

Functional Cognition, Co-Occurring Disorders, and Women's Health Resources

Selected resources from AOTA's Mental Health Special Interest Section Resource Library | August 2026

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About This Guide

This resource guide was developed to support the August 18, 2026 MHSIS Practice Chat, **Addressing Functional Cognition in Women's Co-Occurring Care: Early Insights**, led by Michele Karen Johnson, OTD, OTR/L, in collaboration with the Functional Cognition Community of Practice. The discussion explores factors that impact functional cognition for individuals in co-occurring treatment settings, with attention to occupational performance, daily functioning, treatment engagement, and residential treatment contexts for women.

Why Functional Cognition Matters

Functional cognition refers to the dynamic integration of cognitive skills during everyday activity and occupational performance. In co-occurring treatment settings, it may be shaped by mental health symptoms, substance use, trauma exposure, medication effects, sleep disruption, sensory processing, pain, stress, environmental demands, and social determinants of health. For women, these factors may intersect with reproductive health, parenting, caregiving, safety, housing, relationships, work, education, and recovery roles. Occupational therapy practitioners contribute by observing performance, analyzing routines and environments, identifying supports and barriers, and connecting cognitive strengths and needs to daily participation.

Key concepts addressed: functional cognition; co-occurring mental health and substance use disorders; women's health; maternal mental health; residential treatment; performance-based assessment; executive functioning; self-management; safety; supported decision making; sensory processing; trauma-informed and recovery-oriented care.

Functional Cognition: Evidence and Practice Foundations

Giles, G., Edwards, D., Baum, C., Furniss, J., Skidmore, E., Wolf, T., & Leland, N. (2020). Making functional cognition a professional priority. *American Journal of Occupational Therapy*, 74(1), 7401090010p1-7401090010p6. <https://doi.org/10.5014/ajot.2020.741002>

A foundational AJOT article calling for occupational therapy to prioritize functional cognition as a central practice concern. Useful for framing cognition through everyday performance, participation, and real-world occupational demands.

Resource type: Professional priority and practice-framing article

Lee, Y., Randolph, S. B., Kim, M. Y., Foster, E. R., Kersey, J., Baum, C., & Connor, L. T. (2025). Performance-based assessments of functional cognition in adults, part 2-Psychometric properties: A systematic review. *American Journal of Occupational Therapy*, 79, 7904205140. <https://doi.org/10.5014/ajot.2025.050949>

A companion systematic review examining reliability, validity, and other psychometric properties of adult performance-based functional cognition assessments.

Resource type: Systematic review of psychometric properties

Stillman, M., Sullivan, A., & Alterio, C. (2022). The value of a collaborative approach to addressing executive functioning weakness in school-based intervention: An occupational therapy perspective. *Special Education Research, Policy, and Practice*, 6(1), 154-170. https://issuu.com/hofstra/docs/2022_edition-special_education_research_policy_154

Although school-focused, this article reinforces the value of collaborative approaches to executive functioning and highlights OT contributions when functional performance is affected by executive functioning needs.

Resource type: OT article on executive functioning and collaborative practice

Lee, Y., Randolph, S. B., Kim, M. Y., Foster, E. R., Kersey, J., Baum, C., & Connor, L. T. (2025). Performance-based assessments of functional cognition in adults, part 1-Assessment characteristics: A systematic review. *American Journal of Occupational Therapy*, 79, 7904205130. <https://doi.org/10.5014/ajot.2025.050948>

A systematic review describing characteristics of performance-based assessments that directly observe everyday activities such as cooking, meal preparation, managing finances, telephone use, and medication management.

Resource type: Systematic review of performance-based functional cognition assessments

Stewart, K., Hancock, N., Chapparo, C., & Stancliffe, R. J. (2022). Functional performance and the Allen Cognitive Level Screen for adults with mental illness: A scoping review. *American Journal of Occupational Therapy*, 76(2), 7602205150. <https://doi.org/10.5014/ajot.2022.045757>

A scoping review focused on functional performance and use of the Allen Cognitive Level Screen with adults with mental illness. Relevant for considering evidence, limits, and clinical reasoning in co-occurring care settings.

Resource type: OT scoping review of functional performance and Allen Cognitive Level Screen use

Deste, G., Barlati, S., Galluzzo, A., Corsini, P., Valsecchi, P., Turrina, C., & Vita, A. (2019). Effectiveness of cognitive remediation in early versus chronic schizophrenia: A preliminary report. *Frontiers in Psychiatry*, 10, Article 236. <https://doi.org/10.3389/fpsy.2019.00236>

A preliminary report comparing cognitive remediation in early versus chronic schizophrenia. Useful for considering cognitive intervention, participation, and treatment engagement in serious mental illness and co-occurring care contexts.

Resource type: Cognitive remediation research article

Assessment and Clinical Reasoning Resources

Assessment Note

Many additional occupational therapy and interdisciplinary assessment tools are available in the MHSIS Resource Library. The tools included here are intentionally selective and are offered as examples that may inform OT reasoning, performance-based assessment, interdisciplinary communication, intervention planning, documentation, and outcome measurement. Inclusion does not substitute for agency policy, professional training, scope of practice, cultural and contextual relevance, psychometric review, or clinical judgment.

ACLS and LACLS Committee. (2022). Manual for three forms of Version 5 of the Allen Cognitive Level Screen (2nd ed.). ACLS and LACLS Committee.

Current manual for Version 5 Allen Cognitive Level Screen forms. Relevant for trained practitioners who need to connect results with skilled observation, verification, functional performance, supports, and environmental fit.

Resource type: Functional cognition screening manual

Katz, N. (2006). Routine Task Inventory-Expanded (RTI-E). Allen Cognitive Network.

A semi-standardized assessment within the Cognitive Disabilities Model that examines functional cognition through ADL, IADL, communication, and work-readiness tasks.

Resource type: Functional cognition and routine-task assessment tool

Allen, C. K. (1985). Occupational therapy for psychiatric diseases: Measurement and management of cognitive disabilities. Little, Brown.

Includes the Alternative Cognitive Level Test and foundational Cognitive Disabilities Model content; may be useful when other CDM assessments do not yield clear information or when a level below 3 is suspected.

Resource type: Foundational functional cognition text and assessment source

Albert, S. M., Edelstein, O. E., & Park, H. (2020). The Self-Medication Assessment Tool (SMAT): Development, reliability, and validity. Research in Social and Administrative Pharmacy, 16(8), 1035-1041.

<https://doi.org/10.1016/j.sapharm.2019.11.003>

A medication self-management assessment relevant to health management, routines, executive functioning, safety, adherence supports, caregiver involvement, and independent living.

Resource type: Health management and medication self-management assessment tool

George, J., Phun, Y. T., Bailey, M. J., Kong, D. C., & Stewart, K. (2004). Development and validation of the medication regimen complexity index. The Annals of Pharmacotherapy, 38(9), 1369-1376.

<https://doi.org/10.1345/aph.1D479>

The Medication Regimen Complexity Index (MRCI) is a validated 65-item clinical tool used to objectively quantify how difficult a medication regimen is to manage, extending beyond a simple medication count.

Resource type: Medication regimen complexity assessment tool

van de Glind, G., van den Brink, W., Koeter, M. W. J., et al. (2013). Validity of the Adult ADHD Self-Report Scale (ASRS) as a screener for adult ADHD in treatment-seeking substance use disorder patients. Drug and Alcohol Dependence, 132(3), 587-596. <https://doi.org/10.1016/j.drugalcdep.2013.04.010>

Examines the ASRS as a screener for adult ADHD among people seeking treatment for substance use disorders. ADHD-related executive functioning needs can affect engagement, time management, emotional regulation, medication routines, relapse prevention, and daily performance.

Resource type: Interdisciplinary ADHD screening resource for substance-use treatment contexts

MultiContext. (n.d.). Weekly Calendar Planning Activity training, setup, administration, and scoring resources.

<https://multicontext.net/new-page>

Videos on the setup, administration, and scoring of the Weekly Calendar Planning Activity as a supplement to the WCPA manual. The WCPA manual is required for proper scoring and interpretation.

Resource type: Functional cognition assessment training media

Co-Occurring Mental Health and Substance Use Resources

Substance Abuse and Mental Health Services Administration. (2024). Co-occurring mental health and substance use services (Publication No. PEP24-01-008). Center for Mental Health Services, Substance Abuse and Mental Health Services Administration.

An issue brief for state mental health directors and policymakers that provides an overview of integrated co-occurring mental health and substance use services, evidence-based practices, and resources.

Resource type: Federal issue brief on co-occurring services and integrated care

National Institute on Drug Abuse. (n.d.). Chart of evidence-based screening tools and assessments. National Institutes of Health. <https://nida.nih.gov/nidamed-medical-health-professionals/screening-tools-resources/chart-screening-tools>

A curated NIH/NIDA webpage of evidence-based screening tools relevant to substance use, opioid risk, tobacco, alcohol, prescription medication, and related behavioral health concerns. Screening information may support OT evaluation, care planning, documentation, and team communication.

Resource type: NIH webpage for interdisciplinary screening tools

Shourvazi, R., MirzaKhani, N., Rahmanirasa, A., Pashmdarfard, M., & Loabichian, M. (2024). The relationship between sensory processing, substance abuse and impulsivity with suicide in schizophrenia: A narrative review. *Function and Disability Journal*, 7, Article E121.5. <http://dx.doi.org/10.32598/fdj.7.121.5>

A narrative review connecting sensory processing, substance abuse, impulsivity, suicide, and schizophrenia. Relevant to complex co-occurring presentations involving sensory processing, functional cognition, emotional regulation, and risk.

Resource type: Narrative review on sensory processing, substance use, impulsivity, and suicide risk

McNeely, J., Wu, L.-T., Subramaniam, G., Sharma, G., Cathers, L. A., Svikis, D., Sleiter, L., Russell, L., Nordeck, C., Sharma, A., O'Grady, K. E., Bouk, L. B., Cushing, C., King, J., Wahle, A., Schwartz, R. P., & Rotrosen, J. (2016). Performance of the Tobacco, Alcohol, Prescription Medication, and Other Substance Use (TAPS) tool for substance use screening in primary care patients. *Annals of Internal Medicine*, 165(10), 690-699. <https://doi.org/10.7326/M16-0317>

A two-stage screening and brief assessment tool addressing tobacco, alcohol, prescription medication, and other substance use. Relevant where substance use affects routines, roles, sleep, self-care, parenting, treatment engagement, and health management.

Resource type: Substance-use screening and brief assessment tool

Women's Health, Maternal Mental Health, and Occupational Participation

Barbic, S. P., MacKirdy, K., Weiss, R., Barrie, A., Kitchin, V., & Lepin, S. (2021). Scoping review of the role of occupational therapy in the treatment of women with postpartum depression. *Annals of International Occupational Therapy*, 4(4), e249-e259. <https://doi.org/10.3928/24761222-20210921-02>

A scoping review identifying OT roles in supporting women experiencing postpartum depression, including occupational disruption, transition to motherhood, and parenting-related functional challenges.

Resource type: OT scoping review on postpartum depression

Cox, J. L., Holden, J. M., & Sagovsky, R. (1987). Detection of postnatal depression: Edinburgh Postnatal Depression Scale. *British Journal of Psychiatry*, 150, 782-786. <https://pubmed.ncbi.nlm.nih.gov/3651732/>

The Edinburgh Postnatal Depression Scale is a widely used screening tool for identifying risk of postnatal depression. Screening does not replace clinical assessment or diagnostic evaluation.

Resource type: Perinatal depression screening tool

Markfield, F., & Reaume, C. D. (2025). Uncovering occupational therapy's role in addressing postpartum anxiety: A scoping review. *The Open Journal of Occupational Therapy*, 13(4), 1-16. <https://doi.org/10.15453/2168-6408.2332>

A scoping review highlighting OT-relevant settings, assessments, and interventions for postpartum anxiety, including performance patterns, sensory experiences, emotional regulation, and meaningful activity.

Resource type: OT scoping review on postpartum anxiety

Westerneng, M. (2020). Third trimester routine ultrasound in relation to prenatal maternal anxiety and bonding: Getting the picture [Doctoral dissertation, Vrije Universiteit Amsterdam]. <https://research.vu.nl/ws/portalfiles/portal/110954774/523663.pdf>

A dissertation including systematic review content on maternal anxiety and mother-to-infant bonding. Relevant to pregnancy, postpartum transition, emotional well-being, co-regulation, and parent-infant occupations.

Resource type: Maternal anxiety and bonding dissertation/resource

Substance Abuse and Mental Health Services Administration. (2026). Improving maternal mental health in women with serious mental illness (Publication No. PEP26-01-006). U.S. Department of Health and Human Services. <https://library.samhsa.gov>

A federal resource addressing maternal mental health among women with serious mental illness. Relevant to integrated care, family roles, recovery planning, health management, parenting occupations, safety, and occupational participation.

Resource type: Federal maternal mental health resource

Khan, S. (2025). Occupational therapy guidelines for supporting role transitions and managing stress in women experiencing postpartum depression. *Occupational Therapy in Mental Health*. <https://doi.org/10.1080/0164212X.2025.2476167>

Practice-oriented guidelines for supporting role transitions and managing stress in postpartum depression. Relevant to role clarity, support networks, body image, health management, coping, and meaningful occupations.

Resource type: OT intervention guidelines for postpartum depression

Intervention, Environmental, and Program Development Resources

Allen, C. K. (2018). Allen app: The Allen Cognitive Disability Model (1st digital ed.; ACLS-6). ACDMweb.

<https://acdmweb.com/allen-app>

The Allen 6 App presents the Allen Cognitive Disability Model in a digital format. It may support level-informed reasoning when used with appropriate preparation and attention to verification, context, environmental fit, client goals, and occupational meaning.

Resource type: Digital Cognitive Disabilities Model application

Allen Cognitive Group. (2023). Allen cognitive levels case examples and handout suite: Evaluation and intervention; levels; modes; level of care. https://allencognitive.com/wp-content/uploads/Case-Examples-of-Evaluation-and-Intervention-within-CDM_4.2023.pdf

A handout suite with case examples and level-informed evaluation/intervention materials. Useful for translating Cognitive Disabilities Model concepts into practical communication about support needs and activity/environmental fit.

Resource type: Cognitive Disabilities Model case examples and handout suite

Hudspeth, A., & Peltier, C. (2020). An Allen's cognitive levels training program for more comprehensive interprofessional care. Occupational Therapy Capstones, 441.

<https://commons.und.edu/ot-grad/441>

A capstone project that created a quick-reference guide and in-service training based on the Cognitive Disabilities Model and PEO Model for interprofessional teams.

Resource type: Interprofessional training and implementation resource

Allen Cognitive Group. (n.d.). Downloads.

<https://allencognitive.com/downloads/>

The Allen Cognitive Group downloads page provides selected practice materials, handouts, and Cognitive Disabilities Model resources to support clinical reasoning, education, intervention planning, caregiver communication, and documentation.

Resource type: Allen Cognitive Group practice resources and downloads

Toglia, J. P. (2018). The dynamic interactional model and the multicontext approach. In N. Katz & J. Toglia (Eds.), Cognition, occupation, and participation across the lifespan (4th ed., pp. 355-385). AOTA Press. <https://multicontext.net>

The MultiContext Approach provides a framework for promoting strategy use and online awareness of performance across everyday activities. Relevant when cognitive lapses, executive functioning needs, or self-monitoring challenges interfere with participation.

Resource type: Cognitive strategy intervention framework

Schumacher, S. J. (2022). Functional cognition in long-term care: Implementing Allen's Cognitive Level Screen. Occupational Therapy Capstones, 538.

<https://commons.und.edu/ot-grad/538>

A capstone project focused on implementing functional cognition screening in long-term care. Offers transferable ideas for staff education, implementation planning, and connecting screening with needed supports.

Resource type: Functional cognition implementation and staff-education resource

Media and Teaching Resources

AJOT Authors and Issues. (2025). Episode 41: Functional cognition assessments with Yejin Lee and Lisa Connor [Video]. YouTube. <https://youtu.be/eSdauRtank>

An AJOT Authors and Issues conversation about the two-part systematic review on performance-based functional cognition assessments. Useful for introducing students and practitioners to current assessment scholarship.

Resource type: Podcast/video discussion

Canadian Occupational Performance Measure. (n.d.). Five steps to administering the Canadian Occupational Performance Measure video library. YouTube.

<https://youtube.com/@thecopm>

A video library demonstrating COPM administration steps. Relevant when centering the client's own occupational priorities in co-occurring and women's health contexts.

Resource type: Client-centered outcome-measure video library

Allen Cognitive Group. (2013). Simulated ACLS-5/LACLS-5 administration [Video]. Vimeo. <https://vimeo.com/69276435>

A simulated administration of the ACLS-5/LACLS-5 by Allen Cognitive Group expert clinician Catherine Earhart. Full protocols and interpretation require the manual and appropriate training.

Resource type: Assessment demonstration video

Substance Abuse and Mental Health Services Administration. (2022). Screening and treatment for co-occurring mental health and substance use disorders [Video]. YouTube.

<https://youtu.be/ngjrhF5ZtXM>

This 2022 YouTube video from SAMHSA briefly describes integrated screening and treatment for patients with both a mental illness and substance use disorder can make treatment more effective for patients. An integrated approach leads to better quality of care and health outcomes for patients

Resource type: Podcast/video discussion

Reflection Questions

- How do co-occurring mental health and substance use concerns affect functional cognition, occupational performance, and treatment engagement in this setting?
- Which daily routines, roles, environmental demands, and supports are most likely to be missed without an OT perspective?
- How can performance-based assessment complement interdisciplinary screening, diagnostic information, and client self-report?
- How can OT practitioners document cognitive support needs while preserving the person's strengths, preferences, values, and goals?
- What strategies can support functional cognition while preserving dignity of risk, autonomy, safety, and meaningful participation?
- How do women's health, maternal health, caregiving, trauma, stigma, housing, and relationship contexts shape intervention priorities?