

CLASSIFIED MANAGEMENT  
PERFORMANCE OBJECTIVES PLAN  
PART I - Initial Goals

Name:	Site/Department:
Position:	School Year:

PERFORMANCE EXPECTATIONS

1. **Job Skills & Knowledge:** Demonstrates proficiency of essential functions as outlined in the job description; maintains currently knowledge of legislative, political, social, societal, and reimbursement issues that affect students and the practice of occupational therapy; knowledgeable about evidence based research related to OT practices; incorporates feedback and training regularly to enhance job performance.
2. **Evaluations:** Completes occupational therapy evaluations using appropriate methods; analyzes and interprets data in accordance with federal and state law; presents information to parents and team clearly; compiles information into an assessment report; completes assessments within legal timelines.
3. **Therapy:** Implements occupational therapy intervention based on evaluation, student goals, best available evidence, and professional and clinical reasoning; selects appropriate interventions.
4. **Communication:** Engages and actively listens to all contributors; retains, relays and effectively presents clear information in written, verbal, and non-verbal forms; communicates professionally when using various types of District communication tools; communicates clearly and professionally with students, colleagues, parents, and supervisor(s).
5. **Documentation:** Maintains appropriate documentation including data collection and logging billing information (Paradigm); maintains confidentiality of student records.
6. **Problem Solving:** Demonstrates the ability to identify problems and develop solutions in a timely and efficient manner; assists in the identification and implementation of solutions to job-related issues; utilizes various strategies to resolve identified problems; communicates with appropriate people when needing support or help solving a problem.
7. **Working Relationships:** Builds professional rapport with colleagues, supervisors, District staff and all other community members; confers with others in a professional and productive manner; is receptive to feedback from others.
8. **Professional Work Habits:** Maintains professional standards of dress and

grooming; presents an image consistent with their job responsibilities and assignment; dresses and grooms in a manner that is conducive to the health and/or safety of themselves and/or others.

9. **Attendance and Punctuality:** Arrives to work on time; implements therapy sessions regularly per student therapy schedules; attends required meetings (IEP meetings, department meetings, etc.); communicates in a timely manner if unable to attend; adheres to and completes assigned work on schedule; uses available and permissible leaves in an appropriate manner; enters absences in Frontline and communicates with sites/supervisor(s)/sped administrative secretary when out.

## GOALS

Professional Growth Goal:

*Please remember to write the goal as a S.M.A.R.T. goal ensuring you have a specific goal, clear strategies to meeting the goal, and naming the data used to measure progress. Please include what evidence you will collect.*

Site/Department Goal:

*Please remember to write the goal as a S.M.A.R.T. goal ensuring you have a specific goal, clear strategies to meeting the goal, and naming the data used to measure progress. Please include what evidence you will collect.*

District Goal:

*Please remember to write the goal as a S.M.A.R.T. goal ensuring you have a specific goal, clear strategies to meeting the goal, and naming the data used to measure progress. Please include what evidence you will collect.*

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Evaluatee Signature - Date

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Evaluator Signature - Date

Attachment:  
OT Standards

Standard I. Professional Standing and Responsibility

1. An occupational therapy practitioner (occupational therapist or occupational therapy assistant) delivers occupational therapy services that reflect the philosophical base of occupational therapy and are consistent with the established principles and concepts of theory and practice.
2. An occupational therapy practitioner is knowledgeable about and delivers occupational therapy services in accordance with AOTA standards, policies, and guidelines and state, federal, and other regulatory and payer requirements relevant to practice and service delivery.
3. An occupational therapy practitioner maintains current licensure, registration, or certification as required by law or regulation.
4. An occupational therapy practitioner abides by the Occupational Therapy Code of Ethics (AOTA, 2005a).
5. An occupational therapy practitioner abides by the Standards for Continuing Competence (AOTA, 2005b) by establishing, maintaining, and updating professional performance, knowledge, and skills.
6. An occupational therapist is responsible for all aspects of occupational therapy service delivery and is accountable for the safety and effectiveness of the occupational therapy service delivery process (AOTA, 2009a).
7. An occupational therapy assistant is responsible for providing safe and effective occupational therapy services under the supervision of and in partnership with the occupational therapist and in accordance with laws or regulations and AOTA documents (AOTA, 2009a).

8. An occupational therapy practitioner maintains current knowledge of legislative, political, social, cultural, societal, and reimbursement issues that affect clients and the practice of occupational therapy.
9. An occupational therapy practitioner is knowledgeable about evidence-based research and applies it ethically and appropriately to provide occupational therapy services consistent with best practice approaches.
10. An occupational therapy practitioner respects the client's sociocultural background and provides client-centered and family-centered occupational therapy services.

## Standard II. Screening, Evaluation, and Re-evaluation

1. An occupational therapist is responsible for all aspects of the screening, evaluation, and reevaluation process. Standards of Practice The American Occupational Therapy Association
2. An occupational therapist accepts and responds to referrals in compliance with state or federal laws, other regulatory and payer requirements, and AOTA documents.
3. An occupational therapist, in collaboration with the client, evaluates the client's ability to participate in daily life by considering the client's history, goals, capacities, and needs; the activities and occupations the client wants and needs to perform; and the environments and context in which these activities and occupations occur.
4. An occupational therapist initiates and directs the screening, evaluation, and re-evaluation process and analyzes and interprets the data in accordance with federal and state law, other regulatory and payer requirements, and AOTA documents.
5. An occupational therapy assistant contributes to the screening, evaluation, and re-evaluation process by implementing delegated assessments and by providing verbal and written reports of observations and client capacities to the occupational therapist in accordance with federal and state laws, other regulatory and payer requirements, and AOTA documents.
6. An occupational therapy practitioner uses current assessments and assessment procedures and follows defined protocols of standardized assessments during the screening, evaluation, and re-evaluation process.
7. An occupational therapist completes and documents occupational therapy evaluation results. An occupational therapy assistant contributes to the documentation of evaluation results. An occupational therapy practitioner abides by the time frames, formats, and standards established by practice

settings, federal and state law, other regulatory and payer requirements, external accreditation programs, and AOTA documents.

8. An occupational therapy practitioner communicates screening, evaluation, and re-evaluation results within the boundaries of client confidentiality and privacy regulations to the appropriate person, group, organization, or population.
9. An occupational therapist recommends additional consultations or refers clients to appropriate resources when the needs of the client can best be served by the expertise of other professionals or services.
10. An occupational therapy practitioner educates current and potential referral sources about the scope of occupational therapy services and the process of initiating occupational therapy services.

### Standard III. Intervention

1. An occupational therapist has overall responsibility for the development, documentation, and implementation of the occupational therapy intervention based on the evaluation, client goals, best available evidence, and professional and clinical reasoning.
2. An occupational therapist ensures that the intervention plan is documented within the time frames, formats, and standards established by the practice settings, agencies, external accreditation programs, state and federal law, and other regulatory and payer requirements. Standards of Practice The American Occupational Therapy Association
3. An occupational therapy practitioner collaborates with the client to develop and implement the intervention plan, on the basis of the client's needs and priorities, safety issues, and relative benefits and risks of the interventions.
4. An occupational therapy practitioner coordinates the development and implementation of the occupational therapy intervention with the intervention provided by other professionals, when appropriate.
5. An occupational therapy practitioner uses professional and clinical reasoning to select the most appropriate types of interventions, including therapeutic use of self, therapeutic use of occupations and activities, consultation, education, and advocacy.
6. An occupational therapy assistant selects, implements, and makes modifications to therapeutic interventions that are consistent with the occupational therapy assistant's demonstrated competency and delegated responsibilities, the intervention plan, and requirements of the practice setting.

7. An occupational therapist modifies the intervention plan throughout the intervention process and documents changes in the client's needs, goals, and performance.
8. An occupational therapy assistant contributes to the modification of the intervention plan by exchanging information with and providing documentation to the occupational therapist about the client's responses to and communications throughout the intervention.
9. An occupational therapy practitioner documents the occupational therapy services provided within the time frames, formats, and standards established by the practice settings, agencies, external accreditation programs, federal and state laws, other regulatory and payer requirements, and AOTA documents.

#### Standard IV. Outcomes

1. An occupational therapist is responsible for selecting, measuring, documenting, and interpreting expected or achieved outcomes that are related to the client's ability to engage in occupations.
2. An occupational therapist is responsible for documenting changes in the client's performance and capacities and for transitioning the client to other types or intensity of service or discontinuing services when the client has achieved identified goals, reached maximum benefit, or does not desire to continue services.
3. An occupational therapist prepares and implements a transition or discontinuation plan based on the client's needs, goals, performance, and appropriate follow-up resources.
4. An occupational therapy assistant contributes to the transition or discontinuation plan by providing information and documentation to the supervising occupational therapist related to the client's needs, goals, performance, and appropriate follow-up resources.
5. An occupational therapy practitioner facilitates the transition or discharge process in collaboration with the client, family members, significant others, other professionals (e.g., medical, educational, or social services), and community resources, when appropriate. Standards of Practice The American Occupational Therapy Association
6. An occupational therapist is responsible for evaluating the safety and effectiveness of the occupational therapy processes and interventions within the practice setting.

7. An occupational therapy assistant contributes to evaluating the safety and effectiveness of the occupational therapy processes and interventions within the practice setting.