

# Pediatric OT evaluation report outline

Independent report-writing fields; not AOTA’s occupational profile or a test. therapycrm.io

## 1. Evaluation question and chosen activities

|                                                                                                                        |                             |
|------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| Initial / re-evaluation                                                                                                | Prior report / plan version |
| Reason / clinical question                                                                                             |                             |
| Chosen activity / setting and child-caregiver priorities                                                               |                             |
| Strengths / preferences / accessible child input                                                                       |                             |
| Relevant intake / history reference and source dates                                                                   |                             |
| Access / communication / materials / environment                                                                       |                             |
| Original field wording and order. No AOTA form prompts, licensed assessment items or developmental checklist supplied. |                             |

2. OT observation and assessment evidence

OT-selected methods and approved source record references

Eligible unit / support codes / excluded and missing rule

Activity evidence

| Activity / method | Raw count / unit | Access / assistance | Source / limits |
|-------------------|------------------|---------------------|-----------------|
|                   |                  |                     |                 |
|                   |                  |                     |                 |
|                   |                  |                     |                 |
|                   |                  |                     |                 |
|                   |                  |                     |                 |
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Participation strengths / barriers / reported experience

Conditions changed from prior evidence; unassessed areas

Separate observed actions, reports and interpretation. A custom tally is not a standardized or diagnostic score.

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**3. OT reasoning and agreed next steps**

OT interpretation linked to evidence

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Uncertainty / additional evidence or assessment considered

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Discussion and child-caregiver questions / understanding

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Clinician-selected next action / owner / review date

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Sharing scope / current plan reference

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Author / credentials / signature / date under clinic process

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Sensory and work-sample observations do not supply a sensory diagnosis or treatment prescription. Clinician review is required before use.