



Occupational and Physical Therapy  
**INSTRUCTIONS FOR COMPLETING  
THE WORKLOAD AND CASELOAD FORMS**

**Note that new forms have been generated for School Year 2015-2016.  
Outdated forms must be discarded to avoid confusion.**

**WORKLOAD FORM (Weekly Schedule):**

This form reflects the weekly duties and responsibilities of the DOE therapist. It includes: direct, consultative and integrated treatment time, involvement in various areas of the school environment (transitions between classes, morning routines, movement group, etc.), and; administrative activities such as documentation, treatment planning, classroom observation/screening, and others, as needed.

- Full-time therapists are expected to schedule **eight 30 minute treatment sessions** per day or the equivalent.
- At anytime during the school year, if your caseload is **below the equivalent of seven 30 minute sessions** per day, you must contact your OT/PT Supervisor ASAP.
- The *Workload Form* must reflect individual school hours and account for all the time, including and contractual 30 minute lunch period. Lunch may not be scheduled at either the beginning or end of the day. Ensure that you have a total of 6 hours and 55 minutes per day (inclusive of a 30-minute lunch break).
- Whether you are assigned to one or more schools, you need to enter your entire schedule on one Workload Form only.

**STUDENT CASELOAD FORM and STUDENTS TO BE CONTRACTED OUT FORM:**

These forms are utilized to ensure timely delivery of services to all mandated students.

- The *Student Caseload Form* must contain the Students' Information, Dates of Last IEP, Current Mandates and Start Dates. Any update such as addition of new students; modification, continuation or termination of mandates based on recently concluded IEP meetings; and transfer of students to other schools must be written on the *same form*.
- The *Students to Be Contracted Out Form* is to be completed when more students are present in the school than can be served by the assigned DOE therapist(s). When deciding which students to put on your caseload and which to contract out, you must discuss the list of mandated students with your school administrator. Note that being the assigned DOE therapist in your school, you are responsible for re-evaluation of these students who were contracted out (in addition to those in your caseload) for Triennials or as may be requested by your school administrator or OT/PT Supervisor. **Should any students be added to this form in the middle of the school year, submit the updated form to your OT/PT Supervisor ASAP.**
- If you are assigned to more than one school, **you must complete separate *Student Caseload Forms* and *Students to Be Contracted Out Forms* for each school.**

**FINAL REMINDERS:**

- **The use of self-generated, outdated, or any other forms is not acceptable.**
- Your preliminary *Caseload*, *Workload* and *Students to Be Contracted Out Forms* must be submitted to your OT/PT Supervisor(s) via email by **September 18, 2015**. If you are sending the forms via email, ensure that copies signed by school administrator(s) in all your schools are kept in your file.
- The *Caseload Form*, *Workload Form* and *Students to Be Contracted Out Form* must be kept up-to-date and re-submitted to your OT-PT Supervisor on **January 22, 2016 and on June 3, 2016**. In addition, any of these forms must also be submitted to your CFN Supervisor(s) **as changes occur**.
- For further details or if you need assistance, see sample completed forms or speak with a Senior Instructional Therapist (SIT) or OT/PT Supervisor.