Carroll University  
Master of Occupational Therapy Program  
OTH 610 Management and Supervision  
Fall 2017

**Course Offering**  
3 Credit Hours

**Prerequisites**  
Admission to the MOT Program

**Format**  
Lecture

**Class Day/Time**  
Mondays 1-4p.m.

**Class Location**  
CGS 119

**Faculty**  
Prof. April Doebert-Fischer, OTR DCCT  
Office  
Charles House 106  
Office Hours  
Mondays 9-12, Thursdays 11-2; Fridays 9-2  
Phone  
262-951-3108  
Email  
adoebert@carrollu.edu

**Course Description**  
This course examines general principles of administration, management, and leadership. Program design, funding, and implementation will be presented. Staffing patterns, quality assurance, reimbursement, contractual issues, program development and evaluation, and reimbursement issues are discussed as they relate to management in health care and practice. Effects of systems and legislative and social issues on practice, organizations, and the consumer will be explored, analyzed and applied to current and emerging settings.

**Course Rationale**  
The dynamic nature of health care and the continual shifting of health delivery systems requires a skill set that includes the ability to respond, transform, and meet both the constraints of the system, and the needs of the consumer. Occupational therapy clinicians and managers need to have an educational foundation that supports the acquisition of knowledge to address health care transformation in both traditional settings and emerging areas of practice. In addition, having an awareness of business plans, marketing strategies, methodologies related to continuous quality improvement and operations management will yield practitioners who can integrate effective strategies within health care settings and service businesses that meet both organizational and consumer/community expectations.

**Relationship to Curriculum Design**  
The course of study emphasizes service to community that is specific to the needs therein. Taking a humanistic approach to treatment outcomes through program design and management will support curricular threads that capture professional development,
and service to populations embracing the concept that the best practice strategies approach care as being unique to each person who seeks that care. This course provides a just right learning environment that fosters the application of this approach to best practice. Concurrent courses support this approach as students’ didactic experience culminates with pediatrics interventions that will provide an opportunity to consider program design and management as it relates to younger populations and communities with family needs. Succinctly, students will begin to acquire foundational knowledge of research design and methodologies which will further support this learning environment. Entrepreneurship and systems/organizational management will lay a solid foundation which will prepare students effectively to enter the final clinical rotation and capstone project that completes the curriculum.

<table>
<thead>
<tr>
<th>Student Learning Objectives</th>
<th>ACOTE Standards</th>
<th>Instructional Methods</th>
<th>Assessment Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>(At course conclusion, students are expected to:)</td>
<td></td>
<td>The following instructional methods will be utilized throughout</td>
<td>The following assessment methods will be utilized</td>
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</table>
| 1. Demonstrate an understanding of the use of technology to support performance, participation, health and well-being. This technology may include, but is not limited to, electronic documentation systems, distance communication, virtual environments, and telehealth technology. | B.1.8 | • Lecture  
• Independent Learning  
• Readings  
• Class Discussion  
• Group Learning | • Quiz  
• Case Study  
• Legal Dimensions Presentation  
• Feedback  
• Self-awareness project |
2. Discuss the various reimbursement systems, appeals mechanisms, documentation requirements, federal and state legislation regulations, and national requirements for credentialing, licensure, certification and registration that affect occupational therapy.

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<thead>
<tr>
<th>B.4.10</th>
<th>B.7.2</th>
<th>B.7.3</th>
<th>B.7.4</th>
<th>B.9.4</th>
<th>B.9.5</th>
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</thead>
<tbody>
<tr>
<td>Lecture</td>
<td>Independent Learning</td>
<td>Readings</td>
<td>Inquiry Learning</td>
<td>Problem-based Learning</td>
<td>Active Learning</td>
</tr>
</tbody>
</table>

3. Identify and demonstrate techniques for collaboration and supervision of occupational therapy assistances and other professionals on therapeutic interventions.

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<thead>
<tr>
<th>B.5.25</th>
<th>B.7.7</th>
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<tbody>
<tr>
<td>Lecture</td>
<td>Independent Learning</td>
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4. Verify the occupational therapists role and responsibilities as a consultant, practitioner, educator, research, entrepreneur.

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<thead>
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<th>B.9.9</th>
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<tr>
<td>Lecture</td>
<td>Independent Learning</td>
<td>Readings</td>
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5. Describe the role of the occupational therapist in care coordination, case management, and transition services in traditional and emerging practice environments.

<table>
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<tbody>
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<tr>
<th>Quiz</th>
<th>Business Plan</th>
<th>Case Study</th>
<th>Legal Dimensions Presentation</th>
<th>Feedback</th>
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<tr>
<td>Quiz</td>
<td>Business Plan</td>
<td>Case Study</td>
<td>Legal Dimensions Presentation</td>
<td>Feedback</td>
</tr>
<tr>
<td>Quiz</td>
<td>Hope Street Group</td>
<td>Legal Dimensions Presentation</td>
<td>Feedback</td>
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</table>
6. Analyze the trends in models of service delivery, the impact of contextual factors, and the processes for quality improvement while developing program changes in management and delivery of occupational therapy services and strategies for assisting the consumer in receiving occupational therapy services.

7. Demonstrate an understanding of the process of locating and securing grants and how grants can serve as a fiscal resource for scholarly activities.

ACOTE Standards Relating to Course Objectives

This course meets or partially meets the following standards of education for the Accreditation Council for Occupational Therapy Education (ACOTE). The student will:

- B.1.8 Demonstrate an understanding of the use of technology to support performance, participation, health and well-being. This technology may include, but is not limited to, electronic documentation systems, distance communication, virtual environments, and telehealth technology.
- B.4.10 Document occupational therapy services to ensure accountability of service provision and to meet standards for reimbursement of services, adhering to the requirements of applicable facility, local, state, federal, and reimbursement agencies. Documentation must effectively communicate the need and rationale for occupational therapy services.
- B.5.25 Identify and demonstrate techniques in skills of supervision and collaboration with occupational therapy assistants and other professionals on therapeutic interventions.
- B.5.26 Understand when and how to use the consultative process with groups,
• B.5.27 Describe the role of the occupational therapist in care coordination, case management, and transition services in traditional and emerging practice environments.

• B.6.5 Analyze the trends in models of service delivery, including, but not limited to, medical, educational, community, and social models, and their potential effect on the practice of occupational therapy.

• B.7.1 Describe and discuss the impact of contextual factors on the management and delivery of occupational therapy services.

• B.7.2 Describe the systems and structures that create federal and state legislation and regulations and their implications and effects on practice.

• B.7.3 Demonstrate knowledge of applicable national requirements for credentialing and requirements for licensure, certification, or registration under state laws.

• B.7.4 Demonstrate knowledge of various reimbursement systems (e.g., federal, state, third party, private payer), appeals mechanisms, and documentation requirements that affect the practice of occupational therapy.

• B.7.5 Demonstrate the ability to plan, develop, organize, and market the delivery of services to include the determination of programmatic needs and service delivery options and formulation and management of staffing for effective service provision.

• B.7.6 Demonstrate the ability to design ongoing processes for quality improvement (e.g., outcome studies analysis) and develop program changes as needed to ensure quality of services and to direct administrative changes.

• B.7.7 Develop strategies for effective, competency-based legal and ethical supervision of occupational therapy and non–occupational therapy personnel.

• B.8.9 Demonstrate an understanding of the process of locating and securing grants and how grants can serve as a fiscal resource for scholarly activities.

• B.9.4 Discuss strategies for ongoing professional development to ensure that practice is consistent with current and accepted standards.

• B.9.5 Discuss professional responsibilities related to liability issues under current models of service provision.

• B.9.7 Discuss and justify the varied roles of the occupational therapist as a practitioner, educator, researcher, consultant, and entrepreneur.

• B.9.9 Describe and discuss professional responsibilities and issues when providing service on a contractual basis.

• B.9.12 Describe and discuss strategies to assist the consumer in gaining access to occupational therapy services.

Required Texts

Course Assessment
Grading for this course will be based on a total possible accumulation of 1000 points, with letter grades applied to a percentage of this total as follows:

Grading Scale:  
93-100 % = A  
90-92.9% = A/B  
83-89.9% = B  
80-82.9% = B/C  
70-79.9% = C  
60-69.9% = D  
<60% = F  

Progress will be evaluated through the following means:

<table>
<thead>
<tr>
<th>EVALUATION</th>
<th>POINTS</th>
<th>LINKED STUDENT LEARNING OUTCOMES</th>
<th>LINKED ACOTE STANDARDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership Interview</td>
<td>50</td>
<td>4</td>
<td>B.5.26, B.9.7, B.9.9</td>
</tr>
<tr>
<td>Assignment</td>
<td>Score</td>
<td>Weight</td>
<td>Notes</td>
</tr>
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<td>---------------------------------------------------------------------------</td>
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<tr>
<td>Grant Research Assignment</td>
<td>50</td>
<td>7</td>
<td>B.8.9</td>
</tr>
<tr>
<td>Hope Street Group</td>
<td>50</td>
<td>5</td>
<td>B.5.27</td>
</tr>
<tr>
<td>Self-Awareness Collage</td>
<td>25</td>
<td>1</td>
<td>B.1.8</td>
</tr>
<tr>
<td>Total</td>
<td>890</td>
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</tr>
</tbody>
</table>

**Attendance:** Attendance is required. It is never “ok” to skip class. Any absence, except for those arising from absolutely unavoidable circumstances, result in a reduction in your overall course grade.

**Class participation:** Class participation means more than simply being present; you must regularly contribute in a meaningful way. Participation is a component of your overall grade.

**The Self-Evaluation** will consist of a personal professional development assessment.

**The Peer-Evaluation** will consist of evaluating a peer on professional development.

**Quizzes:** Five quizzes (20 points each) will be given as scheduled in the syllabus. Quizzes will be given at the start of class.

**Assignments:**
Project Business Plan (PBP)
PBP will be the signature assignment for this course. Students will design and prepare a business plan for an emerging area of Occupational Therapy practice. This process will include the application of program development concepts, concepts of business fundamentals such as evaluation, planning, marketing, financing (including securing funding), program management as relevant to care coordination, case management, service delivery and outcomes. The project will be chunked into steps, with each step being awarded points for completion evidenced by written work. Points received in each step will be applied to total allotted for this assignment.

Students will prepare a 40-45-minute oral presentation about their business plan. The specifics of these presentations will be given to you via a separate handout and discussed in lecture. Groups are required to utilize available visual aid resources (PowerPoint, video, etc.) and it is required that ALL group members speak at the presentation. All members of the group may not receive the same grade based on peer and self-feedback.

Both written work and oral presentation will be assessed through various means including rubric, verbal and written feedback, participation and contribution.

Each group will have a discussion board set up for their group. Discussions should occur on this forum. Each group member will give written feedback on all group members at the end.

The project business plan will be graded in six sections. The specifics of each assignment will be given to you via a separate handout and discussed in lecture.

Community Interview: Leadership and Gender
Students will conduct and write a paper about an interview with a leader in the community. The identified leader MUST be female. Students will be asked to identify interviewee’s leadership style and make a comparison of this style to styles that are most prominent in leadership today. In addition, students will be asked to investigate historical tenets of occupational leadership and traits of those who have made contributions to the profession. Students will be asked to reflect on leadership styles, and gender as related to health care and health care professions.

Performance will be assessed according to grading rubric, and using written and verbal feedback. Further details can be found on the eLearning course site. B Standards addressed:

Students will be divided into groups and assigned a topic related to policies, legal issues, professional responsibilities and accountability related to reimbursement and OT practice.
Groups will prepare a 15-20-minute presentation on their findings. Groups will also be asked to prepare notes on topic to be distributed to classmates. Students will be assessed according to oral presentation rubric, verbal feedback, and group member evaluation. Further details can be found on the eLearning course site.

**Grant Assignment:** Standard B.8.9
Select a topic of research interest and conduct a key word search suing the www.grants.gov database to secure potential funding opportunities from public grant sources. Identify two potential funding opportunities and print out the grant announcements. Write a one page reflective paper discussing researching grants and possible topics of future interest. This is an individual assignment.


**Hope Street Group:** Standard B.5.27. Each student will complete two groups at Hope Street Ministries, 1 adult and one pediatric. Hope Street is located at 2522 W Capital Drive, Milwaukee. This assignment is linked with OTH665. Each group will consist of four to five students. Only two-3 students from each group will lead each group at Hope Street. All group members will contribute. The following are a list of topics with corresponding dates.

<table>
<thead>
<tr>
<th>Date</th>
<th>Adult Group</th>
<th>Children’s Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 21, 2017</td>
<td>Safety within the home (Home Safety and Protection)</td>
<td>Jump, Sit, Stand (Gross Motor Skills)</td>
</tr>
<tr>
<td>October 5, 2017</td>
<td>The Need for Z’s (Importance of Sleep)</td>
<td>Yummy Foods (Cooking)</td>
</tr>
<tr>
<td>October 19, 2017</td>
<td>Your body is a temple (Nutrition)</td>
<td>Fun with Glitter (Craft/activity)</td>
</tr>
<tr>
<td>November 2, 2017</td>
<td>Planning Quick and Simple Meals (Meal Planning)</td>
<td>Getting Ready for the Day (Dressing &amp; Grooming Skills)</td>
</tr>
<tr>
<td>November 16, 2017</td>
<td>Be and Live Well (Health and Wellness)</td>
<td>How to regulate your body (Sensory Skills)</td>
</tr>
<tr>
<td>November 30, 2017</td>
<td>Managing Every Day Stress (Stress Management and Relaxation)</td>
<td>ABC’s (Academic Skills)</td>
</tr>
<tr>
<td>December 7, 2017</td>
<td>10 coping strategies for everyday practice (Positive coping Skills)</td>
<td>Firefighters to Princesses (Imagination Play)</td>
</tr>
</tbody>
</table>

**Student Writing Guidelines**
As a reminder, the MOT program requires that students follow APA (American Psychological Association) style for all written work. Papers submitted in a format other than APA will be returned ungraded. It is strongly recommended that students purchase the *Publication Manual of the American Psychological Association, 6th Edition.* Thus, for all work submitted in written or presentation form (including references), must be APA style and format.
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**Student Responsibility:**
Regular attendance is expected and required for successful completion of this course. Three or more unexcused absences and/or tardiness will be noted and will result in specific point deductions at the instructor’s discretion, because you will miss out on important interactions/classroom exercises. Students should come prepared for each class period by: 1) having reviewed the previous information from each unit and 2) having at least skimmed assigned readings and reviewed any materials provided. Because of the nature of this course, you should expect to spend a great deal of time in independent study and review outside of class; your Instructor can only do so much for you. Each student is responsible for material assigned and presented in class, whether the student is present or absent. Because of the nature of the course, NO MAKE UP EXAMS/quizzes will be given except under extraordinary circumstances and as approved PRIOR to the absence by the course Instructor (when possible). In the case of an unexpected absence (such as a medical emergency) written documentation (such as an explanation from the attending physician) will be required to sit for the exam. The scheduling of and format for any make-up exams/quizzes will be at the discretion of the Course Coordinator. Additional policies will be in accord with those outlined in the MOT Program Student Handbook. It should be re-emphasized that repeated tardiness or disruptive behavior, as well as any form of academic misconduct will not be tolerated in this course.

**Statement on Academic Integrity**
The Carroll University Academic Integrity Policy is located in your student handbook on the University website. http://www.carrollu.edu/campuslife/. Please familiarize yourself with it. If a student is found in violation of the Carroll University Academic Integrity Policy, I reserve the right to fail the student on the assignment/exam or even FAIL the student in the course.

Some examples of violations will be discussed on the first day of class. These will include:

1. Plagiarism
   - Must use OWN words
   - If you copy more than two or three consecutive words from an author, then you are plagiarizing that author.
   - A student who uses an author’s words as her/his own will receive 0 points for that assignment. A second offense will result in failure in the course.

2. Failure to return or removal of an exam
3. Submitting work completed by another individual
• A student who copies another student’s work and the student who allowed the other student to copy her/his work will each receive 0 points for that assignment. A second offense will result in failure in the course.

(4) Discussing quiz/exam questions with students who have not yet taken the quiz/exam.

(5) Any other forms of cheating

**Core Professional Behaviors**

1. **PERSONAL RESPONSIBILITY**
   - Student is punctual
   - Student completes assignments and tasks on time
   - Student attends all lecture and laboratory sessions

2. **PERSONAL HONESTY & INTEGRITY**
   - Student is honest in word and actions and is accurate in reporting all information
   - Student maintains positive learning environment
   - Student follows the University policies regarding academic integrity (i.e., cheating on exams, removal of an exam, passing exam information to peers)

3. **RESPECT**
   - Student gives full attention to lecturer, does not talk in class, treats others with dignity
   - Student refrains from the use of technology during class (cell phones, headphones, “surfing” the web on laptops)

4. **TEACHABILITY/ADAPTABILITY**
   - Student takes responsibility for own actions and understands consequences of inappropriate actions
   - Student behavior is appropriate during times of high stress

5. **COMMUNICATION**
   - Student properly formats emails to instructors and with respect (i.e., correct punctuation and salutations)
   - Student refrains from spreading rumors regarding instructors and course assessments
   - Student follows appropriate procedures for discussion of course issues and concerns
     - 1st student contacts their lecture or laboratory instructor
• 2nd Student communicates concerns to course coordinator (should the need arise, the coordinator will direct the student to the Departmental Chair)

6. RELATIONSHIP WITH PEERS
   • Student participates in class and small group discussions
   • Student demonstrates ability to function within a group (i.e. student respects the opinions of others and can work collaboratively to solve problems).

7. PERSONAL APPEARANCE
   • Student dresses appropriately for presentations and palpation

Courtesy:
Course faculty will treat you with respect, while expecting the same in return. You are also expected to respect your fellow students. Therefore, please do the following:

1. Turn off your cell phone, beeper, or anything else that might make noise.
2. Do not converse while the teacher or a fellow student is speaking in class.
3. You are expected to arrive on time. If, because of some problem, you are forced to come in late, do come in. However, do so quietly and do not walk in front of the instructor while s/he is lecturing. There is no excuse for chronic lateness. Those who are routinely late will be invited to withdraw from the class and have points deducted from their class participation grade. If you have an emergency, please let me know.
4. Computer use policy: If you use a computer, it must be used ONLY for taking notes UNLESS specifically given permission otherwise. If you use a computer for any other purpose, you will permanently lose computer use privileges in the classroom.

CONSEQUENCES (SHOULD STUDENT NOT MEET EXPECTATIONS)

*At the discretion of the Instructor:
   ➢ A deduction in course points (i.e., -10 pts for cell phone use)
   ➢ Removal from class
   ➢ Tardiness of required assignments, -5% per day late
   ➢ Multiple offenses may result in a full letter grade deduction

Disability/Illness:
Any student who feels s/he may need an accommodation based on the impact of a disability should contact the instructor privately to discuss the specific needs. Please contact the Office of Services for Students with Disabilities at 262-524-7335 in the Walter Young Center to coordinate reasonable accommodations for students with documented disabilities.
If you are ill and unable to attend a class, it is your responsibility to notify faculty in a timely fashion. In order to make up an assignment you must document that illness.

**Extended illness may make it impossible for you to complete the class requirements.**

**Academic Progression and Proficiency**
Academic progression in the MOT program requires a grade of C or better in all MOT courses. A student receiving a D, F, or U on any assignment or exam in any course must remediate and be reassessed to ensure competence. It is necessary for the student to demonstrate proficiency before progressing through the course. Successful remediation results in demonstration of competence NOT a change in the initial grade.

The minimum passing score for practical examinations and skill checks is 80%. If a student does not pass the exam in the initial attempt, remediation occurs and reassessment is performed to ensure competence. The recorded grade from the initial examination remains unchanged. The maximum number of attempts varies between courses/faculty and depends on examination content and faculty judgment. Failure to meet this standard results in a failing grade in the course and an inability to progress in the program.

In addition, students may be required to complete a learning contract in collaboration with faculty and MOT advisor. The learning contract is a method through which a student identifies potential barriers to learning and creates an action plan toward successful learning and performance.

**Statement of the Right to Modify Course Content**
The instructor and the University reserve the right to modify, amend, or change the syllabus (course requirements, grading policy, etc.) as the curriculum and/or program require(s).