



NORTH CAROLINA BOARD OF OCCUPATIONAL THERAPY

ROLES AND SUPERVISORY REQUIREMENTS OF THE OCCUPATIONAL THERAPIST AND THE OCCUPATIONAL THERAPY ASSISTANT DURING THE DELIVERY OF OCCUPATIONAL THERAPY SERVICES

ROLES AND RESPONSIBILITIES	OCCUPATIONAL THERAPIST (OT/L)	OCCUPATIONAL THERAPY ASSISTANT (OTA/L)
EVALUATIONS	<p>Makes the initial contact with the client. Directs the evaluation process. Determines the need for services. Defines the problems within the domain of occupational therapy that need to be addressed. Determines the client's goals and priorities in collaboration with the OTA/L and client/caregiver. Interprets the information provided by the OTA/L and integrates that information into the evaluation decision-making process. Establishes intervention priorities. Determines specific future evaluation needs. Determines specific assessment tasks that can be delegated to the OTA/L. Initiates and completes the evaluation, interprets the data, and develops the intervention plan in collaboration with the OTA/L.</p>	<p>Contributes to the evaluation process by implementing specifically delegated assessments for which service competency has been established and documented.</p>
INTERVENTION PLANNING	<p>Responsible for the development of the occupational therapy intervention plan. The plan is developed collaboratively with the OTA/L and the client/caregiver.</p>	<p>Provides input into the intervention plan as appropriate.</p>
INTERVENTION IMPLEMENTATION	<p>Responsible for implementing the occupational therapy intervention. May delegate aspects of the occupational therapy intervention to the OTA/L depending on the OTA/L's demonstrated and documented service competency. Supervises all aspects of intervention delegated to the OTA/L.</p>	<p>Implements delegated aspects of intervention in which service competency has been demonstrated and documented.</p>
INTERVENTION REVIEW	<p>Responsible for determining the need for continuing or discontinuing services.</p>	<p>Contributes to the process of determining continuing or discontinuing services by providing information about the client's response to intervention to assist with the OT/L's decision making.</p>
DOCUMENTATION	<p>Responsible for the overall completion of the evaluation, treatment plan, or discharge plan.</p>	<p>Documents treatment, treatment response and outcome. Documents client's level of function at discharge.</p>
DISCHARGE	<p>Responsible for the client's discharge from OT services.</p>	<p>Reports data for discharge summary. Formulates discharge and/or follow-up plans under the supervision of an OT/L.</p>
OUTCOME EVALUATION	<p>Responsible for the selection and measurement of outcomes that are related to the client's ability to engage in occupations.</p>	<p>Responsible for being knowledgeable about the client's targeted occupational therapy outcome and for providing information relating to outcome achievement.</p>
STUDENT SUPERVISION	<p>Responsible for the supervision of OTA/S and Level I fieldwork OT/S. After 1 year of clinical experience, may supervise Level II OT/S.</p>	<p>Supervise volunteers and ancillary staff under the supervision of an OT/L. Supervise Level I OT/S and OTA/S. After 1 year of clinical experience, may supervise Level II OTA/S under the direct supervision of an OT/L.</p>

FOR THE PROTECTION OF THE CLIENT, THE SUPERVISING OT/L SHALL BE AWARE OF THE SERVICE COMPETENCY OF THE OTA/L ON AN ONGOING BASIS. A CHANGE OF SETTING WILL REQUIRE CLOSE SUPERVISION UNTIL COMPETENCY HAS BEEN ESTABLISHED. THE OTA/L WOULD THEN REQUIRE SUPERVISION CORRESPONDING TO THE LEVEL OF COMPETENCY IN THE PRACTICE SETTING.