




































Entry-level OTR Self-assessment Tool Feedback

Domain 1	ACQUIRE INFORMATION REGARDING FACTORS THAT INFLUENCE OCCUPATIONAL PERFORMANCE THROUGHOUT THE OCCUPATIONAL THERAPY PROCESS.	
Task 1	Acquire information about a client's functional skills, roles, context, and prioritized needs through the use of available resources and standardized and non-standardized assessments in order to develop an occupational profile.	
	Knowing the influence of normal developmental milestones on physical, cognitive, and psychosocial function across the lifespan	
	Knowing common diagnoses identified in trusted resources such as the International Classification of Diseases, 9th edition (ICD-9) and the Diagnostic and Statistical Manual, 5th Edition (DSM 5)	
	Understanding the influence of typical patterns, progressions, and prognoses associated with physical, neurological, developmental, congenital, and psychosocial conditions on occupational performance (e.g., stages of disease, secondary complications, outcomes)	
	Integrating information about the influence of co-existing congenital anomalies, acute onset medical conditions, chronic degenerative physical conditions, or mental health diagnoses when assessing development, social participation, and occupational roles	
	Establishing and maintaining a therapeutic rapport with the client and relevant others in order to gather information	
	Determining client needs, problems, concerns, and priorities related to occupations and daily life activity performance (e.g., interviews, observations, record review)	
	Using appropriate information gathering tools and methods to guide the development of a client-centered occupational profile	
	Recognizing the purpose, indications, advantages, and limitations of commonly used standardized and non-standardized screening or assessment instruments	
	Prioritizing the use of commonly administered standardized and non-standardized screening or assessment instruments based on a top-down or bottom-up approach to efficiently complete the evaluation process	
	Administering and scoring a variety of commonly used standardized and non-standardized screening or assessment instruments (e.g., Functional Independence Measure, Denver Developmental Screening, Jebsen-Taylor Hand Function Test, goniometry, Canadian Occupational Performance Measure, Beck Anxiety Inventory)	
	Using clinical observations, commonly administered observation-based assessments, and screening tools to assess contextual factors and gather outcomes information related to occupational performance (e.g., Functional Independence Measure, Barthel Index, Outcome and Assessment Information Set, Knox Preschool Play Scale, School Function Assessment, Safety Assessment of Function and the Environment for Rehabilitation, Health Outcome Measurement and Evaluation)	

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Domain 1	Task 1	Adapting assessments based on client needs, precautions, and level of care (e.g., acute hospitalization, community-based settings, school setting) while maintaining the integrity of the assessment		
		Understanding the demands of the assessment, including anticipating when the client may have difficulties (e.g., fatigue, inattention, frustration, safety) and administering the assessment to maximize performance		
		Identifying the influence of context (e.g., cultural, physical, spiritual), activity demands (e.g., space demands, sequencing, timing), and client factors (e.g., body functions, body structures) on performance skills and patterns in order to support client participation in areas of occupation		
		Recognizing and responding in a therapeutic manner to typical and atypical physiological, cognitive, and behavioral conditions (e.g., fatigue, inattention, pain, anxiety, anger, changes in vital signs) during the evaluation process		
		Evaluating the effectiveness of modifications and/or devices within areas of occupation within context		
		Recognizing facilitators and/or barriers in the physical and social environment (e.g., inaccessible playgrounds, noise level, social stigma associated with disabilities) that influence occupational performance		
		Identifying client preferences, needs, and options for community mobility (e.g., accessibility for use of para-transit, public or school bus transportation, outreach and family and caregiver support for community mobility) considering client preferences, needs, skills, abilities, and typical environmental demands		
		Accessing tools and checklists to analyze the environment for accessibility and risk based on physiological, cognitive, and behavioral conditions of clients (e.g., Americans with Disabilities Guidelines and Accessibility Audit tools and checklists, Safety Assessment Scale (SAS), universal design principles, specifications, and checklists)		
		Knowing when to terminate the assessment due to unexpected and/or anticipated behavioral or physical responses during the evaluation process		
		Accessing information in accordance with funding and regulatory requirements (e.g., Medicare, Medicaid, workers' compensation, managed care organizations, Americans with Disabilities Act, Health Insurance Portability and Accountability Act, Individuals with Disabilities Education Act)		
		Seeking assistance from more experienced professionals and consulting professional resources in situations beyond entry-level to acquire information about a client's occupational performance		
		Task 2	Analyze evidence obtained from the occupational profile to identify factors that influence a client's occupational performance.	
			Knowing where to find information about theoretical approaches or models of practice used to identify environmental and contextual factors that support or hinder occupational performance	














Candidate Name: Kasi Webb

Domain 1	Task 2	Using theoretical approaches (e.g., Developmental, Motor Learning, Cognitive-behavioral) or models of practice (e.g., Ecology of Human Performance (EHP), Model of Human Occupation (MOHO), Person Environment Occupation (PEO)) to identify environmental and contextual factors that support or hinder occupational performance	
		Analyzing client activities in relation to the occupational profile, practice setting, and stage of the occupational therapy process in order to identify factors that influence a client's occupational performance	
		Identifying activity demands that support or hinder occupational performance across the lifespan	
		Determining the influence of environments and activity demands on physical, cognitive, and psychosocial development and occupational performance	
		Understanding the influence of internal and external factors (e.g., environment, medication, habits, roles, family preferences, and social expectations) on occupational performance	
		Recognizing the influence of social, cultural, personal, spiritual, temporal, and virtual contexts on the occupational performance of clients	
		Knowing where to find additional information about unfamiliar issues relating to a client's occupational performance and the demands of activities (e.g., terminology, medical procedures, assessment tools, theoretical approaches, models of practice)	
		Recognizing the need to seek assistance from experienced OT colleagues in situations beyond entry-level to analyze evidence regarding a client's occupational performance	
Domain 2	FORMULATE CONCLUSIONS REGARDING CLIENT NEEDS AND PRIORITIES TO DEVELOP AND MONITOR AN INTERVENTION PLAN THROUGHOUT THE OCCUPATIONAL THERAPY PROCESS.		
Task 1	Analyze and interpret standardized and non-standardized assessment results, using information obtained about the client's current condition, context, and priorities in order to develop and manage client-centered intervention plans.		
	Selecting best practice evidence from textbooks, peer-reviewed journals, research, special interest sections, and Internet-based listservs and forums to support critical reasoning and clinical decision-making		
	Formulating conclusions regarding client needs and priorities guided by client preferences, the occupational profile, assessment results, and appropriate theoretical frame of reference or models of practice (e.g., Model of Human Occupation (MOHO), Ecology of Human Performance (EHP), Cognitive-behavioral model, sensorimotor model) to formulate conclusions		
	Interpreting quantitative and qualitative data from individual assessment tools in order to provide advocacy for the client and/or to formulate the intervention plan for improving a client's occupational performance		
Identifying the influence of co-existing diseases, congenital anomalies, conditions, and/or normal aging on a client's occupational performance			


Candidate Name: Kasi Webb

Domain 2	Task 1	Understanding levels of care (e.g., inpatient settings, sub-acute facilities, school system, partial hospitalization, outpatient clinic, transitional living facilities)	
		Integrating screening and assessment results with the client's occupational profile, condition, and expected outcomes, and with the level of service to develop a targeted action plan, monitor progress, and reassess the plan	
		Evaluating the effectiveness of environmental modifications, assistive technology, or adaptive devices for clients within the home, school, and/or transitional setting	
		Knowing when to reassess the plan based on client progress, level of service delivery, and transition plans	
		Using evaluation outcomes to determine program development and/or client advocacy needs (e.g., aging in place, falls prevention, community support groups, inservices)	
		Knowing the general principles of health promotion, wellness, prevention, and/or educational programming as related to the provision of OT services	
		Recognizing the importance of aligning with various consumer, family, professional, and policy-making groups to advocate for services for populations (e.g., community accessibility, community outreach, information and referral services, residential living, disability rights, occupational justice) and to identify various funding sources (e.g., insurance reimbursement, grant-based funding)	
		Identifying client services and community organizations that may benefit the client's occupational performance within a variety of contexts (e.g., job coach, vocational rehabilitation specialists, National Alliance for the Mentally Ill, Muscular Dystrophy Association, American Diabetes Association)	
		Communicating with policy-makers and advocating with relevant parties regarding needs of clients (e.g., reimbursement systems for care and services, resources, social policy, supports and services, occupational justice)	
		Seeking assistance from more experienced professionals as needed to interpret evaluation results, support intervention planning, and advocate for services to populations	
	Task 2	Collaborate with the client, the client's relevant others, occupational therapy colleagues, and other professionals and staff, using a client-centered approach to manage occupational therapy services guided by evidence and principles of best practice.	
		Knowing interprofessional roles and responsibilities in context (e.g., physician, surgeon, psychiatrist, nurse, social worker, case manager, nutritionist, chaplain/spiritual advisor, speech and language pathologist, teacher)	
		Communicating effectively with the client, interprofessional team members, and relevant others about client goals, referral needs and outcomes while adhering to ethical and confidentiality guidelines	
		Reviewing evaluation results to determine the need for referral to other professionals or services	



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Domain 2	Task 2	Completing referrals as indicated to facilitate quality care (e.g., community outreach resources, homeless shelters, optometry, physical therapy, vocational rehabilitation, supported employment)	
		Collaborating with the client and relevant others to prioritize needs and identify goals throughout the continuum of care	
		Consulting and/or collaborating with individuals and community organizations (e.g., job coach, vocational rehabilitation specialists, National Alliance for the Mentally Ill, Muscular Dystrophy Association, American Diabetes Association) to identify service needs within multiple contexts	
		Consulting and/or collaborating with other professionals to advocate for services (e.g., community accessibility, community outreach, information and referral services, residential living, disability rights, occupational justice) and resources (e.g., insurance reimbursement, grant-based funding) for populations by aligning with various consumer, family, professional, and policy-making groups	
		Formulating a collaborative client-centered intervention plan that adheres to guidelines of the practice setting (e.g., rehabilitation facility, school, acute care, outpatient facility) and includes: assessment findings, prioritized problem list, measurable long-term and short-term goals with timeframes for completion, and culturally-relevant occupation-based intervention activities for achieving stated goals	
		Identifying community resources that support engagement in occupation (e.g., child development programs, adaptive sports and leisure programs and services, homeless shelters, supported employment programs, parent support groups, specific disability/diagnoses related organizations and websites)	
		Applying the therapeutic use of self with the client and relevant others (e.g., spouse, family members, caregivers) while managing collaborative interventions and transition plans	
		Articulating the value of occupational therapy to clients and relevant others (e.g., the client's family members, caregivers, interprofessional team members, third party payers)	
		Providing updates to the client, relevant others, OT colleagues, and other professionals regarding the client's goal attainment	
		Formulating a transition plan in collaboration with the client and/or relevant others based on prioritized needs and best practice	
		Identifying appropriate transitional services (e.g., vocational training, group home, home health services, outpatient therapy, peer support groups, transitional living centers)	
		Determining frequency and duration of intervention based on contextual factors and expected outcomes	
		Prioritizing client needs and goals based on client-centered evaluation outcomes and in collaboration with the client, primary caregiver, family and/or interprofessional team	














Candidate Name: Kasi Webb

Domain 2	Task 2	Seeking assistance as needed from experienced professionals to verify if selected intervention strategies and approaches are consistent with prioritized needs and best practice	
Domain 3		SELECT INTERVENTIONS FOR MANAGING A CLIENT-CENTERED PLAN THROUGHOUT THE OCCUPATIONAL THERAPY PROCESS.	
	Task 1	Manage interventions for the infant, child, or adolescent client, using clinical reasoning, the intervention plan, and best practice standards consistent with pediatric conditions and typical developmental milestones (e.g., motor, sensory, psychosocial, and cognitive) in order to support participation within areas of occupation.	
		Applying the principles of typical development in relation to engagement in meaningful occupations taking into account developmental, physical, sensory, psychosocial, and cognitive functioning	
		Using occupation in a therapeutic manner appropriate to developmental level and pediatric conditions and typical roles, habits, and routines	
		Acknowledging the need to use precautions and applicable emergency procedures based on specific pediatric conditions	
		Understanding the interaction of client factors, performance skills, performance patterns, contexts and environments, and activity demands on the selection of developmentally-appropriate intervention activities	
		Knowing the learning needs of the child and/or caregiver prior to selecting intervention activities	
		Selecting intervention strategies and approaches (e.g., developmental, compensatory, preventive, remedial, adaptive, biomechanical, sensorimotor) that are developmentally-appropriate, meaningful, and support the appropriate frame of reference or model of practice (e.g., Model of Human Occupation (MOHO), Ecology of Human Performance (EHP), Cognitive-behavioral model, sensorimotor model) within a variety of contexts (e.g., home, daycare, school, clinic)	
		Applying therapeutic use of self to support participation in the intervention consistent with cognitive, developmental, psychosocial, and physical needs, and task demands	
		Recognizing and responding in a therapeutic manner to emotional or physical stress, behavioral responses, and typical symptoms of grief and loss when managing interventions related to pediatric conditions	
		Understanding the importance of using play as an occupation in a therapeutic manner to promote developmental skills and abilities	
		Selecting and implementing occupation-based interventions consistent with child and family preferences, child's cognitive, developmental, psychosocial, and physical needs and abilities, task demands, and prioritized goals	
		Identifying techniques to develop and enhance visual perceptual and visual motor processing skills	











Candidate Name: Kasi Webb

Domain 3	Task 1	Selecting cognitive and behavioral strategies to facilitate engagement in developmentally-appropriate activities	
		Using motor learning strategies to promote skill development	
		Applying sensory-based interventions and/or sensory modulation techniques during intervention based on pediatric conditions, tasks, and environmental demands	
		Integrating methods and strategies for improving range of motion, strength, and activity tolerance as an adjunct to occupation-based activities and consistent with pediatric conditions and developmental milestones	
		Implementing facilitation and handling principles (e.g., proprioceptive, neuromuscular facilitation, motor control) and techniques (e.g., contract-relax, brushing, joint approximation, movement patterns, stroking, neutral warmth, postural cueing) into the intervention for supporting participation in activity consistent with developmental level, pediatric conditions, congenital anomalies, and best practice standards	
		Determining social competence and integrating occupation-based approaches to support social participation	
		Identifying developmentally-appropriate methods and techniques to use during occupation-based group activities consistent with social and emotional needs, pediatric conditions, task, and environmental demands	
		Knowing types, functions, and use of orthotic and prosthetic devices based on pediatric conditions and task demands	
		Selecting, designing, fabricating, and/or modifying commonly prescribed orthotic devices for pediatric conditions to promote performance	
		Knowing indications, contraindications, types and functions of commonly prescribed adaptive devices, durable medical equipment, high and low tech assistive technology, and/or augmentative communication devices for supporting function based on child and family preferences, child's cognitive, developmental, psychosocial, and physical needs and abilities, task demands, and prioritized goals	
		Integrating the use of commonly prescribed adaptive devices, durable medical equipment, high and low tech assistive technology, and/or augmentative communication devices into the intervention to support progress toward prioritized goals based on pediatric conditions, task, and environmental demands	
		Adjusting the intervention method, technique, and/or task demands during a session in response to variances from a child's or caregiver's anticipated responses	
		Understanding indications and contraindications of interventions for enabling feeding and eating skills based on child's current abilities, developmental needs, family preferences, and environmental demands	














Candidate Name: Kasi Webb

Domain 3	Task 1	Implementing evidence-based interventions to enable feeding and eating skills (e.g., positioning, chewing, swallowing, oral motor control, hand-to-mouth patterns) based on child's current abilities, developmental needs, family preferences, and environmental demands	
		Organizing the environment and selecting instructional methods to effectively and safely teach and use transfer and positioning techniques consistent with developmental level, task, and environmental demands	
		Using prevocational and vocational exploration interventions to support transition planning in relation to pediatric conditions, developmental milestones, and prioritized goals	
		Prioritizing needs and options for using commonly prescribed seating and mobility systems, assistive technology, and durable medical equipment taking into account child and family preferences, environmental factors (e.g., living situation, available space, environment), cognitive and physical ability to use equipment, and the family and social support systems	
		Modifying the living and/or transitional environment to maximize accessibility and mobility within various contexts (e.g., ramps, child safety-proofing, rearrangement of furniture, modifications of door widths)	
		Adapting the school environment to meet the curriculum-based needs of the child (e.g., providing desktop slant board, creating a quiet area, establishing sensory stations, decreasing distractions)	
		Communicating with the primary caregiver, child, and relevant others (e.g., family, team members, vendors, payers) about acquiring appropriate assistive technology, durable medical equipment, communication devices, and/or seating and mobility systems, and implementing environmental modifications for supporting engagement in occupation based on pediatric conditions, task and environmental demands	
		Educating the child and relevant others about the safe and effective use and maintenance of commonly prescribed environmental modifications, positioning devices, seating and mobility systems, durable medical equipment, and/or assistive technology	
		Recognizing and managing adverse reactions to environmental modifications (e.g., cost, space issues, child's behavioral responses)	
		Grading an activity or task based on developmental needs, context, and task demands to support engagement in occupations	
		Using client and/or caregiver preferred learning styles to effectively teach methods for grading an activity or task based on developmental needs, context, and task demands	
		Applying methods and techniques to promote the continuation of interventions within multiple contexts based on current pediatric conditions, developmental level, and expected outcomes (e.g., home program, caregiver instructions, teacher consultation)	
		Recognizing situations for which the presenting client factors, activity demands, and/or contexts require expertise beyond entry-level for pediatric conditions and typical developmental milestones	

Candidate Name: Kasi Webb

Domain 3	Task 1	Seeking assistance as needed from experienced professionals and/or specialty certified OT colleagues for pediatric cases requiring interventions and approaches that are beyond entry-level practice	
	Task 2	Manage interventions for the young, middle-aged, or older adult client, using clinical reasoning, the intervention plan, and best practice standards consistent with general medical, neurological, and musculoskeletal conditions in order to achieve functional outcomes within areas of occupation.	
		Understanding the interaction of client factors, performance skills, performance patterns, contexts and environments, and activity demands on the selection of activities for managing interventions based on medical, neurological, and musculoskeletal conditions	
		Selecting intervention strategies and approaches (e.g., compensatory, preventive, remedial, adaptive, biomechanical, sensorimotor) that are age-appropriate, meaningful, and support the appropriate frame of reference or model of practice (e.g., Model of Human Occupation (MOHO), Ecology of Human Performance (EHP), Cognitive-behavioral model, sensorimotor model) within a variety of contexts (e.g., home, work, community, acute care, skilled nursing, assisted living, long-term care)	
		Using occupation in a therapeutic manner appropriate to the client's medical, neurological, and musculoskeletal conditions and preferred roles, habits, and routines	
		Acknowledging the need to use precautions and emergency procedures for common general medical, neurological, and/or musculoskeletal conditions when managing interventions	
		Recognizing and responding in a therapeutic manner to emotional and physical stress, behavioral responses, and typical symptoms of grief and loss when managing interventions for clients whose occupational performance is influenced by medical, neurological, and/or musculoskeletal conditions	
		Knowing the learning needs of the client and/or primary caregiver prior to selecting intervention activities that address occupational performance influenced by medical, neurological, and/or musculoskeletal conditions	
		Selecting and implementing rehabilitative strategies and procedures (e.g., activities of daily living, joint protection, work simplification, edema management, pressure-relief) to support progress toward prioritized intervention goals based on medical, neurological, and musculoskeletal conditions	
		Applying therapeutic use of self to support client participation in the intervention consistent with client preferences, needs, medical, neurological, and/or musculoskeletal conditions, and task demands	
		Facilitating individual and group occupation-based intervention activities consistent with prioritized needs, current abilities, and general medical, neurological, and musculoskeletal conditions in order to achieve functional outcomes within areas of occupation	
		Integrating methods and strategies for improving range of motion, strength, and activity tolerance as an adjunct to occupation-based activities and consistent with client needs, abilities, and medical condition	
		Implementing evidence-based strategies and techniques for facilitating or inhibiting sensory, motor, and perceptual processing as an adjunct to occupation-based activities and consistent with client needs, abilities, and medical condition	













Candidate Name: Kasi Webb

Domain 3	Task 2	Understanding indications, contraindications, and general techniques for effectively using superficial and deep thermal, mechanical, and electrotherapeutic physical agent modalities as an adjunct to participation in occupation-based activities	
		Selecting and applying superficial and deep thermal, mechanical, and electrotherapeutic physical agent modalities as an adjunct to participation in occupation-based activities	
		Knowing types, functions, and use of orthotic and prosthetic devices based on prioritized client needs, general medical, neurological, and musculoskeletal conditions, and task demands	
		Selecting, designing, fabricating, and/or modifying commonly prescribed orthotic devices based on prioritized client needs, general medical, neurological, and musculoskeletal conditions, and task demands	
		Knowing indications, contraindications, types, and functions of commonly prescribed adaptive devices, durable medical equipment, high and low tech assistive technology, and/or augmentative communication devices for supporting function based on client needs and preferences, medical, neurological, or musculoskeletal conditions, task and environmental demands	
		Integrating the use of commonly prescribed adaptive devices, durable medical equipment, high and low tech assistive technology, and/or augmentative communication devices into intervention based on prioritized needs, occupational performance goals, task and environmental demands, and medical, neurological, or musculoskeletal conditions	
		Applying evidence-based interventions to enable feeding and eating skills (e.g., positioning, chewing, swallowing, oral-motor control, hand-to-mouth patterns) based on client abilities and preferences, medical conditions, and environmental demands	
		Recognizing indications and contraindications for interventions enabling feeding and eating skills based on medical, neurological, and musculoskeletal conditions, and environmental demands	
		Organizing the environment and selecting instructional methods to effectively and safely teach and use transfers and positioning techniques	
		Selecting commonly prescribed seating and mobility systems, positioning devices, and/or environmental modifications considering client preferences, skills, and abilities, expected outcomes, family and social support systems, and financial abilities for acquisition, use, and maintenance	
		Communicating with the client and relevant others (e.g., family, team members, vendors, payers) about acquiring appropriate assistive technology, durable medical equipment, communication devices, and/or seating and mobility systems, and implementing environmental modifications	
		Educating the client and relevant others about the safe and effective use and maintenance of environmental modifications, positioning devices, seating and mobility systems, durable medical equipment, and/or assistive technology	
		Modifying the living and/or transitional environment to maximize accessibility and mobility of the client within various contexts (e.g., ramps, elevators, railings, removal of clutter, area rugs or cords, rearrangement of furniture, modifications of door widths, high color contrast between furniture and floor coverings)	













Candidate Name: Kasi Webb

Domain 3	Task 2	Recognizing and managing client and caregiver reactions to environmental modification (e.g., cost, space issues, client's behavioral responses)	
		Prioritizing client needs and options for community mobility (e.g., driving evaluation, assessment of accessibility for use of public transportation, qualification criteria for community transportation services)	
		Applying principles of ergonomics and universal design to environmental modifications in a variety of contexts (e.g., work, volunteer occupations, home environments, community areas, various living situations)	
		Using client-centered prevocational and vocational exploration processes and procedures consistent with client preferences, skills, and medical, neurological, or musculoskeletal conditions	
		Adapting and/or grading the intervention methods, techniques, tasks, and activities based on client needs and preferences, context, activity demands, client factors, and/or client or caregiver response	
		Using client and/or caregiver preferred learning styles to effectively teach methods for grading an activity or task based on medical, neurological, and/or musculoskeletal conditions, context, and task demands to support participation in occupations	
		Applying methods and techniques to promote the continuation of the intervention within context based on client needs and preferences, physical abilities, cognitive level and expected outcomes (e.g., home program, caregiver instructions)	
		Recognizing situations for which the presenting client factors, activity demands, and/or contexts require expertise beyond entry-level for medical, neurological, and musculoskeletal conditions	
		Seeking assistance as needed from experienced professionals and/or specialty certified OT colleagues for client cases requiring interventions and approaches for medical, neurological, and musculoskeletal conditions beyond entry-level practice	
		Task 3	Manage interventions for the young, middle-aged, and older adult client, using clinical reasoning, the intervention plan, and best practice standards consistent with psychosocial, cognitive, and developmental abilities in order to achieve functional outcomes within areas of occupation.
Understanding the interaction of client factors, performance skills, performance patterns, contexts and environments, and task demands on the selection of activities for managing interventions based on psychosocial, cognitive, and developmental abilities			
Designing group activities consistent with psychosocial, cognitive, and developmental frames of reference or models of practice			
Facilitating group occupation-based intervention activities consistent with prioritized needs and psychosocial skills, cognitive level, and developmental abilities to achieve functional outcomes within areas of occupation			







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Domain 3	Task 3	Selecting intervention strategies and approaches (e.g., cognitive, behavioral, preventive, remedial, adaptive, psychodynamic) that are age-appropriate, meaningful, and support the appropriate frame of reference or model of practice (e.g., Model of Human Occupation (MOHO), Ecology of Human Performance (EHP), Cognitive Disabilities, psychoeducation) within a variety of contexts (home, work, community, acute care, skilled nursing, assisted living, long-term care, partial hospitalization)	
		Integrating the learning needs of the client and relevant others into the intervention process based on psychosocial skills, cognitive abilities, and environmental demands	
		Selecting teaching methods and techniques to integrate into interventions to support a client's participation in occupations based on current psychosocial, cognitive, and developmental abilities within context	
		Using occupation in a therapeutic manner appropriate to psychosocial skills, cognitive abilities, and prioritized roles, habits, and routines	
		Identifying interventions to support client-centered goals and priorities (e.g., creative expression, physical activities, role play, self-management techniques, coping skills, lifestyle modification, ADL, BADL, work)	
		Organizing the environment and selecting instructional methods during interventions for supporting participation in occupations based on current psychosocial skills, cognitive level, and developmental abilities within context	
		Applying therapeutic use of self to support client participation in the intervention consistent with current psychosocial skills, cognitive level, and developmental abilities	
		Using precautions and emergency procedures for common psychosocial, cognitive, and developmental conditions when managing interventions	
		Recognizing and responding in a therapeutic manner to emotional or physical stress, behavioral responses, and typical symptoms of grief and loss when managing interventions consistent with clients' current psychosocial skills, cognitive level of function, and developmental abilities	
		Selecting preparatory methods and techniques (e.g., reducing environmental distractions, organizing tools and materials, reviewing methods and procedures, managing stress, using visual imagery) to facilitate continuity and reinforce client psychosocial skills and cognitive level of function as an adjunct to occupation-based activities	
		Understanding the principles and application of compensatory, remedial, and/or preventive strategies (e.g., problem-solving worksheets, memory aids, falls prevention, medication management strategies) consistent with psychosocial, cognitive, and developmental models of practice (e.g., acquisitional, behavioral, compensatory) to address abilities, roles, habits, and routines in a variety of contexts	
		Incorporating crisis and risk management techniques and/or the minimum use of seclusion and restraints as indicated by context and regulatory guidelines	














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Domain 3	Task 3	Using prevocational and vocational exploration processes and procedures consistent with client preferences, skills, and psychosocial, cognitive, or developmental abilities	
		Educating the client and relevant others about the safe and effective use of environmental modifications for supporting participation in occupation within context based on prioritized client needs and preferences, psychosocial skills, cognitive level of function, and developmental abilities	
		Recognizing and managing client and caregiver reactions to environmental modification (e.g., cost, space issues, behavioral responses)	
		Identifying modifications to the living and/or transitional environment for supporting independence within areas of occupation (e.g., removal of clutter, labeling drawers and contents, maintaining routines, posting checklists) based on prioritized client needs and preferences, psychosocial skills, cognitive level of function, and developmental abilities	
		Identifying needs and options for community mobility which may include recommending a driving evaluation, assessment of accessibility for use of public transportation, outreach, and family/caregiver support	
		Selecting commonly prescribed durable medical equipment, environmental modifications, and/or assistive technology considering client preferences, prioritized needs, psychosocial skills, cognitive level of function, developmental abilities, context, expected outcomes, family and social support systems, and financial abilities for acquisition, use, and maintenance	
		Integrating commonly prescribed durable medical equipment, environmental modifications, adaptive devices and/or assistive technology into interventions for supporting progress toward prioritized goals based on client preferences, prioritized needs, psychosocial skills, cognitive level of function, developmental abilities, task and environmental demands	
		Communicating with the client and relevant others (e.g., family, team members, vendors, payers) about acquiring appropriate durable medical equipment and/or assistive technology or implementing environmental modifications for supporting participation in occupations within context	
		Adjusting and/or grading the intervention method, technique, task, or environment during a session in response to variances in contexts, activity demands, psychosocial condition, client behavior, and/or caregiver responses	
		Using client and/or caregiver preferred learning styles to effectively teach a client or caregiver methods for grading an activity or task based on psychosocial skills, cognitive level of function, developmental abilities, context, and task demands to support participation in occupations	
		Applying methods and techniques to promote the continuation of the intervention within context based on the client's psychosocial needs, cognitive level of function, developmental abilities, and expected outcomes (e.g., home program, caregiver instructions)	
		Recognizing situations for which the presenting client factors, activity demands, and/or contexts require knowledge and skills beyond entry-level related to cognitive, psychosocial, and developmental conditions	
		Seeking assistance as needed from experienced professionals and/or specialty certified OT colleagues for client cases requiring interventions and approaches for cognitive, psychosocial, and/or developmental conditions beyond entry-level practice	











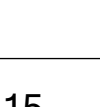
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Domain 4	MANAGE AND DIRECT OCCUPATIONAL THERAPY SERVICES TO PROMOTE QUALITY IN PRACTICE.	
	Task 1	<p>Maintain and enhance competence, using professional development activities relevant to practice, job responsibilities, and regulatory body in order to provide evidence-based services.</p> <p>Creating a professional development plan and critically appraising professional competence to provide ethical client-centered care based on best practice standards (e.g., self-assessment, peer review) </p> <p>Engaging in ongoing continuing competence activities to advance professional skills and abilities for serving clients in a variety of practice settings (e.g., acute and subacute care, home and community health, early intervention and school, work and industry) </p> <p>Knowing various sources of information (e.g., research-based articles, peer and non-peer reviewed literature, Internet searches, Web logs, lectures, inservices) and their relevance to evidence-based practice </p> <p>Recognizing the importance of tracking trends and responding to changes in practice as reported in evidence-based literature and research (e.g., peer-reviewed journals, Internet-based websites, and/or conferences, workshops) </p> <p>Accessing, selecting, and systematically reviewing research literature addressing issues related to occupational therapy practice </p> <p>Understanding the importance of conducting occupational therapy research in order to improve service delivery </p> <p>Interpreting results and conclusions of professional literature and applying evidence-based knowledge in order to provide effective services and to promote quality care within a variety of settings </p> <p>Knowing the importance of effective methods for disseminating outcomes of investigations in order to contribute to the occupational therapy body of knowledge (e.g., publishing study outcomes, presenting at professional conferences, sharing information with colleagues and other professionals, clients, and the public) </p> <p>Completing professional development and service competency activities for self and supervisees (e.g., peer review, supervisory meeting, self-assessment) to meet regulatory and facility-specific requirements </p> <p>Using effective methods and strategies for promoting the value of the OTR or COTA credential </p>
	Task 2	<p>Manage occupational therapy service provision in accordance with laws, regulations, accreditation guidelines, and facility policies and procedures governing safe and ethical practice in order to protect consumers.</p> <p>Understanding the value and purpose of accrediting bodies in relation to service delivery models (e.g., The Joint Commission (formerly JCAHO), Commission on Accreditation of Rehabilitation Facilities (CARF), Healthcare Facilities Accreditation Program (HFAP)) </p>




Candidate Name: Kasi Webb

Domain 4	Task 2	Obtaining information in accordance with regulatory requirements (e.g., Commission on Accreditation of Rehabilitation Facilities (CARF), Health Insurance Portability and Accountability Act (HIPAA)), funding requirements (e.g., Title 22, Medicaid, workers' compensation), and/or levels of service provision (e.g., acute care, long-term care, school, community)	
		Knowing professional responsibilities related to OT credentialing and licensure	
		Complying with the NBCOT Code of Conduct and Professional Practice Standards, and ethical codes of state OT regulatory bodies	
		Complying with federal and state regulations and guidelines governing OT service provision (e.g., Americans with Disabilities Act (ADA), Centers for Medicare and Medicaid (CMS), Individuals with Disabilities Education Act (IDEA), state regulatory entities)	
		Referring to appropriate documents and manuals to learn facility policies, procedures, and guidelines specific to service delivery models and funding sources	
		Consulting appropriate facility personnel to answer questions regarding facility policies, procedures, and guidelines specific to service delivery models and funding sources	
		Complying with facility policies, procedures, and guidelines specific to service delivery models and funding sources	
		Identifying where to find information about funding, reimbursement, and/or payment sources that support occupational therapy services	
		Recognizing general information about federal and state funding sources and service requirements for persons with disabilities (e.g., Americans with Disabilities Act (ADA), tax credits and exemptions)	
		Knowing general guidelines/parameters related to third party payer requirements for hospital and clinic-based services (e.g., Medicare, Medicaid, managed care organizations (MCO), preferred provider organizations (PPO), private insurance, vocational rehabilitation, workers' compensation)	
		Identifying where to find information about services supported through grant-based initiatives	
		Recognizing the opportunities private, local, and national philanthropic funding sources can provide to support intervention programs and services for clients	
		Understanding reimbursement guidelines for durable medical equipment, seating and mobility systems, and assistive technology (e.g., State Children's Health Insurance Program (SCHIP), private insurance plans, specific philanthropic organizations, grant-based criteria)	

Candidate Name: Kasi Webb

Domain 4	Task 2	Assessing safety and risk in the workplace and adhering to guidelines as outlined by workplace regulatory and accreditation entities (e.g., Health Insurance Portability and Accountability Act (HIPAA), Occupational Safety and Health Administration (OSHA), Centers for Disease Control and Prevention (CDC), The Joint Commission (formerly JCAHO), Commission on Accreditation of Rehabilitation Facilities (CARF))	
		Understanding the purpose for and importance of implementing ongoing quality improvement processes and procedures (e.g., program evaluation, outcome measures)	
		Developing and implementing ongoing quality improvement processes and procedures in accordance with accepted guidelines and in collaboration with experienced OT practitioners or service-specific interprofessional teams	
		Identifying roles and responsibilities of the OTR and COTA for providing safe and ethical occupational therapy within a specified setting	
		Delegating tasks and responsibilities to OT personnel according to professional standards and applicable reimbursement guidelines for service provision	
		Knowing effective supervision practices relative to supervisees's professional competence, performance indicators, and practice act regulations	
		Applying effective methods for assessing competency needs of supervisees related to service provision within a particular setting	
		Designing competency-based activities linked to specified learning objectives for supervisees	
		Adhering to guidelines for confidentiality in documentation and dissemination of client health-related information (e.g., Health Insurance Portability and Accountability Act (HIPAA))	
		Recognizing the importance of documenting effective remedial plans based on performance indicators while adhering to facility policies and procedures	
		Differentiating documentation requirements in accordance with practice setting, regulatory agencies, or funding sources (e.g., Medicare, Medicaid, managed care organizations (MCO), preferred provider organizations (PPO), private insurance, workers's compensation, Individuals with Disabilities Education Act (IDEA), State Children's Health Insurance Program (SCHIP), school-based services)	
		Knowing various documentation styles and formats commonly used in OT practice (e.g., SOAP, RUMBA, CMS Form 700, electronic medical records (EMR), Medicaid documentation, forms for Individualized Family Service Program Plan (IFSP) and Individualized Education Program Plan (IEP))	
		Identifying commonly used terminology when documenting OT services (e.g., Diagnostic Related Groups (DRG), Resource Utilization Groups (RUG), Current Procedural Terminology (CPT Codes), International Classification of Diseases, 9th edition (ICD-9) and the Diagnostic and Statistical Manual, 5th Edition (DSM 5), Individualized Education Program Plan (IEP), Individualized Family Service Program Plan (IFSP))	

Candidate Name: Kasi Webb

Domain 4	Task 2	Understanding the importance of documenting medical necessity and functional skills and abilities according to measurable goals	
		Using documentation as a means to measure service outcomes	
		Seeking information from facility administrators and other pertinent resources about laws, regulations, accreditation guidelines, and facility policies and procedures governing safe and ethical practice in order to protect consumers.	

Key:



No knowledge or skills – You are unfamiliar with concept or practice of the skill. Additional study is needed in this area to learn the concepts and clinical application related to this skill.



General knowledge through observation and academic learning – You are familiar with general knowledge related to the skill through academic learning and observation but have had limited opportunities to apply this during fieldwork. You should focus on strategies for gaining more knowledge about this skill and ways to demonstrate this knowledge in clinical situations.



General clinical skills under supervision - You are familiar with the general clinical application of this skill and have occasionally applied the skill under direct supervision. You may want to collaborate with an experienced OTR clinician to plan independent practice-based learning activities requiring these skills.



Entry-level competence – You have implemented the skill across routine situations within the guidelines of Level II fieldwork practice setting. Your responses indicate you have experience associated with entry-level competence.

Candidate Name: Kasi Webb

USING THE RESULTS FROM THIS TOOL:

Results from this *Entry-level OTR Self-assessment Tool* provide you with a self-perceived indication of your knowledge and experience in relation to the domains, tasks, and skills of OT practice for the entry-level OTR professional. If you are preparing for the certification examination, you can use the results from this tool along with the OTR *Validated Domain, Task and Knowledge Statements*, and OTR certification examination blueprint specifications to assist with developing an effective study plan.

You may want to consider using the following resources to supplement your growth as an entry-level OTR professional:

Official NBCOT Study Tools:

The official NBCOT study tools offer candidates a variety of test preparation resources to assist with preparation for the OTR certification examination. Each tool reflects the validated domain, task and knowledge statements of the current examination blueprint. For details of the official NBCOT study tools, go to the NBCOT website (www.nbcot.org) and click on "Exam Prep" located in the "Certification Candidates" tab on the home page.

360° Feedback:

Share the results from this tool to complete a 360° review of your entry-level skills and abilities with your fieldwork supervisors, OTR and COTA colleagues, OT program directors or faculty. Because each of these individuals offers a different perspective on your OT skills and abilities, you can obtain a complete picture of your strengths and weaknesses in the assessed areas.

Academic Learning Materials:

You can create a customized plan for enhancing your entry-level OT knowledge using resources from your academic program. These include:

- OT textbooks
- Peer-reviewed journal articles
- Class handouts and notes
- Audio or video presentations
- Lab books and references
- Fieldwork case studies