation activity, with the specific animation requirements specified by the teacher. The student is expected to (a) create new (within the program) or import three to five pre-existing visual elements (e.g., text, shapes, photographs, drawings) and (b) animate one or more elements using a visual effect (e.g., appear, disappear, move). The student may use a digital writing or pointing tool (stylus, digital pen, or digital pencil), mouse, keyboard, touch pad, or touch screen to complete the task. If the student imports a pre-existing drawing that the student created separately on paper, any actions associated with creating the drawing are not included as part of the task observation. The task observation **begins after** the teacher or student has started the computer and logged in, but **before** the student opens the animation or graphic design program. The task observation **ends after** the student has saved the file (if not automatically saved by the program) and has exited the program. If the student is asked to export the animation or turn off the computer, these actions are included in the task observation. Based on the teacher's expectations, restoring may include cleaning up the workspace, returning unneeded items to their proper places, and disposing of used or unwanted items in a garbage container. Restoring also includes saving one's work, if needed, before exiting the program.	Average	Much harder than average
Manipulative-based math tasks		
Geometric manipulatives – with or without written answers. Performing this task involves using flat geometric shapes (e.g., squares, triangles, parallelograms), with the specific activity specified by the teacher, to learn simple math or geometry concepts and/or to solve simple math or geometry problems. The student is expected to place geometric shapes beside one another to create larger geometric shapes and, when specified by the teacher, to write answers on worksheets or blank pieces of paper. Based on the teacher's expectations, restoring may include cleaning up the workspace, returning unneeded items to their proper places, and disposing of used or unwanted items in a garbage container.	Easier than average	Average

Math manipulatives – count or sort objects. Performing this task involves using small objects (e.g., cubes, small toys, rods), with the specific activity specified by the teacher, to (a) count objects and/or (b) sort objects by attributes such as color or shape. Based on the teacher's expectations, restoring may include cleaning up the workspace, returning unneeded items to their proper places, and disposing of used or unwanted items in a garbage container.	Average	Average
Math manipulatives – solve simple math problems. Performing this task involves using small objects (e.g., cubes, small toys, rods) to solve simple math problems and, when specified by the teacher, writing answers on worksheets or blank pieces of paper. Based on the teacher's expectations, restoring may include cleaning up the workspace, returning unneeded items to their proper places, and disposing of used or unwanted items in a garbage container.	Average	Harder than average
Paper-based writing tasks		
Circle and connect. Performing this task involves marking visual information on paper by either circling letters, words, or numbers, or by connecting figures such as in dot-to-dot activities or picture-matching tasks. The student may use a pencil, crayon, pen, or marker to complete the task. Using a ruler to make straight connecting lines is acceptable if permitted by the teacher. Based on the teacher's expectations, restoring may include cleaning up the workspace, returning unneeded items to their proper places, and disposing of used or unwanted items in a garbage container.	Average	Easier than average
Writing tasks: copying, short answers, and composition. Performing this task involves completing written schoolwork on paper using a pencil or other writing tool, with the specific writing demands specified by the teacher. The student may be asked to (a) copy individual letters, words, or numbers; (b) write short answers consisting of one or two words; (c) compose or copy one or two sentences with each comprised of three or more recognizable words; (d) write a brief paragraph of at least three recognizable sentences and not more than half a page; or (e) write two to three paragraphs totaling more than half a page but less than a full page of text. Using a ruler to draw straight writing lines is acceptable if permitted by the teacher. Based on the teacher's expectations, restoring may include cleaning up the workspace, returning unneeded items to their proper places, and disposing of used or unwanted items in a garbage container.	Average	Average

Scribbling and coloring tasks		
Scribble colors onto paper. Performing this task involves applying color or making marks on blank paper using a crayon, marker, or pencil, as specified by the teacher. The teacher's expectation must be that the student is **not** expected to draw recognizable figures or objects. Based on the teacher's expectations, restoring may include cleaning up the workspace, returning unneeded items to their proper places, and disposing of used or unwanted items in a garbage container.	Average	Easier than average
Color pictures. Performing this task involves using crayons, markers, colored pencils, or other drawing or coloring tools, with the specific activity specified by the teacher. The student may be asked to (a) color in one or more predrawn shapes, figures, or pictures, (b) draw one or more simple recognizable shapes, figures, or pictures on blank paper and color them in, or (c) draw one or more complex pictures and color them in and/or add embellishments, again, depending on what is specified by the teacher. Based on the teacher's expectations, restoring may include cleaning up the workspace, returning unneeded items to their proper places, and disposing of used or unwanted items in a garbage container.	Average	Average
Cutting and pasting tasks		
Paste multiple items. Performing this task involves using paste or glue, with the specific activity specified by the teacher. The student may be asked to attach five or more small items (e.g., small pieces of paper, cotton balls, noodles) to a flat surface (e.g., a sheet of paper) or to paste a single large picture onto another sheet of paper or into a workbook. Based on the teacher's expectations, restoring may include cleaning up the workspace, returning unneeded items to their proper places, closing any open containers, and disposing of used or unwanted items in a garbage container.	Average	Average
Cut paper – no pasting. Performing this task involves cutting paper with scissors, without any requirement to paste the cut pieces, with the specific cutting demands specified by the teacher. The student may be asked to cut along straight lines (e.g., along the edge of a sheet of paper, simple shapes such as squares or rectangles), simple curved lines (e.g., circles, hearts, wavy lines), or more complex straight-line figures.	Average	Average

Based on the teacher's expectations, restoring may include cleaning up the workspace, returning unneeded items to their proper places, and disposing of used or unwanted items in a garbage container.		
Cut and paste shapes. Performing this task involves cutting along predrawn or teacher-specified lines and using paste or glue to attach the cut pieces to another sheet of paper or other surface, with the specific cutting and pasting demands specified by the teacher. The student may be asked to cut along straight lines, simple curved lines (e.g., circles, hearts, wavy lines), or more complex curved lines (e.g., figures with multiple parts such as petals, stems, or limbs). Based on the teacher's expectations, restoring may include cleaning up the workspace, returning unneeded items to their proper places, closing any open containers, and disposing of used or unwanted items in a garbage container.	Harder than average	Harder than average

* The schoolwork task challenges gradually increase, as follows: **Much easier** than average, **Easier** than average, **Average**, **Harder** than average, and **Much harder** than average.

Appendix 4. QOP: Social Interaction – Social Exchange Descriptions and Challenges

Description: Types of Social Exchanges	Challenge
Collaborating with others: Any ecologically-relevant social interaction where the person is expected to interact with others* as they use tangible objects to jointly implement a prespecified or preplanned project. The project may be related to preparing food, completing an art project, playing a collaborative game, performing a school or work assignment, engaging in a home repair or construction task, etc.	Harder than average
Engaging in casual conversation: Any ecologically-relevant social interaction where the person is expected to engage in "small talk" with others*. Commonly, casual conversations are expected to occur in the context of people (a) eating a meal together, (b) taking a coffee break or having a drink together after work, (c) playing together with toys, (d) playing a card or board game with others, or (e) engaging together in a leisure or sport activity. *Engaging in casual conversation* is the only type of social exchange with no preplanned topic or agenda.	Average
Planning and decision-making: Any ecologically-relevant social interaction where the person is expected to discuss, negotiate, or jointly plan with others* a shared activity or outcome that has been preselected or agreed upon to occur in the future. The shared activity or outcome may be related to the social partners (a) reaching mutual agreement regarding rules or perspectives; (b) agreeing on plans for a future event or project; (c) agreeing on who will perform various tasks when implementing a future event or project; or (d) planning the details (e.g., time, place) of a future meeting, appointment, or outing.	Average
Sharing information with others: Any ecologically-relevant social interaction where the person is expected to provide others* with information about a preplanned or prespecified topic. The information can be related to facts, opinions, experiences, locations, directions, objects, etc. The interaction can even involve the person sharing information with others during an interview, a lecture, or while training or mentoring others.	Average
Asking others for information: Any ecologically-relevant social interaction where the person is expected to ask others* for information about a preplanned or prespecified topic. The information can be related to facts, opinions, experiences, locations, directions, objects, etc. The interaction also may involve the person asking a social partner for information during an interview.	Average

Selling goods or providing services to others: Any ecologically-relevant social interaction where the person is expected to take orders, serve goods, provide services, accept payments, sell products, or provide assistance to others*. The selling of goods or provision of services must be carried out in-person, not virtually or on a website. Examples of appropriate social partners include customers or clients.	Average
Acquiring goods or services from others: Any ecologically-relevant social interaction where the person is expected to (a) order and/or pay for prespecified or preplanned goods or services from others*, or (b) request assistance or support from others. The ordering and/or purchasing must be carried out in-person, not virtually or on a website. Examples of appropriate social partners include salespersons, cashiers, bankers, librarians, clerks, or service providers.	Easier than average

* **Others**: one or more social partners

Appendix 5. Tips for Observing Occupational Performance and Taking Notes

Observing people engaged in occupational performance and then remembering what you have observed is an art. Your observations may be short, lasting only a few minutes. Others may be more prolonged. During the observation, you must remain an "**unobtrusive observer**" – one who is respectful and as discrete as possible yet is positioned such that you can **see and hear** what is happening. At the same time, you must record **observational notes** that will enable you to remember the details of what you observed when later rating the quality of the person's occupational performance. These notes will provide you with specific examples to support your ratings and the documentation of the results of your performance analyses.

Text Box 7. A Warning about Rating While Observing the Person's Performance

Do not attempt to rate the quality of a person's performance during the observation. Failure to take observational notes and use them when rating the person's quality of performance after the observation will result in **errors that invalidate your results**. Common errors caused by trying to rate during the observation include:

- **Taking your attention away from your observation**, and therefore, not observing the person's actions as the task performance progresses
- **Rating the actions incorrectly** because you did not read and rely on the rating examples in the QOP manual. Errors include rating an action too leniently or severely, or rating the actions on incorrect performance skills

Below, we summarize a variety of strategies that will enable you to (a) be an unobtrusive observer, and (b) take thorough notes while keeping your "eyes and ears" on what the person is doing and saying. We recommend you try the various strategies and determine which ones work best for you.

Being an Unobtrusive Observer

1. When observing **ADL task performance**:
   - Avoid interfering with the person's performance.
   - If you are standing where the person needs to go, step out of the person's way, but maintain your "eyes and ears" on the person's occupational performance.

- If needed, reposition yourself, so that you can see and hear what is happening.

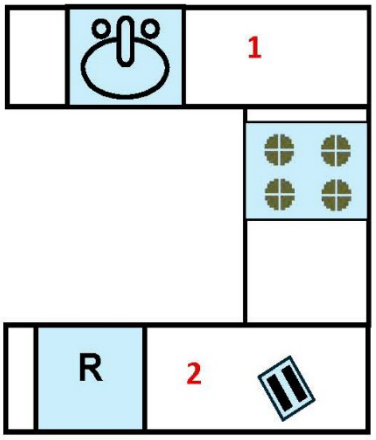
2. When observing **schoolwork task performance**:
   - Position yourself to the side of the classroom, but where you can observe what the student is doing and hear any interactions they have with the teacher or other students.
   - To ensure the student's performance is not singled out, observe naturally, avoiding drawing attention to the student you are observing – appear to be observing others, not just the student you are evaluating – doing so avoids compromising the student's privacy.
3. When observing **social interaction**:
   - Position yourself far enough away from the person and their social partner(s) that they are not tempted to include you in the interaction.
   - Position yourself close enough that you can still see what all participants are doing (e.g., gestures, facial expressions) and hear what they are saying (e.g., tone of voice, clarity of speech).
   - Listen carefully to what the person is saying.

Note-taking Strategies

1. Use **abbreviations** that make sense to you
   - Fridge = refrigerator
   - OJ = orange juice
   - L = left; R = right
   - X3 = three times
   - SP = social partner; T = teacher
   - S/L = Searches/Locates (process skill)
   - NR = no response to a message sent
   - Q = Asks question
2. Note the **actions you observe or hear** and, when relevant, the **objects** the person interacts with
   - Lifts glass
   - Takes OJ to table
   - Help – open jar
   - Help – fall risk, carry jar
   - Writes name

- Q – where crayons?
- Shakes head, “No”
- Smiles
- Interrupts SP

3. Record **actions in the order** you observe them (see ***Figures 5, 8, & 9*** below).
4. Note any observed “performance errors” (**effort, inefficiency, or social inappropriateness; grip slip, pause**).
5. Draw a **quick floor plan or drawing**, adding numbers to indicate locations of objects or ordering of steps (see ***Figures 5, 6, & 7*** below).
6. Use **arrows** to indicate direction of movements (see ***Figures 5 & 6*** below).
7. Use **drawings with numbers or numbers combined with arrows** to record the progression of actions when the task performance is related to sweeping, vacuuming, ironing, raking, or coloring (see ***Figures 6 & 7*** below).
8. When observing **social interaction**
   - Record what the people say in an abbreviated manner.
   - Record the body language, gestures, and tone of voice.
   - Record when the person or the social partner does not respond to messages (**NR**).
   - Use arrows combined with text to record the back-and-forth flow of the messages between the person and the social partner (see **Figure 9** below).
9. Record any **messages** sent to the person by others (e.g., clarification of task expectations, cues/verbal assistance).
   - Teachers or others may send messages that are **not related** to occupational performance (“Remember, children, some dogs are small and some are big.”) – these comments do not need to be recorded.
   - Other comments from teachers or others may further clarify the **specific expectations** of an occupational performance (“I forgot to tell you, you need to clean up and put everything away when you are done”, “Think about the colors of dogs, they can be brown, black, or white. Use your crayons and be sure to color within lines.”) – these comments clarify the task expectations and must be recorded to ensure that you rate the student’s performance based on the teacher’s expected outcomes.
   - Teachers or others may give verbal cues or assistance as the person is engaged in an occupational performance (e.g., “John, what color are dogs?”, “Be careful not to press too hard.”) – These are forms of assistance given to the person by others and must be recorded (see ***Figure 8*** below).



OT notes	Observed actions
Glass → 1	Put glass on counter **1** (beside sink)
Pull 2X to open fridge - effort	Pulled twice on handle to open refrigerator, increased effort pulling
S/L 3X OJ fridge	Searched three shelves before finding OJ in refrigerator
OJ → 2	Put OJ on counter **2** (next to the refrigerator)

Figure 5. Using a drawing of a floor plan (with numbers) and brief task notes (with arrows) to record the person's actions.

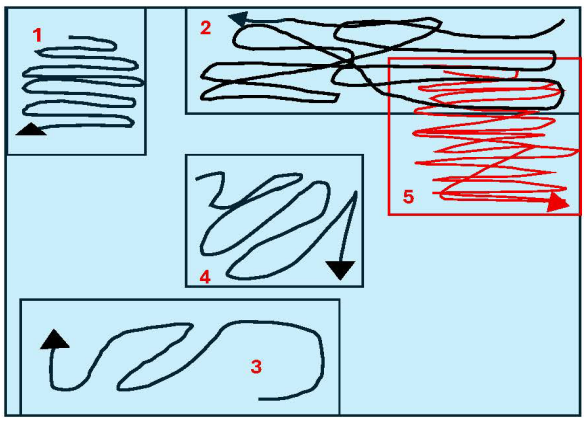


Figure 6. A simple drawing of a floor plan of a room to be swept (large blue rectangle, with numbers and arrows).

Note. The numbers in the smaller boxes depict the order in which the person swept different areas of the room, and the arrows show the progression of the sweeping movements within each smaller area.

Text Box 8. Interpretation of Figure 6

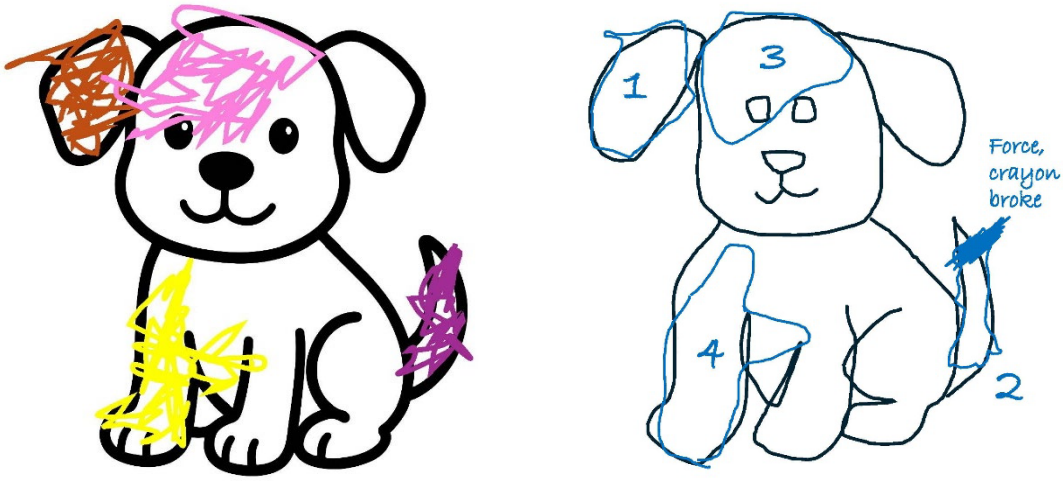
Areas can be outlined and labeled with numbers (e.g., 1, 2, 3, 4, 5). It can also be helpful to illustrate the flow of the sweeping progression. Each numbered area can be considered a step.

The drawing for **Area 1** shows a logical and thorough sweeping pattern. In contrast, **Area 2** illustrates a less orderly process: the person began on the far right, swept downward, then shifted left and moved back and forth (right, left, right, left).

When the person moved to **Area 3**, it becomes clear that the sequence of the first, second, and three steps were clearly random. The line drawn within Area 3 also shows that the person did not sweep thoroughly.

In **Area 5 (red)**, we see the person reswept part of **Area 2**. This is only a concern if **Area 2** was already swept clean; if visible debris remained, returning to sweep again is a reasonable and logical action.

The **empty spaces**, with no arrows, are ones that were never swept.



A. Student's coloring project B. Therapist's drawing

Figure 7. The occupational therapist's quick drawing (B.) of a student's coloring project (A.)

Note. The numbers indicate the order in which the student completed each coloring step. The outlined areas indicate the approximate areas colored, including where the student colored outside the lines and the areas the student did not color in.

OT notes	**Observed actions**
Brown 1, outside lines, not filled in	Used brown crayon to color ear, colored outside line, ear not fully colored in
Pause, choose purple, tail 2, outside lines, not filled	Pauses, gets purple crayon, colors tail, colors outside lines, and tail not fully colored in
Cue - color	Teacher cues the student to use the specified colors by saying, "What color are dogs?"
Push too hard, crayon breaks	Colors with so much force that the purple crayon broke
Cue - force	Teacher cues the student to use less force by saying, "Be careful not to press too hard"

Figure 8. Some of the occupational therapist's observational notes to record additional actions observed during student's coloring project in **Figure 7**.

Person: Fredrico	**Social partner: José**	**Observed actions**
I want to play – whiny, demanding		Socially inappropriate initial greeting; uses whiny, demanding voice to initiate the social interaction with **José**
	get train	**José** responds telling **Fredrico** to get another train
"gimmie" red engine		**Fredrico** uses demanding voice to tell **José** that **he** wants to use **José's** red engine
	mine, get blue	**José** tells **Fredrico** that the red engine is his and that **Fredrico** should get the blue engine
NR		**Fredrico** does not respond to **José's** message
stomps foot, leaves		Instead, **Fredrico** stomps his foot and leaves

Figure 9. Using arrows combined with text to record the back-and-forth flow of the messages between the person and the social partner.

Appendix 6. Rating Scale, Tips, and Rating Examples for the QOP Performance Skills

Rating Scale

- **None:**

  Competent

  No problem observed because (a) there was **no disruption** in the ongoing task performance or social interaction; (b) there was **no doubt** in the occupational therapist's mind that the person's performance of the specific occupational skill was competent (i.e., the motor and process skill performance was effective, without effort, and timely, or the social interaction skill performance was mature, polite, respectful, timely, and socially appropriate); or (c) there was **no opportunity to observe** the occupational performance skill being rated.

- **Mild**:

  Minimally diminished or immature skill

  A **subtle to mild disruption** of the ongoing task performance or social interaction was observed. This includes the observation of (a) **commonly observed, but still ineffective** occupational skill performance; (b) **mild** pauses or delays; (c) a **mild** degree of clumsiness or extra effort; (d) a social interaction skill that was **somewhat** immature, impolite, disrespectful, poorly timed; or (d) a motor or process skill performance that suggested a **mild <u>potential</u>** for unsafe occupational performance but the person was at **<u>no imminent risk</u>** during the observation.

- **Moderate**:

  Moderately diminished or immature skill

  A **moderate disruption** of the ongoing task performance or social interaction was observed. This includes the observation of (a) **moderate** pauses or delays; (b) a **moderate** degree of clumsiness or extra effort; (c) a social interaction skill that was **moderately** immature, impolite, disrespectful, poorly timed; or (d) a motor or process skill performance that suggested a **moderate <u>potential</u>** for unsafe occupational performance but the person was at **<u>no imminent risk</u>** during the observation.

- **Marked**:

  Severely diminished or immature skill

  The observed level of occupational skill performance was **unacceptable or impeded** the ongoing task performance or social interaction. This includes (a) **unacceptable** delays, (b) **marked** physical effort, (c) **markedly** immature social interaction, (d) **<u>imminent risk</u>** of damage of object or danger to the person (e.g., physical or emotional harm, risk to personal integrity), (e) **breakdown** in the ongoing occupational performance, or (f) need for **assistance**.

Tips for Rating the Quality of Each Occupational Performance Skill

The following steps for rating **each** of the motor, process, and social interaction skills are the same. We are using the rating examples for ***Stabilizes*** to illustrate the process.

1. Begin by reading the **overall definition** of the performance skill (e.g., ***Stabilizes*** — *effectively moves through task environment and interacts with task objects without* momentary *propping or loss of balance*).
2. Then read each of the **specific performance skill rating examples** and, if present, any ***Notes***.

   Examples of diminished stabilizes *skill include:*
   - *stumbles or is momentarily unstable while standing or walking during task performance*
   - *momentarily props on external supports (e.g., desk, table, counter) when walking, changing positions (e.g., standing up), or interacting with task objects*
   - *uses assistive devices (e.g., cane, rollator) while walking*
     Note*. Do not consider the use of splints or braces to be assistive devices when rating* stabilizes *skill.*
3. **Verify that your ratings match the rating examples** under the performance skill you are considering. If you observed one or more instances of diminished performance that **matches** the specific rating examples, rate the performance skill as Mild, Moderate, or Marked to indicate the level of diminished skill. If what you observed **does not match** one of the examples, **do not rate** your observation on that performance skill – look for a match under **other** performance skills.
4. As you match, remember that it is appropriate to **substitute words** as long as the action being rated is the same. For example, if the manual says "*momentarily props on external supports (e.g., desk, table, counter) when walking, changing positions (e.g., standing up), or interacting with task objects"*, it is appropriate to rate the observation of a person who props on the floor when standing up from a sitting position. The key point is that the concept is not changed by this rewording – the person is propping on external supports when changing positions.
5. At times, there are **similar rating examples** under different performance skills. If you find an example under more than one performance skill that matches what you observed, be sure to rate it under each.

   For example, two rating examples under ***Stabilizes*** are similar to two of the rating examples under ***Walks****.* If what you observed matches the rating examples under both performance skills, rate both accordingly. In this example, note that ***Walks*** applies only when the person is walking, whereas ***Stabilizes*** includes standing, changing positions, and interacting with task objects.

   Stabilizes
   - *stumbles or is momentarily unstable while standing or walking during task performance*
   - *momentarily props on external supports (e.g., desk, table, counter) when walking, changing positions (e.g., standing up), or interacting with task objects*

Walks

- *walks with some unsteadiness*
- *props on a counter or furniture to maintain stability while walking*

6. **When distinguishing between a rating of None and a rating of Mild,** any instance of very slightly diminished performance skill that matches one of the skill rating examples should be rated as **Mild**, even if the performance observed is typical or expected for a person of that age.
7. **When distinguishing between a rating of Mild and a rating of Moderate,** base the decision on the overall rating scale criteria. A rating of **Mild** indicates a minimal effect, even when you observed **several examples** of **mildly** diminished performance skill (e.g., the person frequently propped on furniture when walking). A rating of **Moderate** indicates that you observed at least one example of moderately diminished performance skill.

Text Box 9. Definition of a Workspace

Several performance skill rating examples refer to a **workspace**. In all instances, a workspace is defined as the immediate area where the person is interacting with task objects. The area may be (a) a table or counter surface, (b) an area of the floor or outside surface, or (c) an area of the body. If, during the performance, the person needs to **take a step** to reach for or place a task object, we consider that they have changed workspaces.

Skill Definitions and Examples for Rating Each Performance Skill

Motor skills – within the context of performing a chosen and ecologically-relevant task, observable task actions related to effectively moving self and tangible task objects; task actions are performed without extra effort or clumsiness

Motor skill rating examples

Stabilizes — effectively moves through task environment and interacts with task objects without *momentary* propping or loss of balance

Examples of diminished *stabilizes* skill include:

- stumbles or is momentarily unstable while standing or walking during task performance
- momentarily props on external supports (e.g., desk, table, counter) when walking, changing positions (e.g., standing up), or interacting with task objects
- uses assistive devices (e.g., cane, rollator) while walking

  Note. Do not consider the use of splints or braces to be assistive devices when rating *stabilizes* skill.

Aligns — effectively interacts with task objects without evidence of *persistent* propping or persistent leaning

Examples of diminished *aligns* skill include:

- persistently leans back or to the side when interacting with task objects
- persistently props on external supports when interacting with task objects (e.g., desk, table, counter)

Positions — effectively positions oneself an effective distance from task objects and without evidence of awkward arm or body positions

Examples of diminished *positions* skill include:

- uses awkward body or arm positions when interacting with task objects (e.g., actively leaning too close to the workspace, positioning the body in an awkward or slumped position, raising the “elbow up” when lifting task objects)

- positions the body or wheelchair too far from the workspace so that it interferes with reaching for or placing task objects
- positions the body or wheelchair so close to a door that the door bangs into the body or wheelchair as the door is opened
- positions the body or wheelchair at a relatively high or low workspace so that it interferes with reaching for or placing task objects

Reaches — effectively extends the arm, and when appropriate, bends the trunk, to get or place task objects that are out of reach

Examples of diminished *reaches* skill include:

- demonstrates increased physical effort when reaching for task objects
- demonstrates increased physical effort when reaching out to place task objects
- demonstrates increased physical effort when reaching down to pick task objects up from the floor
- demonstrates increased physical effort when reaching across or behind the body (e.g., reaching behind the back toward the opposite sleeve of a shirt)

Bends — effectively flexes or rotates the trunk, as needed, when sitting down or when bending to grasp or place task objects that are out of one's reach

Examples of diminished *bends* skill include:

- has increased physical effort or stiffness when bending to reach for or place task objects
- has increased physical effort or stiffness when bending to pick task objects up from the floor
- demonstrates increased physical effort when bending or rotating the trunk to reach across or behind the body (e.g., rotating the trunk and reaching behind the back toward the opposite sleeve of a shirt)
- has increased physical effort or stiffness when bending to sit down or stand up during the task performance

Grips — effectively pinches or grasps task objects such that the objects do not slip (e.g., from between one's fingers, from between the teeth, from between one's hand and a supporting surface)

Examples of diminished *grips* skill include:

- has a "grip slip" on a task object held in the hand
- has a "pinch slip" on a task object held between the fingers

- has a “grip slip” on a task object held between two body parts (e.g., teeth, knees, arm and trunk)
- has a “grip slip” on a task object stabilized under one hand (e.g., bread, plate, paper) while interacting with the task object with another body part (e.g., spreading butter onto the bread, coloring a figure on the paper)

Manipulates — effectively uses dexterous finger movements, without evidence of fumbling, when manipulating task objects (e.g., manipulating buttons when buttoning)

Examples of diminished *manipulates* skill include:

- has decreased dexterity when manipulating task objects (e.g., buttons, shoe laces)
- has decreased dexterity when repositioning task objects within the hand (e.g., knife, pencil)
- fumbles task objects when interacting with them

Coordinates — effectively uses two or more body parts simultaneously when manipulating or grasping task objects, without evidence of fumbling task objects or task objects slipping from one’s grasp

Examples of diminished *coordinates* skill include:

- has a “grip slip,” “pinch slip,” or fumbles task objects when using two hands
- has a “grip slip” on a task object held between two body parts (e.g., knees, arm and trunk)
- has a “grip slip” on a task object stabilized under one hand (e.g., bread, plate, paper) while interacting with the task object with another body part (e.g., spreading butter onto the bread, coloring a figure on the paper)
- ***Note***. Diminished *coordinates* skill is rated only when a gripping or manipulating problem is also observed while two body parts are used together.

Moves — effectively moves task objects along a surface by pushing or pulling, opens doors and drawers by pulling and closes them by pushing, or propels a wheelchair by pushing its wheels

Examples of diminished *moves* skill include:

- becomes unstable and/or props on external objects when opening doors or drawers
- demonstrates increased physical effort when pushing or pulling task objects (e.g., sliding a book across a desk, pulling open a door)
- demonstrates increased physical effort when propelling the wheelchair
- demonstrates increased physical effort when pushing or pulling clothing onto or off the body (e.g., pulling a shirt sleeve up the arm, pushing off the shoes)

Lifts — effectively raises or lifts task objects without evidence of increased physical effort

Examples of diminished *lifts* skill include:

- uses two hands to lift small or lightweight task objects
- uses increased physical effort when lifting task objects
- slides task objects across a surface instead of lifting them (e.g., drags a chair across the floor rather than lifting it over a threshold, pushes a plate across the table instead of picking it up to move it)

Walks — effectively ambulates on level surfaces during the task performance, without shuffling the feet, becoming unstable, propping, or using assistive devices

Examples of diminished *walks* skill include:

- walks with some unsteadiness
- props on a counter or furniture to maintain stability while walking
- uses a wheelchair during task performance
- uses assistive devices (e.g., cane, rollator) while walking during task performance

Note. If the task observation begins with the person already standing or seated at the workspace (e.g., table, desk, bed, sink), and walking is not required during the task performance, *walks* skill should be rated based on the person's ability to walk on level surfaces to arrive at the workspace.

Transports — effectively carries task objects from one place to another while walking or moving in a wheelchair

Examples of diminished *transports* skill include:

- is unstable when transporting task objects
- slides or lifts task objects that typically are transported
- has difficulty transporting task objects when seated in the wheelchair
- has difficulty transporting or is unstable when carrying more than one task object at a time

Note. Give a rating of **None** if the person has no need and does not transport task objects. Transporting a task object as little as only one step is considered to be *transports* skill.

Calibrates — effectively uses movements of appropriate force, speed, or extent when standing up, sitting down, or interacting with task objects (e.g., not crushing task objects, pushing a door with enough force that it closes but does not bang)

Examples of diminished *calibrates* skill include:

- exerts too much pressure such that a task object is crushed or breaks (e.g., squeezing an egg so hard it breaks, pressing so hard with a crayon on the paper that the crayon breaks)
- exerts so little force that a door does not close
- bangs task objects when placing them on the counter or table
- reaches too far or too fast such that a task object is knocked over or onto the floor
- demonstrates diminished control of force such that movements become excessive or inappropriately directed (e.g., reaching too far, too fast; tipping a bottle too far, too fast)
- demonstrates diminished control of movements when standing up or sitting down

Flows — effectively uses smooth and fluid arm and wrist movements when interacting with task objects

Examples of diminished *flows* skill include:

- demonstrates jerky arm movements when interacting with task objects
- has stiff arm or wrist movements when interacting with task objects
- has stiff, nonfluid wrist and finger movements when writing

Endures — effectively persists and completes the task without obvious evidence of physical fatigue, pausing to rest, or stopping to catch one's breath

Examples of diminished *endures* skill include:

- pauses to rest because of obvious physical fatigue
- has obvious shortness of breath during task performance
- demonstrates labored breathing during task performance

Note. Do not confuse *endures* skill (e.g., physical fatigue) with physical effort or clumsiness as described in other motor skills. Also, do not confuse physical fatigue with mental or emotional fatigue (e.g., the person says, "I'm tired," but shows no obvious evidence of physical fatigue).

Paces — effectively maintains a consistent and effective rate or tempo throughout the entire task performance

Examples of diminished *paces* skill include:

- performs part or all of the task too quickly (e.g., rushes)
- performs part or all of the task at a rate that is too slow
- demonstrates an uneven pace during task performance

Process skills – within the context of performing a chosen and ecologically-relevant task, observable task actions related to effectively (a) selecting, interacting with, and using tangible task objects; and (b) carrying out individual actions and steps in an efficient manner; task actions are well organized, timely, without unnecessary steps, pauses, or spatial disorganization

Process skill rating examples

Paces — ***Note***. *Paces* is both a motor skill and a process skill, therefore we give it the ***same rating*** for both motor skills and process skills, based on the person's overall rate or tempo of performance.

Attends — effectively performs the task without looking away from what he or she is doing, pausing, and interrupting the ongoing task progression

Examples of diminished *attends* skill includes:

- looks away, toward an irrelevant sound or movement and pauses the task progression
- pauses the task progression and looks out the window

Heeds — effectively carries out and completes the task originally agreed upon or specified by another person

Examples of diminished *heeds* skill include:

- performs a task different from what was specified (e.g., makes a salad, but omits a specified ingredient; makes a salad, but adds an extra ingredient that was not specified; colors the house and then draws a person when only coloring the house was specified)
- completes the task using materials different from those specified (e.g., makes instant coffee instead of the specified brewed coffee, colors with markers when crayons were specified)
- does not complete the specified task (e.g., does not iron the entire shirt free of wrinkles, makes a sandwich but does not pour the specified beverage, does not color all the shapes on the specified workbook page, writes one or two words when writing a sentence was specified)

  Note. Do not consider the quality of restoration when rating *heeds* skill.

Chooses — effectively selects necessary and appropriate type and number of task objects for the task, including the task objects that one was directed to use (e.g., by a teacher) or that were specified by the person

Examples of diminished *chooses* skill include:

- chooses incorrect items
- chooses too few or too many items
- does not choose needed or specified items

Uses — effectively uses task objects as they are intended (e.g., using a pencil sharpener to sharpen a pencil), and in a hygienic fashion

Examples of diminished *uses* skill include:

- uses a task object for an inappropriate purpose (e.g., uses shaving cream to brush the teeth, uses a spoon or a pencil as a toy, uses a glue stick as a crayon)
- uses a task object in an unsanitary manner (e.g., completely licks the knife clean and then puts it back into the jelly jar, puts pencil in the mouth)

Handles — effectively supports or stabilizes task objects in an appropriate manner, protecting them from damage, slipping, moving, tipping, or falling

Examples of diminished *handles* skill include:

- delays supporting or stabilizing a task object (e.g., delays stabilizing the paper to prevent it from sliding when coloring)
- allows an object to tilt or fall because it was not adequately supported
- holds paper too far from where cutting

Inquires — effectively (a) seeks needed verbal or written information by asking questions or reading directions or labels, and (b) does not ask for information after the person was fully oriented to the task and environment and the information was just discussed

Examples of diminished *inquires* skill include:

- asks questions related to information that was already discussed and clarified before beginning the task performance
- asks where something is located before attempting to look for it after one has been oriented to the location of all task objects
- delays reading written information

Note. Give a rating of **None** if the person asks no questions.

Initiates — effectively starts or begins the next task action or task step without any delay or hesitation

Examples of diminished *initiates* skill include:

- pauses before beginning the next task action
- pauses before beginning the next step of the task performance
- does not initiate a minor or major step of the task performance (e.g., initiates putting on the shoes, but does not initiate tying the shoes; initiates making and serving a sandwich, but does not initiate cutting it in half; initiates writing a paragraph, but does not initiate writing the third sentence)

Continues — effectively performs single actions without any interruptions such that once an action is initiated, one continues without pauses or delays until the action is completed

Examples of diminished *continues* skill include:

- begins an action, pauses, then resumes performing the original action (e.g., begins spreading butter, pauses, then returns to spreading butter; starts coloring a picture, pauses, then returns to coloring the picture)
- starts an action, stops and does something else, and then goes back to performing the original action (e.g., begins spreading butter, stops and gets a glass from the cupboard, then returns to spreading butter; starts coloring a picture, stops to write a sentence below the picture, then returns to coloring the picture)
- starts an action, stops and does something else, and never goes back to performing the original action (e.g., starts coloring a picture, stops to write a sentence below the picture, and never returns to coloring the picture)

Sequences — effectively performs steps in a logical order and with an absence of (a) randomness or lack of logic in the ordering of the steps, and/or (b) inappropriate repetition of steps

Examples of diminished *sequences* skill includes:

- performs steps in an order that is clearly “strange” or illogical (e.g., cuts out an intricate or complex figure and then colors it, causing the figure to wrinkle; puts on a blouse and then puts on underwear over the blouse; attempts to pour juice into a glass and then opens the jar of juice)
- performs steps in a random order (e.g., when coloring in a picture of a house, colors in each part in a random order – upper right corner, lower left corner, door, left side, chimney, lower right corner, etc.)
- repeats an already completed step (e.g., completely colors a shape and then recolors it; completely sweeps an area of a walkway free of debris and then sweeps it again)

Terminates — effectively completes single actions or single steps without inappropriate persistence or premature cessation

Examples of diminished *terminates* skill include:

- performs an action or step too long (e.g., keeps spreading the glue after the surface of the paper is fully covered, keeps pouring water after the glass is already full, continues adding color to a figure that has already been fully colored)
- stops an action or step too soon (e.g., spreads glue on only part of the surface of the paper, stops pouring water when the glass is still only partially filled, stops ironing before the entire shirt is free of visible wrinkles, writes one or two words when writing a sentence was expected)

Searches/Locates — effectively looks for and finds task objects in a logical manner

Examples of diminished *searches/locates* skill include:

- looks in more than one place before finding a task object
- asks where task objects are located before looking for them even though one was oriented to the location of the task objects before beginning the task performance
- searches a long time for task objects before finding them

Gathers — effectively gathers related task objects into the same workspace and regathers any task objects that have spilled, fallen, or been put in an incorrect location

Examples of diminished *gathers* skill include:

- delays gathering related task objects into the same workspace
- gathers objects one at a time
- delays wiping up task materials that spill
- delays regathering task objects that fall on the floor

Organizes — effectively arranges task objects in an orderly manner within a workspace or, when appropriate, across multiple workspaces, ensuring that the workspace is neither too spread out nor too crowded

Examples of diminished *organizes* skill include:

- has a workspace that is too crowded
- has related task objects spread out into two or more workspaces
- has difficulty spatially arranging clothing in order to put it on (e.g., not opening up shoes and lifting the tongue before attempting to put the foot into the shoe, not opening up or arranging a shirt before attempting to put the right arm into the right sleeve and the left

arm into the left sleeve, not arranging a shirt spread out on an ironing board before attempting to iron out the wrinkles)

- places or positions task objects incorrectly (e.g., place utensils on wrong side of plate when setting the table, putting the left sleeve of a shirt on the right arm)

Restores — effectively puts away task objects in their appropriate places and restores the workspace to its original condition

Examples of diminished *restores* skill include:

- does not completely clean up the workspace and put task objects away in their original storage places
- does not wipe up materials that have spilled or pick up task objects that have fallen on the floor
- does not close opened containers (e.g., glue bottle, bread bag)
- does not complete restoration as otherwise specified in the task descriptions

Note. Give a rating of **None** if the task description specifies that restoration is not required.

Navigates — effectively moves the arm, body, or wheelchair without bumping into obstacles while moving around in the task environment or interacting with task objects

Examples of diminished *navigates* skill include:

- bumps one's body or hand into task objects
- bumps one's body into furniture or other potential obstacles (e.g., bumps into wall, bumps into cupboard doors)
- bumps one task object into another (e.g., bumps a jar with a knife held in the hand)
- bumps the wheelchair into furniture or walls

Notices/Responds — effectively responds to (a) nonverbal task-related cues (e.g., heat, movement), (b) the spatial arrangement and alignment of task objects to one another, and (c) cupboard doors or drawers that have been left open during the task performance

Examples of diminished *notices/responds* skill include:

- delays to notice/respond to a door or drawer that has been left open
- delays to notice/respond to an appliance that is not working (e.g., iron not heating, vacuum not picking up debris from floor)
- delays to notice/respond to liquid that is dripping or spilling

- delays to notice/respond when (a) the numbers of a math operation are not neatly aligned in columns, (b) letters or words are spaced too close together of too far apart, or (c) edges of laundry are not neatly aligned when folding the laundry
- delays to notice/respond when coloring outside the lines of the shape on the page
- delays to notice/respond when scissors are not aligned with the paper or when not cutting along the lines of the shape on the page
- delays to notice/respond when putting on clothing incorrectly (e.g., left shoe on right foot, right arm in left sleeve, shirt inside out)

Adjusts — effectively resolves problems by (a) going to a new workspace; (b) moving task objects into or out of the current workspace; or (c) adjusting knobs, dials, switches, or water taps

Examples of diminished *adjusts* skill include:

- delays going to get task objects that were placed in a different workspace
- delays to move a walker out of the way in order to access a different workspace
- repeatedly or unnecessarily adjusts the flow of water from the tap, turns switches on or off, adjusts the volume on a radio, or adjusts the temperature of a burner on a stove
- delays plugging in or turning on electrical appliances
- delays unplugging or turning off electrical appliances
- delays locking or unlocking wheelchair brakes

Accommodates — effectively prevents observable problems with all other motor and process skills, and asks for assistance only when appropriate or needed

Examples of diminished *accommodates* skill include:

- demonstrates – and therefore does not prevent – any problems with other motor or process skills
- delays asking for needed help
- asks for help that is inappropriate or not needed

Note. If the person did not ask for help, then asking for help was not observed and should not be considered when rating *accommodates* skill. For all other motor or process skills rated as **Mild**, **Moderate**, or **Marked**, assume they were not prevented, and rate *accommodates* skill accordingly.

Benefits — effectively prevents observable problems with all other motor and process skills from recurring or persisting

Examples of diminished *benefits* skill include:

- repeats a task action or step unnecessarily (e.g., resweeps an area of the walkway that has already been swept free of debris) and that delays the task progression
- delays responding appropriately to a verbal cue
- demonstrates – and therefore does not prevent – persistence or recurrence of a problem with a motor or process skill

Social interaction skills – observable actions related to effectively communicating and interacting with others within the context of engaging in ecologically-relevant daily life task performances that involve social interaction; social interaction skill performance was mature, polite, respectful, timely, and socially appropriate

Social interaction skill rating examples

Approaches/Starts — effectively approaches or initiates interaction with the social partner, and in a manner that is socially appropriate

Examples of diminished *approaches/starts* skill include:

- uses socially inappropriate methods of catching the attention of the social partner
- initiates a social interaction without an initial greeting, when a greeting would have been appropriate
- responds to a social partner's initiation of the social interaction with an inappropriate response

Note. Give a rating of **None** if your observation started after the social partners initiated the social interaction.

Concludes/Disengages — effectively ends the conversation or social interaction, brings the topic of discussion to a close, and disengages or says goodbye

Examples of diminished *concludes/disengages* skill include:

- delays ending the social interaction by unnecessarily extending the conversation
- ends the social interaction in a manner that is somewhat abrupt
- ends the social interaction in a manner such that the social partner is unclear that the interaction has ended

Note. Give a rating of **None** if your observation ended before the social interaction ended.

Produces speech — effectively produces spoken, signed, or augmentative (i.e., computer-generated) messages that are audible and clearly articulated

Examples of diminished *produces speech* skill include:

- produces speech that is barely audible (e.g., whispering)

- produces speech that is not clearly articulated (e.g., mumbling, slurring of speech)
- produces poorly articulated signs
- spoken words are unintelligible and difficult to understand

Gesticulates — effectively uses socially appropriate gestures (e.g., smiling, nodding the head, pointing) to communicate or support a message

Examples of diminished *gesticulates* skill include:

- uses gestures that are not relevant to the social context
- uses gestures whose meaning, given the social context, remain unclear
- uses gestures that are exaggerated or delayed
- uses very few or no gestures
- uses socially inappropriate or impolite methods to gesture to a social partner

Speaks fluently — effectively speaks in a fluent and continuous manner, with an even pace, and without pauses or delays during the message being sent

Examples of diminished *speaks fluently* skill include:

- speaks in a hesitant manner (e.g., with pauses between or within words, stuttering)
- speaks in a manner that is "flat" or monotonous, without variation in pitch, tone, or rhythm
- speaks too fast or too slow
- speaks with an uneven tempo (sometimes fast, sometimes slow)
- says hardly anything, interfering with the ongoing social interaction

Turns toward — effectively orients or turns the body and the face toward the social partner, whether speaking or listening

Examples of diminished *turns toward* skill include:

- does not turn the body or face toward the social partner
- delays turning to face the social partner
- turns body away from social partner (e.g., has back toward social partner)

Looks — effectively makes eye contact with the social partner, whether speaking or listening

Examples of diminished *looks* skill include:

- looks down or away from social partner when interacting

- delays looking at the social partner
- maintains eye contact for a period of time that is too long
- looks predominantly at one social partner when several people are part of the social interaction

Places self — effectively positions oneself at an appropriate distance from the social partner during the social interaction

Examples of diminished *places self* skill include:

- places oneself (including hands or feet) too close to the social partner
- places oneself at a distance that is too far from the social partner
- delays to place oneself an appropriate distance from the social partner

Touches — effectively responds to and uses touch or bodily contact with the social partner in a manner that is socially appropriate

Examples of diminished *touches* skill include:

- repeatedly bumps, touches, or kicks the social partner
- hits the social partner (e.g., on the back or arm)
- avoids touching or being touched when it is socially relevant and expected (e.g., avoids shaking hands)
- touches the social partner to an extent or in a manner that is inappropriate for the context or relationship of people (e.g., hugging an unfamiliar social partner)

Regulates — effectively maintains socially appropriate behavior by (a) <u>not</u> exhibiting irrelevant, repetitive, or impulsive actions; and (b) by sustaining socially appropriate body postures

Examples of diminished *regulates* skill include:

- demonstrates irrelevant, repetitious actions (e.g., twisting or clapping hands, drumming fingers, chewing gum, tapping foot)
- bites nails, puts fingers in the mouth, or cracks knuckles
- positions oneself slumped down in the chair or half lying on the table
- produces repetitive <u>nonsense</u> verbalizations (e.g., noises such as “ta, ta, tu, ta”)
- uses swear words
- speaks with a loud or “explosive” voice
- repeatedly and unnecessarily readjusts one’s position

Questions — effectively requests relevant facts and information, and asks questions that support the intended purpose of the social interaction

Examples of diminished *questions* skill include:

- asks questions, when information is known or has just been clearly stated
- asks an irrelevant or unclear question
- asks for inappropriate personal information
- delays asking relevant questions as determined by the intended purpose (e.g., delays asking for information when the purpose is to gather information, delays asking the social partner's opinion when the purpose is to collaborate or make decisions together)

Note. When a person is **Sharing information with others**, they may not be expected to ask questions. However, in other types of social interactions, the person is expected to ask questions that align with the intended purpose of the interaction (e.g., asking questions that support teamwork when **Collaborating with others**).

Replies — effectively keeps conversation going by replying appropriately to suggestions, opinions, questions, and comments

Examples of diminished *replies* skill include:

- replies with a response that has too little or too much detail
- replies with a response that is irrelevant to the message received
- sends a message that is indirect, vague, or confusing
- does not reply to the social partner's suggestion, opinion, question, or comment

Discloses — effectively shares personal opinions or information about oneself or others in a respectful and socially appropriate manner, without oversharing about oneself and avoiding content that is negative, derogatory, shaming, or self-elevating

Examples of diminished *discloses* skill include:

- discloses somewhat inappropriate personal information about oneself or others
- expresses negative and/or belittling opinions about oneself or others
- expresses an elevated opinion of oneself (e.g., bragging)
- refers to another person in a way that is negative or derogatory (e.g., saying someone is stupid)

Expresses emotion — effectively displays affect and emotions in a socially appropriate manner

Examples of diminished *expresses emotion* skill include:

- smiles or giggles when nervous, uncertain, or without visible cause
- expresses emotion that does not match spoken message (e.g., smiling when talking about someone's grief)
- uses sarcasm or a tone of voice that does not match the message being sent
- demonstrates minimal emotion (e.g., flat affect)
- demonstrates emotion that is relevant but rather extreme

Disagrees — effectively expresses differences of opinion in a socially appropriate manner

Examples of diminished *disagrees* skill include:

- comments on the social partner's stated suggestions or opinions in a manner that is defensive or argumentative
- responds to the social partner's suggestions or opinions with sarcasm
- does not respond to the social partner's suggestion (e.g., "Shall we try this approach?")
- does not respond to the social partner's opinion (e.g., "I think that we should give him another chance")
- expresses a difference in opinion by whining

Thanks — effectively uses words and gestures to acknowledge receipt of services, gifts, or compliments in a socially and culturally appropriate manner

Examples of diminished *thanks* skill include:

- uses socially undesirable methods to express gratitude or thanks
- says, "Thank you" sarcastically
- does not say, "Thank you" when socially indicated

Transitions — effectively handles transitions in the conversation or changes the topic without disrupting the ongoing conversation

Examples of diminished *transitions* skill include:

- abruptly transitions to a new topic that is irrelevant to the ongoing conversation and intended purpose of the social interaction
- persists in discussing the same or an earlier topic after the conversation has transitioned to a new one

Times response — effectively replies to social messages without delay or hesitation and without interrupting the social partner

Examples of diminished *times response* skill include:

- interrupts the social partner by responding before the social partner has completed a message
- answers the social partner's question before the social partner has finished asking it
- delays responding to the social partner's message or request
- does not reply to a question or comment received from the social partner

Times duration — effectively speaks for a reasonable length of time given the complexity of the message sent

Examples of diminished *times duration* skill include:

- prolongs a message beyond that needed to communicate the desired information
- sends short, one- to two-word messages, when social context would expect longer messages
- does not complete a message, resulting in the message "hanging in the air"

Takes turns — effectively takes one's turn and gives the social partner the freedom to take his or her turn

Examples of diminished *takes turns* skill include:

- delays to take, or does not take, one's own turn
- takes turn before the social partner when it would be more socially appropriate to allow the other person to go first (e.g., entering a doorway, taking a seat, or serving food)
- dominates the social interaction
- lets oneself be dominated by the social partner
- asks several questions in rapid succession, without waiting for replies
- makes a suggestion and then continues the conversation without waiting for a reply
- does not respond to the social partner's comments or questions

Matches language — effectively uses a tone of voice, dialect, and level of language that is socially appropriate and matched to the social partner's abilities and level of understanding

Examples of diminished *matches language* skill include:

- uses childlike language, or phrases that are typical of a child or teenager, with an adult social partner
- sends messages that are too simple or too complex, given the social partner's age or level of understanding
- uses slang or jargon
- uses a highly pitched, childlike voice with an adult social partner
- whines when responding to the social partner

Note. Brief one- or two-word responses that lack detail are not the same as the simple, yet meaningful, messages an adult might use when speaking to a very young child.

Clarifies — effectively responds to gestures or verbal messages from the social partner signaling that the social partner does not comprehend or understand a message, and ensures that the social partner is "following" the conversation

Examples of diminished *clarifies* skill include:

- clarifies unnecessarily (e.g., clarifies a message that was clear and that the social partner acknowledged receiving)
- does not send a response when the social partner sends a message asking for clarification

Acknowledges/Encourages — effectively acknowledges receipt of messages, encourages the social partner to continue interaction, and encourages all social partners to participate in the social interaction

Examples of diminished *acknowledges/encourages* skill include:

- nods or smiles, even when messages are not being sent
- delays to send messages to encourage the social partner to participate in or to continue social interaction
- sends messages to one social partner, but does not send messages to another to encourage that social partner to also participate in the social interaction
- sends a message to the social partner that discourages that social partner from continuing the interaction (e.g., saying things like, "That's stupid" or "I don't want to talk to you")

Empathizes — effectively expresses a supportive attitude towards the social partner by agreeing with, empathizing with, or expressing understanding of the social partner's feelings and experiences

Examples of diminished *empathizes* skill include:

- does not send messages of support for the social partner's feelings and experiences when the implicit or explicit need for a message of support was clearly indicated
- delays sending messages of support for the social partner's feelings and experiences

Heeds — effectively uses goal-directed social interactions focused toward carrying out and completing the intended purpose of the social interaction

Examples of diminished *heeds* skill include:

- engages in a social interaction that has a different intended purpose than originally specified (e.g., engaging in some "small talk" during a problem-solving task; sometimes playing rather than collaboratively working on a project)
- engages in a social interaction with another person who is not part of the intended social interaction (e.g., interrupts social interaction to send a text message)
- asks questions or makes comments that are irrelevant to the intended social interaction
- transitions to a new topic that is irrelevant to the intended purpose of the social interaction, disrupting the intended purpose of the social interaction

Accommodates — effectively prevents ineffective or socially inappropriate social interaction

Examples of diminished *accommodates* skill include:

- asks for help that is inappropriate or not needed
- demonstrates – and therefore does not prevent – any problems with other social interaction skills

  Note. If the person didn't ask for help, then this behavior wasn't observed and shouldn't be considered when rating *accommodates* skill. For all other social interaction skills rated as **Mild**, **Moderate**, or **Marked**, assume they were not prevented, and rate *accommodates* skill accordingly.

Benefits — effectively prevents problems with ineffective or socially inappropriate social interaction from recurring or persisting

Examples of diminished *benefits* skill include:

- repeats words or sentences unnecessarily
- delays before responding appropriately to a verbal cue
- demonstrates – and therefore does not prevent – persistence or recurrence of a problem with other social interaction skills

Appendix 7.

Quality of Occupational Performance: ADL –

Rating Form

Quality of Occupational Performance: ADL – Rating Form

Client name:_____**Date:**_____

Occupational therapist:_____

Task performed:_____

Overall Quality of Performance Ratings Instructions: Check the rating that best matches the client's overall quality of performance.				
Effort	No increase____	Mild increase____	Moderate increase____	Marked increase____
Efficiency	Well organized and timely____	Mild problems____	Moderate problems____	Marked problems____
Safety	No risk____	Mild risk____	Moderate risk____	Marked risk/ Unsafe____
Frequency of assistance	No need____	Occasional____	Frequent____	Constant____

Motor and Process Skill Ratings

Instructions: Circle the rating that best matches the observed quality of performance. Also record the observed performance/rationale for each rating.

Rating (based on level of observed problems): **No** = none, **Mi** = mild, **Mo** = moderate, or **Ma** = marked

Motor skills – within the context of performing a chosen and ecologically-relevant task, observable task actions related to effectively moving self and tangible task objects; task actions are performed without extra effort or clumsiness

Skill name	Rating				Observed performance/rationale
Stabilizes	No	Mi	Mo	Ma	
Aligns	No	Mi	Mo	Ma	
Positions	No	Mi	Mo	Ma	
Reaches	No	Mi	Mo	Ma	
Bends	No	Mi	Mo	Ma	
Grips	No	Mi	Mo	Ma	
Manipulates	No	Mi	Mo	Ma	
Coordinates	No	Mi	Mo	Ma	
Moves	No	Mi	Mo	Ma	
Lifts	No	Mi	Mo	Ma	
Walks	No	Mi	Mo	Ma	
Transports	No	Mi	Mo	Ma	
Calibrates	No	Mi	Mo	Ma	
Flows	No	Mi	Mo	Ma	
Endures	No	Mi	Mo	Ma	
Paces	No	Mi	Mo	Ma	

Process skills – within the context of performing a chosen and ecologically-relevant task, observable task actions related to effectively (a) selecting, interacting with, and using tangible task objects; and (b) carrying out individual actions and steps in an efficient manner; task actions are well organized, timely, and without unnecessary steps, pauses, or spatial disorganization					
Paces	Paces is a motor skill and a process skill and is rated only once				
Attends	No	Mi	Mo	Ma	
Heeds	No	Mi	Mo	Ma	
Chooses	No	Mi	Mo	Ma	
Uses	No	Mi	Mo	Ma	
Handles	No	Mi	Mo	Ma	
Inquires	No	Mi	Mo	Ma	
Initiates	No	Mi	Mo	Ma	
Continues	No	Mi	Mo	Ma	
Sequences	No	Mi	Mo	Ma	
Terminates	No	Mi	Mo	Ma	
Searches/Locates	No	Mi	Mo	Ma	
Gathers	No	Mi	Mo	Ma	
Organizes	No	Mi	Mo	Ma	
Restores	No	Mi	Mo	Ma	
Navigates	No	Mi	Mo	Ma	
Notices/Responds	No	Mi	Mo	Ma	
Adjusts	No	Mi	Mo	Ma	
Accommodates	No	Mi	Mo	Ma	
Benefits	No	Mi	Mo	Ma	

QOP: ADL Rating Form - Page 3 of 3

Appendix 8.

Quality of Occupational Performance: Schoolwork – Rating Form

Quality of Occupational Performance: Schoolwork – Rating Form

Student name:_____**Date:**_____

Occupational therapist:_____

Schoolwork task performed:_____

Overall Quality of Schoolwork Performance Ratings Instructions: Check the rating that best matches the student's overall quality of schoolwork task performance.				
Effort	No increase____	Mild increase____	Moderate increase____	Marked increase____
Efficiency	Well organized and timely____	Mild problems____	Moderate problems____	Marked problems____
Safety	No risk____	Mild risk____	Moderate risk____	Marked risk/ Unsafe____
Frequency of assistance	No need____	Occasional____	Frequent____	Constant____

Motor and Process Skill Ratings

Instructions: Circle the rating that best matches the observed quality of schoolwork task performance. Also record the observed performance/rationale for each rating.

Rating (based on level of observed problems): **No** = none, **Mi** = mild, **Mo** = moderate, or **Ma** = marked

Motor skills – within the context of performing a chosen and ecologically-relevant task, observable task actions related to effectively moving self and tangible task objects; task actions are performed without extra effort or clumsiness

Skill name	Rating				Observed performance/rationale
Stabilizes	No	Mi	Mo	Ma	
Aligns	No	Mi	Mo	Ma	
Positions	No	Mi	Mo	Ma	
Reaches	No	Mi	Mo	Ma	
Bends	No	Mi	Mo	Ma	
Grips	No	Mi	Mo	Ma	
Manipulates	No	Mi	Mo	Ma	
Coordinates	No	Mi	Mo	Ma	
Moves	No	Mi	Mo	Ma	
Lifts	No	Mi	Mo	Ma	
Walks	No	Mi	Mo	Ma	
Transports	No	Mi	Mo	Ma	
Calibrates	No	Mi	Mo	Ma	
Flows	No	Mi	Mo	Ma	
Endures	No	Mi	Mo	Ma	
Paces	No	Mi	Mo	Ma	

Process skills – within the context of performing a chosen and ecologically-relevant task, observable task actions related to effectively (a) selecting, interacting with, and using tangible task objects; and (b) carrying out individual actions and steps in an efficient manner; task actions are well organized, timely, and without unnecessary steps, pauses, or spatial disorganization					
Paces	Paces is a motor skill and a process skill and is rated only once				
Attends	No	Mi	Mo	Ma	
Heeds	No	Mi	Mo	Ma	
Chooses	No	Mi	Mo	Ma	
Uses	No	Mi	Mo	Ma	
Handles	No	Mi	Mo	Ma	
Inquires	No	Mi	Mo	Ma	
Initiates	No	Mi	Mo	Ma	
Continues	No	Mi	Mo	Ma	
Sequences	No	Mi	Mo	Ma	
Terminates	No	Mi	Mo	Ma	
Searches/Locates	No	Mi	Mo	Ma	
Gathers	No	Mi	Mo	Ma	
Organizes	No	Mi	Mo	Ma	
Restores	No	Mi	Mo	Ma	
Navigates	No	Mi	Mo	Ma	
Notices/Responds	No	Mi	Mo	Ma	
Adjusts	No	Mi	Mo	Ma	
Accommodates	No	Mi	Mo	Ma	
Benefits	No	Mi	Mo	Ma	

Appendix 9.

Quality of Occupational Performance: Social Interaction – Rating Form

Quality of Performance: Social Interaction – Rating Form

Client name:_____ **Date:**_____

Occupational therapist:_____

Social partner(s):_____

Social exchange observed:_____

Overall Quality of Social Interaction Rating Instructions: Check the rating that best matches the client's overall quality of social interaction.				
Social effectiveness	Effective, no disruption ____	Minor disruption ____	Moderate disruption ____	Substantial disruption ____

Social Interaction Skill Ratings

Instructions: Circle the rating that best matches the observed quality of social interaction. Also record the observed performance/rationale for each rating.

Rating (based on level of observed problems): **No** = none, **Mi** = mild, **Mo** = moderate, or **Ma** = marked

Social interaction skills – observable actions related to effectively communicating and interacting with others within the context of engaging in ecologically-relevant daily life task performances that involve social interaction; social interaction skill performance was mature, polite, respectful, timely, and socially appropriate

Skill name	Rating				Observed performance/rationale
Approaches/ Starts	No	Mi	Mo	Ma	
Concludes/ Disengages	No	Mi	Mo	Ma	
Produces speech	No	Mi	Mo	Ma	

Gesticulates	No	Mi	Mo	Ma	
Speaks fluently	No	Mi	Mo	Ma	
Turns toward	No	Mi	Mo	Ma	
Looks	No	Mi	Mo	Ma	
Places self	No	Mi	Mo	Ma	
Touches	No	Mi	Mo	Ma	
Regulates	No	Mi	Mo	Ma	
Questions	No	Mi	Mo	Ma	
Replies	No	Mi	Mo	Ma	
Discloses	No	Mi	Mo	Ma	
Expresses emotion	No	Mi	Mo	Ma	
Disagrees	No	Mi	Mo	Ma	
Thanks	No	Mi	Mo	Ma	
Transitions	No	Mi	Mo	Ma	
Times response	No	Mi	Mo	Ma	

Times duration	No	Mi	Mo	Ma	
Takes turns	No	Mi	Mo	Ma	
Matches language	No	Mi	Mo	Ma	
Clarifies	No	Mi	Mo	Ma	
Acknowledges/ Encourages	No	Mi	Mo	Ma	
Empathizes	No	Mi	Mo	Ma	
Heeds	No	Mi	Mo	Ma	
Accommodates	No	Mi	Mo	Ma	
Benefits	No	Mi	Mo	Ma	

Appendix 10. Quality of Occupational Performance (QOP) Scoring Programs – User Guide

⚠️ **Important**

*This Guide is for **PC users** and may vary somewhat for those using macOS systems*

What are the QOP Scoring Programs?

- **QOP: ADL Scoring Program** – used to obtain the Quality of Occupational Performance: ADL – Results Report
- **QOP: Schoolwork Scoring Program** – used to obtain the Quality of Occupational Performance: Schoolwork – Results Report
- **QOP: Social Interaction Scoring Program** – used to obtain the Quality of Occupational Performance: Social Interaction Results Reports

  The occupational therapist enters the ratings for (a) two ADL task performances, (b) two schoolwork task performances, or (c) two social exchanges. The QOP programs calculate ***adjusted scaled scores*** automatically and they are included in the QOP reports.

What You Need

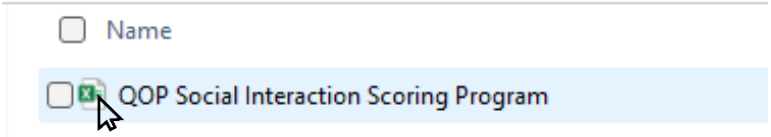
- **Excel 365 (preferred) or Excel 2021**
- Older versions of Excel and other spreadsheet programs (e.g., Google Sheets) do **not** support using the QOP scoring programs (e.g., QOP programs won't download to your computer, incorrect formatting of the printed reports, white fields that fail to automatically fill in)
- The QOP scoring programs do **not** work on phones or most tablets

---

Opening the Programs

- Download the QOP scoring programs to your computer
- Open Excel and then open a QOP scoring program or double click directly on the QOP scoring program
- Wait a moment – the program may take time to load

Double click on the Excel QOP Program



⚠️ **Important**

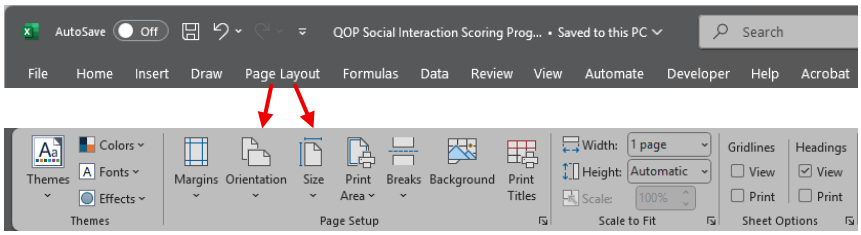
When you open the program, you will see **red** fields and strange texts (e.g. **#VALUE!, #NAME!, ####**) – don't be alarmed – they are normal if fields have not yet been filled.

Page Layout

Before you start using the QOP scoring programs, check the Page Layout settings:

ensure that the **Page Layout** is set as follows:

- **Orientation**: Landscape
- **Paper Size**: Letter or A4

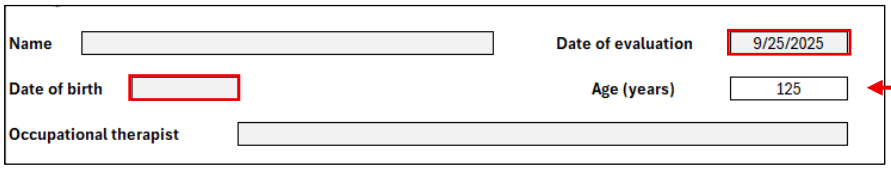


Filling Out the Score Form

- **Light gray**, **light blue**, and **red** – must be filled in
- **White** – filled automatically
- **Name** and **Occupational therapist** – enter free text
- **Date fields** – the **date format displayed will depend on your computer settings** (e.g., USA: MM/DD/YYYY, Europe/Asia: Date formats vary – DD/MM/YYYY, YYYY-MM-DD, and YYYY.MM.DD are most common); you must enter the date using the format in your computer settings

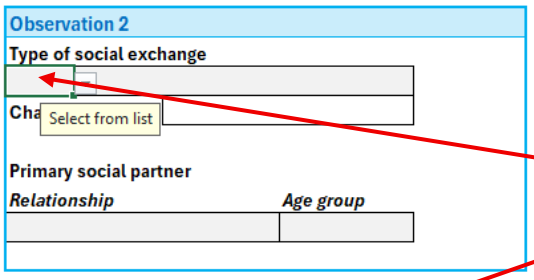
⚠ **Important**

When entering Date of evaluation, the cursor may jump to the end of the last page. Simply scroll back up to the top.



Fill in light grey fields. White fields will fill automatically

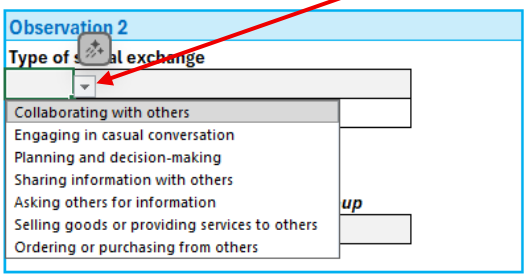
Age = An "odd" number (e.g., 125) will display until both date fields have been filled in



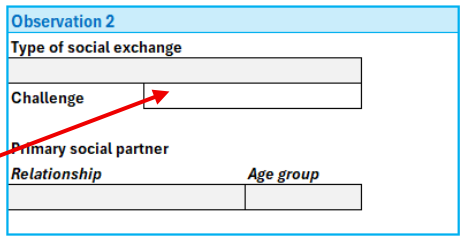
⚠ ***Important***

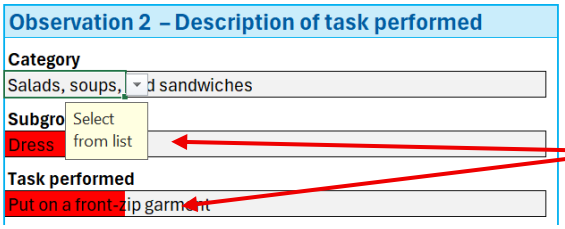
*Most of the **light grey**, **light blue**, and **red** fields are filled in using pull down menus*

- *Always click on the **left end** of the field*
- *When you see the down arrow, click on it*
- *A pulldown menu will appear*
- *Choose the correct option*



***White fields** will fill automatically*

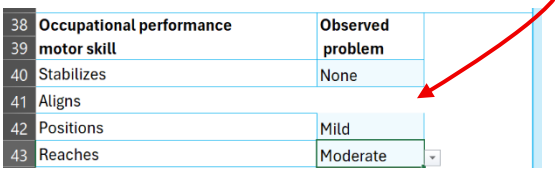




***Note**. Entering the Task performed for **QOP: ADL** requires that you enter three levels of data: Category, Subgroup, and Task performed. If you go back up and make a change in an upper level, the lower level(s) will turn red, indicating a mismatch between the upper and lower levels. Similarly, **QOP: Schoolwork** requires that you enter two levels of data and the same mismatch error will occur if you change the upper level.*

⚠️ ***BEWARE – NEVER USE CUT-PASTE FUNCTION!***

***DO NOT** attempt to **Cut** data (**Ctl+X or ⌘+X**) from one field and **Paste** (**Ctl+V or⌘ +V**) the data into another. If you do, the field will turn **white** and the pull-down list will be **deleted** from that field.*

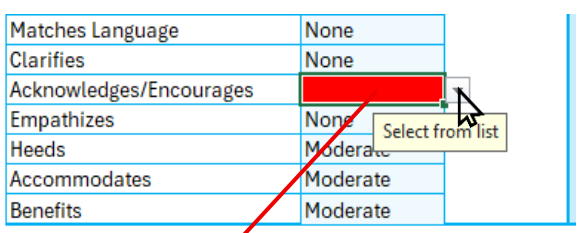


***Note**. A disruption of the program can occur if you use CUT-PASTE in any field that has a pull-down list*

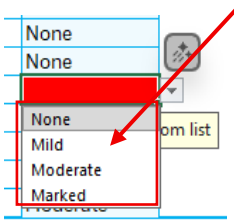
*If this happens, use **Undo** (**Ctl+Z or ⌘+Z**) until you have **restored** the empty field and the pull-down arrow ▾ reappears*

Entering Skill Ratings

- **Skill ratings** – may be **red** or **light blue**; all skills must be rated

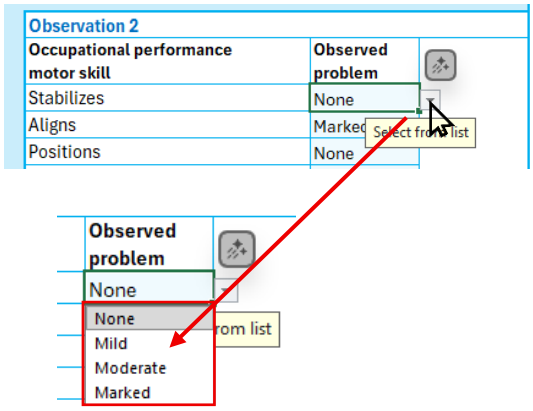


***Single click** on ▾ in empty **red** fields to see the pulldown rating list*



⚠️ ***Important***

- ***All skills must be rated***
- *Fields remain **red** if a skill rating is blank*
- *Use **None** if you observed **no problem***



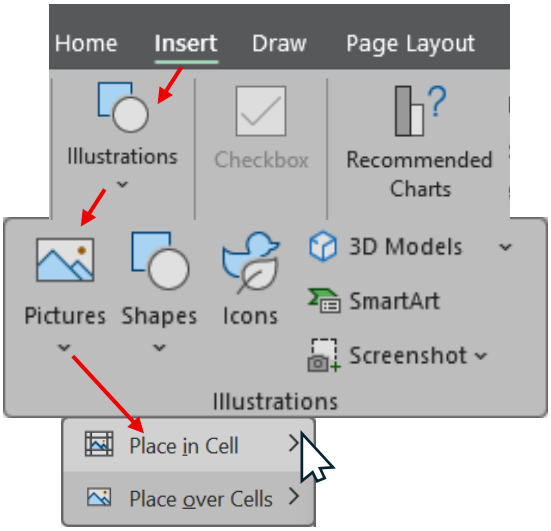
***Single click** on ▾ by **light blue** rating fields to use the pulldown list to change a rating*

Signing the Report

Choose one:

1. Paste in or Insert a signature image (.png or .jpg)
   - Click Insert → Illustrations → Pictures → Place in cell → This Device → File folder where image is stored → Click on image file name → Click Insert
   - To resize or reposition the signature image, click on the picture icon and adjust image as desired

     Note. The exact sequence will vary across computer systems



2. Type your name as text, using a font of your choice (e.g., Bradley Hand ITC)
3. Print and sign by hand

Signed digitally using text

Saving a Person's Data

- **Save as an Excel file** – save each completed report under a **unique file name (e.g., QOP: ADL Results Maria Gonzalez)**

Common Errors

- **If all skills have been rated: Invalid results –** your skill ratings exceeded the upper or lower limits of the scaled range

***Too low**: your ratings were too strict*

Results	
Adjusted score in scaled units* (Scale: 0–100)	
4	Invalid results: Skill ratings too low

***Too high**: your ratings were too lenient*

Results	
Adjusted score in scaled units* (Scale: 0–100)	
98	Invalid results: Skill ratings too high

Note. *The standardized z-score will also be reported as **INVALID.***

⚠️ ***Important*** *When an adjusted scaled score rounds to the upper limit (e.g., Social Interaction = 95) and a **red warning appears**, the calculated value exceeds the upper limit, indicating **your ratings are too high**.*

- **#NAME?, ####, or #VALUE!** – needed data is **incorrect** or **missing**
  - Date is **incorrect**

Name	Maria Gonzalez	**Date of evaluation**	8/26/2025
Date of birth	09/23/203	**Age (years)**	#VALUE!

***Incorrect** date format (**203** vs. **2023**) results in an error message*

  - Skill rating is **missing**

Results	
Adjusted score in scaled units* (Scale: 0–100)	
#VALUE!	####
Equivalent quality of social interaction*	
* The definitions of the key terms reported in the F	

Social interaction skill ratings	
Observation 1	
Social interaction skill	**Observed problem**
Approaches/Starts	None
Concludes/Disengages	None
Produces Speech	Mild
Gesticulates	Moderate
Speaks Fluently	Moderate
Turns Toward	Mild
Looks	
Places Self	Mild
Touches	Mild

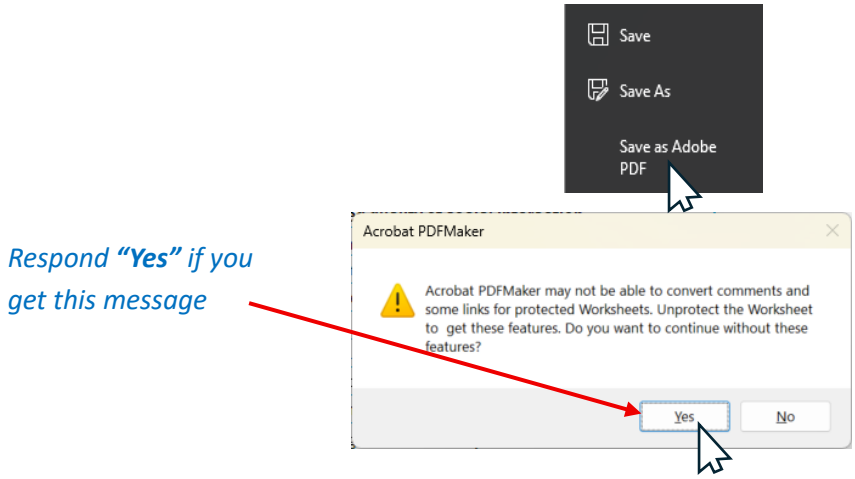
***Result**: error messages*

***Problem**: **missing** skill rating*

- **#NAME?** – caused by old Excel or language issues
- **White fields that should fill automatically are blank after all data has been entered** – caused by old Excel or language issues

Printing the Report

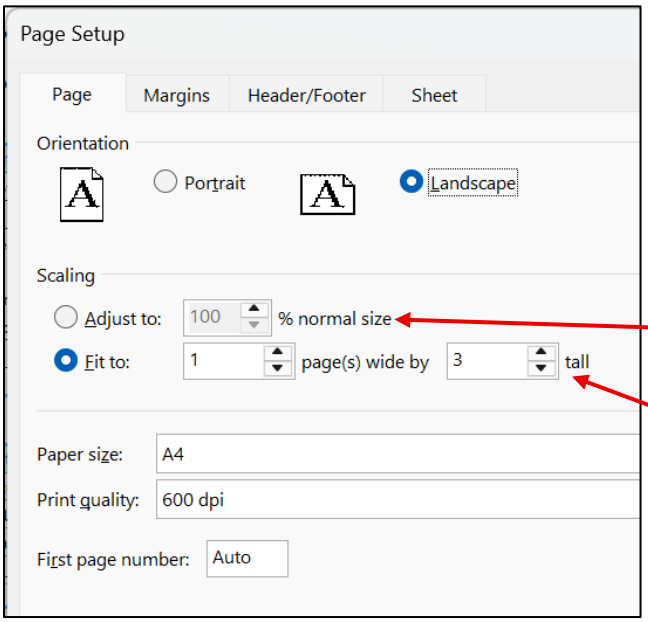
- **Save file a PDF** – use a **unique** name (can be the same as the Excel file **e**.g., QOP: ADL Results Maria Gonzalez)



⚠️ Important

Page breaks incorrect – In **Page Setup** window:

- **Scale the print size** to less than 100% (e.g., 85%) or
- Use **Fit to: 1 page wide x <u>4 pages</u> tall (**for QOP: ADL and QOP: Schoolwork)
- Use **Fit to: 1 page wide x <u>3 pages</u> tall** (for QOP: Social Interaction)



⚠️ *Important*

*Keep **each set** of skill ratings (Motor, Process, or Social Interaction) on **one page***

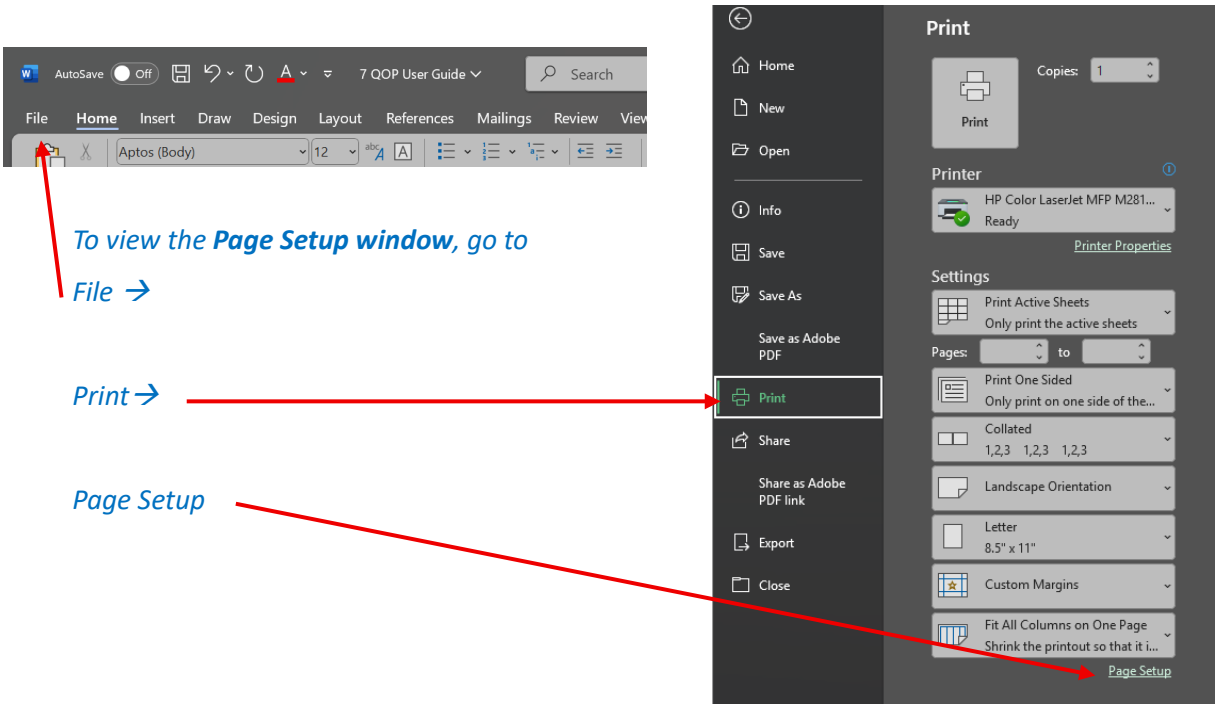
Two options for correcting page break problems on A4 paper:

a. ***Adjust to**: 85% from 100%*

OR

b. ***Fit to: 1 page wide** by **3 (or 4) tall** (option chosen here)*

Note. *To view **Page Setup** window, see directions of next page*


AutoSave
Off
7 QOP User Guide
Search
File
Home
Insert
Draw
Design
Layout
References
Mailings
Review
View
Aptos (Body)
12
To view the Page Setup window, go to
File →
Print →
Page Setup
Home
New
Open
Info
Save
Save As
Save as Adobe PDF
Print
Share
Share as Adobe PDF link
Export
Close
Print
Copies:
1
Print
Printer
HP Color LaserJet MFP M281...
Ready
Printer Properties
Settings
Print Active Sheets
Only print the active sheets
Pages:
to
Print One Sided
Only print on one side of the...
Collated
1,2,3 1,2,3 1,2,3
Landscape Orientation
Letter
8.5" x 11"
Custom Margins
Fit All Columns on One Page
Shrink the printout so that it i...
Page Setup

Appendix 11. Quality of Occupational Performance: ADL – Results Report – Interpretation Criteria

The interpretation of the results of the *Quality of Occupational Performance: ADL* is based on the extensive evidence supporting its predecessor, the *Assessment of Motor and Process Skills* (AMPS; Fisher & Jones, 2012, 2014; unpublished data, May, 2019).

The standardization sample of the AMPS included slightly more than 196,000 people between the ages of 2 and 103 years. The sample was comprised of people from (a) North America, (b) the United Kingdom and the Republic of Ireland, (c) the Nordic countries, (d) Australia and New Zealand, (e) Asia (Japan, Korea, Singapore, Hong Kong), (f) German-speaking parts of Central Europe, (g) other European countries (e.g., Netherlands, Belgium, Italy, Spain), (h) South America, and (i) the Middle East. Of this sample, 25,355 were typically-developing people without known or suspected diagnoses or disabilities. These data provided the basis for developing the age-related norms for the QOP: ADL.

Both the motor skill and process skill scales (which include both skills and tasks) were examined for gender bias. When analyzed using binary categories of male and female, no evidence of gender bias was found. Although this binary classification does not reflect the full range of gender identities, the evidence supports that the QOP: ADL can be used with confidence, without concern that a person's gender will influence the results.

Comparisons were also made across six world regions: North America; the United Kingdom and the Republic of Ireland; the Nordic countries; other European countries; Australia and New Zealand; and Asia. The results demonstrated that the motor skill and process skill scales are not influenced by world region. This indicates that as long as individuals perform familiar and culturally relevant ADL tasks, their QOP: ADL results are not affected by cultural factors. It is essential that the occupational therapist become familiar with how the ADL task is typically and acceptably performed before observing it, especially if it is a task the therapist has never performed or seen before. What matters is that the person performs the ADL task in a logical and effective way, consistent with cultural norms, not the way the therapist would do it.

Finally, the standard error (*SE*) of the ADL motor and ADL adjusted scaled scores is considered the most useful reliability index because it provides an estimation of the potential variation in a person's QOP: ADL adjusted scaled scores (Feldt & Brennan, 1989). The *SE* also can be used to determine if there is a significant difference between two sets of adjusted scaled scores (e.g., before and after intervention). More specifically, if two adjusted scaled scores differ by 2 *SE*, the two scores have a high probability of differing significantly ($p \leq .15$; Harvill, 1991). The ADL motor *SE* is 6 scaled units and the ADL process *SE* is 4.5 scaled units.

Criterion-referenced interpretation of the QOP: ADL	
ADL motor ability adjusted scaled score	**Interpretation expressed as the person's observed quality of performance for two ADL tasks**
90 and above	Invalid: performance skill ratings too high, resulting in an invalid adjusted score
84–89	ADL tasks are performed without extra effort or clumsiness; ADL task actions are performed with precision and smoothness, and with an absence of unintended errors (e.g., dropping items, spilling, bumping into objects, tripping)
77–83	ADL tasks possibly performed with extra effort or clumsiness
7–76	ADL tasks are performed with extra effort of clumsiness; increasingly likely to need assistance performing ADL tasks
6 and below	Invalid: performance skill ratings too low, resulting in an invalid adjusted score
ADL process ability adjusted scaled score	**Interpretation expressed as the person's observed quality of performance for two ADL tasks**
84 and above	Invalid: performance skill ratings too high, resulting in an invalid adjusted score
71–83	ADL tasks are preformed efficiently; ADL task actions are well organized, timely, without unnecessary steps, pauses, delays, or spatial-temporal disorganization
58–70	ADL task performance possibly inefficient; persons with ADL process ability adjusted scaled scores below 65 are increasingly likely to need assistance performing ADL tasks
8–57	ADL task performance is inefficient; very likely to need assistance performing ADL tasks
7 and below	Invalid: performance skill ratings too low, resulting in an invalid adjusted score

Evaluating change	Criteria
Observable change	**ADL motor and ADL process**: If the person is evaluated on two occasions, a change of 7 or more scaled units indicates an observable change has occurred
Significant change	**ADL motor**: If the person is evaluated on two occasions, a change of 12 or more scaled units (i.e., 2 or more *SE*) indicates that the change was significant ($p \leq .15$); the *SE* of the adjusted ADL motor ability scaled score is 6 scaled units **ADL process**: If the person is evaluated on two occasions, a change of 9 or more scaled units (i.e., 2 or more *SE*) indicates that the change was significant ($p \leq .15$); the *SE* of the adjusted ADL process ability scaled score is 4.5 scaled units

Norm-referenced interpretation

The standardized *z*-score shows how far a person's test result is above or below the mean (*M*, average) for typically-developing people of the same age, expressed in standard deviation (*SD*) units. A positive *z*-score (e.g., +1.0) means the person's adjusted score is above average, while a negative *z*-score (e.g., -1.0) means it is below average. The expected range is often defined as within ±1 *SD* of the *M* (about 68% of typically-developing people) or more broadly within ±2 *SD*s (about 95%), although criteria for age-appropriate performance may vary across settings.

The *M* and *SD* for typically-developing people (sometimes referred to as age norms) are shown in the table below.

Mean quality of ADL ability for people identified as typically-developing

Age (years)	ADL motor ability		ADL process ability	
	M (scaled units)	***SD (scaled units)***	***M (scaled units)***	***SD (scaled units)***
2	49	11	33	11
3	58	11	42	9
4	63	9	49	9
5	65	9	51	9
6	70	9	54	9

(continued)

Mean quality of ADL ability for people identified as typically-developing (continued)				
Age (years)	ADL motor ability		ADL process ability	
	M (scaled units)	*SD (scaled units)*	*M (scaled units)*	*SD (scaled units)*
7	72	9	58	9
8	72	9	61	9
9	77	9	63	9
10	77	9	63	9
11	79	9	65	9
12	83	9	67	9
13	83	9	70	9
14	85	9	70	9
15	85	9	72	9
16–17	88	9	74	9
18–24	88	9	77	9
25–29	88	9	79	9
30–49	89	9	79	9
50–59	88	9	79	9
60–64	86	9	77	9
65–69	85	9	77	9
70–74	81	9	74	9
75–79	79	9	72	9
80–84	77	9	72	9
85+	77	9	72	9

Appendix 12. Quality of Occupational Performance: Schoolwork – Results Report – Interpretation Criteria

The basis for interpreting of the results of the *Quality of Occupational Performance: Schoolwork* is derived from the evidence supporting its predecessor, the *School Version of the Assessment of Motor and Process Skills* (School AMPS; Fisher, Bryze, & Hume, 2002; Fisher, Bryze, Hume, & Griswold, 2005; Kaelin, van Hartingsveldt, Gantschnig, & Fisher, 2018; Munkholm, Berg, Löfgren, & Fisher, 2010; Munkholm & Fisher, 2008; Sperens, Munkholm, & Fisher, 2012; unpublished data, May, 2019).

A total of 10,681 students, ranging in age from 3 to 15 years, comprised the standardization sample. The students were from (a) North America, (b) the United Kingdom and the Republic of Ireland, (c) the Nordic countries, (d) German-speaking parts of Central Europe (Germany, Switzerland, Austria), (e) other European countries (e.g., Netherlands, Italy, Belgium), (f) Australia and New Zealand, and (g) Asia (Japan, Korea, Singapore). There were 2573 typically-developing students without known or suspected diagnoses or disabilities whose data provided the basis for developing the age-related norms for the QOP: Schoolwork.

When the motor skill and process skill scales (which include both performance skills and schoolwork tasks) were examined, there was no evidence of gender bias. These analyses were implemented using binary categories for boys and girls. Although this binary classification does not reflect the full range of gender identities, the evidence supports that the QOP: Schoolwork results can be applied with confidence, without concern that a student's gender identity has influenced the results.

Comparisons made among students from North America, United Kingdom, the Nordic countries, and Australia and New Zealand revealed that the motor skill and process skill scales likely are not influenced by world region. Additionally, the mean schoolwork motor and process scores of typically-developing children from Germann-speaking parts of Central Europe did not differ significantly from the age-normative means for the international standardization sample. These results indicate that if individuals perform familiar and culturally relevant schoolwork tasks, their QOP: Schoolwork results are likely not affected by cultural factors associated with world region.

Comparisons of the data for **six global groups** of students matched for age: (a) **Typically-developing**; (b) **At risk**: students who had not been identified as having a diagnosis or disability, but who had external factors (e.g., pre- or peri-natal, environmental) that placed them at risk, or who were experiencing learning or behavioral problems in their classrooms; (c) **Mild disabilities**: students with identified disorders of attention, specific learning disabilities not associated with intellectual disabilities, developmental coordination disorders, or sensory integrative disorders; (d) **Neurological disabilities <u>not</u> associated with intellectual disabilities**: students with spina bifida, cerebral palsy, muscular dystrophy, brain injuries or stroke, or other similar neurological disorders; (e) **Cognitive and psychological disorders**: students with intellectual disabilities, autism spectrum disorders, psychiatric disorders, or other similar cognitive or psychological disorders; and (f) **Other/multiple disorders**: students with musculoskeletal disorders, medical disorders, neurological disorders <u>combined with</u> intellectual

disabilities, severe developmental disorders, multiple disorders; or students whose status was unknown, revealed the following:

- Typically-developing students had significantly higher mean schoolwork motor and schoolwork process scores than did the students in any of the other five groups.
- The mean schoolwork motor and schoolwork process scores for students at risk and for those with mild disabilities did not differ significantly.
- The students with neurological disabilities or other/multiple disorders had significantly lower mean schoolwork motor scores than did the other four groups.
- The students with cognitive and psychological disorders and with other/multiple disorders had significantly lower mean schoolwork process scores than did the other four groups.

Finally, the standard error (*SE*) of the schoolwork motor and process adjusted scaled scores is considered the most useful reliability index because it provides an estimation of the potential variation in a student's scaled scores (Feldt & Brennan, 1989). The *SE* also can be used to determine if there is a significant difference between two sets of adjusted scaled scores (e.g., before and after intervention). More specifically, if two adjusted scaled scores differ by 2 *SE*, the two scores have a high probability of differing significantly ($p \leq .15$; Harvill, 1991). The schoolwork motor and the schoolwork process *SE*s are both 5 scaled units.

Evaluating change	Criteria
Observable change	**Schoolwork motor:** If the student is evaluated on two occasions, a change of 5 or more scaled units indicates an observable change has occurred **Schoolwork process**: If the student is evaluated on two occasions, a change of 7 or more scaled units indicates an observable change has occurred
Significant change	**Schoolwork motor and schoolwork process**: If the student is evaluated on two occasions, a change of 10 or more scaled units (i.e., 2 or more *SE*) indicates that the change was significant ($p \leq .15$); the *SE* of the adjusted schoolwork motor and the schoolwork process scaled scores are both 5 scaled units

Criterion-referenced interpretation of the QOP: Schoolwork	
Schoolwork ability adjusted scaled score	**Interpretation expressed as the student's observed quality of performance for two schoolwork tasks**
89 and above	Invalid: performance skill ratings too high, resulting in an invalid adjusted score
79–88	Schoolwork tasks are performed without extra effort or clumsiness; schoolwork task actions are performed with precision and smoothness, and with an absence of unintended errors (e.g., dropping items, spilling, bumping into objects, tripping)
66–78	Schoolwork tasks possibly performed with extra effort or clumsiness
10–65	Schoolwork tasks are performed with extra effort of clumsiness; increasingly likely to need assistance performing schoolwork tasks
9 and below	Invalid: performance skill ratings too low, resulting in an invalid adjusted score
Schoolwork process ability adjusted scaled score	**Interpretation expressed as the student's observed quality of performance for two schoolwork tasks**
83 and above	Invalid: performance skill ratings too high, resulting in an invalid adjusted score
79–82	Schoolwork tasks are preformed efficiently; schoolwork task actions are well organized, timely, without unnecessary steps, pauses, delays, or spatial-temporal disorganization
64–78	Schoolwork task performance possibly inefficient; may need occasional assistance performing schoolwork tasks
19–63	Schoolwork task performance is inefficient; increasingly likely to need assistance performing schoolwork tasks
18 and below	Invalid: performance skill ratings too low, resulting in an invalid adjusted score

Norm-referenced interpretation

The standardized *z*-score shows how far a student's test result is above or below the mean (*M*, average) for typically-developing students of the same age, expressed in standard deviation (*SD*) units. A positive *z*-score (e.g., +1.0) means the student's adjusted scaled score is above average, while a negative *z*-score (e.g., -1.0) means it is below average. The expected range is often defined as within ±1 *SD* of the *M* (about 68% of typically-developing students) or more broadly within ±2 *SD*s (about 95%), although criteria for age-appropriate performance may vary across settings.

The *M* and *SD* for typically-developing students (sometimes referred to as age norms) are shown in the table below.

Mean quality of schoolwork ability for students identified as typically-developing

Age (years)	Schoolwork motor ability		Schoolwork process ability	
	M (scaled units)	***SD (scaled units)***	***M (scaled units)***	***SD (scaled units)***
3	70	6	60	7
4	72	6	62	7
5	75	6	64	7
6	77	6	67	9
7	77	6	69	9
8	79	6	69	9
9	80	6	72	9
10–11	82	6	72	9
12–15	83	5	72	9

Appendix 13. Quality of Occupational Performance: Social Interaction – Results Report – Interpretation Criteria

The criteria for interpreting the *Quality of Occupational Performance: Social Interaction* are based on the strong research that supported its earlier version, the *Evaluation of Social Interaction* (ESI; Fisher & Griswold, 2018, unpublished data, May, 2019).

The ESI was standardized on a large sample of almost 15,000 people from 19 countries. Approximately 10,000 of these were individuals without known disabilities, ranging in age from 2 to 93 years. The sample included people from North America, the United Kingdom, Republic of Ireland, the Nordic countries, Australia, Japan, Korea, Singapore, German-speaking parts of Central Europe, the Netherlands, Belgium, and Italy.

When scoring the *Quality of Occupational Performance: Social Interaction*, the cultural norms of each country are taken into account. Data from 12 countries showed that the social interaction skills and their intended purposes can be applied without cross-cultural bias.

The social interaction skills and their intended purposes are also free of gender bias. In the original research, gender was recorded only in binary terms (male and female). While this does not represent the full diversity of gender identities, the evidence indicates that the social interaction skills and their intended purposes of the QOP: Social Interaction are not influenced by gender.

Finally, the standard error (*SE*) of the social interaction adjusted scaled score is considered the most useful reliability index because it provides an estimation of the potential variation in a person's QOP: Social Interaction results (Feldt & Brennan, 1989). The *SE* also can be used to determine if there is a significant difference between two sets of adjusted scaled scores (e.g., before and after intervention). More specifically, if two adjusted scaled scores differ by 2 *SE*, the two scores have a high probability of differing significantly ($p \leq .15$; Harvill, 1991). The QOP: Social Interaction *SE* is 4.5 scaled units.

Norm-referenced interpretation
The standardized *z*-score shows how far a person's test result is above or below the mean (*M*, average) for typically-developing people of the same age, expressed in standard deviation (*SD*) units. A positive *z*-score (e.g., +1.0) means the person's adjusted scaled score is above average, while a negative *z*-score (e.g., -1.0) means it is below average. The expected range is often defined as within ±1 *SD* of the *M* (about 68% of typically-developing people) or more broadly within ±2 *SD*s (about 95%), although criteria for age-appropriate performance may vary across settings. The *M* and *SD* for typically-developing people (sometimes referred to as age norms) are shown in the table below.

Mean quality of social interaction for people identified as typically-developing		
Age (years)	***M (scaled units)***	***SD (scaled units)***
2	16	10
3	31	10
4	41	10
5	46	10
6	51	10
7–8	56	10
9–10	60	10
11–13	65	10
14–15	70	8
16–18	73	8
19–20	78	8
21–29	80	8
30–39	83	8
40–69	80	8
70–79	73	8
80+	68	10

Criterion-referenced interpretation	
Adjusted scaled score	**Interpretation expressed as the person's observed quality of social interaction during two social exchanges**
89 and above	Invalid: performance skill ratings too high, resulting in an invalid adjusted score
80–88	Competent: mature, polite, and well-timed social interaction
73–79	Competent to occasionally questionable social interaction
65–72	Questionable to mildly ineffective or immature social interaction
53–64	Mildly to moderately ineffective or immature social interaction
36–52	Moderately to markedly ineffective or immature social interaction
11–35	Markedly ineffective or immature social interaction
10 and below	Invalid: performance skill ratings too low, resulting in an invalid adjusted score

Evaluating change	Criteria
Observable change	If the person is evaluated on two occasions, a change of 8 or more scaled units indicates that the change was observable
Significant change	If the person is evaluated on two occasions, a change of 9 or more scaled units (i.e., 2 or more *SE*) indicates that the change was significant ($p \leq .15$); the *SE* of the adjusted scaled score is 4.5 scaled units

Quality of Occupational Performance

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A suite of standardized performance analyses:

- Quality of Occupational Performance: ADL
- Quality of Occupational Performance: Social Interaction
- Quality of Occupational Performance: Schoolwork