Dr. Aditi the OT

A quick clinical reasoning guide for school-based OT practitioners

Is Your School OT Caseload Actually Manageable?

You feel overwhelmed or unable to complete all of your school OT responsibilities within your workday.

Is most of your time spent on direct student services (treatment)?

YES → **Review and adjust your service delivery:**
- ✔ Confirm service frequency, duration, and group size.
- ✔ Use efficient, skills-based groups.
- ✔ Align scheduling with available treatment time.

NO ↓

Is a significant amount of your time spent on indirect responsibilities (evaluations, IEPs, consultation, RTI, documentation, travel)?

YES → **Track and manage non-treatment time:**
- ✔ List all OT responsibilities (evaluations, IEP meetings, consultation, RTI, documentation, etc.).
- ✔ Estimate time and set weekly blocks on your schedule.
- ✔ Look for tasks you can streamline or delegate (e.g., data collection, materials prep).

NO ↓

Given your total responsibilities, can your workload realistically fit within your available work hours?

YES → **Your workload is likely manageable.**
Continue to monitor regularly, especially when there are changes in your caseload or district responsibilities.

NO ↓

Your workload exceeds your available time.
- ✔ Document all responsibilities and estimated time (direct and indirect).
- ✔ Identify your highest priorities (e.g., IEP deadlines, evaluations, mandated services).
- ✔ Collaborate with your administrator on scheduling, workload adjustments, and supports (e.g., additional time, shared responsibilities, or staffing).

Caseload size alone does not reflect workload. Consider the total demands of service delivery, evaluation, documentation, consultation, and collaboration.

Clinical Note

A manageable workload allows you to meet students' IEP needs, collaborate effectively, and maintain high-quality, educationally relevant services. Workload documentation can support data-informed discussions with your administrator. (AOTA, 2020; IDEA, 2004)

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