Updated Workload Tool for OT, PT, and SLP Practitioners
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Purpose
• More accurately capture workloads and ALL responsibilities/time allocation of practitioners
• Provide more data for program management and planning
• Help PSUs distribute workloads equitably
• Account for personnel time
• Ensure efficient staffing and time allocation
• Provide logistical information for workload waiver
• Utilize accurate, timely data for program management
• Anticipate and advocate for staffing requirements

Background
• Combined:
  • Previous NC FTE Workload Tool +
  • ASHA tool +
  • Mike Maykish’s spreadsheet wizardry/Tool from Brunswick County
• Piloted it with volunteer PSUs
• Collected feedback, modified, and submitted to NC DPI Leadership
• Modified and finalized the tool

Mythbuster # 1
TRUE or FALSE
50 is the recommended number of students on a related service provider’s caseload (head count)

The answer is: ❌FALSE
Mythbuster #2

TRUE or FALSE

The caseload cap of 50 only includes the number of students directly served by the supervising OT, SLP, or PT and does not include the assistant’s caseload.

The answer is: ✗FALSE

Mythbuster #3

TRUE or FALSE

Students receiving supplemental aids and services only (SAS) do not count toward the 50 caseload cap.

The answer is: ✗FALSE

Mythbuster #4

TRUE or FALSE

IEP hours + number of students make a workload and should be the only factors considered.

The answer is: ✗FALSE

Mythbuster #5

TRUE or FALSE

The only priority for OT, PT, & SLP practitioners must be IEP hour coverage.

The answer is: ✗FALSE
Mythbuster #6

TRUE or FALSE

A workload model rather than a caseload model is strongly endorsed by ASHA, AOTA, and APTA

The answer is: ✔️ TRUE

Mythbuster #7

TRUE or FALSE

The Workload Tool is just one more thing to do.

The answer is: ✗ FALSE

Workload Model Benefits

- Increased scheduling flexibility
- Enhanced teacher/team collaboration
- Helps to ensure OT, PT, and SLP practitioners are considered equal partners
- Improved rapport building with parents and teachers
- Therapists become part of the school community
- Therapists have better access to resources and provide system-wide support
- Increased student advocacy
- Increased job satisfaction

AOTA, APTA, ASHA Joint Statement on Workload (2014)

Key Changes/Updates

- Dynamic, real-time data rather than static ratio/multiplier (directly calculated by practitioner’s actual work)
- Electronic tool with automatic calculations for many fields to promote utilization (low data input = high data yield)
- Practitioner schedule/time allotment added
- Appendix clarifies categories with specific examples
- Reports are automatically generated to summarize key data points
Workload Tool for OT, PT and SLP Practitioners

- **Optional** tool for PSUs
- **Only required** for PSUs to submit along with caseload waivers (if workload exceeds 50)
- Can be adjusted for each PSUs specific needs
- Used on an ongoing basis to reflect changes across the school year
- IEP hours - can pull from Standard Reports

**Updated Workload Tool**

- use link above for 'forced copy' version so you can explore the tool
- copy in session materials folder is View Only

Note: Appendix is included in the Workload Tool

Introduction/Overview Video of Workload Tool

**Video Tutorial**

[Description of video content]
**Coming Soon...**

- OT, PT, SLP Workload Tool, Video, & Appendix will be distributed at the Statewide Related Service Representatives Meeting on May 27th
- FTE Guidance Document will also be updated soon
- Summer Institute session- MTSS for OT & PT practitioners

**Contact Us - Questions & Technical Assistance**

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We're from DPI & we're here to help!