

**Updated Workload Tool for
OT, PT, and SLP Practitioners**

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Session materials- <https://bit.ly/WkloadTool>

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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

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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

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Mythbuster # 1

TRUE or FALSE

50 is the recommended number of students on a related service provider's caseload (head count)

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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

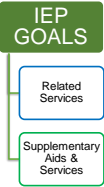


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Mythbuster #3

TRUE or FALSE

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



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Mythbuster # 4

TRUE or FALSE

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



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Mythbuster #5

TRUE or FALSE

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



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Mythbuster #6

TRUE or FALSE

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

Mythbuster #7

TRUE or FALSE

The Workload Tool is just one more thing to do.

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

Workload Tool for OT, PT and SLP Practitioners

Updated Workload Tool

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

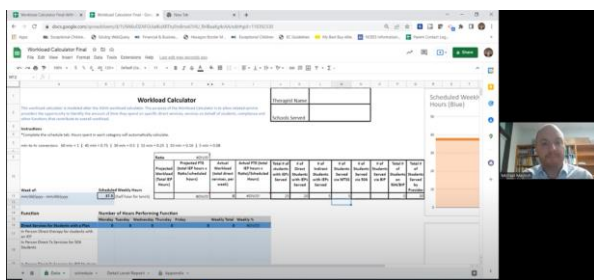
Note: Appendix is included in the Workload Tool

[Introduction/Overview Video of Workload Tool](#)

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Video Tutorial



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Workload Calculator

The workload calculator is modified after the ADHD workload calculator. The purpose of the Workload Calculator is to allow related service providers the opportunity to identify the amount of time they spend on specific direct services, services on behalf of students, compliance and other functions that contribute to overall workload.

Instructions:

*Complete the schedule tab. Hours spent in each category will automatically calculate.

min-to-hr conversion: 60 min = 1 | 45 min = 0.75 | 30 min = 0.5 | 15 min = 0.25 | 10 min = 0.166 | 5 min = 0.083

Therapist Name	
Schools Served	

Ratio	HOURS																				
	Projected FTE Workload (Total IEP Hours)	Actual Workload (Total direct services per week)	Actual FTE (Total direct services/scheduled hours)	Ratio (Actual/Projected)	# of students with IEP Served	# of Direct Students with IEP Served	# of Indirect Students via MTSS	# of Students Served via SDA	# of Students Served via BIP	Total # of Student Served by Provider											
Week of:	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Scheduled Weekly Hours</td> <td>12.5</td> <td>Half hour for lunch</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table>										Scheduled Weekly Hours	12.5	Half hour for lunch								
Scheduled Weekly Hours	12.5	Half hour for lunch																			
	40.000000	40.000000	1.000000	1.000000	25	25	1	1	1	28											

Function	Number of Hours Performing Function																	
	Monday	Tuesday	Wednesday	Thursday	Friday	Weekly Total												
Direct Services for Students with a Plan	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>Monday</th> <th>Tuesday</th> <th>Wednesday</th> <th>Thursday</th> <th>Friday</th> <th>Weekly Total</th> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>40.000000</td> </tr> </table>						Monday	Tuesday	Wednesday	Thursday	Friday	Weekly Total						40.000000
Monday	Tuesday	Wednesday	Thursday	Friday	Weekly Total													
					40.000000													
In Person Direct Therapy for students with a IEP																		
In Person Direct To Services for SDA Students																		
In Person Direct To Services for BIP Students																		
Virtual Direct To Services for IEP Students																		
Virtual Direct To Services for SDA Students																		
Virtual Direct To Services for BIP Students																		
Evaluation/Reevaluation						40.000000												

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Services on Behalf of Students with a Plan/Indirect Services	Mon	Tues	Wed	Thu	Fri	Sat	Sun	MON/OT
Activities include: Planning, staff/parent training, consultation with staff, programming/maintaining AAC devices, creating therapy materials, environmental adaptation, incorporate skill practice into class/routine, Data Review/Discussion, Obtain/monitor/maintain AT/DME, Communicate/Collaborate with school, district, or community partners	0	0	0	0	0	0	0	MON/OT
Intervention in MTSS								
Direct Intervention with Students Activities to support MTSS: observe students in classrooms (for all purposes except evaluations), adapt gen ed curriculum and materials for your students, consultation with teachers								
Documentation and Requirements to Comply with Federal, State and District Mandates and Licensure	0	0	0	0	0	0	0	MON/OT
Activities include: complete service logs, scheduling, Paperwork (writing IEPs, scoring/writing evaluation reports, progress reports, IOC, work on district-wide initiatives, professional development, supervision, Case Management tasks, Letters of Medical Necessity, Sanitize/PPE Meetings								
Special Education Assignments	0	0	0	0	0	0	0	MON/OT
Travel								
Other Activities	0	0	0	0	0	0	0	MON/OT
Activities include: Schedule/Use interpreters for ELs, emails, phone calls, school duties (ex. car ride) Other time investments you would like captured (describe duty and frequency) ex. Health Department Meeting 1x/month Use this space for any additional								

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Mon	Tues	Wed	Thu	Fri	Sat	Sun	Mon	Tues	Wed	Thu	Fri	Sat	Sun	Monday	Tuesday	Wednesday	Thursday	Friday
7:00				12:00 PM										No Person Direct To Services for IEP Meetings				
7:05				12:05 PM										No Person Direct To Services for IEP Meetings				
7:10				12:10 PM										No Person Direct To Services for IEP Meetings				
7:15				12:15 PM										No Person Direct To Services for IEP Meetings				
7:20				12:20 PM										No Person Direct To Services for IEP Meetings				
7:25				12:25 PM										No Person Direct To Services for IEP Meetings				
7:30				12:30 PM										No Person Direct To Services for IEP Meetings				
7:35				12:35 PM										No Person Direct To Services for IEP Meetings				
7:40				12:40 PM										Virtual Direct To Services for IEP Students				
7:45				12:45 PM										Virtual Direct To Services for IEP Students				
7:50				12:50 PM										Virtual Direct To Services for IEP Students				
7:55				12:55 PM										Virtual Direct To Services for IEP Students				
8:00				1:00 PM										Virtual Direct To Services for IEP Students				
8:05				1:05 PM										Virtual Direct To Services for IEP Students				
8:10				1:10 PM										Virtual Direct To Services for IEP Students				
8:15				1:15 PM										Virtual Direct To Services for IEP Students				
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8:40				1:40 PM										Virtual Direct To Services for IEP Students				
8:45				1:45 PM										Virtual Direct To Services for IEP Students				
8:50				1:50 PM										Virtual Direct To Services for IEP Students				
8:55				1:55 PM										Virtual Direct To Services for IEP Students				
9:00				2:00 PM										Virtual Direct To Services for IEP Students				
9:05				2:05 PM										Virtual Direct To Services for IEP Students				
9:10				2:10 PM										Virtual Direct To Services for IEP Students				
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9:40				2:40 PM										Virtual Direct To Services for IEP Students				
9:45				2:45 PM										Virtual Direct To Services for IEP Students				
9:50				2:50 PM										Virtual Direct To Services for IEP Students				
9:55				2:55 PM										Virtual Direct To Services for IEP Students				
10:00				3:00 PM										Virtual Direct To Services for IEP Students				

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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!

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