

Disclaimer: This plan is a sample plan only.

Case Example:

Sue Flinn is a COTA is a COTA who has been practicing for three years all in the same setting. You will see that this plan is a plan that is updated each year. The individual does not reestablish competency on each item unless is a competency that might require this. For example, physical agent modalities or crisis intervention prevention may require re-establishing competency. A space for re-establishing competency is provided for each item, but it may be left blank if that is most appropriate. You will also see different dates of established competency. For example, perhaps Sue's main focus in this setting was implementing group protocols for social skills training, but now Sue has expanded care she is providing to completing ADL training. You can see that this competency was then added at the time she began to provide this type of intervention.

Sample Format for Supervision Plan

OTA Name: Sue Flinn

Occupational Therapist Substantiating Supervision: Joel Hagen

Facility: Sunshine Center

Date Initial Plan Established: 5/2011

Date Plan Reviewed: 5/2014

Brief description of facility: Sunshine center is a behavioral residential center serving clients ages 12-17.

Brief job description of OTA: Complete skills training including ADL, IADL, Prevocational, Social Participation, and Education.

OTA's years of practice in this setting: 3

Practice Content and Competency Chart

Evaluation method: RD= Return Demonstration; O=Observation; TD= test/discussion of knowledge

Competency	Competency Established	Evaluation Method	Comments
Demonstrate safety precautions with all clients using Crisis Prevention Intervention methods.	5/2011	TD	Took course; passed test. Requires yearly recertification
Competency reestablished (if appropriate, ie PAMS): 5/12- TD 5/13 - TD 5/14 - TD			
Documents according to insurance and agency guidelines	6/2011	O, RD	Joel Hagen, OTR/L, trained me in documentation process and guidelines.
Competency reestablished (if appropriate, ie PAMS)			
Efficiently communicates to OT through verbal and written progress notes regarding progress of clients	6/2011	O, RD	Joel Hagen, OTR/L, trained me in documentation process and guidelines.
Competency reestablished (if appropriate, ie PAMS)			

Implement group protocols for social skills training and recognize need to make changes as appropriate	7/2011	RD	Joel Hagen, OTR/L observed, provided feedback and established competency
Competency reestablished (if appropriate, ie PAMS):			
Demonstrate effective use of training techniques for ADL's	9/2011	O	Joel Hagen observed, provided feedback, determined competent to provide
Competency reestablished (if appropriate, ie PAMS):			
Demonstrate ability to utilize effective training techniques to assist clients in achieving highlight level of independence in IADLs	10/2011	O	Joel Hagen, OTR/L observed me follow intervention planning for training in laundry skills for clients with an emphasis on sequencing and attention
Competency reestablished (if appropriate, ie PAMS)			
Implement sensory diet and recognize over or under stimulation and make changes as	10/2011	O/TD	Competency demonstrated to Joel Hagen following training, case studies, and implementation intervention plan for sensory modulation

appropriate			
Competency reestablished (if appropriate, ie PAMS)			
Follow cognitive remediation or compensation plan set forth by occupational therapist. Recognize if plan require modification and communicate with OT	1/2014	0	Sue Smith, OTR/L trained me in several sessions. I consult as appropriate. Sue Smith is employed at Sunshine center
Competency reestablished (if appropriate, ie PAMS)			

Describe the frequency of supervision: I work in a facility with two OTs onsite. I meet weekly with them in treatment planning meetings to plan intervention for clients. This next year I also met for one hour per week as I wanted to establish competency in the CO-OP method of intervention.

Describe the methods or types of supervision: Discussion of intervention plans and observation within the treatment setting. Feedback and structured skill practice.

Will other OTs contribute to the OTA's supervision, if so describe: Two OTs are onsite. Joel Hagen is my primary supervisor; however Sue Smith contributes to my supervision as well.

We hereby certify that we collaborated in developing this plan and agree to follow through with the supervision process described in this plan.

Shae Flinn 5/1/14
OTR/L

Occupational Therapy Assistant Date

Joel Mysen OTR/L 5/1/14

Occupational Therapist Substantiating Supervision Date

Contributors to the plan:

See Smith OTR/L May 1, 2014

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