

**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)



The answer is:
• FALSE

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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



The answer is: FALSE



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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



The answer is: FALSE



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Mythbuster # 4

TRUE or FALSE

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



The answer is: FALSE



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Mythbuster #5

TRUE or FALSE

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



The answer is: FALSE



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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



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

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

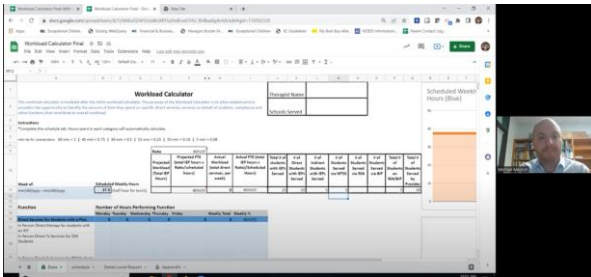
Note: Appendix is included in the Workload Tool

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

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Video Tutorial



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Workload Calculator

Therapist Name:

Schools Served:

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 = 0.16 | 5 min = 0.08

Ratio		Hours		Ratio		Hours		Ratio		Hours	
Projected Workload (Total IEP Hours)	Projected FTE (Total IEP Hours)	Actual Workload (Total Direct Services)	Actual FTE (Total Direct Services)	# of students with IEP	# of Direct Services	# of Indirect Services	# of Students via MTSS	# of Students via SDA	# of Students via IEP	Total # of Student Served	Total # of Student Served by Provider
120	40X(3)	40X(3)	40X(3)	25	25	1	1	1	1		28

Function

Function	Number of Hours Performing Function				
	Monday	Tuesday	Wednesday	Thursday	Friday
Direct Services for Students with a Plan					
In Person Direct Therapy for students with a Plan					
In Person Direct To Services for SDA Students					
In Person Direct To Services for IEP Students					
Virtual Direct To Services for IEP Students					
Virtual Direct To Services for SDA Students					
Evaluation/Reevaluation					

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Services on Behalf of Students with a Plan/Indirect Services	M	T	W	Th	F	S	S	MON	TUE	WED	THUR	FRI	SAT	SUN
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	INDIVID						
Intervention in MTSS	0	0	0	0	0	0	0	INDIVID						
Direct Intervention with Students	0	0	0	0	0	0	0	INDIVID						
Documentation and Requirements to Comply with Federal, State and District Mandates and Licensure	0	0	0	0	0	0	0	INDIVID						
Travel	0	0	0	0	0	0	0	INDIVID						
Other Activities	0	0	0	0	0	0	0	INDIVID						

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Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Monday	Tuesday	Wednesday	Thursday	Friday	
				12:00 PM										No Person Direct To Services for SLP Meetings					
				12:00 PM										No Person Direct To Services for SLP Meetings					
				12:00 PM										No Person Direct To Services for SLP Meetings					
				12:00 PM										No Person Direct To Services for SLP Meetings					
				12:00 PM										No Person Direct To Services for SLP Meetings					
				12:00 PM										Virtual Direct To Services for SLP Students					
				12:00 PM										Virtual Direct To Services for SLP Students					
				12:00 PM										Virtual Direct To Services for SLP Students					
				12:00 PM										Virtual Direct To Services for SLP Students					
				12:00 PM										Availability/ Provision					
				12:00 PM										Meeting/Coaching/Indirect Services					
				12:00 PM										MTSS Direct Intervention					
				12:00 PM										MTSS Support Activities					
				12:00 PM										Telephone Services/In-person					

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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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