AOTA ECHO Series on Occupational Therapy Interventions for Adults with Multiple Sclerosis

Welcome Packet Table of Contents

About Project ECHO®

[Project ECHO (Extension for Community Healthcare Outcomes)](link) began as an initiative from the University of New Mexico to bring up-to-date treatment information to health care practitioners and their patients in rural areas. This model began in 2003, and today it is being used for more than 3,000 programs around the world, addressing a wide variety of needs. The team for an ECHO program follows a hub-and-spoke structure. In this case, AOTA is the hub and provides event coordinators, facilitators, and speakers. The spokes are the participants who attend sessions, share their experience, and help spread knowledge to their community. The AOTA ECHO Series creates a network where occupational therapists, occupational therapy assistants, researchers, students, and academicians learn from each other, leading to better outcomes for clients.

Programs that collaborate with Project ECHO use the ECHO model™:
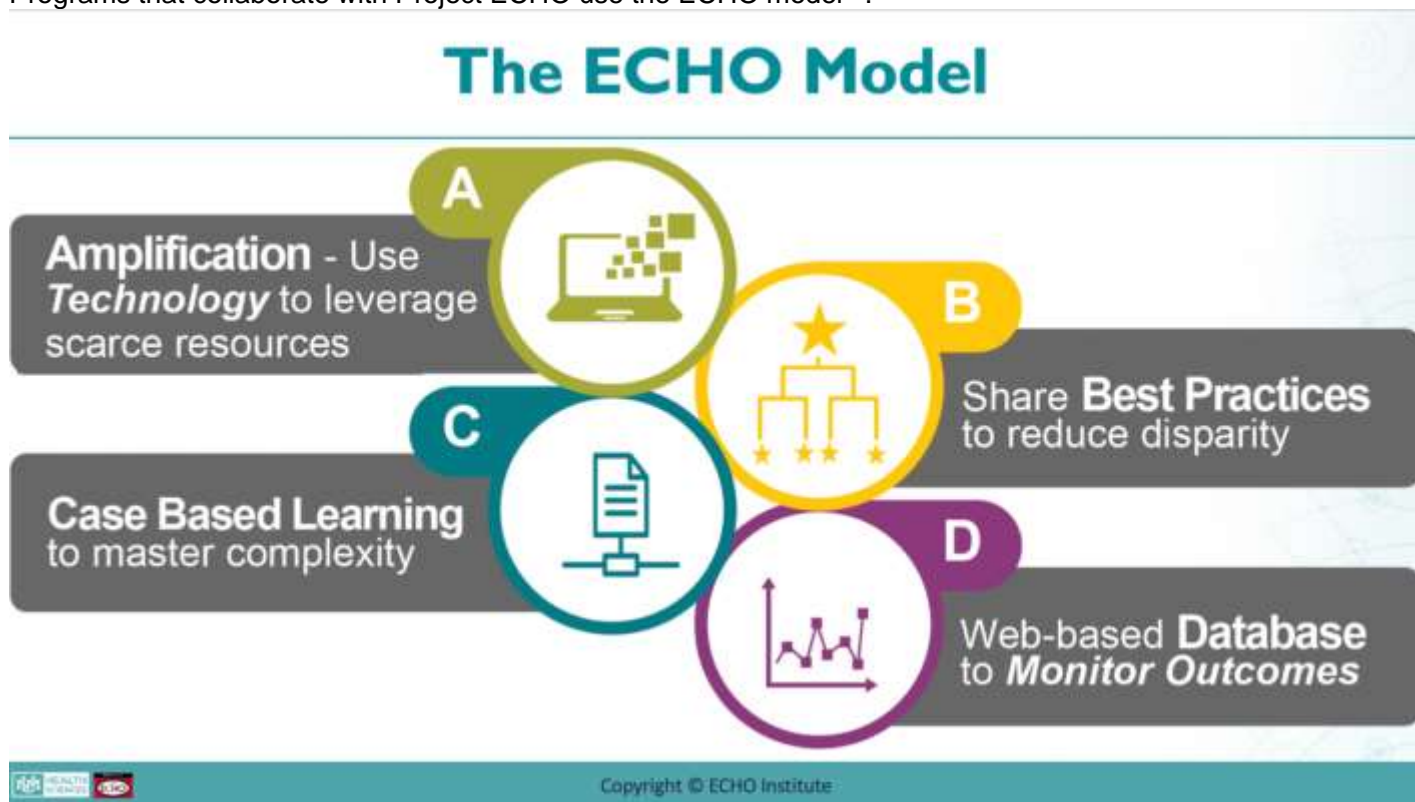
Graphic used with permission. Graphic is from CC101 Presentation (TeleECHO™ Coordination: Fundamentals of Coordinating and Executing a Successful TeleECHO Session)

ECHO programs help to spread knowledge by:
- Using technology to leverage scarce resources
- Sharing "best practices" to reduce disparities
- Using case-based learning to master complexity
- Monitoring outcomes using a web-based database*

These strategies are considered core principles of the ECHO model.

AOTA collects and shares administrative data related to AOTA ECHO Series sessions with Project ECHO. For more information, visit the [University of New Mexico's ECHO Website.](link)

About the AOTA ECHO Series on Multiple Sclerosis

This ECHO series on Occupational Therapy Interventions for Adults with Multiple Sclerosis (MS) is run through the American Occupational Therapy Association, meaning that sessions are coordinated and facilitated by AOTA staff. The goal of this project is to assist occupational therapy practitioners (i.e., occupational therapists and occupational therapy assistants) with using the findings from AOTA systematic reviews and Practice Guidelines to support and inform their interventions.

Multiple Sclerosis Practice Guidelines

The information in the AOTA ECHO Series on Multiple Sclerosis is guided by the *Occupational Therapy Practice Guidelines for Adults with Multiple Sclerosis.* These guidelines are intended to guide occupational therapy practitioners when working with adults with MS. The Practice Guidelines are informed by systematic reviews. The *Occupational Therapy Practice Guidelines for Adults with Multiple Sclerosis* were published in 2022 in the September/October issue of the *American Journal of Occupational Therapy* (Volume 76, Issue 5).

Schedule

Session	Date and Time	Topic	Presenter(s)
1	January 12, 2023 8:00 pm–9:30 pm ET	Overview of MS and Health Management as an Occupation	Rebecca Cunningham, OTD, OTR/L, MSCS Ashley Uyeshiro Simon, OTD, OTR/L, MSCS Caitlin Synovec, OTD, OTR/L, BCMH
2	January 19, 2023 8:00 pm–9:30 pm ET	Clinical Recommendations From AOTA's MS Practice Guidelines	Rebecca Cunningham, OTD, OTR/L, MSCS Ashley Uyeshiro Simon, OTD, OTR/L, MSCS
3	February 2, 2023 8:00 pm–9:30 pm ET	Ensuring Quality OT Services and Addressing Gaps in the Practice Guidelines	Ashley Uyeshiro Simon, OTD, OTR/L, MSCS Rebecca Cunningham, OTD, OTR/L, MSCS Kathy Zackowski, PhD, OTR
4	February 9, 2023 8:00 pm–9:30 pm ET	Approaches for Facilitating Change	Ashley Uyeshiro Simon, OTD, OTR/L, MSCS Rebecca Cunningham, OTD, OTR/L, MSCS
5	February 23, 2023 8:00 pm–9:30 pm ET	Collaborating With Clients With MS to Address Health Management Needs	Maureen Gecht-Silver OTD, MPH, OTR/L Rebecca Cunningham, OTD, OTR/L, MSCS Ashley Uyeshiro Simon, OTD, OTR/L, MSCS
6	March 2, 2023 8:00 pm–9:30 pm ET	Community-based Services and MS	Rebecca Cunningham, OTD, OTR/L, MSCS Ashley Uyeshiro Simon, OTD, OTR/L, MSCS Suzanne Carron, OTR/L, MSOT

Presenters

Suzanne Carron, OTR/L, MSOT
Director, Healthcare Engagement
Healthcare Access Division
National Multiple Sclerosis Society

Suzanne began her career at the National Multiple Sclerosis Society in 1999 developing and overseeing wellness, research, family, education, and therapeutic exercise programs for individuals affected by multiple sclerosis and developing and implementing professional education programs in collaboration with MS specialists. Currently, as Director–Healthcare Stakeholder Engagement at the National MS Society, she provides leadership to the Healthcare Stakeholder Engagement field team in developing and managing strategic healthcare provider relationships and partnerships with community health organizations and oversees special projects. She holds a Bachelor's degree in Business Management from Maryville University and a Master of Science Degree in Occupational Therapy from Washington University School of Medicine in St. Louis, MO.

Rebecca Cunningham, OTD, OTR/L, MSCS
Clinical Faculty Member at the Occupational Therapy Faculty Practice
USC Chan Division of Occupational Science and Occupational Therapy
Herman Ostrow School of Dentistry
University of Southern California

Dr. Rebecca Cunningham provides Lifestyle Redesign® OT services to individuals with multiple sclerosis, Parkinson's disease, epilepsy, Mast Cell Activation Syndrome (MCAS) and dysautonomia, and sleep disorders. She is a member of the USC MS multidisciplinary team, movement disorders multidisciplinary team, and MCAS working group. Rebecca holds the designation of certified MS specialist and has completed training for the delivery of Cognitive Behavioral Therapy for insomnia. She is a co-author of the AOTA MS Practice Guidelines.

4

Maureen Gecht-Silver, OTD, MPH, OTR/L
Assistant Professor of Clinical Family Medicine and Clinical Occupational Therapy and Associate Director of Medical Student Education—Retired
Retired Member, Department of Family and Community Medicine
University of Illinois at Chicago

Motivational Interviewing Network of Trainers (MINT)

Dr. Maureen Gecht-Silver recently retired as an Assistant Professor in Clinical Family Medicine and Occupational Therapy at the University of Illinois at Chicago (UIC). She has experience as the Associate Director of Medical Student Education and instructed in the Family Medicine Clerkship. As part of the UIC OT faculty practice, she was engaged in researching and applying a self-management approach to OT service delivery in primary care and specialty clinics. Related research interests include training health professionals in self-management, and motivational interviewing. Maureen has a longstanding interest in promoting self-management for people with chronic health conditions. She is a trainer for the Stanford Developed Chronic Disease, Pain, and Diabetes Self-management Programs (CDSMP, CPSMP, and DSMP). She is a member of the Motivational Interviewing Network of Trainers. She has more than 25 years of clinical experience as an occupational therapist in a variety of practice settings. In 2016, she completed a doctorate in occupational therapy at UIC.

Ashley Uyeshiro Simon, OTD, OTR/L, MSCS
Associate Professor of Clinical Occupational Therapy
USC Chan Division of Occupational Science and Occupational Therapy
Herman Ostrow School of Dentistry
University of Southern California

Dr. Ashley Uyeshiro Simon teaches undergraduate occupational therapy courses that focus on lifestyle management, self-care, and well-being. Her clinical background is in Lifestyle Redesign®, primarily for chronic neurological conditions such as migraines, neuropathic pain, and multiple sclerosis. She collaborated with AOTA's Evidence-Based Practice Program on a systematic review and a practice guideline, among other publications. She is a co-author of the AOTA MS Practice Guidelines.

Caitlin Synovec, OTD, OTR/L, BCMH
Senior Program Manager
National Institute for Medical Respite Care at National Health Care for the Homeless Council
Former Occupational Therapist at Health Care for the Homeless

Dr. Caitlin Synovec, OTD, OTR/L is an occupational therapist with clinical experience working with adults experiencing homelessness to improve quality of life and engagement in their preferred communities. Her experience also includes program development for collaborative and interdisciplinary care; education and training for OT practitioners; and health care and direct service providers on the intersection of homelessness, poverty, and complex comorbidities and their impact on health for individuals and communities. She is a former member and Chairperson of the AOTA Commission on Practice and a co-author of the *Occupational Therapy Practice Framework: Domain & Process, 4th Edition*.

Kathy Zackowski, PhD, OTR
Associate Vice President, Research
National Multiple Sclerosis Society

Dr. Kathy Zackowski is the Associate Vice President for Research at the National MS Society in the U.S. She manages the Society's research portfolio on clinical and rehabilitation care. Prior to being at the Society, she was at Johns Hopkins School of Medicine as an Associate Professor where her laboratory focused on investigating mechanisms that underlie sensorimotor impairments and

disability resulting from damage to the central nervous system, and she worked as a clinician there providing occupational therapy to individuals with multiple sclerosis.

Structure of Sessions

Each session includes a didactic portion that will be presented by expert(s) on the topic. The second portion of each session will include a discussion of at least one case study, in a format like clinical rounds. The case studies provide participants with the opportunity to apply the information learned in the didactic portion, as well as hear from subject matter experts. Didactic portions of the Zoom sessions will be recorded and posted to CommunOT in the Practice Guidelines ECHO library for later viewing and asynchronous discussion by ECHO participants who are also AOTA members. If you are interested in joining AOTA, information about membership can be found at www.aota.org/membership.

Participant Benefits

Potential benefits for occupational therapy practitioners:

- Learn from practitioners, researchers, and academicians in the fields of multiple sclerosis and occupational therapy
- Enhance one's ability to support clients with MS and their care partners
- Increase the use of evidence in practice to provide higher quality care
- Improve one's ability to develop an occupational profile
- Gain greater understanding of occupational therapy's role with the occupation of health management for individuals with MS
- Learn strategies to promote practitioner-client collaboration
- Stay up to date on best practice for MS
- Join a network of occupational therapy practitioners who are interested in MS
- Receive input from experts and colleagues on challenging cases

Potential benefits for clients and communities:

- Reduced health disparities by improving access to occupational therapy services that are evidence-based and up-to-date
- Reduced travel time and wait time to receive appropriate care
- Improved holistic care for clients who have MS

Participation Details

Registration

Registration for this series closed on January 5, 2023. Participation is free of charge.

Using Zoom

All sessions will take place via Zoom Webinar. If you do not have Zoom installed on your computer, you may download it for free at https://zoom.us/download. To ensure sessions run smoothly, please follow the AOTA Event Code of Conduct.

Communications

Shortly after each session, participants will receive an email verifying their participation along with a link to a brief questionnaire. Responses to the questionnaire will be used to assess series outcomes and improve future sessions. **Please retain a copy of the email for your records and complete the questionnaire within 48 hours of receiving it**. Additional resources related to didactic topics and cases may be sent between sessions.

Posing Questions

You are encouraged to pose questions to the speakers. You may submit questions in advance using the **question/case submission form**. You may also submit questions during the session using the Zoom Q&A feature. Questions are encouraged!

Case Presentations

What to submit

Presentation and discussion of cases are a key component of the ECHO model; participants are encouraged to submit a de-identified case. Cases may follow a specific client or be an aggregate and contain details from multiple different clients. While this is an excellent opportunity to receive input on a more complex or challenging case, any case on an adult client with MS may be proposed.

Confidentiality

Client confidentiality must be maintained throughout the case presentation and discussion. **All cases must be de-identified and contain no HIPAA identifiers**. Any details that may identify a client should not be mentioned. For more information on HIPAA and what details are considered protected health information, see this webpage from HIPAA Journal.

Why submit a case?

- Receive expert input on challenging cases
- Practice applying strategies learned to your own caseload/population
- Provide learning opportunities for other participants, including the presenters

How to submit a case

If you are interested in submitting a case for discussion in a session, the first step is to **complete the question/case submission form**. This template, in the form of an online questionnaire, will be sent out along with the post-session questionnaire after each meeting. If your proposed case is selected to be presented at an upcoming ECHO session, you will be contacted by the coordinators. All cases in this ECHO series will be presented in the format of an *occupational profile*. After your proposed case is selected, AOTA staff will work with you to **create an occupational profile** for the case. During the session, you will be given approximately 10 minutes to introduce your case and pose questions to the group. The session facilitators will be responsible for leading the discussion, but case authors are welcome to contribute as well.

Unfortunately, due to the limited number of sessions in this series, not all proposed cases will be able to be presented for discussion.

About the Occupational Profile

The occupational profile is an evaluation tool that summarizes "a client's (person's, group's, or population's) occupational history and experiences, patterns of daily living, interests, values, needs, and relevant contexts" (AOTA, 2020, p. 21). This tool is used to gather and organize information from the client's perspective that is relevant to occupational therapy (Chisholmn & Boyt Schell, 2019). An example of the Occupational Profile Template created by AOTA is included below. Within each section of the template are guiding questions to gather relevant information. The page numbers within the template refer to the 4th edition of the Occupational Therapy Practice Framework: Domain and Process, which includes more details on using the occupational profile. Both Microsoft Word and PDF versions of the template can be found on the AOTA website.

AOTA Occupational Profile Template

"The occupational profile is a summary of a client's (person's, group's, or population's) occupational history and experiences, patterns of daily living, interests, values, needs, and relevant contexts" (AOTA, 2020, p. 21). The information is obtained from the client's perspective through both formal and informal interview techniques and conversation.

The information obtained through the occupational profile contributes to a client-focused approach in the evaluation, intervention planning, intervention implementation, and discharge planning stages. Each item below should be addressed to complete the occupational profile. Page numbers are provided to reference the description in the *Occupational Therapy Practice Framework: Domain and Process* (4th ed.; AOTA, 2020).

OCCUPATIONAL PROFILE			
Client Report	**Reason the client is seeking service and concerns related to engagement in occupations (p. 16)**	Why is the client seeking services, and what are the client's current concerns relative to engaging in occupations and in daily life activities? (This may include the client's general health status.)	
	Occupations in which the client is successful and barriers impacting success (p. 16)	In what occupations does the client feel successful, and what barriers are affecting their success in desired occupations?	
	Occupational history (p. 16)	What is the client's occupational history (i.e., life experiences)?	
	Personal interests and values (p. 16)	What are the client's values and interests?	
Contexts		What aspects of their contexts (environmental and personal factors) does the client see as supporting engagement in desired occupations, and what aspects are inhibiting engagement?	
	Environment (p. 36) (e.g., natural environment and human-made changes, products and technology, support and relationships, attitudes, services, systems and policies)	Supporting Engagement	Inhibiting Engagement
	Personal (p. 40) (e.g., age, sexual orientation, gender identity, race and ethnicity, cultural identification, social background, upbringing, psychological assets, education, lifestyle)	Supporting Engagement	Inhibiting Engagement

10

Performance Patterns	Performance patterns (p. 41) (e.g., habits, routines, roles, rituals)	What are the client's patterns of engagement in occupations, and how have they changed over time? What are the client's daily life roles? (Patterns can support or hinder occupational performance.)	
Client Factors		What client factors does the client see as supporting engagement in desired occupations, and what aspects are inhibiting engagement (e.g., pain, active symptoms)?	
	Values, beliefs, spirituality (p. 51)	Supporting Engagement	Inhibiting Engagement
	Body functions (p. 51) (e.g., mental, sensory, neuro-musculoskeletal and movement-related, cardiovascular functions)	Supporting Engagement	Inhibiting Engagement
	Body structures (p. 54) (e.g., structures of the nervous system, eyes and ears, related to movement)	Supporting Engagement	Inhibiting Engagement
Client Goals	Client's priorities and desired targeted outcomes (p. 65)	What are the client's priorities and desired targeted outcomes related to the items below?	
		Occupational Performance	
		Prevention	
		Health and Wellness	
		Quality of Life	
		Participation	
		Role Competence	
		Well-Being	
		Occupational Justice	

©2020 by the American Occupational Therapy Association.
For a complete description of each component and examples of each, refer to the *Occupational Therapy Practice Framework: Domain and Process* (4th ed.)

11

Practice Improvement Staff

Julie Malloy, OTD, MOT, OTR/L, PMP, CPHQ, FNAP
Vice President, Practice Improvement

Susan Cahill, PhD, OTR/L, FAOTA
Director, Evidence-based Practice

Hillary Richardson, MOT, OTR/L, DipACLM
Practice Manager, Knowledge Translation, Evidence-based Practice, & Practice Improvement

Shannon White, COTA/L, MA
Program Manager, Practice Improvement & Advanced Certification

Madison McCrorey, OTS
AOTA Level II Fieldwork Student
Available through March 2023

For question about the AOTA ECHO series, email ebp@aota.org.

References

American Occupational Therapy Association. (2020). Occupational therapy practice framework: Domain and process (4th ed.). *American Journal of Occupational Therapy, 74* (Suppl. 2), 7412410010. https://doi.org/10.5014/ajot.2020.74S2001

Chisholm, D., & Boyt Schell, B. A. (2019). Overview of the occupational therapy process and outcomes. In B. A. Boyt Schell & G. Gillen (Eds.), *Willard and Spackman's occupational therapy* (13th ed., pp. 352–368). Wolters Kluwer.

Cunningham, R., Uyeshiro Simon, A., & Preissner, K. (2022). Practice Guidelines—Occupational therapy practice guidelines for adults with multiple sclerosis. *American Journal of Occupational Therapy*, *76*, 7605397010. https://doi.org/10.5014/ajot.2022.050088

Resources

American Occupational Therapy Association. (2021). The Association—Improve your documentation and quality of care with AOTA's updated Occupational Profile Template. *American Journal of Occupational Therapy*, *75*, 7502420010. https://doi.org/10.5014/ajot.2021.752001

Arora, S., Kalishman, S., Dion, D., Thornton, K., Murata, G., Fassler, C., …Brown, J. (2012). Knowledge networks for treating complex diseases in remote, rural, and underserved communities. In A. McKee & M. Eraut (Eds.), *Learning trajectories, innovation and identity for professional development* (pp. 47–70). Springer.