

# **The Cognitive Orientation to Daily Occupational Performance (CO-OP) Approach Toolkit**

# The CO-OP Approach Toolkit: Instructions for Clinicians

This package includes:

1. CO-OP Approach for Stroke Recovery: Patient and Family Handout
2. CO-OP Approach for Stroke Recovery: Aphasia-Friendly Handout
3. Goal-Plan-Do-Check Worksheet
4. Appendix: Tip Sheets

You can use the handouts and tools with patients and/or their family members to:

- Explain the CO-OP Approach.
- Teach them how to use Goal-Plan-Do-Check.
- Give them opportunities to practice Goal-Plan-Do-Check with you or on their own when working towards their goals.

Use the Tip Sheets in the Appendix to support your practice and documentation when using the CO-OP Approach

Note: This toolkit should be used by clinicians trained in the CO-OP Approach. For details about training opportunities visit: <https://www.tostroke.com>

# CO-OP Approach for Stroke Recovery

Your healthcare provider may use the Cognitive Orientation to Daily Occupational Performance or the “CO-OP Approach” to help you recover from your stroke.

## How is the CO-OP Approach different?

Your healthcare provider may ask you questions to get you thinking about the steps you take to work towards your goals. They may give you tips and ideas to guide you instead of doing things for you.

The CO-OP Approach helps you problem solve ways to learn new skills and reach your goals.

## How does it work?

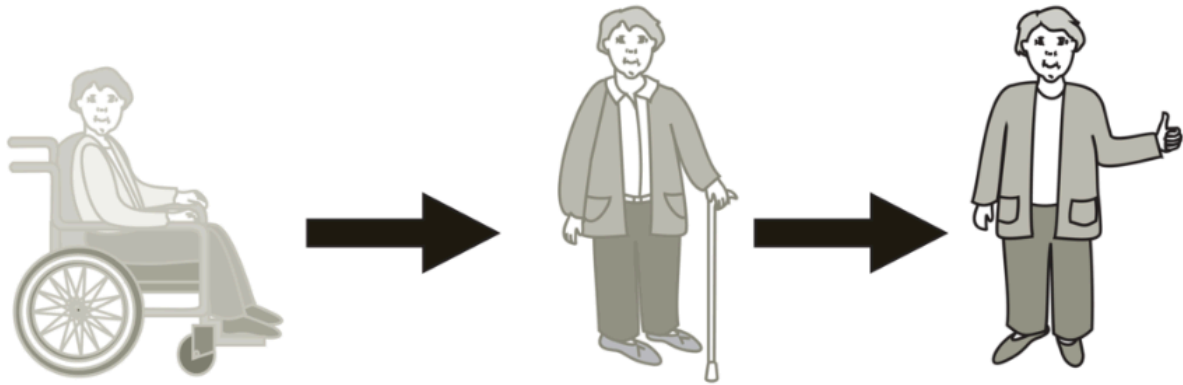
We will teach you these steps to help you work on your goals:

1. Goal - What do you want to do?
2. Plan - How do you achieve it?
3. Do - Complete your plan.
4. Check - Did you do your plan? Did it work?
5. If your plan didn't work, return to step 2 and try a new plan.
6. If you reached your goal, choose a new one.

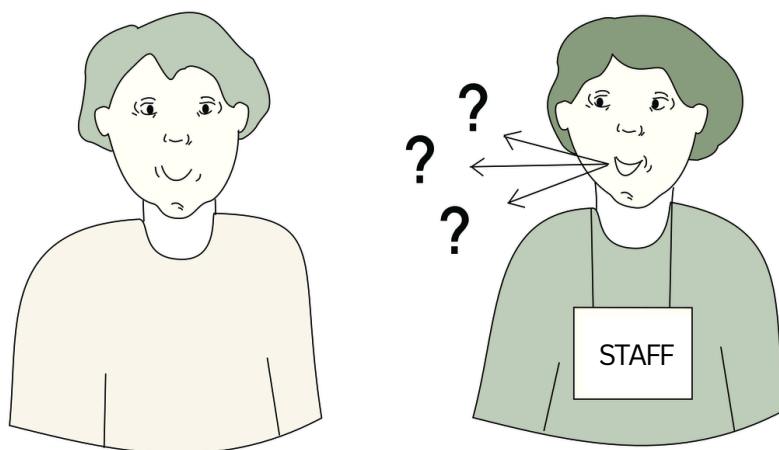
When you think and problem solve while learning new skills, you...

- ✓ learn better,
- ✓ learn faster, and
- ✓ use what you learn in other areas of your daily life.

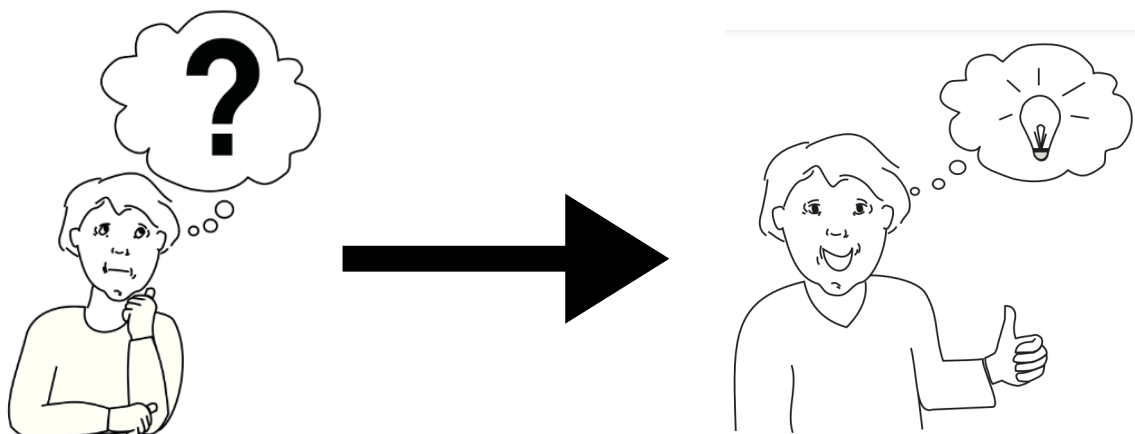
The CO-OP Approach can help you **reach your goals.**



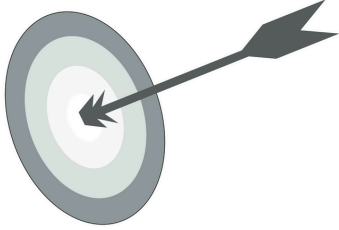
Your healthcare provider **asks you questions.**



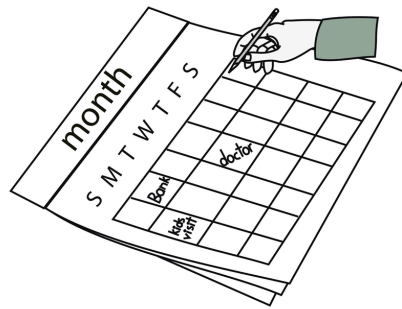
This helps you **problem solve** and **learn new skills.**



**Goal-Plan-Do-Check** can help you reach your goals:



1. Set a **Goal**



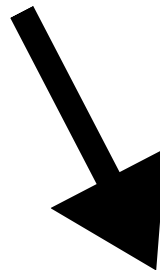
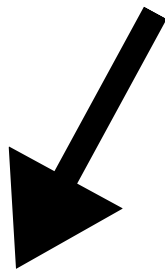
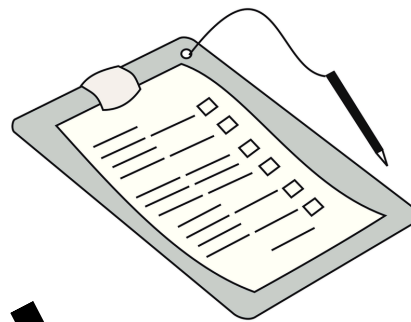
2. Make a **Plan**



3. **Do** your plan

4. **Check:**

Did you reach your goal?



**Yes**

Set a **new goal**.



**No**

Make a **new plan**.

• Your abilities may change after a stroke.

Goal-Plan-Do-Check (GPDC) is a problem-solving tool you can use to meet your goals.

When you use a problem-solving tool and come up with your own strategies to meet your goal, you are more likely to stick to the plan.

•

# Using Goal - Plan - Do - Check

## An example

### Goal

What do I want to do?

I want to be sure I have enough energy during the day to go to all of my appointments.

### Plan

How do I achieve it?

My plan is to:

- Eat breakfast
- Check my blood sugar levels
- Schedule breaks during my day

### Check

Did I do my plan? Did my plan work?

I followed my plan and was able to go to all of my appointments and do all the things I needed to do today.

### Do

Complete my plan

Today I:

- Ate my breakfast on time
- Tested my blood sugar
- Took 2 breaks during my day

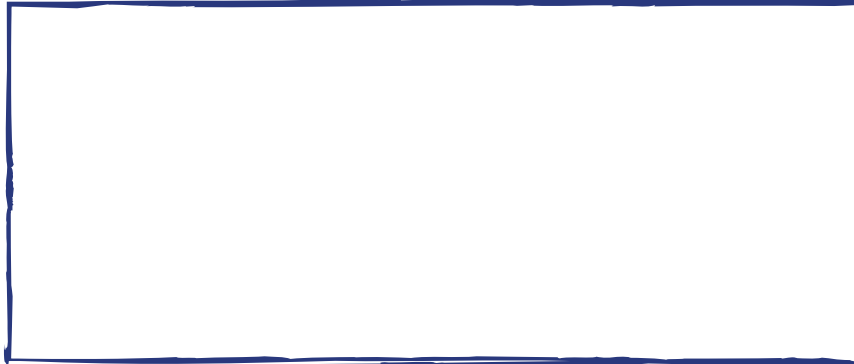
\*If you did not complete your plan, do your Plan.  
If your plan did not work, create a new Plan.

**When you achieve your goal, create a new one!**

Use this worksheet to help you achieve your goal!

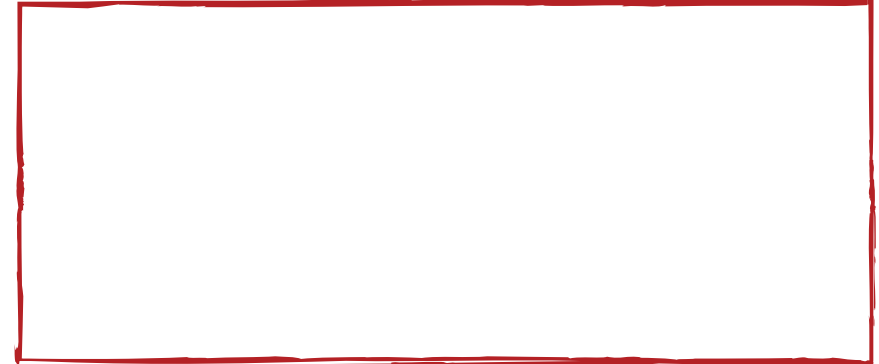
# Goal

What do I want to do?



# Plan

How do I achieve it?



# Check

Did I do my plan? Did my plan work?



# Do

Complete my plan



.....  
If you answered no,  
return to Plan\*

\*If you did not complete your plan, do your Plan.  
If your plan did not work, create a new Plan.

**When you achieve your goal, create a new one!**

# **CO-OP Toolkit: Appendix**

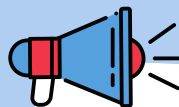


# The CO-OP Approach

## Guided Discovery Questions for Domain Specific Strategies

### BODY POSITION

- What are you noticing about how you are standing?
- What position should the head of your bed be at when you eat?
- Where should your feet be when you are preparing to stand?



### ATTENTION TO TASK

- Is it difficult to stay focused when you are...?
- What would help you focus more?
- Is there a way you could more easily see what you are doing?

### TASK SPECIFICATION/ MODIFICATION

- What are you doing with your (body part/tool)?
- How could you change or adjust your (body part/tool) to be more successful?
- How else could you hold the (tool)?



### FEELING THE MOVEMENT

- What does/should that feel like?
- Does that feel different than last time?
- Can you feel the food on the left side of your mouth?
- Are you gripping tightly or lightly? Can you try holding it with your (left/right/unaffected) side to see how it feels?



### VERBAL MOTOR MNEMONIC

- What does this movement remind you of?
- What would you call that strategy/movement?



### IMAGERY

- Would it help to close your eyes and imagine yourself (performing the task)?
- What would it look like? What would it feel like?



### DISTRACTION

- It may help the smoothness of your movements if you think about something else while you are (performing the task). Could you try counting backwards or reciting a poem or song?



### VERBAL ROTE SCRIPT

- What can you tell yourself to help you remember the steps? (e.g. left, right, left)



### RELAXATION

- Are you feeling anxious or nervous about trying this?
- Will being relaxed help you be more successful?
- What can you do to help you relax?
- If your hand is cramping when you write, what can you do to relax it?



### SUPPLEMENTING TASK KNOWLEDGE

- Would it be helpful to watch me do it first?
- There are tools that can help with (performing the task). Would you like me to show you?
- Is now a good time to talk about strategies for managing...?



### GENERAL QUESTIONS TO CHECK IN

- How do you think this is working?
- What did you do differently that time?
- What could you change for next time?



# THINGS TO INCLUDE WHEN DOCUMENTING USE OF THE CO-OP APPROACH™

- The patient's goals
- Baseline performance as identified by the patient (e.g. use COPM®)
- Dynamic Performance Analysis
- What **Strategies** were used and which were successful?

## Guided Discovery

- One thing at a time
- Ask, don't tell
- Coach, don't adjust
- Make it obvious

## Global Cognitive Strategy

- Was Goal-Plan-Do-Check taught?
- Did you use resources to support teaching?
- What was the outcome?

## Domain Specific Strategies

- |                      |                      |                |
|----------------------|----------------------|----------------|
| • Body Position      | • Supplementing      | • Verbal Motor |
| • Attention to Task  | Task Knowledge       | Mnemonic       |
| • Task Specification | • Feeling the        | • Imagery      |
| • Task Modification  | Movement             | • Relaxation   |
|                      | • Verbal Rote Script | • Distraction  |

- Plan/Next steps with patient

# SAMPLE DOCUMENTATION WHEN USING THE CO-OP APPROACH™



## **Patient Reported Goal and Baseline Performance**

COPM reviewed. Patient identified "brushing teeth" was of high importance, but indicated dissatisfaction with their performance of this activity. Patient rated performance at 6 and satisfaction at 4. Writer confirmed with patient that this was the goal they wanted to work on.



## **Dynamic Performance Analysis (DPA)**

Initial trial: Patient able to apply toothpaste to toothbrush independently. While brushing, the toothbrush slipped out of the patients hand three times. Patient was able to fill cup with water and bring to mouth to rinse.



## **Strategies Utilized**

Writer introduced Goal - Plan - Do - Check to the patient and provided a worksheet. Guided Discovery was used to support the patients ability to identify strategies to work towards their goal by bringing attention to the patient's body position ("What are you noticing about how you are holding the toothbrush?"). Patient was able to identify that they needed to hold the toothbrush tighter, however they noted that they had difficulty with this. With further prompting using Task Modification (How could you change or adjust your hand or the toothbrush to be more successful?), the patient was able to identify that if the toothbrush had a thicker handle they might be able to achieve their goal.



## **Plan/Next Steps**

Patient reported they would trial the plan of using a thicker handle with the Rehab Assistant during their session tomorrow. Writer to continue to work with patient using above strategies until goal achieved.

# CO-OP 5 Essential Elements

There are 5 Essential Elements for an intervention to be considered the CO-OP Approach.

- 1. Client-Centred Functional Goal Setting**
  - Client-centered
  - Collaborative
  - Addresses a specific task or performance of a skill
  - Administer COPM
- 2. Dynamic Performance Analysis**
  - Establish baseline performance (e.g. observe and score PQRS)
  - Performance problems are identified
  - Potential strategies to enable performance are identified
- 3. Cognitive Strategy Use**
  - Global Cognitive Strategy use (e.g. Goal-Plan-Do-Check) *and/or*
  - Domain-Specific Strategy use (e.g. body positioning, attention to task, etc.)
- 4. Guided Discovery**
  - Encourages independent problem solving
  - Coach, don't adjust
  - One thing at a time
  - Ask, don't tell
  - Make it obvious
- 5. Enabling Principles**
  - Make it Fun
  - Promote Learning
  - Work towards independence
  - Promote Generalization and Transfer

*Other available tip sheets:*

**Goal-Plan-Do-Check  
Worksheet**

**Things to Include when  
Documenting use of  
the CO-OP Approach**

**Guided Discovery  
Questions for Domain  
Specific Strategies**

# CO-OP Template Phrases

The CO-OP Approach occurs across multiple sessions and settings. Clear documentation of the CO-OP Approach is key to support continuity of care across the continuum.

Essential Element	Documentatation Template Phrases Use the following template phrases as a guide when documenting the use of the CO-OP Approach.
Client-Centred Functional Goal Setting	<ul style="list-style-type: none"><li>• Collaborative goal setting completed with patient during session.</li><li>• See [note/COPM] in chart from [date] for details.</li><li>• Patient chosen goal for the session: [list goal(s)].</li></ul>
Dynamic Performance Analysis	<ul style="list-style-type: none"><li>• Writer observed as follows during intiial trial of goal: [describe performance problems or performance breakdowns].</li><li>• Patient scored performance prior to recieving guidance. Baseline PQRS: [input score].</li></ul>
Cognitive Strategy Use: Global and Domain Specific	<ul style="list-style-type: none"><li>• [Global/domain specific] strategy used during intervention to address goal: [input strategy name and description of how it was used].</li><li>• Outlined cognitive strategy with [patient/caregiver/family member] present as follows: [describe strategy]. Used teach back to confirm comprehension. [Patient/caregive/family member] reported back with [description of cueing].</li><li>• Writer reviewed “Goal-Plan-Do-Check Worksheet” with patient. Patient completed worksheet with [description of cueing] as follows: [describe process of completing worksheet].</li><li>• Writer provided copy of “Goal-Plan-Do-Check Worksheet”. Patient agreeable to completing worksheet independently prior to next session.</li></ul>
Guided Discovery	<ul style="list-style-type: none"><li>• Used guided discovery, specifically [name principle of guided discovery], with patient while working towards goal as follows: [provide description or example of use in session].</li><li>• To work towards the patient’s goal, writer provided guiding questions: [List and describe integration of guiding questions in session].</li></ul>
Enabling Principles	<ul style="list-style-type: none"><li>• Used [name of enabling principle] with patient while working towards goal as follows: [provide description or example of use in session].</li><li>• Patient able to [generalize/transfer] [describe strategy used] to [describe task].</li></ul>



At the end of each session, review progress and and next steps with the patient. Ensure to document the plan, goals and all next steps. Include the use of CO-OP in all relevant referrals.