

## INTAKE/ASSESSMENT LESSON NOTES

Client Name: \_\_\_\_\_ Date: \_\_\_\_\_

Instructor: \_\_\_\_\_ Assessment #: \_\_\_\_\_

### Client Interview

- What's your whole name? (social interest) \_\_\_\_\_
- What day is today? Where are we? (orientation) \_\_\_\_\_
- How long have you been riding? (long term memory) \_\_\_\_\_
- Tell me something you did in your last lesson. (eye contact) \_\_\_\_\_
- What horses have you ridden? Favorite? (social interactions) \_\_\_\_\_  
(expressive language) \_\_\_\_\_  
(receptive language) \_\_\_\_\_
- Discuss daily living activities (level of independence) \_\_\_\_\_
- Discuss communication (assistive technologies) \_\_\_\_\_  
(hearing) \_\_\_\_\_  
(vision) \_\_\_\_\_
- Discuss Heat/Weather Sensitivities, Allergies \_\_\_\_\_

### Ambulation Activities

- walk around room and outside (ambulation, on different surfaces, posture) \_\_\_\_\_
- balance on each foot for 10 seconds (following directions) \_\_\_\_\_  
(standing balance) \_\_\_\_\_
- jump up/down 5x (lower extremity strength) \_\_\_\_\_
- walk up/down stairs, carrying something (coordination) \_\_\_\_\_  
(gravitational security) \_\_\_\_\_
- play with rings, stack toys (upper extremity manipulation) \_\_\_\_\_  
(numbers, letters, colors) \_\_\_\_\_  
(attention span) \_\_\_\_\_

### Mounting Activities (on a mock or real horse)

- put on a helmet (cooperation) \_\_\_\_\_  
(tactile/sensory issues) \_\_\_\_\_
- introduce the horse and volunteers (response to strangers, & new situations) \_\_\_\_\_  
(comfort around horses) \_\_\_\_\_
- Introduce and review the mounting steps (following directions) \_\_\_\_\_
- mount with assistance as needed (memory of steps) \_\_\_\_\_  
(body awareness) \_\_\_\_\_  
(proprioceptive/vestibular level) \_\_\_\_\_  
(range of motion) \_\_\_\_\_  
(muscle tone) \_\_\_\_\_  
(reflex activity) \_\_\_\_\_

### Mounted Activities

- Request participant sit upright (posture and alignment) \_\_\_\_\_  
(trunk control) \_\_\_\_\_  
(righting reaction) \_\_\_\_\_
- Request participant perform exercises - (seated balance) \_\_\_\_\_
- arms out to the side (upper extremity strength) \_\_\_\_\_
- backward arm circles (coordination) \_\_\_\_\_
- two point (lower extremity strength) \_\_\_\_\_  
(cardio endurance) \_\_\_\_\_
- Identify 3 horse parts

### Manipulation Activities

- Request participant use one hand to grasp requested object from bin of various items (clothes pin, ball, horse shoe)
- Request participant reach across the midline and deposit item in prescribed bucket  
(fine motor skills) \_\_\_\_\_  
(gross motor skills) \_\_\_\_\_  
(hand-eye coordination) \_\_\_\_\_  
(hand dominance) \_\_\_\_\_  
(grasp/release) \_\_\_\_\_  
(task sequencing) \_\_\_\_\_

### Riding Activities

- Introduce basic skill (understanding concepts) \_\_\_\_\_
- Obstacle course - (learning) \_\_\_\_\_
- state the goal (reaction to authority/leadership) \_\_\_\_\_
- ask the rider how they plan to achieve it (thought process) \_\_\_\_\_  
(problem solving) \_\_\_\_\_  
(decision making) \_\_\_\_\_
- have them ride the plan (follow through with plan?) \_\_\_\_\_  
(assistance needed?) \_\_\_\_\_  
(achieved goal?) \_\_\_\_\_  
(handle frustration?) \_\_\_\_\_  
(emotional expression) \_\_\_\_\_
- (can combine with above manipulation activity)
- Review horse parts earlier identified (memory) \_\_\_\_\_

### Dismount

- Introduce and Review steps (add notes to mounting activities, above)
- Dismount with assist as needed