

# REVIEWING THE DEVELOPMENT OF THE SCREEN OF CANCER SURVIVORSHIP-OCCUPATIONAL THERAPY SERVICES (SOCS-OTS)



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# OBJECTIVES & DISCLOSURES

1. Analyze gaps in cancer care by identifying the limitations of current medical screens and the resulting underutilization of occupational therapy (OT) services.
2. Evaluate the developmental framework of the SOCS-OTS, including Delphi method, the integration of the Model of Occupational Participation for Cancer Survivorship (MOPCS), Prospective Surveillance Model (PSM), and the Occupational Therapy Practice Framework (OTPF).
3. Apply clinical interpretation guidelines for the SOCS-OTS to determine when a patient requires a referral for OT services based on the screening tool's scoring threshold.

**Katie Polo**, has no relevant financial relationship(s) with ineligible companies to disclose.

**Katie Polo**, has no non-financial conflicts of interest relevant to this activity.

**Katie Polo**, has copyrights to the Screen of Cancer Survivorship-Occupational Therapy Services (SOCS-OTS) as the developer.

# Participation & Performance Restrictions

70% of people living with and beyond cancer (PLWBC) experience short/long-term symptoms from cancer and its treatments, impacting daily functioning (Neo et al., 2017)

Reported disabilities related to occupational performance and participation throughout cancer care continuum (Polo et al., 2021)

Significant relationship between performance, participation, and engagement in daily activities and QOL (Hwang et al., 2015; Loh, 2020)

High observed ADL motor ability is associated with high QOL (Brekke et al., 2019)

# Underutilization of Occupational Therapy Services

Less than 20% of older breast cancer survivors utilize cancer rehabilitation services to address cancer-related disability (Brick et al., 2021)

Only 32% of older adults received OT services within the first 2 years (Pergolotti, 2014)

Concerns of great severity in occupational performance, only 29% received OT services (Polo, 2020)

# Current Screening Processes Fall Short

Distress or overarching screens monitor the medical symptoms of cancer (i.e fatigue, cognition, pain, CIPN, depression, anxiety etc.)

Patient Reported Outcome Measures (i.e. PROMIS, European Organization for Research and Treatment of Cancer (EORTC)) Monitor physical function and/or side effects

Are **NOT** comprehensive in understanding individuals' occupational performance issues and do **NOT** indicate a need for OT services in cancer care because they are outcome measures **NOT** screening tools

# Ideal Models to Screen for Need

An occupational participation perspective to cancer care is grossly lacking in many survivorship care models (Loh & Jonsson, 2016)

Model of Occupational Participation for Cancer Survivorship (MOPCS), an expansion of ICF that includes rebuilding, re-engaging, and empowering through occupational performance (Loh & Jonsson, 2016)

Prospective Surveillance Model (PSM) is a proactive approach to cancer care that prioritizes the early identification and treatment of physical and functional impairments (Stout 2016; Stout, 2023)

# Screen of Cancer Survivorship-Occupational Therapy Services (SOCS-OTS) (Polo et al., 2024)

- New Innovative Patient-Reported Screening Tool
- Content Validation by Delphi Study
- Purpose of Tool: To be used by patients and reviewed by the cancer care team to identify the need for occupational therapy services by the identification of occupational performance issues (performance and participation of all daily activities) in individuals living with and beyond cancer
- Developed using: MOPCS, PSM, & Occupational Therapy Practice Framework (OTPF)



# SOCS-OTS Development (Polo et al., 2024)

Classical Delphi method (5 Rounds with Deductive & Inductive Approach) to assess expert opinion consensus on items to include on SOCS-OTS

## Phase I, Deductive Approach

- Scoping Review of the Literature to ID occupational performance issues
- Categorizing relevant performance issues found in review by areas of occupation in the OTPF
- Item modification to reflect OTPF language and scope of OT practice
- The initial tool developed included 13 items for review by expert panelists

## Phase II, Inductive Approach

- Expert Inclusion: Rounds 1 & 2 were people living with and beyond cancer; Rounds 3-5 were OTP's with 5+ years experience in oncology, a 30% adult oncology caseload, or OT researchers with published oncology article(s)
- Items had to meet 80% consensus for inclusion in the next round of Qualtrics surveys and for the final tool

# SOCS-OTS

## 20-Items

- Check All that Apply Format
- 3 or more items checked indicate a need for OT Services
- 5 minutes or less to fill out

Final items indicating a need for OT services are categorized into the following domains:

- 1.) Basic activities for daily living
- 2.) Instrumental activities of daily living
- 3.) Health management
- 4.) Rest and sleep
- 5.) Work
- 6.) Leisure
- 7.) Social participation

# SOCS-OTS

Target Population: adult population (18+) with any cancer, throughout the cancer care continuum

Type: Patient-reported screening tool

Intended Use: It should be used alongside traditional survivorship care plans and distress screens to integrate missing occupational performance limitation reports into cancer care coordination

Consider using the SOCS-OTS with routine screening procedures, following a prospective surveillance model, throughout active cancer care and the entire survivorship continuum

Interpretation: 3 or more problems indicate a possible need for OT services\*\*

# SOCS-OTS: Current Studies

- Exploring the psychometric properties of the SOCS-OTS for use in the Physical Medicine and Rehabilitation (PM&R) clinic at UT MD Anderson Cancer Center (MDACC)
- Current: Working with an international partner for translation of the SOCS-OTS in Hebrew & Arabic languages

Instructions: Please check ALL items that you are having difficulties doing.

Activities of Daily Living (ADL)	
Bathe and/or shower	<input type="checkbox"/>
Engage in sexual activity and/or sexual expression (e.g., hugging, kissing, foreplay, masturbation, oral sex, intercourse)	<input type="checkbox"/>
Engage in activities to give and receive affection needed to successfully interact in close personal relationships (e.g., friends, family members, intimate partners)	<input type="checkbox"/>
Move self from one position or place to another (e.g., reaching, moving in bed, moving in a wheelchair, performing transfers, walking during tasks, and transporting items)	<input type="checkbox"/>
Toilet and toilet hygiene	<input type="checkbox"/>
Dress/undress (e.g., fasten and adjust clothing and shoes, remove personal devices/prosthetic devices/splints)	<input type="checkbox"/>
Personal hygiene and grooming (e.g., using a razor, applying cosmetics, combing or brushing hair, caring for nails, applying deodorant, brushing/flossing teeth, denture care)	<input type="checkbox"/>

Instrumental Activities of Daily Living (IADL)	
Provide care for others (e.g., childcare, caring for older parents, etc.)	<input type="checkbox"/>
Drive and move around the community (e.g., using public or private transportation)	<input type="checkbox"/>
Manage my finances (e.g., ability to perform planning and use of finance resources with goals, ability to perform my online banking etc.)	<input type="checkbox"/>
Clean my home	<input type="checkbox"/>
Plan, prepare, serve and/or clean up meals	<input type="checkbox"/>
Grocery shop (e.g., prepare grocery list, order online/go to store, bag groceries, unloading groceries, paying)	<input type="checkbox"/>

Continue to next page >

Instructions: Please check ALL items that you are having difficulties doing.

Health Management	
Maintain my desired exercise routine and physical fitness	<input type="checkbox"/>
Manage my medications (e.g. filling prescriptions at the pharmacy, understanding medication instruction, taking medications on a routine basis, refilling prescriptions in a timely manner)	<input type="checkbox"/>
Manage my health (e.g. communicate with healthcare providers, understand recommendations for care plan, manage symptoms and conditions, etc.)	<input type="checkbox"/>
Rest and Sleep	
Rest and sleep	<input type="checkbox"/>
Work	
Engage in desired work performance and/or return to work	<input type="checkbox"/>
Leisure	
Participate in leisure activities	<input type="checkbox"/>
Social Participation	
Socialize with my family and friends	<input type="checkbox"/>

Total Number of Problems Above:

\* If the total number of problems is  $\geq 3$ , talk further with your healthcare provider about considering if OT services are needed for you.

# QUESTIONS?

Please Contact Me—I LOVE Discussion!

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