

# School-Based Occupational Therapists' Roles Supporting Transitions Into and Throughout Kindergarten to Grade 12: A Scoping Review

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**Importance:** Large educational transitions occur when students enter and exit school or move between grades or divisions within the kindergarten to Grade 12 (K–12) school system. For students with disabilities, the quality of large educational transitions affects academic and postschool outcomes, which is germane to school-based occupational therapists.

**Objective:** To explore the school-based occupational therapy literature to describe the roles of occupational therapists in supporting large educational transitions and to identify relevant terminology.

**Data Sources:** We searched six databases (CINAHL, EMCare, Embase, ERIC, MEDLINE, and PsycINFO) for peer-reviewed publications in English with no date limitations.

**Study Selection and Data Collection:** We included articles focused on children and youth with disabilities and school-based occupational therapy services supporting large transitions within K to 12 education. Using directed content analysis, we reported on publication characteristics, occupational therapy roles, and terminology.

**Findings:** We included 46 publications spanning 37 yr that addressed transitions into school ( $n = 3$ ), within K to 12 grades or divisions ( $n = 10$ ), or to exit secondary education ( $n = 33$ ). Occupational therapists assumed many roles in supporting large transitions, some much more frequently than others; 125 transition terms were used across included articles with few terms explicitly defined.

**Conclusions and Relevance:** School-based occupational therapists' involvement in educational transitions is extensive, with potential for expansion. Consistency in terminology would support future research and practice.

**Plain-Language Summary:** A large educational transition occurs when students move between a school, grade, or division as part of their K to 12 education. For students with disabilities, the quality of a large educational transition affects their academic and postschool outcomes. This review provides an understanding of how school-based occupational therapists support educational transitions for youth with disabilities. The review found that occupational therapists took on many roles, with the potential for expanding their roles. The review also identified 125 transition terms that were used across the literature review and found that few terms were explicitly defined. Consistency in terminology would support future research and expanded occupational therapy practice in this area.

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Within education, students with disabilities navigate many transitions. Some transitions are “small” daily transitions, such as moving from one location in a school to another, switching between school subjects, or switching between activities within the school day. Other transitions are “large” and represent significant milestones in one’s educational journey, such as

entering and exiting school, moving from grade to grade, or moving between schools or school systems (Dockett et al., 2017; Ontario Ministry of Education, 2022). Although both types of transitions are important, large transitions are recognized for directly contributing to the future academic success, health, and well-being of students with disabilities (Council of

Ministers of Education, 2017; Gothberg et al., 2019; Jones et al., 2009).

School-based occupational therapists focus on enhancing students' participation and performance in their educational occupations, including academic, extracurricular, or prevocational and vocational activities (Cahill & Bazyk, 2020). Although they most certainly have a role in supporting students with large educational transitions, exactly what this looks like has yet to be synthesized or described comprehensively. School-based occupational therapy practice is guided by an education model in which the goals, services, and supports aim to improve educationally relevant outcomes and students' integration into the school environment (Cahill & Bazyk, 2020; Hanft & Shepherd, 2016). Given that the focus of services is on students' participation and performance in their educational occupations, an education-based framework for transition may help to elucidate these roles.

The Taxonomy for Transition Programming 2.0 (Taxonomy 2.0) framework is a tool that occupational therapy practitioners can use to guide the planning, evaluation, and research of transitions in education settings (Kohler et al., 2016). The Taxonomy 2.0 provides best practice strategies to support transitions in education across five practice categories:

- *Student-focused planning* is a continuous process centered on a student's visions, goals, and interests (Gothberg et al., 2017; Razak et al., 2022). In early grades, family visions, interests, and goals play a critical role in the planning process. As students age, they gain self-awareness, agency, and increased levels of participation in the planning process, specifically those related to individual educational plans (IEPs; Gothberg et al., 2019).
- *Student development* focuses on student skill acquisition and participation in school and work-based learning experiences (Kohler et al., 2016; Razak et al., 2022). This occurs through the assessment and development of students' academic, life, social, emotional, and employment skills and through the provision of student supports (Gothberg et al., 2017; Razak et al., 2022).
- *Interagency collaboration* recognizes the need for strong collaboration, including understanding roles and clear communication among all members of the education team that contribute to ensuring a student's success (Kohler et al., 2016).
- *Family engagement* acknowledges the diversity of families and their "firsthand knowledge of what works and does not work" (Gothberg et al., 2017, p. 175) for their child.
- *Program structures* center on program characteristics and evaluation, strategic planning, policies and procedures, and resource development and allocation (Gothberg et al., 2017; Kohler et al., 2016).

Not only is the Taxonomy 2.0 a tool to guide transition practices, but it also has been applied in research related to transitions (Brady et al., 2021; Cumming et al., 2020; Poirier et al., 2022; Williams-Diehm et al., 2018).

Use of the Taxonomy 2.0 framework as a tool can support education and rehabilitation professionals to identify how their unique skills can help facilitate student transitions. For example, occupational therapists have expertise in facilitating the skills needed to participate in school occupations and are expected, as a professional competency, to demonstrate skills in developing trusted relationships and goals with clients and in communicating through a variety of methods (American Occupational Therapy Association [AOTA], 2021; Association of Canadian Occupational Therapy Regulatory Organizations [ACOTRO] et al., 2021; National Board for Certification in Occupational Therapy [NBCOT], 2023). This competency aligns with practice strategies in student-focused planning and may contribute to the IEP and transition planning development (Kohler et al., 2016). In addition, occupational therapists are experts in building trusting collaborative relationships with others (ACOTRO et al., 2021; NBCOT, 2023). This involves competency areas in actively and respectfully participating in collaborative decision-making, sharing information about the occupational therapy role, fostering the exchange of information, and developing interprofessional skills (ACOTRO et al., 2021; AOTA, 2021; NBCOT, 2023). These competencies align with the category of interagency collaboration in the Taxonomy 2.0 and with the categories of program structures and family engagement.

The alignment between the Taxonomy 2.0 practice categories and occupational therapy competencies suggests that this framework could be useful for clarifying the role of school-based occupational therapists in large educational transitions. Therefore, in this study, we used this framework to help answer the following research question: How are the roles of school-based occupational therapists defined in the literature with respect to supporting transitions into and throughout kindergarten to Grade 12 (K–12) for children and youth with disabilities? To provide context for our findings, we also identified any definitions for the term *transition* as well as any terminology that included the word *transition*.

## Method

We conducted a scoping review following guidance from the Joanna Briggs Institute methodology for scoping reviews and the Preferred Reporting Items for Systematic reviews and Meta-Analyses extension for Scoping Reviews (PRISMA–ScR; Peters et al., 2020; Tricco et al., 2018). Consistent with recommended practice (Peters et al., 2020), we published a protocol a priori on Open Science Framework (<https://osf.io/3kcea>). In our protocol, we proposed

using the Canadian Model of Client-Centered Enablement (Townsend et al., 2007) to guide data extraction regarding occupational therapists' roles; however, we subsequently changed our framework to the Taxonomy 2.0 (Kohler et al., 2016) because it more closely aligned with best practice in transitions within education.

### Eligibility Criteria

Eligibility criteria were based on *population*, *concept*, and *context* (see Table A.1 in the Supplemental Material, available online with this article at <https://research.aota.org/ajot>). Our *population* was children and youth with disabilities. We defined *disability* broadly as any “impairments, activity limitations and participation restrictions, referring to the negative aspects of the interaction between an individual (with a health condition) and that individual's contextual factors (environmental and personal factors)” (World Health Organization, 2011, p. 4). Our *concept* was school-based occupational therapy roles and services supporting large transitions within the *context* of K to 12 education, including entry into school, grade to grade, elementary to secondary, and preparation for exit out of secondary school.

We included articles from peer-reviewed journals published in English. No date limits were set. We included qualitative, quantitative, and mixed-method studies, as well as nonempirical sources such as position and opinion papers.

### Search

In consultation with a health sciences librarian at McMaster University (Hamilton, Ontario, Canada), we conducted a three-step search strategy (Khalil et al., 2021; Pollock et al., 2021). The first step involved developing, testing, and refining the search strategy across two databases: CINAHL and ERIC. The second step involved adapting the search strategy by identifying database-specific keywords and index terms. We then ran the adapted search strategy across six databases (CINAHL, EMCare, Embase, ERIC, MEDLINE, and PsycINFO) in November 2021 and again in June 2023 (see Table A.2 in the Supplemental Material for an example). The third step involved the first author (Kari Renahan) hand searching the reference list of all included studies. Final search results were imported into the referencing software EndNote 20 (2020) for de-duplication and exported into Covidence systematic review management software (Veritas Health Innovation, 2019).

### Screening and Selection of Sources

Using Covidence (Veritas Health Innovation, 2019), the first author (Renahan) and one member from the review team (Chitrini Tandon, Annie Jiang, or Erin Knobl), screened all titles and abstracts to determine eligibility. Consistent with guidelines (Peters et al.,

2020), the review team conducted consensus and reliability exercises for the title and abstract screening and full-text review stages. At the title and abstract stage, the team reviewed the same 10 records in a training exercise followed by another 25 records to calibrate reliability. At the full-text stage, the team reviewed the same 10 records to establish consistency. We set percentage agreement at 80% and resolved disagreements at each stage through discussion and consensus during weekly meetings (Pollock et al., 2021).

### Data Extraction Process

The first author (Renahan) developed a data extraction chart based on the Joanna Briggs Institute Manual for Evidence and Synthesis (Peters et al., 2020). The chart captured study characteristics, roles of school-based occupational therapists supporting transitions, and transition terms and definitions (see Table A.3 in the Supplemental Material). Roles could be activities that were already being performed (i.e., actual roles) or those that were not yet being performed but could be in the future (i.e., potential roles). The development of categories for charting actual and potential roles was guided by the Taxonomy 2.0 framework (Kohler et al., 2016). Pilot testing of the data extraction form entailed three review team members (Jiang, Knobl, and Renahan) independently charting the data from the same two articles. Results were discussed and disagreements were resolved through consensus, with the data extraction chart revised iteratively (Pollock et al., 2023). Once pilot testing was completed, data extraction proceeded using Covidence (Veritas Health Innovation, 2019). One reviewer (Renahan) extracted data from each included article with another member (Jiang or Knobl) verifying the extractions. Disagreements were resolved through consensus.

### Data Analysis and Synthesis Process

We conducted a directed content analysis with a focus on manifest content to synthesize the roles of occupational therapists supporting transitions and definitions of key transition terms (Elo & Kyngäs, 2008). Our analysis process followed three phases: preparation, organization, and reporting (Elo & Kyngäs, 2008; Kleinheksel et al., 2020).

In the *preparation phase*, we made decisions regarding which data to extract. The research team reviewed *The Competencies for Occupational Therapists in Canada* (ACOTRO et al., 2021) to develop a common understanding of professional competencies. We defined *roles* as “a set of socially agreed-upon behavioural expectations, rights and responsibilities for a specific position or status in a group or in society . . . [that] may be further conceptualized and defined by individuals enacting these roles” (Boyd Schell et al., 2014, p. 1240). We extracted text if it met our definition for roles. With respect to transition terms, we extracted all

terms that contained the word *transition* and any definitions associated specifically with it.

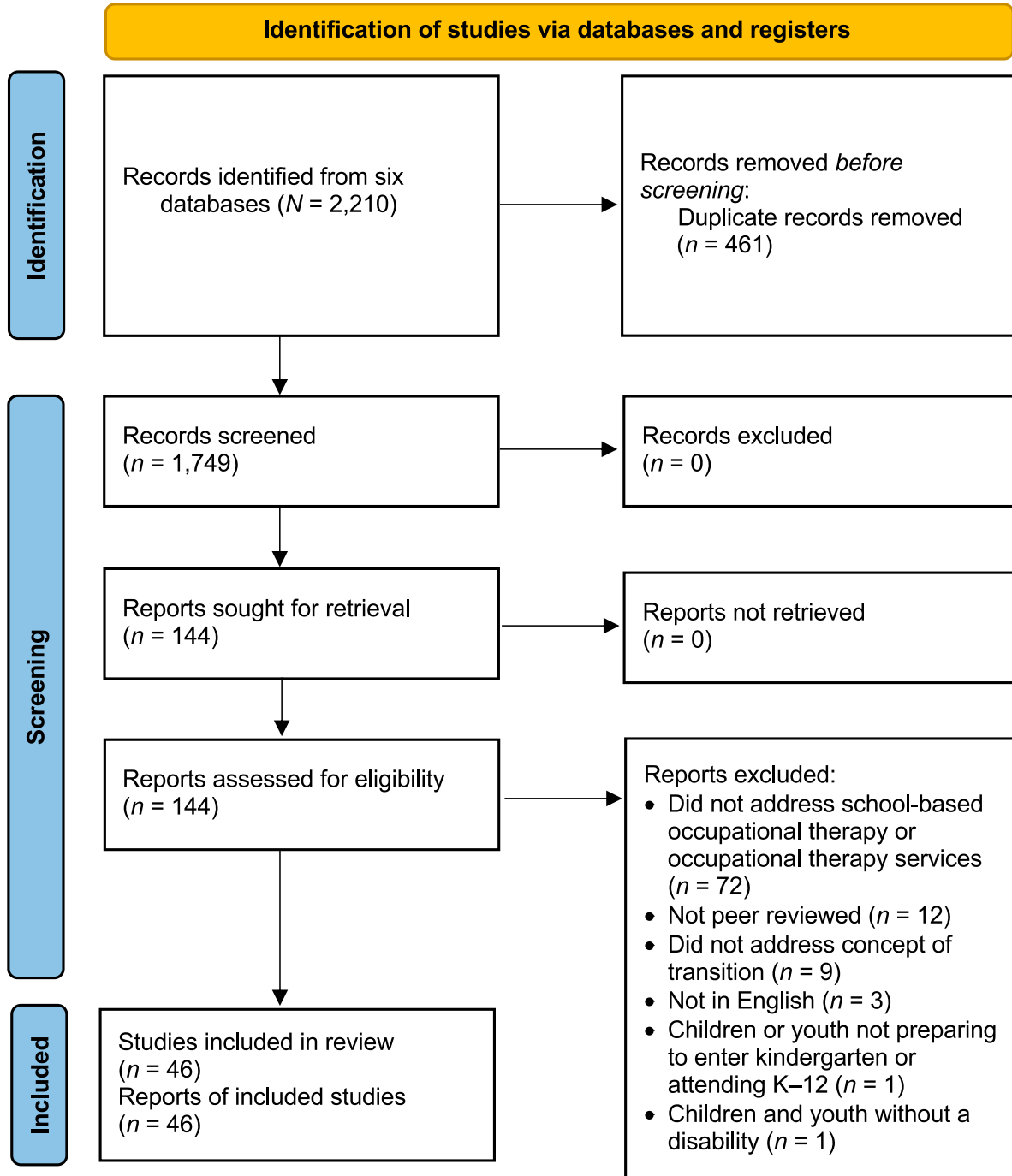
Next, in the *organization phase*, we deductively categorized each extracted passage of text according to the category within the Taxonomy 2.0 that it best represented and whether it represented an actual or potential role (Elo & Kyngäs, 2008). Finally, during the *reporting phase*, we created figures, tables, and a narrative summary for both transition terms and occupational therapy roles (Elo & Kyngäs, 2008). We also

created a descriptive numerical summary of study characteristics and an overview of the population, context, and concept for each article (Peters et al., 2020; Pollock et al., 2023).

## Results

We located 2,210 citations, of which 1,749 remained after deduplication (Figure 1). Following title and abstract screening, we reviewed 144 full text articles for

**Figure 1. Preferred Reporting Items for Systematic reviews and Meta-Analyses flowchart for the selection of studies for the scoping review.**



*Note.* Figure format from “The PRISMA 2020 Statement: An Updated Guideline for Reporting Systematic Reviews,” by M. J. Page, J. E. McKenzie, P. M. Bossuyt, I. Boutron, T. C. Hoffmann, C. D. Mulrow, . . . D. Moher, 2021, *BMJ*, 372, n71. <https://doi.org/10.1136/bmj.n71>

eligibility, of which 46 studies met our inclusion criteria. Percentage agreement among all four reviewers was 87% for title and abstract screening and 93% for full-text review.

### Characteristics of Sources of Evidence

Table A.4 in the Supplemental Material summarizes the descriptive characteristics of the 46 included articles. Articles were published over a 38-yr span from 1985 to 2023. Authors were from the United States ( $n = 37$ ), South Africa ( $n = 3$ ), Thailand ( $n = 3$ ), Canada ( $n = 2$ ), and Australia ( $n = 1$ ). Slightly more than half the publications ( $n = 25$ ) were empirical studies, and the remaining were nonempirical ( $n = 21$ ). Among empirical publications, methodologies included qualitative ( $n = 12$ ), quantitative ( $n = 5$ ), mixed method ( $n = 4$ ), and research synthesis ( $n = 4$ ). Nonempirical publications were perspective pieces discussing application of theory, articles providing descriptions of programs and services, or opinion pieces. While not mutually exclusive or reported for all studies, publications were situated in the context of public schools ( $n = 24$ ), private schools ( $n = 6$ ), and other types of schools, including one government-subsidized school and two homeschools. Of the articles, 72% ( $n = 33$ ) focused on secondary transitions (preparing for, navigating, and exiting high school), 22% ( $n = 10$ ) addressed transitions across grades, and 6% ( $n = 3$ ) addressed transitions into kindergarten. Also, not mutually exclusive, within the 33 articles that addressed secondary transitions, the focus of the transition included general transitions across and within secondary grades ( $n = 18$ ), transitions to adult life ( $n = 6$ ), transitions to employment ( $n = 6$ ), and transitions to postsecondary education ( $n = 6$ ).

### School-Based Occupational Therapy Roles

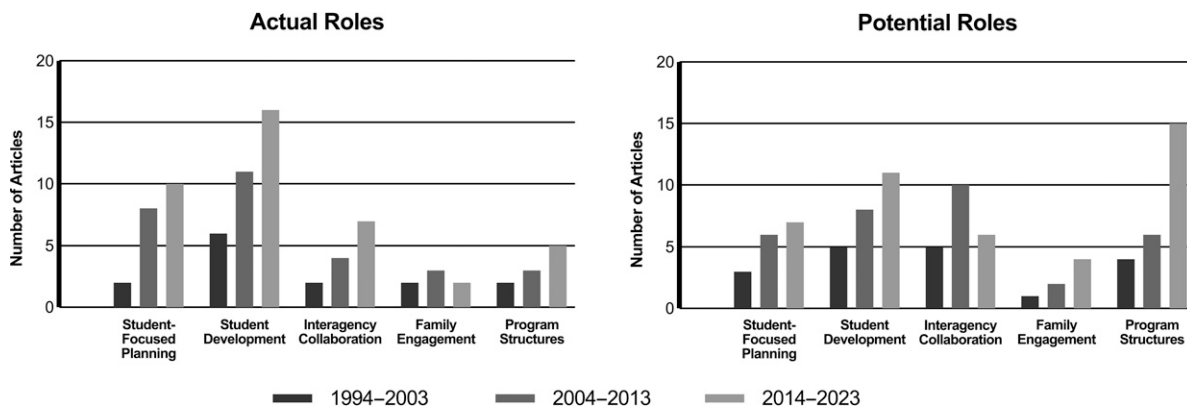
The publications addressed all five categories of the Taxonomy 2.0 (see Figure 2). Supporting student development was cited the most as an actual (80%,  $n = 37$ ) or potential (54%,  $n = 25$ ) role, with contributions to student-focused planning cited second most frequently

as an actual (46%,  $n = 21$ ) or potential (37%,  $n = 17$ ) role. In contrast, roles pertaining to program structures were more likely to be identified as potential roles (57%,  $n = 26$ ) rather than actual roles (26%,  $n = 12$ ). Similarly, roles related to interagency collaboration were identified as potential in 48% ( $n = 22$ ) of reviewed articles, with only 32% ( $n = 15$ ) citing actual roles for occupational therapists. The category of family engagement had the fewest articles citing actual (15%,  $n = 7$ ) or potential (15%,  $n = 7$ ) roles for occupational therapists.

In addition to describing the frequency with which each of the Taxonomy 2.0 categories was represented as actual and potential roles for occupational therapists, we also summarized the actions and activities included in the authors' descriptions. In Table A.5 in the Supplemental Material, we provide a synthesis of our extracted data. For some categories within the Taxonomy 2.0, cited roles were mutually exclusive, meaning they were reported in the literature only as either actual roles or potential roles. This was the case for roles related to the categories of interagency collaboration and program structures. In contrast, for the student development, student-focused planning, and family engagement categories, some activities and actions were reported as actual roles only, some as potential roles only, and others as both actual and potential roles, depending on the authors and source article. Roles identified as an actual and potential role are identified by italicized text in Table A.5 in the Supplemental Material.

The student development category had the most extensive identification of roles compared with all other categories and the greatest overlap between actual and potential roles. Actual roles focused on assessment of students (Kardos & White, 2005), their environment (George & Seruya, 2018; Myers, 2008; Prigg, 2002), and their occupations (Abbott & Provident, 2016; Mankey, 2011; J. E. Spencer et al., 2003) and comprised tasks such as goal setting (Lersilp et al., 2023; Tomchek et al., 2017), providing education about disability legislation (Goodman et al., 2020), and providing expertise and training (e.g., Panyo et al., 2023;

**Figure 2. Number of publications in all five categories of Taxonomy 2.0 for actual roles versus potential roles.**



Tomchek et al., 2017). Potential roles overlapped with actual roles and identified a need to increase occupational therapists' knowledge of transition resources (Pierce et al., 2021; B. Spencer et al., 2018) and to contribute to transition teams by sharing assessments and interventions (Eismann et al., 2017). Within student-focused planning, actual roles included participation in IEP meetings, collaborating with students to set goals, and making referrals to needed services or resources (Myers, 2008; Shea & Giles, 2012; J. E. Spencer et al., 2003). Suggested potential roles in this area include occupational therapists assisting students in preparing for IEP meetings, advocating for the transition process within schools, and educating staff on the importance of managing one's health and well-being (Benson et al., 2021; Stewart, 2011). As previously noted, the category of family engagement contained the fewest actual and potential roles compared with all other categories. The literature supporting roles in these categories spans from 1996 to 2021, with actual roles described as encouraging families to participate in groups (Myers, 2006), linking families to postsecondary and social opportunities (Benson et al., 2021; Juan & Swinth, 2010), and supporting families as they adjust to their youth's new roles (Gangl et al., 2011; Myers, 2006).

The categories of interagency collaboration and program structures identified a greater number of potential roles compared with actual roles. The evidence surrounding roles in these two categories spans from 1985 to 2023. An example of an actual role in interagency collaboration includes collaboration with other team members, families, and other agencies in the transition planning process (Gardner et al., 2012; George & Seruya, 2018; Pierce et al., 2021). Potential roles in this category included forming partnerships between rehabilitation institutions and schools (Kardos & White, 2005), consulting with potential employers (Pierce et al., 2020), and taking on advocacy roles between schools through the transition process (J. E. Spencer et al., 2003). Within program structures, actual roles focused on working with schools to augment curriculum aimed at skill development and providing evidence to support program development (Jackson, 1990; Kardos & White, 2005; Nel et al., 2007). As with interagency collaboration, there were many identified potential roles, including exploring alternative models of service delivery (Eismann et al., 2017; Mankey, 2014), understanding facilitators and barriers to the transition process (Ellman et al., 2020), and building connections between secondary and postsecondary institutions (Bissell & Cermak, 2015; Gangl et al., 2011).

## Terminology

The term *transition*, on its own, was used in 100% of publications ( $n = 46$ ) and defined in 9% ( $n = 4$ ). Harvey et al. (2022) stated that the term *transition* was defined by the American Occupational Therapy Association's Standards of Practice for Occupational

Therapy but did not provide that definition. Michaels and Orentlicher (2004) also referenced AOTA's (2000) Standards of Practice for Occupational Therapy, defining transitions "as a process 'involving actions coordinated to prepare for or facilitate change, such as from one functional level to another, from one life stage to another, from one program to another, or from one environment to another'" (p. 210). Myers (2006) drew from Rice and O'Brien (1990) and from Kagan (1992), defining transitions as "points of change in services and personnel who coordinate and provide services" (p. 2) and "activities that support the principle of continuity for young children" (p. 7), respectively. Finally, Clark et al. (1988) referenced Public Law 98-199, which viewed "transitions as a multidimensional phenomenon involving vocational planning and placement as well as sustained independent living" (p. 326).

In addition to the term *transition*, we identified 125 other transition terms within the included articles, and only 14% of these 125 terms ( $n = 17$ ) were defined (see Table A.6 in the Supplemental Material). The most frequently cited other transition terms included *transition service or services* (85%,  $n = 39$ ); *transition plan, plans, or planning* (57%,  $n = 26$ ); *transition process* (53%,  $n = 25$ ); *transition program, programs, or programming* (46%,  $n = 21$ ); and *transition team or teams* (41%,  $n = 19$ ).

## Discussion

In this study, we aimed to determine how the roles of school-based occupational therapists in supporting large transitions into and throughout K-12 education for children and youth with disabilities are described and how terms related to large educational transitions are defined in the school-based occupational therapy literature. Our findings showed that between 1985 and 2023, there was growing evidence to support alignment between the focus of school-based occupational therapy and best practices to support students with disabilities who were navigating large transitions. We also identified that transition terminology was extensive, variable, and infrequently defined in the school-based occupational therapy literature. The expansive identification of actual roles for occupational therapists supporting large transitions in education provided evidence that school-based occupational therapists demonstrated the skills and expertise to support this area of practice. Certain school-based occupational therapy roles within the Taxonomy 2.0 categories were more established. For instance, occupational therapy roles within student development and student-focused planning were more prevalent compared with the categories of interagency collaboration, program structures, and family engagement, which included roles that were evolving. Overall, the widespread identification of potential roles across all the Taxonomy 2.0 categories showed the desire of occupational therapists and researchers to expand school-based occupational

therapy roles in supporting large transitions in education.

### School-Based Occupational Therapy Roles

Occupational therapists may be challenged to define their roles in supporting large educational transitions because the very nature of school-based occupational therapy practice is itself changing. Recent shifts in the delivery of school-based occupational therapy services have broadened from individual models of pullout services to a continuum of services embedded within authentic contexts with a strong emphasis on educational relevance, capacity building, collaboration with school staff, and linkages with families (Ball, 2018; Campbell et al., 2023). Consequently, certain roles, such as those supporting individual student development and student-focused planning, are likely to be well developed and established for occupational therapists because those roles are consistent with how occupational therapy services in schools historically have been delivered (i.e., individually and focused on skill development; Cahill & Bazyk, 2020). In contrast, roles involving interagency collaboration and program structures are broader and focused more on addressing issues within and across disciplines, organizations, and systems rather than at the level of individual students. Such roles are increasingly evident within newer tiered approaches to school-based occupational therapy; however, these approaches to school-based occupational therapy are themselves emergent and evolving (VanderKaay et al., 2023). Thus, the broadening of roles and models of service delivery provides a plausible explanation for the growing identification of potential roles within the Taxonomy 2.0 categories.

School-based occupational therapy roles were least defined for both actual and potential roles in the Taxonomy 2.0 category of family engagement. Given evidence demonstrating the importance of family engagement in supporting large educational transitions (Cobb & Alwell, 2009; Landmark et al., 2010; Test et al., 2009), a gap in defined actual and potential roles within this category is concerning. For instance, although family engagement results in more successful postschool outcomes for students with disabilities, including school completion, postsecondary education, and employment, there are barriers to partnering with families in the school context (Hirano et al., 2018; Hoffman et al., 2020; Mazzotti et al., 2021). In addition, within the school-based occupational therapy literature, there are known limitations to family engagement (Kennedy et al., 2021). Thus, although the absence of roles in this area is concerning, it is not unexpected considering these identified barriers and limitations.

### Advancing Practice or Advancing Roles

We believe several avenues of action are possible concerning how occupational therapists might apply our

findings to enhance their roles in supporting large educational transitions. First, occupational therapists themselves need a better understanding of their roles on transition teams (Benson et al., 2021; Eismann et al., 2017; Goodman et al., 2020; Rosner et al., 2020). Although school-based occupational therapists demonstrate professional competencies and skills (ACOTRO et al., 2021; NBCOT, 2023) that can contribute to many aspects of transitions, such as preparation, planning, and coordination, several authors indicated that they lacked a full understanding of their role in educational transitions and recommended the need for further education, training, and advocacy in this area (Abbott & Provident, 2016; Kardos & White, 2005; Mankey, 2011; Myers, 2008; Panyo et al., 2021; Rodrigues & Seruya, 2019). More specifically, Kardos and White (2005) identified a gap between therapists' knowledge of transition planning terminology and the purposes of transitions, and a lack of awareness of outcome measures to support secondary transitions outcomes. To address these gaps, Kardos and White (2006) illustrated how assessment tools can be used to support school-based occupational therapists' contribution to transition planning for youth with disabilities. They found that e-training modules were an effective method to improve therapists' knowledge around the secondary transition planning process and indicated that training around educational transitions provides therapists with knowledge, which can empower them to seek opportunities for involvement to support transitions.

Second, education team members require a better understanding of what knowledge and expertise occupational therapists offer and how they can contribute to supporting large educational transitions. An education team's lack of understanding of the occupational therapy role can be a barrier to supporting transitions and affect the collaborative relationship (Kardos & White, 2005). This may explain why occupational therapists are often excluded from IEP or transition meetings (Goodman et al., 2020). In addition, teachers report not understanding the school-based occupational therapist's role and scope of practice (Truong & Hodgetts, 2017), so it is not surprising that their knowledge is limited regarding how occupational therapists might support large transitions. Suggestions to address the team's knowledge include increasing occupational therapists' knowledge of their role (Abbott & Provident, 2016) and developing guidelines for referrals (J. E. Spencer et al., 2003) and clinical practice (Panyo et al., 2021).

Finally, occupational therapists can explore ways to broaden their perspectives regarding their role to support transitions earlier (Benson et al., 2021), contribute to program development and systemwide changes (Gangl et al., 2011), and augment educational curricula (George & Seruya, 2018; Pierce et al., 2020; Rodrigues & Seruya, 2019; B. Spencer et al., 2018). Advocacy for occupational therapy roles supporting transitions

needs to extend beyond individual occupational therapists and include national or state–provincial associations. For example, funding limitations have been identified as a barrier to the school-based occupational therapy role supporting transitions (Goodman et al., 2020), and national or state–provincial associations could lobby to advocate for changes in policies that influence funding. Further exploration of the barriers and facilitators to school-based occupational therapy roles may support the advancement of roles in this area.

### Transition Terminology

A lack of consensus around terminology challenges both clinicians and researchers. With respect to clinicians, findings from our review indicated that occupational therapists identified a lack of knowledge around secondary transition planning and their associated roles (Juan & Swinth, 2010; Kardos & White, 2006) and were challenged to translate transition knowledge into practice (Abbott & Provident, 2016). Furthermore, many authors did not define the terms they used to discuss and study educational transitions, which may impede occupational therapists' ability to define their role to others (e.g., students, parents, educators, administrators, allied health professionals) and advance the profession in this area of practice. With respect to researchers, our review indicated that when authors used different terms to refer to transitions without clearly defining those terms, they created challenges when others attempted to interpret and compare research findings. For example, although some of the 125 identified transition terms identified in our review were defined explicitly, it remained problematic that 85% of these terms were not defined within the school-based occupational therapy literature. Moving forward, researchers may want to identify a consistent definition for the term *transition* that can be applied within the school-based occupational therapy literature.

### Limitations

Although our findings enhance understanding of the occupational therapy roles in supporting educational transitions, it is important to recognize the limitations in our study. First, we focused only on peer-reviewed publications in English; therefore, we may not have located all publications relevant to our research question. Second, we chose to perform a directed content analysis using a transition framework from the field of education. Although a directed approach provided a structured method to extract data and aligned with best practices in educational transitions, the use of predetermined categories meant that we only captured findings that were represented by the Taxonomy 2.0 framework. If feasible, using a directed content analysis in combination with an inductive approach would be beneficial. Finally, we did not assess the

methodological quality of the articles because the aim of our study was to provide a map of the available evidence rather than evaluate the strength of the empirical evidence (Munn et al., 2018).

### Implications for Occupational Therapy Practice

Our findings offer evidence that school-based occupational therapists contribute unique skills and expertise to support large educational transitions for students with disabilities from kindergarten through Grade 12. We have highlighted key strategies that occupational therapists and educators can apply to their practice based on our findings.

The findings of this scoping review have the following implications for school-based occupational therapists:


- They should review policy and legislation around transitions in education that are relevant to their practice context, especially as these documents tended to be the source for definitions of transition terms.
- They need to familiarize themselves with the Taxonomy 2.0 framework to understand best practice strategies to support transitions within an education context.
- They can broaden their scope of practice by identifying roles they are actively engaging in and exploring what opportunities exist for growth and role development.
- They can offer education to other professionals within the education system on the roles they can play in supporting transitions.
- They can advocate at a national or provincial–state level for policy and legislative changes to support funding for occupational therapy roles supporting large educational transitions.

Educational institutions focusing on occupational therapy training may want to ensure curriculum includes a broadened scope of practice in school-based occupational therapy services to include education around the role supporting transitions, an overview of policy and legislation governing transitions in education, frameworks such as the Taxonomy 2.0 that identify best practice strategies within an educational context, and content on service delivery models that have a focus on collaboration and family engagement.

### Conclusion

Through a comprehensive examination of available literature, this scoping review serves as a foundation for understanding the role of school-based occupational therapy in supporting large educational transitions. Many of the areas for professional growth align with shifts in models of service delivery currently evolving around school-based occupational therapy services. A gap in the school-based occupational therapy literature is the lack of consensus surrounding the terms used to



discuss and study transition and inconsistent practices in specifying how these terms are defined. 

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