



# Occupational Therapy Assessment Package (OTAP)

## *End-user Instructions and Software Tutorial*

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The Occupational Therapy Assessment Package (OTAP) enables occupational therapists to perform complex analyses of raw test scores in order to calculate linearized measures of a person’s ability to perform daily life tasks (e.g., activities of daily living, social tasks, and schoolwork tasks) and generate reports that summarize the person’s test results. The evaluation tools that are analyzed using the OTAP software include the Assessment of Motor and Process Skills (AMPS), the School Version of the AMPS (School AMPS), the Evaluation of Social Interaction (ESI).

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For more information about the OTAP software security features, see the [OTAP Software Client Right to Privacy and Management of Sensitive Personal Information](#) document found on the website for the Center for Innovative OT Solutions (CIOTS): [www.innovativeOTsolutions.com](http://www.innovativeOTsolutions.com).

## Installation

### **OTAP software system requirements**

- Java 7 or later
- A modern operating system
  - Windows 8 (desktop mode); Windows 7, Vista, or XP (SP3)
  - Windows Server 2012 or 2008
  - Mac OSX 10.7.3 or later
  - Ubuntu 10.04 or later, Linux 5.5+, Suse Linux Enterprise Server 10 SP2, 11.x
- A PDF reader, such as Adobe reader from [www.adobe.com](http://www.adobe.com), is required for viewing and printing reports
- OTAP software must be installed to a location where the user has permission to save data

### **Standard installation**

1. Install Java from <https://www.java.com>
2. Install OTAP software
  - Visit the CIOTS website, [www.innovativeOTsolutions.com](http://www.innovativeOTsolutions.com)
  - Click *OTAP Software / Install OTAP Software*
  - Follow on-screen *Installation Instructions*

### **Alternate installation**

(Java installation *not* required)

1. Browse to the **Alternate OTAP Install** webpage on the CIOTS website:  
<http://www.innovativeotsolutions.com/content/otap-software/alternate-otap-install/>
2. Follow on-screen *Installation Instructions*

## License Keys

### **Getting an OTAP software license key**

License keys are sent by e-mail when the occupational therapist either (a) participates in an AMPS, School AMPS, or ESI training course, or (b) purchases a new license key. Lost or forgotten license keys that have not expired may be retrieved from the CIOTS website:

1. Visit the CIOTS website, [www.innovativeOTsolutions.com](http://www.innovativeOTsolutions.com)
2. Log in to the CORE area of the website using your CORE username and password
  - Your CORE username and password are the ones you provided during your training course
  - Your CORE password and your OTAP software password are *not* the same
  - If you have lost or forgotten your CORE password, click *Forgot your password* to reset it
  - If you can no longer access the e-mail address provided when you participated in your training course, contact [info@innovativeOTsolutions.com](mailto:info@innovativeOTsolutions.com)
3. Click *Retrieve Software Codes*

### **Getting an OTAP software administrator license key**

Administrator license keys allow an IT administrator to install OTAP software, set the required time interval for password changes, set the database location, and print event logs. For details about what is included in an event log, see the *OTAP Software Client Right to Privacy and Management of Sensitive Personal Information* document found on the CIOTS website: [www.innovativeOTsolutions.com](http://www.innovativeOTsolutions.com). A free, administrator license key is available upon request from [info@innovativeOTsolutions.com](mailto:info@innovativeOTsolutions.com).

### ***Registering a license key and creating an OTAP software password***

1. Launch OTAP software
2. Click *File / Register*
3. Copy and paste your 25 character license key into the requested field. See steps 1–3 of the ***Getting an OTAP software license key*** section of this tutorial.
4. Click *Enter*
5. Enter your name
6. Create an OTAP software password. A password must include:
  - At least 8 characters
  - One lower-case letter
  - One upper-case (BLOCK) letter
  - One number
  - One of the following special characters:  
! @ # \$ % ^ & ( ) \ / , . - \_ + = |
7. Click *Register*
8. **Optional:** Enter your professional credentials and/or title such as OTR/L; B.App Sc(OT); Ph.D., FCAOT, OTReg(Ont.); etc. Your name and credentials/title (if any) will appear on clinical reports generated by OTAP software
9. Click *Enter*

***Keep your password and your license key confidential. Allowing others to use your OTAP software password or your license key is a serious violation of national and international client confidentiality laws.***

### ***Updating a license key or adding a new license key***

1. Log in to OTAP software
2. Click *File / Update License*
3. Copy and paste your new 25 character license key into the requested field
4. Click *Enter*

### **Logging in to OTAP Software**

1. Launch OTAP software
2. Click *File / Log in*
3. Select your Login Name from the drop-down menu of registered users  
**Note.** If your Login Name does not appear in the list, then you must register your license key. See the ***Registering a license key and creating an OTAP software password*** section of this tutorial.
4. Enter the password that you created when you registered your license key
5. Click *Log in*

### **Resetting an OTAP Software Password**

It is recommended that you reset your OTAP software password occasionally. If you have *not* forgotten your password, you may reset it after you log in:

1. Log in to OTAP software
2. Click *File / Reset password*
3. Enter your current password
4. Enter your new password two times
5. Click *Enter*

If you have forgotten your OTAP software password, you may reset it using a new, free license key.

1. Get a new license key from the CIOTS website  
**Note.** See steps 1-3 of the **Getting an OTAP software license key** section of this tutorial
2. Launch OTAP software
3. Click *File / Reset Password*
4. Select your Login Name from the drop-down menu of registered users
5. Enter your new password two times
6. Click *Enter*

## Changing Rater Information

1. Log into OTAP software
2. Click *Edit / Rater Information*
3. Edit your name, credentials, and/or title as you would like them to appear on reports
4. Click *Save*

## Preferences

### **Changing the date format**

5. Click *Edit / Preferences*
6. Click the *Date format* menu to change the way dates are entered into and displayed in the program
7. Click *Save*

### **Changing the people-sort preference**

1. Click *Edit / Preferences*
2. Click the *Sort people by* menu to change how the list of people in the main window are sorted
3. Click *Save*

### **Changing the language for reports**

Not all reports have been translated into all languages. If a report has not been translated into your preferred language it will be generated in English.

1. Click *Edit / Preferences*
2. Click the *Language for text in reports* menu to change how the language of reports
3. Click *Save*

### **Changing the required time interval for password changes**

1. Click *Edit / Preferences*
2. Enter a number from 1 to 999 in the *Reset password* preference to set the number of days before the program requires the user to change his or her password
3. Click *Save*

### **Changing the OTAP software database location**

The default location of the database is the location of the otap.jar file. The location of the database may be set to a new directory or the default directory. The database location affects all users. ***It is critical that all users have permission to save data to the directory of the OTAP software database.***

1. Click *Edit / Preferences*
2. Click *Browse*
3. Select the new location of the OTAP software database
4. Click *Select*

## Data Entry

### Entering course scores

1. Gather the Evaluation Worksheets from your recent training course
2. Click the *Course Scoring* menu
3. Select AMPS, School AMPS, or ESI
4. Click the person's name that matches the name on an Evaluation Worksheet
5. Enter course scores for this person
6. Click *Enter*
7. Repeat Steps 4–7 for each Evaluation Worksheet
8. Click *Save*

**Note.** See the training course handouts for details about completing rater calibration requirements. Course handouts are available from the CIOTS website, [www.innovativeOTsolutions.com](http://www.innovativeOTsolutions.com).

### Adding a new person

1. Click *Edit / Add New Person*
2. Enter the person's gender, birth date, and name\*
3. Check the box, *Informed consent has been obtained*†
4. Click *Save*

\* The option to enter the person's name is not available when using the program in anonymous mode. When using OTAP software in anonymous mode, be sure to retain the person's OTAP software ID number and keep it in a secure location according to the established procedures within your work setting (e.g., the security of such procedures which also apply to hard copies of test score forms).

† Checking the box, *Informed consent has been obtained*, indicates that you have obtained verbal or written permission from the person to share his or her anonymous evaluation data with the Center for Innovative OT Solutions (CIOTS). When you send your data to CIOTS for data analysis, the person you evaluated cannot be identified in any way. The box, *Informed consent has been obtained*, must be checked before any evaluation data for the person can be exported for rater calibration purposes.

### Adding evaluation data

1. Click *Edit / Add New Evaluation*
2. Select the *Diagnoses* tab and enter
  - Evaluation date
  - Diagnosis(es) at the time of evaluation
3. Select the *Tasks* tab and enter evaluation data for each task observed
4. Enter the *Global baseline statement* for the evaluation
5. Select the *Skills of Significance* tab (optional) and
  - Select skill item clusters of *relative strength* and/or *relative weakness*
  - Enter a specific baseline statement for each cluster
6. Click *Save*

**Note.** A complete evaluation is required (a) to generate a person's measures or reports, or (b) to export the person's data for rater calibration purposes. An evaluation is complete only when the following data have been entered:

- Evaluation date
- The person's diagnosis at the time of the evaluation

- Evaluation data for at least two calibrated tasks
- The person's functional level rating (AMPS only) or a classroom environment rating (School AMPS only)
- Global baseline statement

## Generating Reports

1. Select the person's evaluation date in the main program window
2. Click the *Reports* menu
3. Click the report type:
  - Report Supplement
  - Results Report \*†<sup>1</sup>
  - Progress Report \*+<sup>2</sup>
  - Raw Scores Report \*<sup>1</sup>
4. Enter the name of the person whose report you are generating (anonymous mode only)
5. Use the *Save report as...* window to browse to the location on your computer where you wish to save the report as a portable document file (PDF).

\* The evaluation must be complete to generate this report

† The user must have successfully completed the rater calibration process *and* updated his or her license key to generate this report. See the ***Updating a license key or adding a new license key*** section of this tutorial.

<sup>1</sup> This report may be printed for exactly one evaluation date only

<sup>2</sup> This report may be printed for exactly two evaluation dates only

### ***Generating a Progress Report when a different occupational therapist administered the other evaluation***

1. Select the evaluation date for the person whose report you wish to generate
2. Click *Reports / Progress Report*
3. Enter the name of the person whose report you are generating (anonymous mode only)
4. Enter the following information about the evaluation administered by the other occupational therapist:
  - Evaluation date
  - Measure(s)
  - Task names (at least two calibrated tasks are required)
5. Use the *Save report as...* window to browse to the location on your computer where you wish to save the report as a portable document file (PDF).

## Exporting data

### ***Exporting backup data***

1. Click *File / Export / OTAP software Backup*
2. Select a location to save your exported data file
3. Click *Export*
4. Click *Finish*

### ***Exporting calibration data***

1. Click *File / Export / Calibration Data*
2. Select AMPS, School AMPS, or ESI
3. Select a location to save your exported data file
4. Click *Export*
5. Click *Finish*

**Note.** Remember to submit your exported data file to CIOTS for data analysis. See your course handouts, available for download from [www.innovativeOTsolutions.com](http://www.innovativeOTsolutions.com), for details about completing the rater calibration requirements. If your data are incomplete in any way, the program will display a message with common problems. Check your data again to fix the error or add the missing data and export your data again.

### ***Exporting revalidation data***

1. Click *File / Export / Revalidation Data*
2. Select AMPS, School AMPS, or ESI
3. Select a location to save your exported data file
4. Click *Export*
5. Click *Finish*

### ***Exporting data for one person to a CSV file***

You may export your data to a comma separated value (CSV) file for import into an electronic patient record or statistical software package (e.g., Excel, SPSS).

1. Click to select a person in your OTAP software
2. Click *File / Export / Selected Person's Data*
3. Select AMPS, School AMPS, or ESI
4. Enter an identification number for this person (Person ID)
5. Click *Enter*
6. Select the date(s) of the evaluation(s) for export
7. Click *Select*
8. Select a location to save your exported data file
9. Click *Export*
10. Click *Finish*

**Note.** The Person ID you enter is *not* saved in the OTAP software. The Person ID may be an official identification number (e.g., the person's hospital- or government-issued identification number) or it may be created by you to assist with organizing your exported data.

### ***Exporting all data to a CSV file***

You may export all of the data you have entered into your OTAP software to a comma separated value (CSV) file for import into an electronic patient record or statistical software package (e.g., Excel, SPSS).

1. Click *File / Export / All Data to CSV File*
2. Select AMPS, School AMPS, or ESI
3. Select a location to save your exported data file
4. Click *Export*
5. Click *Finish*

## Importing data

### **Importing data that was exported from OTAP software**

1. Click *File / Import / OTAP Software Backup*
2. Browse to the location of your OTAP software backup file
3. Select (click to highlight) your OTAP software backup file (e.g., *OTAPsoftwareBackupData.zip*)
4. Click *Import*

### **Importing data that was exported from legacy software (e.g., AMPS 9, School AMPS 2005, ESI 2009)**

1. Create a backup of your data using the *Backup* function in your legacy software
2. Get a transfer key from the CIOTS website:
  - a) Visit [www.innovativeOTsolutions.com](http://www.innovativeOTsolutions.com)
  - b) Log in to the CORE area of our website
    - o Your CORE login username is your e-mail address that you provided during your course
    - o Your CORE login password is the one you created during your course
    - o Your CORE password is not the same as your OTAP software password. Lost or forgotten CORE passwords may be reset by clicking *Forgot your password* on the CORE login page.
    - o If you cannot access the e-mail address that you provided during your course, contact [info@innovativeOTsolutions.com](mailto:info@innovativeOTsolutions.com) for help changing your e-mail address in our records
  - c) Click *Retrieve Software Codes*
  - d) Copy your *transfer key* (to be used in Step 6)
3. Log in to your OTAP software
4. Click *File / Import / Old Software Backup*
5. Paste your *transfer key* into the requested field (from Step 2)
6. Click *Enter*
7. Browse to the directory containing your legacy software backup files
8. Click *Import*
9. Click *Finish*
10. Click *Print* to create a paper copy of imported data for your records

**Note.** Legacy software Client IDs are *not* imported into OTAP software. Further, person names are *not* imported when using anonymous mode. A list of names with new OTAP software ID numbers is presented in a new window that can be printed for the occupational therapist's records. Retain the list and keep it in a secure location according to the established procedures within your work setting (e.g., the security of such procedures which also apply to hard copies of test score forms).

**Note.** OTAP software collects and requires more information about a person and/or the evaluation than was collected in legacy software. A person's birth date, global baseline statement, and some diagnostic categories may need to be entered into OTAP software before measures or reports can be generated.

## Tips and Shortcuts

### **Using the keyboard**

Most windows in the OTAP software allow keyboard shortcuts

- Tab: Move to the next field for data entry, drop-down menu, or button
- Shift + Tab: Move to the previous field for data entry, drop-down menu, or button
- Space: Activate the drop-down menu or button
- Arrow keys: Navigate up or down among items in an activated drop-down menu
- Enter: Activate the default window button



**Right-click menus**

Use the right button on your mouse (right-click) to activate some pop-up menus

- Right-click a selected person to *Edit* or *Delete* the person's data
- Right-click a selected person to *Add a New Evaluation*
- Right-click a selected evaluation to *Edit* or *Delete* the evaluation data
- Right-click a selected evaluation to generate a report