



## Occupational Therapist (OT) and Physical Therapist (PT) Screening and Evaluation Procedures

1. The teacher of record (TOR) completes the occupational therapist (OT)/ physical therapist (PT) screening request form. The reason for referral section, in the screening request form, should include specific problems/delays the student is experiencing in the classroom.
2. The TOR will email the completed screening request form to the designated building OT/PT.
3. The OT/PT will perform a classroom observation and then compile the Occupational Therapist (OT) (doc 9.9) or Physical Therapist (PT) (doc 9.11) summary report. The report is to include written recommendations for the student. A copy of this report will be sent to the TOR and one copy placed in the student's confidential file.
4. If an OT/PT evaluation is not recommended, but classroom strategies are given, the active role of the therapist will end.
5. If the results of the screening determine the need for an OT/PT evaluation, the TOR will be responsible for obtaining parent permission to perform an evaluation. This is done by initiating a new case conference. If a PT evaluation is required the TOR will obtain the name of the student's physician and email this information to the designated building PT staff. The PT will request that the physician complete the physical therapy referral form (doc 9.17).
6. The TOR will notify the therapist once the signed parent permission form is returned. The therapist will then begin the evaluation process.
7. Once the therapy evaluation is complete, the therapist will contact the TOR to schedule a case conference.