

## OTA ALC Annual Meeting Fall 2024

## Session 2:

## Practice Resources and Tools for OTA Educators

## **Presenters**



Shannon White MA, COTA/L, CAPM, ROH Program Manager, Practice at AOTA



Julie Malloy
OTD, MOT, OTR/L, PMP, CPHQ, FNAP
Vice President, Practice at AOTA



## **Objectives**

Following this presentation, individuals will be able to:

- Locate new and updated practice resources on the AOTA website
- Identify immediate, short term, and long-term opportunities to use AOTA practice resources within their OTA programs
- Suggest new AOTA practice resources





## **Practice Team Members**



Julie Malloy OTD, MOT, OTR/L, PMP, CPHQ, FNAP Vice President, Practice



Teresa Dufeny PhD, OTR/L, Director, Evidence-Based Practice



Jamar Haggans MS, OTR/L Director of Quality



Scott A. Trudeau PhD, MAOT Director, Practice Engagement



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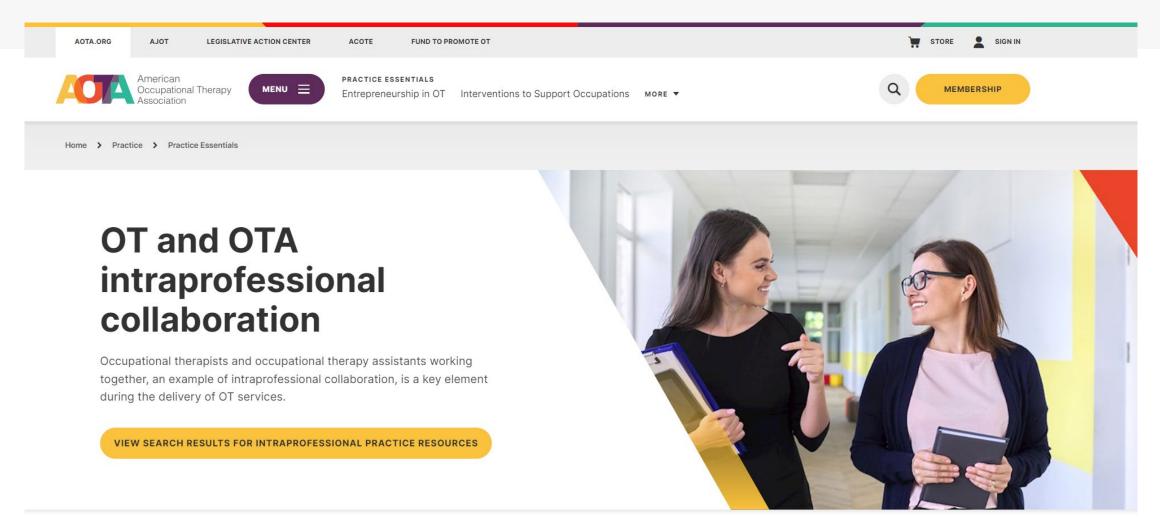


**Tom Quinn BA**Project Assistant



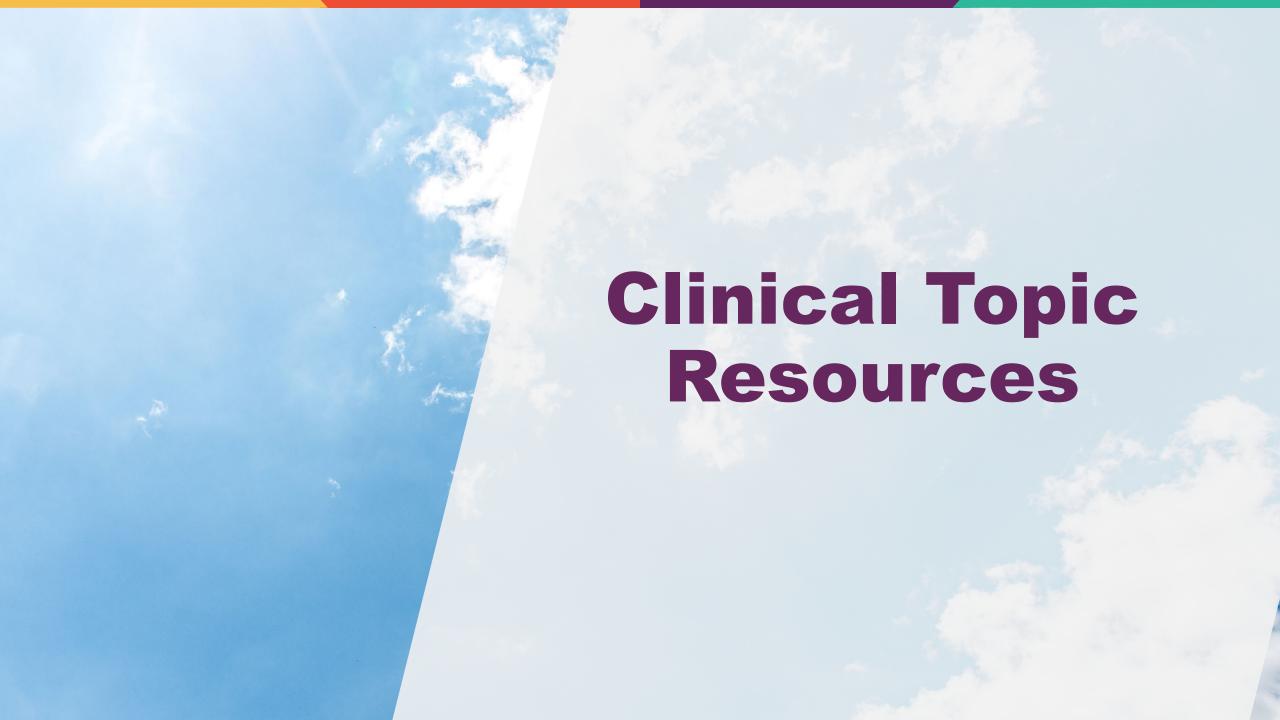
# OT/OTA Intraprofessional Collaboration Resource

## **OT/OTA Collaboration**



#### OT and OTA Intraprofessional Collaboration Webpage





## **Curated Webpages**

**School-Based** 

Early Intervention Pain Management

Sleep

Functional Cognition

Musculoskeletal Conditions



## **Curated Webpages**

Interventions to
Support
Occupations

**Stroke** 

SDOH

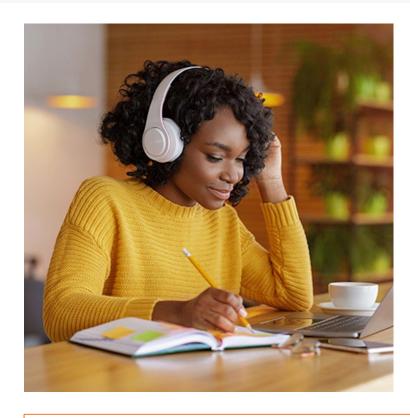
Sex as an ADL

Women's Health

Entrepreneurship



## **Podcasts**



Available through Spotify, Apple Podcasts, and the AOTA website

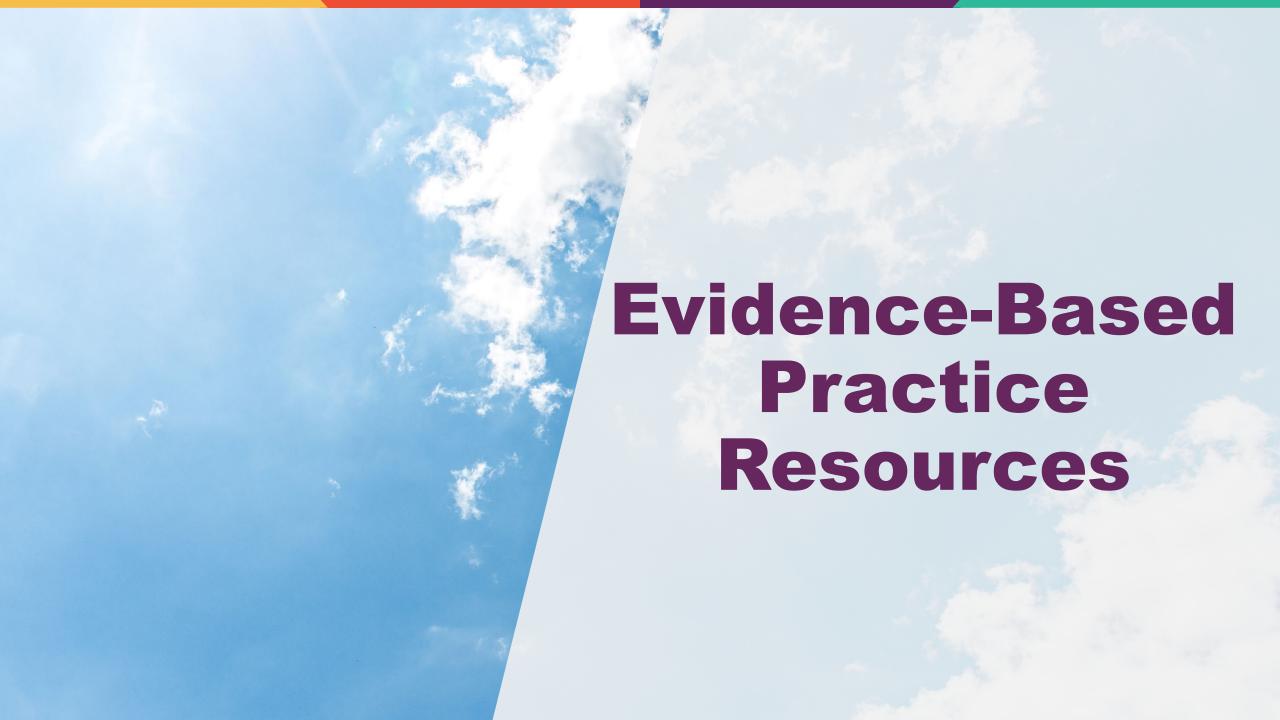
## AOTA Podcasts

- Everyday Evidence
  - Habits and Wellness in Psychiatric Rehab
  - Early Childhood Competencies
  - Practice Guidelines for Autistic Individuals

#### AOTA Podcast

- Maternal-Infant Mental Health
- Addressing Air Travel Accessibility
- Sexuality and Intimacy





## **Practice Guidelines**

## **AOTA Practice Guidelines in AJOT**

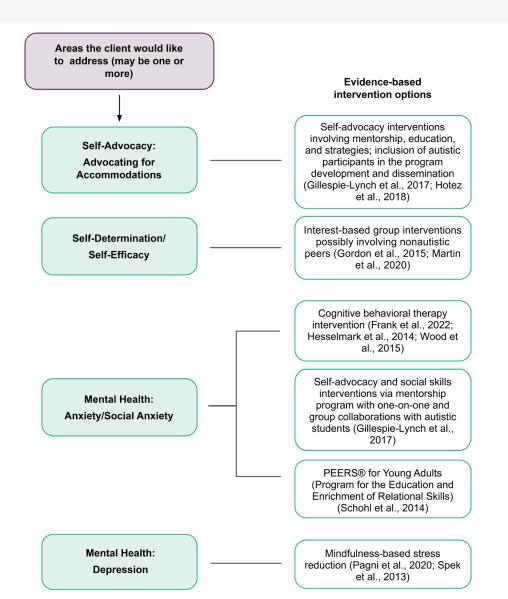


AOTA's topic-specific Practice Guidelines present clinical recommendations and tools for translating knowledge to guide your practice. Several new topic areas are now available!





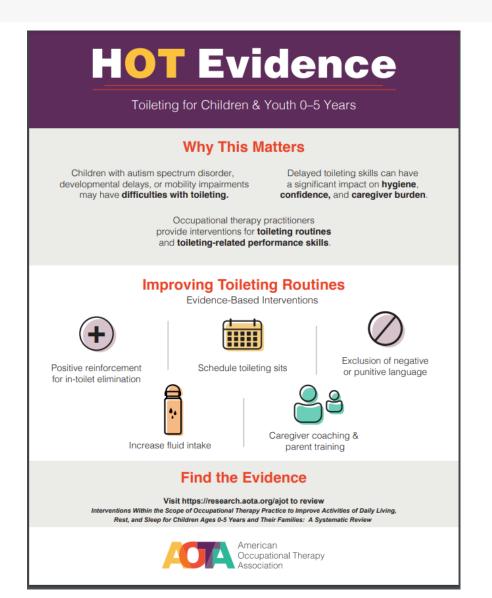
## **Practice Guidelines**





## Hot Evidence Infographics

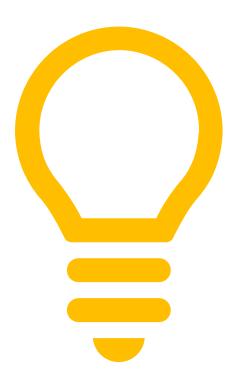
### **Hot Evidence Infographics**





## **Evidence-Informed Intervention Ideas**

## **Evidence-Informed Intervention Ideas**



#### **EVIDENCE-BASED PRACTICE**

## Evidence-informed intervention ideas: Toileting for children and youth 0-5

Many children with developmental delays and disabilities struggle with learning how to use the toilet. Delayed toileting skills can have a significant impact on hygiene, confidence, and caregiver burden. Occupational therapy practitioners provide interventions for toileting routines and toileting-related performance skills. There is moderate strength of evidence for the use of various intervention strategies to support the development of independent toileting among young children. Occupational therapy practitioners are encouraged to use these evidence-based intervention ideas as a guide for clinical decision making but should reference the <a href="systematic review">systematic review</a> for more specific information.

#### **Scheduling Toileting Sits**

- . Consistently take the child to the bathroom at set times to establish a routine.
- Encourage the child to visit the bathroom:
- After waking up
- Before and after naptime
- · Before and after a new play activity
- Before a meal
- · Before bedtime
- · Before leaving home for an outing

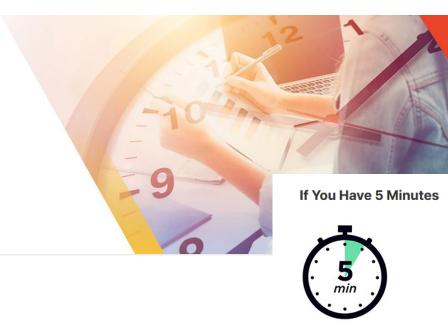


## **Daily Dose of Practice Improvement**

### **Daily Dose of Practice Improvement**

# A Daily Dose of Practice Improvement: Starting With 5 Minutes

Every occupational therapy practitioner can use evidence to inform practice, but not every practitioner feels like they have the time to do so. Whether you have 5 minutes or 5 hours, AOTA resources will help you use evidence to launch your career and guide your practice.



- Review HOT Evidence Infographics
  - · Snapshots of evidence-based interventions from Critically Appraised Topics or Systematic Review Briefs
- Watch a video about how to access research articles through PubMed
- Review our Member Spotlights-Quality





## **Occupational Profile**

- PDF and Word Templates available for Download
- Directions for how to include the Occupational Profile Template in your electronic health record
- New! Examples available

## **AOTA Occupational Profile**



aota.org

#### **AOTA Occupational Profile Template**

"The occupational profile is a summary of a client's (person's, group's, or population's) occupational history and experiences, patterns of daily living, interests, values, needs, and relevant contexts" (AOTA, 2020, p. 21). The information is obtained from the client's perspective through both formal and informal interview techniques and conversation.

The information obtained through the occupational profile contributes to a client-focused approach in the evaluation, intervention planning, intervention implementation, and discharge planning stages. Each item below should be addressed to complete the occupational profile. Page numbers are provided to reference the description in the Occupational Therapy Practice Framework: Domain and Process (4th ed.; AOTA, 2020).

	0	CCUPATIONAL PROFILE		
Client Report	Reason the client is seeking service and concerns related to engagement in occupations (p. 16)	Why is the client seeking services, and what are the client's current concerns relative to engaging in occupations and in daily life activities? (This may include the client's general health status.)		
	Occupations in which the client is successful and barriers affecting success (p. 16)	In what occupations does the client feel successful, and what barriers are affecting their success in desired occupations?		
	Occupational history (p. 16)	What is the client's occupational history (i.e., life experiences)?		
	Personal interests and values (p. 16)	What are the client's values and interests?		
Contexts		What aspects of their contexts (environmental and personal factors) does the client see as supporting engagement in desired occupations, and what aspects are inhibiting engagement?		
	Environment (p. 36) (e.g., natural environment and human-made changes, products and technology, support and relationships, attitudes, serv- ices, systems and policies)	Supporting Engagement	Inhibiting Engagement	
	Personal (p. 40) (e.g., age, sexual orientation, gender identity, race and ethni- city, cultural identification, social background, upbringing, psychological assets, educa- tion, lifestyle)	Supporting Engagement	Inhibiting Engagement	



## Occupational Profile Examples

## **AOTA Occupational Profile Community Mental Health – Homelessness Example**

"The occupational profile is a summary of a client's (person's, group's, or population's) occupational history and experiences, patterns of daily living, interests, values, needs, and relevant contexts" (AOTA, 2020, p. 21). The information is obtained from the client's perspective through both formal and informal interview techniques and conversation.

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	O	CCUPATIONAL PROFILE
	Reason the client is seeking service and concerns related to engagement in occupations (p. 16)	Why is the client seeking services, and what are the client's current concerns relative to engaging in occupations and in daily life activities? (This may include the client's general health status.)  Client is referred to OT due to his concerns regarding transitioning from a homeless shelter into independent living due to diagnoses of schizophrenia and bipolar disorder. Client reports difficulty with money and medication management and has concerns about home maintenance/cooking.
Client Report	Occupations in which the client is successful and barriers impacting success (p. 16)	In what occupations does the client feel successful, and what barriers are affecting their success in desired occupations?  Success: morning self-care ADLs. Able to complete chores in the homeless shelter using a checklist.  Barriers: receiving assistance from staff at local shelter with medication management which he won't have in independent living. Poor short-term memory, distractibility, and executive function deficits in sequencing and organizing.
	Occupational history (p. 16)	What is the client's occupational history (i.e., life experiences)? Client has been experiencing homelessness for 2 years, incarcerated for 5 years prior with no family supports nearby. Previous substance use disorder but has been in recovery for the past year. He has lived locally his entire life and occasionally visits an old childhood friend. He completed the 11th grade and later obtained a GED. His mother experienced depression and alcoholism. Prior to being incarcerated, client has inconsistent work history including busser, construction, and janitor. Client is not married and has no children.
	Personal interests and values (p. 16)	What are the client's values and interests? Client values dependability and his friendships. His interests include living independently and creating community support networks to attend leisure activities.

### **AOTA Occupational Profile Resources**

#### **AOTA's Occupational Profile Template**

A template designed for you to use in any practice setting—print it and complete it by hand, type text directly into the document, or include it in an electronic health record (EHR).

Occupational Profile Template (PDF version)	
Occupational Profile Template (Word version)	<b>(</b> +)
Include the Occupational Profile Template in electronic health records (EHR)	+
Occupational Profile Examples (PDF version)	(+)



## **Section GG**

## Section GG Resources



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Client: \_\_\_\_\_DX: \_\_\_\_\_MRN: \_\_\_\_Eval Date: \_\_\_\_DC Date: \_\_\_\_

## Section GG Self-Care (Activities of Daily Living) and Mobility Items

This form can be used to help you score and document Section GG items as you complete your comprehensive occupational therapy evaluation. Section GG is utilized across all post-acute care (PAC) settings by Medicare (CMS). While Section GG is a standardized assessment, other assessments can and should be utilized during a comprehensive occupational therapy evaluation. For more information on how Section GG is utilized in your setting, see the Medicare Assessments linked on the last page. AOTA encourages practitioners to utilize this data as an advocacy tool with management to demonstrate the value of OT in PAC. Remember, Section GG is intended to be used as an interdisciplinary tool so it is not necessary for the OT to score all items at the evaluation. See page 3 for scoring information. Visit acids.org/value for more ideas on how to use Section GG data in your practice.

See page 2 for transfer and mobility items that may also apply to the occupational therapy evaluation.

Discharge Item

See page 3 for the Section GG scoring algorithm.

6 = Independent; 5 = Setup; 4 = Supervision/Touching; 3 = Partial Assistance; 2 = Substantial Assistance; 1= Dependent; 07 = Refused; 09 = Not Applicable; 10 = Not attempted due to environment limitations; 88 = Not attempted due to medical condition/safety

Definition

#### Self-Care Items (Assessment Item GG 0130\*\*\*)

Admission Goal

	Admission	Goai	Discharge	item	Definition
Α				Eating	The ability to use suitable utensils to bring food to the mouth and swallow food once the meal is presented on a table/tray. Includes modified food consistency.
В				Oral hygiene	The ability to use suitable items to clean teeth. Dentures: The ability to remove and replace dentures from and to mouth, and manage equipment for soaking and rinsing.
С				Toilet hygiene	The ability to maintain perineal hygiene, adjust clothes before and after using toilet, commode, bedpan, or urinal. If managing ostomy, include wiping opening but not managing equipment.
D				Wash upper body**	The ability to wash, rinse, and dry the face, hands, chest and arms while sitting in a chair or bed.
E				Shower/bathe self*	The ability to bathe self in shower or tub, including washing, rinsing, and drying self. Does not include transferring in/out of tub/shower, washing of back or hair.
F				Upper body dressing*	The ability to dress and undress above the waist, including fasteners.
G				Lower body dressing*	The ability to dress and undress below the waist, including fasteners. Does not include footwear.
н				Putting on/taking off footwear*	The ability to put on and take off socks and shoes or other footwear that are appropriate for safe mobility, including fasteners.

\*Indicates the item is not <u>currently</u> reported to CMS in Long Term Care Hospitals (LTCH) \*\*Indicates the item is <u>only</u> reported to CMS in LTCH.

\*\*\* These items correspond with GG130 in Medicare Assessments including the Minimum Data Set (MDS), Inpatient Rehabilitation
Facility Patient Assessment Instrument (IRF-PAI), Long Term Care Hospital Continuity Assessment Record Evaluation Tool (LTCH
CARE), and the Outcome and Assessment Information Set (OASIS).



## **Group and Concurrent Therapy**

Considerations
for Group, Concurrent
and Individual
Therapy



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### Considerations for Group, Concurrent, and Individual Therapy in Skilled Nursing Facilities

The Centers for Medicare & Medicaid Services (CMS) supports the clinical judgement of the practitioner. Refer to coverage rules by the payer for more details.

In the PDPM final rule, CMS (2019) states: "we expect therapists to determine the frequency, duration, and modality of therapy based on sound clinical reasoning and the individual needs of each patient." (84 Fed. Reg. 38728. Individual Therapy **Group Therapy** Concurrent Therapy Clinical & Regulatory Overview Therapist or therapy assistant treating two to six patients ...therapy is provided to two One therapist or aspatients by one therapist sistant to one client at a at the same time regardless of payer source who are performing the same or similar activities. (CMS, 84 Fed. Reg. time. Should be the prior therapy assistant doing mary mode of therapy 38728, 38745-38750, 2019) different activities." (CMS. and the standard of 84 Fed. Reg. 38728, 38745care. (CMS, 84 Fed. Appropriate for clients when implemented to address client-38750, 2019) Reg. 38728, 38745specific goals. May be appropriate for some 38750, 2019) clients and some goals. **Clinical Considerations** The typical OT interven- Provide interventions in group to the right clients at the right Interventions should be tion session should be different for each client individual. and directed at a specific Interventions must be skilled and medically necessary. goal for each client. Interventions must be Consider infection control issues for any shared equipment. skilled and medically The interventions must When identifying clients for group interventions, provide an necessary. be skilled and medically activity analysis of the group intervention considering the necessary. Any interventions that include safety concerns Best used when clients Individual goals & current functional capacity are likely best comare working on master- Psychosocial needs & benefits of treatment in group pleted in an individual ing a skill or occupation. setting. Functional cognition & sensory impairments (e.g., vision, Should be avoided for novel interventions and Consider infection anytime hands-on assiscontrol for immunocom Carefully consider the number of clients in the group. More tance is needed for safety promised or contagious complex clients or clients with lower functional capacity may benefit from a smaller group. Concurrent therapy might only be a portion of an Clients at different stages of rehabilitation may benefit from intervention session and being together in groups to share the lived experience and is adjunct to individual recovery through rehabilitation. interventions. The group intervention should be the same or similar and AOTA anticipates concurshould be directed at a specific goal in each client's plan of rent interventions to be the care. (The goals do not need to be the same or even similar least often implemented for all clients.) mode of occupational Each client in the group should be able to meaningfully participate with the assistance of the practitioner throughout Medicare Part B does not recognize concurrent interventions.



## **Productivity**

#### **Productivity**

Occupational therapy practitioners benefit from understanding how productivity is utilized or calculated, how to engage in advocacy about productivity standards, and how to manage time effectively.



## **Productivity Webpage**



#### Measuring productivity

- Assists with monitoring efficiencies to balance client, practitioner, and business needs
- Helps to identify the need for more staff, to balance caseloads, and support proposed operational changes
- · Compares performance against established standards



## **Productivity**



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#### **AOTA Productivity Worksheet**

Utilize this worksheet to understand the productivity expectations for your position or during job interviews.

	How is your productivity calculated?				
Unit based Per visit Pe	Per hour				
What is included in your productivity calculation? (Circle all that apply)					
Units/time billed Documentation time Chart review time Misc. tasks Me	eetings/training				
Does your work allow you to remove non-billable time from productivity calculations? (Note: non-bil still be productive time. However, some companies may not use it in productivity calculations)	illable time may				
	Never				
Are some units weighted? (Note: these are usually untimed codes) (circle all that apply)					
All untimed codes Eval codes L (orthotic) codes Wound care	Timed codes				
What is the productivity standard?  How is productivity calculated?					

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#### Managing Productivity as an Occupational Therapy Practitioner

#### **Productivity Decision Guide**

#### Overview

According to the U.S. Bureau of Labor Statistics (BLS), productivity is a measure of economic performance measuring the amount of output with the number of hours worked (BLS, n.d.). While all time spent in the work environment should be productive toward your work and organizational goals, each company may have different productivity metrics or standards. Monitoring efficiencies helps organizations balance the client, practitioner, and business needs of their operations. This data can also help companies identify the need for more staff, manage caseloads, and identify the need for operational changes.

Productivity standards are utilized in many settings to compare performance against established standards (Jacobs & McCormack, 2019). Productivity standards vary between settings and organizations and are calculated using a variety of methods. Occupational therapy practitioners benefit from understanding the different productivity models and how to work toward providing efficient care.

#### Productivity Types

Each setting has a different client population, staffing needs, size, and pace. All of these factors can inform productivity standards.

Productivity is sometimes associated with client caseload or billable time, but workload is also part of the equation. So, while not all time is billable, all time should be productive. A **caseload** typically refers to the number of clients for which a practitioner is providing care. **Billable time** often refers to the time a clinician bills a payer or client, often in minutes or units. A **workload** refers to all of the activities that an occupational therapy practitioner needs to perform in their role, such as documentation, care coordination, organizational training, scheduling, etc.

There are three common types of productivity standards utilized in occupational therapy practice. These are unitbased, time-based, and visit-based.

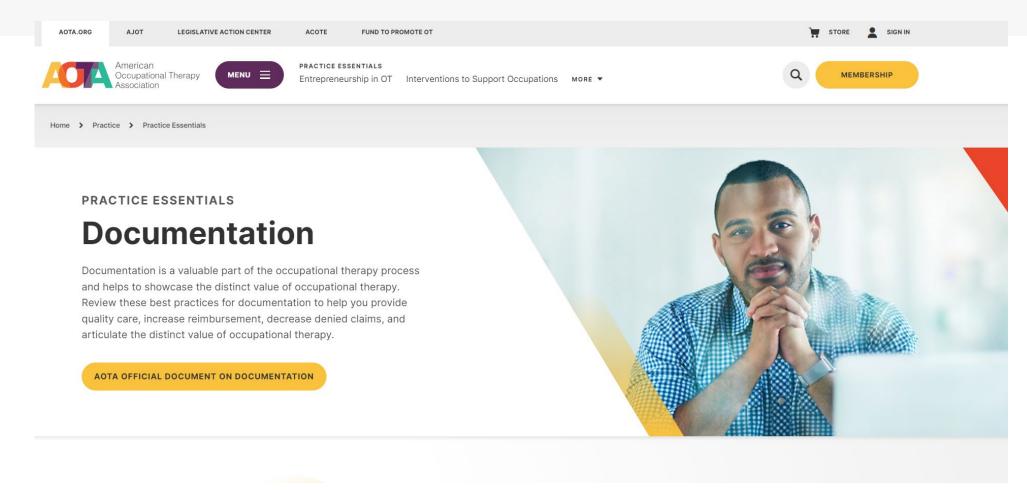
Unit-Based	Time-Based	Visit-Based
to achieve a certain number of billable units (or hours, etc.) per day, week, or		The employer expects the practitioner to provide a certain number of visits per day, week, or month.

Some organizations may also have more than one productivity metric, sometimes including administrative time or non-billable client care activities in their calculations.

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## **Documentation**



## **Documentation Webpage**



## **AOTA Practice Recommendations**

Formerly

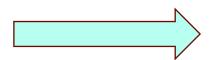
What is the Choosing Wisely initiative?



An initiative of the ABIM Foundation

Choosing Wisely is an initiative of the American Board of Internal Medicine (ABIM) Foundation. The campaign aims to promote meaningful conversations between practitioners and clients and ensure quality health care that is efficacious and costeffective.



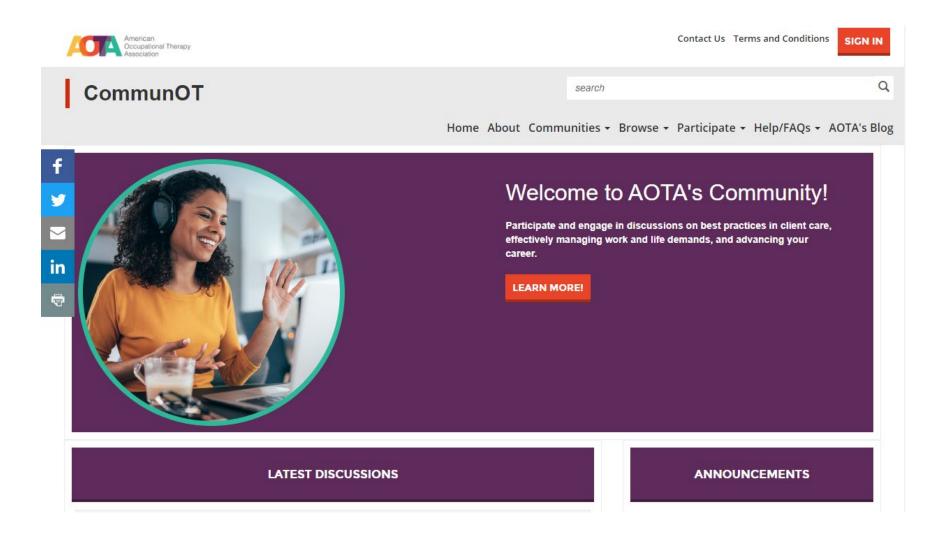








Networking and Emerging Practice Resources



https://communot.aota.org/home



## **Communities of Practice**

# Social Learning through AOTA's Communities of Practice | AOTA

#### Communities of Practice

- 25 active Communities of Practice
- Serving nearly 2000 AOTA members

#### **Our Communities of Practice**



#### **Autism Community of Practice**

Explores the strategies, challenges, and opportunities providing occupational therapy to autistic individuals. This CoP is housed under the Developmental Disabilities Special Interest Section.



#### **Cancer Care Community of Practice**

The Cancer Care Community of Practice addresses the complex needs of oncology survivors across the continuum of care. This section is housed under the Rehabilitation & Disabilities Special Interest Section.



#### **Dementia Community of Practice**

Explores evidence-informed practice and the role of OT in supporting occupational performance and quality of life for people living with dementia and their care partners. This CoP is housed under the Productive Aging Special Interest Section.



#### **Early Childhood Community of Practice**

Addresses the demands of working in this critical phase of the life span to address needs as early as possible to prevent later challenges. This CoP is housed under the Children & Youth Special Interest Section.



#### Emergency Response & Disaster Management Community of Practice

Explore a variety of direct service, advocacy, research, and leadership perspectives in both emergency response and all phases of disaster management. This CoP is housed under the Developmental Disabilities Special Interest Section.

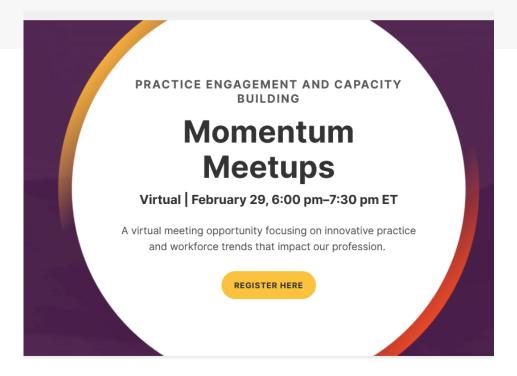


#### Environmental Modifications Community of Practice

Explores best and emerging practice in the area of home and environmental modifications which are routinely incorporated into occupational therapy assessment and intervention plans to understand and address performance issues. This CoP is housed under the Home & Community Health Special Interest Section.



## **Momentum Activities**



AOTA's Practice Engagement & Capacity Building team is hosting an interactive session for this month's Momentum Meetup.

February's Momentum Meetup will focus on diversity, equity, inclusion, justice, access, and belonging (DEIJAB) matters.

The DEIJAB Committee will share information about the Committee's mission and purpose, strategic plans to support the DEIJAB efforts of the Association, and to highlight accomplishments/future initiatives.



#### Momentum Activities

- Third annual Summit held in Fall 2023
- Added monthly Meet-ups to support ongoing work
- Over 600 members have connected thru activities



## **Member Spotlights**



### <u>AOTA Member Spotlights -</u> Quality

- Discussions with AOTA members who are leading the way in quality and innovation
- Highlights the skills occupational therapy practitioners have utilized to pursue their passions
- Concrete examples of how quality and innovation have led to new roles or services



## What Are Your Future Plans?

Which resource Which resource Which resource could you use could you use could you use this semester? next semester? next AY?



## Help Us With Our Future Plans

Request an AOTA Practice Resource





# We appreciate AOTA Members Volunteers!

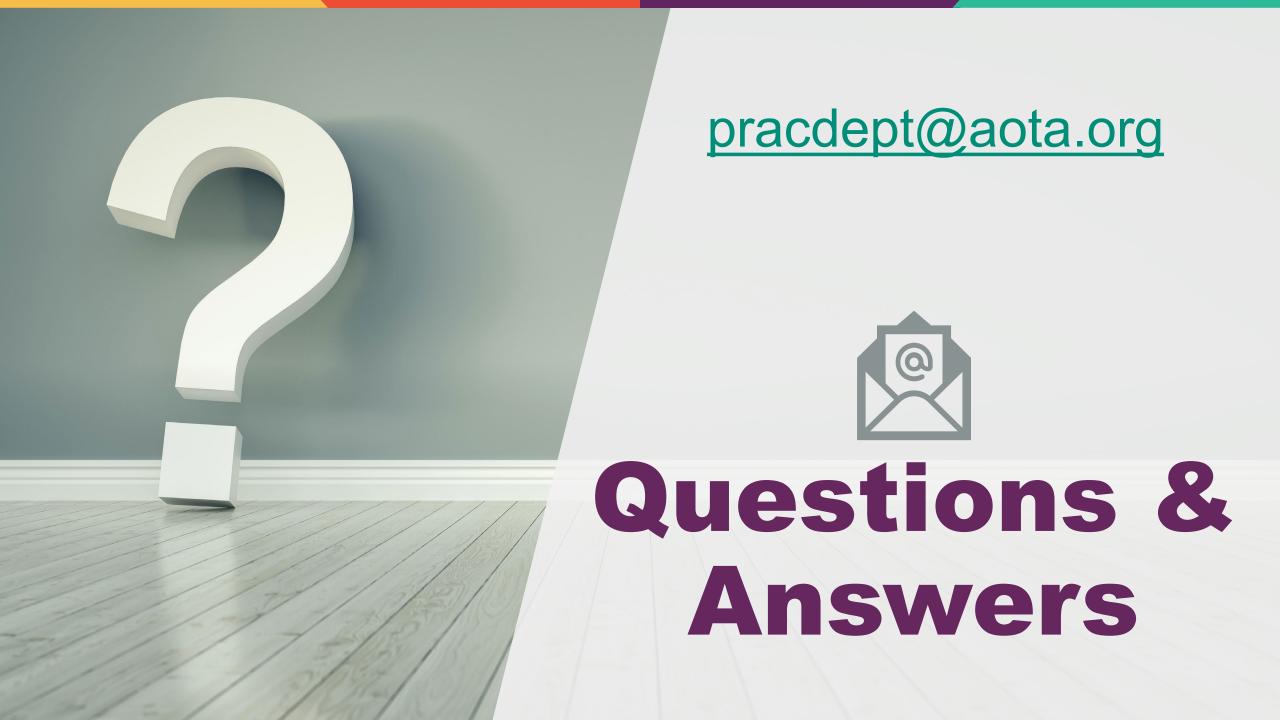
Practice resources are developed with the expertise of many AOTA member volunteers and AOTA Staff.













## **Practice Team Webpages**

**EBP and KT** 



Workforce Engagement and Capacity Building



**Quality** 

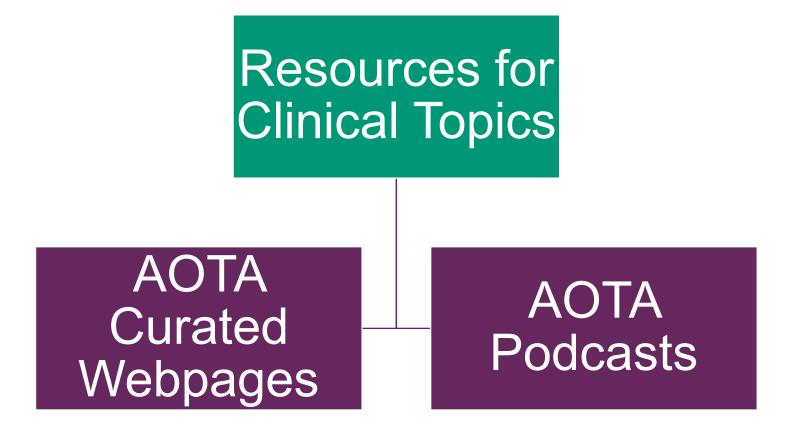




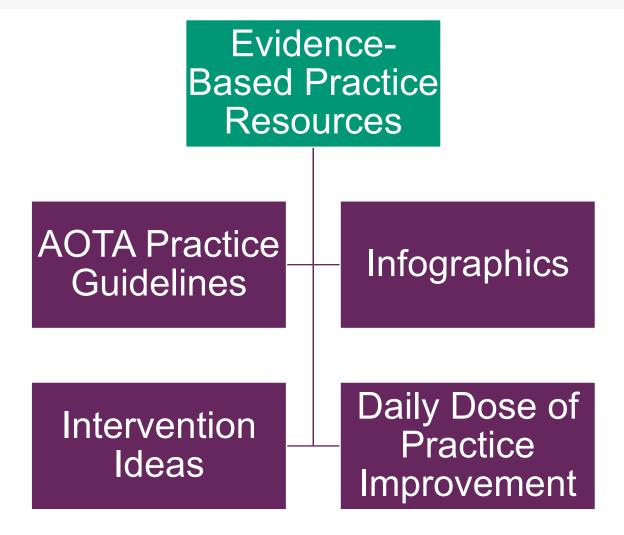
Resources for OT/OTA Collaboration

OT/OTA
Intraprofessional
Collaboration
Webpage

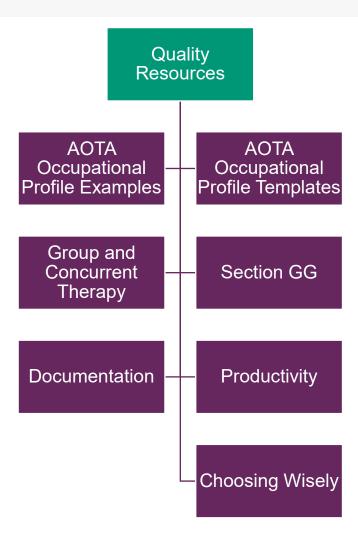




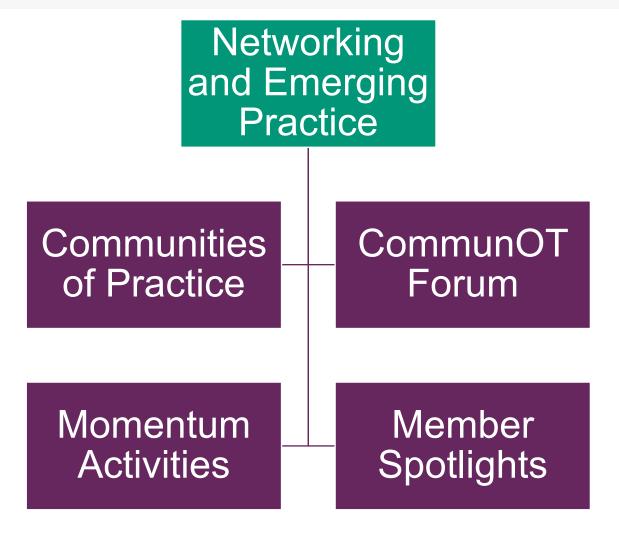




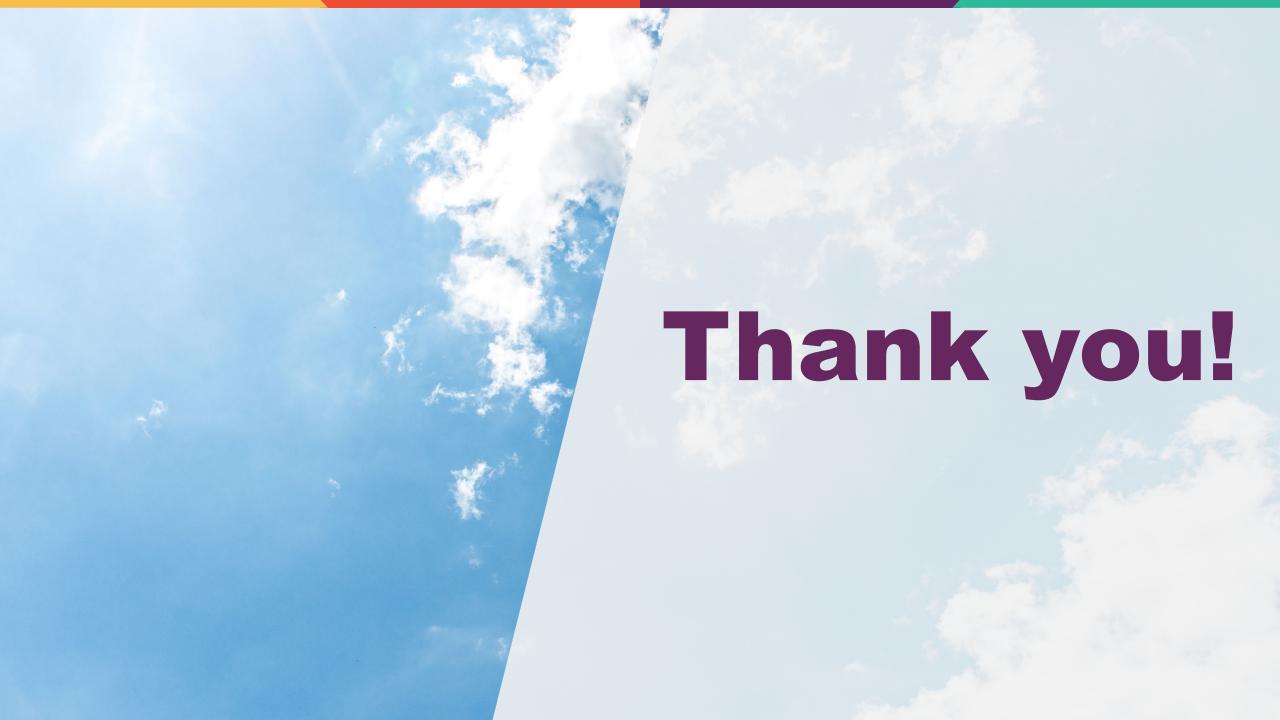














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