



Swell Kids

Ready to Learn, Ready to Participate

A Preschool & Early Elementary OT Referral Guide
For Teachers, Caregivers & School Professionals

Building Skills To Ride The Waves Of Life



What does school-based OT support?

Occupational therapy helps children develop the skills they need to participate in the things that matter most—playing, learning, getting dressed, eating, making friends, and becoming more independent.

CLASSROOM ACTIVITIES

- Coloring
- Cutting
- Writing
- manipulating materials
- Completing tabletop tasks

LEARNING & EXECUTIVE FUNCTION

- Attention
- Following directions
- Planning
- Problem-solving
- Transitions

SELF-CARE ROUTINES

- Dressing
- Toileting
- Handwashing
- Feeding
- Managing belongings

MOTOR & COORDINATION

- Posture
- Balance
- Bilateral coordination
- Motor planning
- Playground participation

ATTENTION & REGULATION

- Participating in routines
- Managing transitions
- Maintaining attention
- Responding to sensory demands

PLAY & SOCIALIZATION

- Exploring materials
- Engaging in play
- Participating in groups
- Interacting with peers.

OT isn't just about skills-- it's about helping children participate and succeed in their everyday activities.

TEACHER OBSERVATION CHECKLIST

What Are You Noticing?

Child's Name: _____

Date: _____

Teacher / Observer: _____

Check the areas where concerns are consistently observed. A single difficulty does not necessarily indicate a need for OT.

FINE & VISUAL MOTOR

- ☐ Avoids or struggles with coloring, drawing, or pre-writing activities
- ☐ Has difficulty holding or controlling crayons, pencils, or markers
- ☐ Struggles to copy age-appropriate shapes, lines, or letters
- ☐ Has difficulty using scissors
- ☐ Struggles to manipulate small classroom materials, puzzles, or fasteners
- ☐ Has difficulty coordinating both hands during tasks
- ☐ Tires quickly during fine motor activities

POSTURE, MOTOR, & COORDINATION

- ☐ Frequently slides down, leans, or changes position during seated work
- ☐ Has difficulty maintaining a stable seated position
- ☐ Struggles with balance, climbing, jumping, or playground activities
- ☐ Has difficulty coordinating movements during songs, games, or PE
- ☐ Appears to have difficulty planning or learning new motor tasks
- ☐ Avoids movement activities that peers typically enjoy

Look for patterns—not perfection.

Consider how often the concern occurs, how much it affects participation, and whether classroom strategies have helped.

SENSORY PROCESSING & REGULATION

- ❑ Becomes overwhelmed by classroom noise, movement, or visual stimulation
- ❑ Has difficulty transitioning between activities
- ❑ Frequently seeks movement, crashing, touching, or other sensory input in ways that interfere with participation
- ❑ Avoids certain classroom textures, materials, or activities
- ❑ Has difficulty returning to a calm, ready-to-learn state
- ❑ Requires significantly more adult support than peers to participate in routines
- ❑ Has difficulty recognizing or responding to body cues

SELF-CARE & INDEPENDENCE

- ❑ Needs significant assistance with dressing or undressing
- ❑ Has difficulty managing buttons, zippers, shoes, or backpacks
- ❑ Struggles with handwashing or toileting routines
- ❑ Has difficulty using utensils or participating in mealtime routines
- ❑ Needs frequent adult assistance for age-expected classroom routines
- ❑ Has difficulty opening containers or managing personal belongings

CLASSROOM PARTICIPATION & EXECUTIVE FUNCTION

- ❑ Has difficulty following multi-step directions
- ❑ Struggles to begin or complete familiar tasks
- ❑ Has difficulty organizing materials
- ❑ Needs frequent reminders to remain engaged
- ❑ Has difficulty shifting between tasks or activities
- ❑ Struggles to participate in group or tabletop activities
- ❑ Has difficulty completing routines independently

WHEN TO REFER + NEXT STEPS

Consider initiating a referral conversation when:

- A concern is persistent across multiple observations
- A child has difficulty participating in age-appropriate classroom routines
- Challenges interfere with learning, play, self-care, or peer participation
- A child requires substantially more support than peers for everyday tasks
- Classroom strategies have been attempted, but concerns continue
- The child demonstrates difficulty across more than one functional area
- A family or caregiver expresses concerns about the child's participation or independence

1. OBSERVE

Document what you see using objective, specific language.

Instead of:

“Child has poor fine motor skills.”

Try:

“During a 10-minute coloring activity, the child required four prompts to maintain a functional grasp and stopped participating after approximately three minutes.”

2. IDENTIFY

Ask:

- Does this affect classroom participation?
- Does it limit independence?
- Does it interfere with learning or play?
- Is the child avoiding activities?
- How much adult support is needed?

4. COLLABORATE

Share observations with the appropriate school team and family. Follow your school's referral process and applicable special education procedures.

3. TRY CLASSROOM SUPPORTS

Examples may include:

- Visual schedules or first/then lang.
- Movement breaks
- Adapted writing tools or paper positioning
- Larger or easier-to-manipulate materials
- Extra time for transitions
- Demonstration and verbal/visual cues
- Seating or positioning adjustments
- Breaking tasks into smaller steps

REMINDER

OT referrals are about access and participation—not about labeling a child.

Occupational therapy evaluation may help identify strengths, barriers, and strategies that support a child's ability to participate in meaningful school routines.

Follow your school's established referral process. School-based OT eligibility and services are determined through the appropriate educational evaluation process.



Confident. Capable. Connected.

Pediatric Occupational Therapy for Growing Kids

At SoCal Kids Therapy, we believe therapy should feel like play—and should make a meaningful difference in everyday life.

WE CAN HELP WITH:

- Fine motor & visual motor skills
- Self care & independence
- Sensory processing
- Emotional regulation
- Picky eating and feeding challenges
- Play skills
- Motor coordination
- School readiness

SERVING FAMILIES LOCATED IN:

- Ladera Ranch
- Rancho Mission Viejo
- Coto De Caza
- San Juan Capistrano
- Mission Viejo
- Laguna Niguel
- Dana Point
- San Clemente

WONDERING IF OT CAN HELP?

Schedule a free 15-min parent consultation!

**SCAN TO LEARN
MORE!**

