

Specifications  
for the

OCCUPATIONAL THERAPIST SERIES

**Series Definition**

Positions in these classes perform and/or supervise professional occupational therapy services, or perform professional work as a program/staff specialist in support of an occupational therapy program. Occupational therapy involves the assessment of needs and the provision of treatment designed to develop, improve, enhance and/or restore: daily living skills (including self-help skills and activities that involve interactions with others and the environment, work readiness or work performance, play skills or leisure capacities, or educational performance skills); sensory-motor, oral-motor, perceptual and/or neuromuscular functioning; and emotional, motivational, cognitive and/or psychosocial components of performance.

**Distinguishing Characteristics**

Classes in this series are distinguished from each other by differences in:

- The complexity of work in terms of the nature, variety, and difficulty of work assignments; scope and level of responsibility; and the impact of the work on others or on program operations;
- The breadth of knowledge and abilities required to perform the work;
- The nature and scope of recommendations, decisions and commitments;
- Available guidelines;
- The nature and degree of supervision received; and
- The nature and degree of supervision exercised over subordinate positions, and the scope of supervisory control exercised over subordinate positions and the size and complexity of the organization supervised.

### **Class Distinctions**

**Occupational Therapist III (6.286)** - This class reflects the fully independent journey worker level which performs the full range of professional occupational therapy services to individuals and groups.

Positions in this class are required to plan and organize their own activities so as to meet the needs of assigned patients/clients. The work may involve the provision of all occupational therapy services for a unit, center or facility; however, work performance is generally limited to planning, providing and evaluating direct patient evaluations and treatment services. A high degree of professional judgment is exercised in determining goals and selecting treatment techniques for each patient or client.

Work is performed under the general supervision of a higher level Occupational Therapist, or through professional consultation from other technically qualified professionals, normally through conferences and reviews of reports. Recommendations and decisions pertaining to treatment goals, evaluations, etc., involving the more difficult aspects of complex cases are made in accordance with established policies. Decisions on routine aspects of evaluation and treatment services are made as part of the regular assignment. Positions may work as a member of a multi-disciplinary team.

*Examples of Duties: (Positions may not be assigned all of the duties listed, nor do the examples necessarily include all of the duties that may be assigned. This does not preclude the assignment of duties that are not listed. The scope and level of complexity of assigned duties are commensurate with the scope and level of complexity of work reflected in each class.)*

1. Selects, administers and interprets appropriate standardized and non-standardized tests and evaluations in assessing patients/clients' motor and psycho-social skills and functioning.
2. Develops and implements treatment programs/plans/interventions to develop self-help skills in activities of daily living, or to elicit improved perceptual, neuro-developmental, motor and personal-social skills; assesses effectiveness of treatment plans and makes modifications as necessary.
3. Maintains case records by writing progress notes and reports of patients'/clients' response to treatment plans.
4. Prepares correspondence, reports, case histories, treatment plans and other material.
5. Collaborates with physicians, members of multi-disciplinary teams, and other members of the health care team relative to patient/client treatment and

- progress; provides evaluation and progress reports on patients/clients; offers and receives recommendations, suggestions and expertise concerning the patient/client and treatment plan.
6. Designs, produces and instructs others in the use of adaptive equipment, wheelchairs, positioning chairs, utensils, splints and other orthotic and assistive devices.
  7. Determines supplies needed for patient/client treatment, and submits requisitions and requests to purchase supplies, as necessary.
  8. Provides consultation to parents, caregivers, teachers, employers and others to provide information regarding patients'/clients' abilities, limitations, progress and needs. Also provides instruction/training regarding how they may assist/facilitate the patients'/clients' progress/functioning.
  9. Instructs and directs the work of paraprofessional occupational therapy personnel in the implementation of treatment plans; makes suggestions on the use of effective therapeutic techniques.
  10. Provide orientation and conducts in-service training for new occupational therapists, occupational therapy assistants, other health care professionals and volunteers regarding occupational therapy treatment services.
  11. Supervises student occupational therapists that are in a degree program who need to complete clinical affiliations. Provides orientation, mentors and guides students' performance, and evaluates their competency.

**Occupational Therapist IV (6.287)** - This class reflects responsibility as: (A) a supervisor of a small- to moderate-sized program of occupational therapy, or (B) a program specialist responsible for developing and evaluating policies, procedures and standards for occupational therapy services for a target population.

**Type A** - An Occupational Therapist that is responsible for supervising, planning, organizing, and coordinating a program of occupational therapy services for a facility, center, institution or a sub-program of a large division level occupational therapy program where the scope of the services is considered small to moderate. The scope of such a program is based on the number of professional and paraprofessional subordinate staff, the size and scope of the program within the hierarchy of the agency's total occupational therapy program, the limited specializations within the occupational therapy program of services, the availability of supervisory guidance or lack of such guidance, etc. A position in this class may be the sole professional Occupational Therapist in a facility or program, or may supervise a small staff (1 to 8 positions) of subordinate professional, paraprofessional and/or allied health services positions. The primary consideration, however, is that the position is responsible for, and is significantly involved in, planning, organizing, coordinating and conducting the

occupational therapy services program, including the development and maintenance of operational policies and procedures, and necessary coordination of services with other disciplines. Positions of this type may also provide direct services to patients/clients for a significant portion of the time.

Type B - An Occupational Therapist that functions as a program specialist that is responsible for program planning and evaluation activities, including the development, revision, and evaluation of policies, procedures and standards, in an occupational therapy program area, and providing advice and assistance to line personnel in public and/or private treatment facilities or program(s). Such functions may be performed as the occupational therapy representative of an interdisciplinary team established to monitor and evaluate ongoing private and/or public therapy treatment programs and may involve coordination of the team's activities.

Examples of Duties: *(Positions may not be assigned all of the duties listed, nor do the examples necessarily include all of the duties that may be assigned. This does not preclude the assignment of duties that are not listed. The scope and level of complexity of assigned duties are commensurate with the scope and level of complexity of work reflected in each class.)*

Type A

1. Plans, organizes, coordinates, supervises and evaluates the provision of occupational therapy services.
2. Schedules, assigns, reviews and evaluates the work of occupational therapists, other health care professionals, paraprofessionals and student interns, in the provision of services.
3. Provides assistance and direction to staff in the implementation of daily activities.
4. Attends conferences and staff meetings for cooperative planning of programs or treatment services.
5. Oversees the maintenance of case records containing progress notes and reports of patients'/clients' response to treatment plans.
6. Develops and revises operational policies, procedures and standards for the work unit.
7. Conducts studies of operations, program problems and activities, and makes recommendations for modification and expansion of existing services, or initiation of new services.

8. Interviews and recommends selection of applicants, orients new employees, approves/disapproves leave requests and recommends approval/disapproval of personnel actions, and counsels and disciplines employees as necessary.
9. Develops and implements staff development activities.
10. Prepares requisitions for and maintains inventory of occupational therapy supplies and equipment.
11. Develops and recommends operating budget and other resource requirements.
12. Prepares correspondence, reports and other written material.
13. Provides professional occupational therapy services.

Type B

1. Identifies occupational therapy service needs for a target population/community; conducts research on occupational therapy methodologies and techniques; develops plans, policies and standards to provide services; develops community support for the program's activities.
2. Applies for, administers and monitors grant funds; coordinates and evaluates services and modifies plans as necessary.
3. Provides advice, assistance and/or training to peers, team members, personnel in public and/or private treatment facilities and/or programs on the characteristics and modalities that may be used to treat certain types of conditions.
4. Provides advisory and consultative services and program information to teachers and other school officials, operators of private treatment facilities, parents, other therapists, diagnostic team members, family members, etc.
5. Conducts studies of operations, program problems and activities, and makes recommendations for modification and expansion of existing services, or initiation of new services.
6. Develops and recommends operating budget and other resource requirements.
7. Prepares correspondence, reports and other written material.

**Occupational Therapist V (6.288)** - This class reflects responsibility as: (A) a supervisor of a large program of occupational therapy services, including the supervision of a large staff of occupational therapists and allied therapy personnel, or (B) the top-level occupational therapy consultant for the State's public health program

responsible for planning, developing, evaluating, improving and implementing a broad program of occupational therapy services on a statewide basis.

Type A - Supervises a large occupational therapy unit (10 or more positions) with responsibility for planning, organizing, coordinating, directing and evaluating a program of occupational therapy services. In addition to supervisory functions, a position in this class is responsible for developing and maintaining operating policies, procedures and guidelines and implementing the occupational therapy program. The work of a position in this class is complicated by the coordination of services of a large staff and responsibility for program planning and direction and integration of services with other disciplines.

Type B - Serves as the State's top-level consultant for occupational therapy services. Plans, develops, evaluates, improves and implements the State's public health occupational therapy services program on a statewide basis and provides direction to the program's occupational therapists. The State's public health occupational therapy services program is comprised of distinct ongoing programs in several occupational therapy specialization areas.

Examples of Duties: *(Positions may not be assigned all of the duties listed, nor do the examples necessarily include all of the duties that may be assigned. This does not preclude the assignment of duties that are not listed. The scope and level of complexity of assigned duties are commensurate with the scope and level of complexity of work reflected in each class.)*

Type A - Duties performed are similar to Occupational Therapist IV, Type A above; however, activities are more intense because of the larger size of the program and the need for a greater degree of coordination/integration of services with others.

#### Type B

1. Plans and develops a statewide program of occupational therapy services in a broad public health program having ongoing functions in several areas of occupational therapy specialization.
2. Develops policies, objectives, guidelines and procedures for the occupational therapy program.
3. Conducts studies to evaluate the effectiveness of the occupational therapy program and determine appropriate needs; recommends revisions and modifications to program plans to improve the quality and level of services provided; recommends new programs in consideration of needs and current trends in occupational therapy.

4. Coordinates occupational therapy services in various clinics and/or program areas in order to provide adequate coverage and continuity of services; participates in planning new community projects.
5. Prepares program plans and budget requests for staffing, equipment and supplies; applies for federal project grants and renewals; prepares reports and correspondence.
6. Provides statewide consultative services in occupational therapy to occupational therapists, program administrators, service directors, allied health personnel and others regarding policy determination, program development, operation and evaluation.
7. Plans and conducts workshops; gives lectures and demonstrations and participates in seminars representing the State's public health occupational therapy program.
8. Reviews proposed legislation and prepares and presents written testimony; drafts proposed changes to statutes and administrative rules.

**COMPETENCIES REQUIRED:** *(The competencies required to effectively perform the key duties of these classes are indicated in the following table. The degree of each competency required is commensurate with the scope and level of complexity of the duties and responsibilities that are reflected in each class.)*

*"P" indicates a prerequisite competency that must be brought to the job.*

*"A" indicates a competency that is required for full performance that may be acquired on the job, within the probationary period.*

COMPETENCIES	OCCUPATIONAL THERAPIST		
	III	IV	V
<b>TECHNICAL COMPETENCIES</b>	P	P	P
Knowledge of the principles and practices of occupational therapy			
Knowledge of anatomy, physiology and kinesiology, as related to the practice of occupational therapy	P	P	P
Knowledge of human growth and development	P	P	P
Knowledge of human behavior, motivation and needs	P	P	P
Understand the effects of health, disability, disease processes and traumatic injury to the individual within the context of family and society	P	P	P
Select, administer and interpret a variety of standardized and non-standardized screening tools and tests to assess the need for occupational therapy intervention.	P	P	P

COMPETENCIES	OCCUPATIONAL THERAPIST		
	III	IV	V
Develop and implement intervention plans and strategies, including goals and methods to achieve them. Use therapeutic adaptation pertinent to the needs of the client/patient, including, but not limited to, family/caregiver training, behavioral modifications, orthotics, prosthetics, assistive devices, equipment and other technologies.	P	P	P
Measure and evaluate clients'/patients' performance and progress; modify intervention plans, strategies, materials or instrumentation, as appropriate; maintain case records of clients' response to treatment plans.	P	P	P
<b>GENERAL COMPETENCIES</b> READING: Understand and interpret complex written material, including laws, rules, regulations and policies.	P	P	P
WRITING: Use correct English grammar, punctuation and spelling; communicate information in a succinct and organized manner; produce written information that is appropriate for the intended audience.	P	P	P
ORAL COMMUNICATION: Express information to individuals and groups effectively, taking into account the audience and nature of the information.	P	P	P
DECISION MAKING: Make sound, well-informed and objective decisions; perceive the impact and implications of decisions.	P	P	P
PROBLEM SOLVING: Identify problems; analyze problems logically and systematically; determine accuracy and relevance of information; use sound judgment to generate and evaluate alternatives and to make recommendations.	P	P	P
REASONING: Identify rules, principles or relationships that explain facts, data or other information; analyze information, make correct inferences and draw accurate conclusions.	P	P	P
INFORMATION MANAGEMENT: Identify a need for and gather information from appropriate sources; organize information to facilitate analysis and decision making.	P	P	P

COMPETENCIES	OCCUPATIONAL THERAPIST		
	III	IV	V
INTERPERSONAL SKILLS: Deal effectively with others; establish and maintain effective working relationships with others; treat others with courtesy and tact.	P	P	P
ORGANIZATIONAL AWARENESS: Understand and apply pertinent laws, rules, policies and procedures.	A	A	A
SUPERVISORY SKILLS: Plan, assign, direct, and evaluate the work of others; provide counseling and discipline as necessary.	N/A	*	*

\*Required (P) for positions with supervisory responsibility.

### **MINIMUM QUALIFICATION REQUIREMENTS**

#### **Certification and License Requirements**

1. Applicants must have passed the occupational therapist national certification examination administered by the National Board for Certification in Occupational Therapy (NBCOT) at the time of application.
2. Applicants must possess a valid license to practice occupational therapy in the State of Hawaii at the time of appointment.

#### **Experience Requirements**

Applicants must have had progressively responsible experience of the quality and quantity described in the following, or any equivalent combination of training and experience:

Class Title	Occupational Therapy Experience (Years)
Occupational Therapist III	0
Occupational Therapist IV	1
Occupational Therapist V	2

**Occupational Therapy Experience:** Work experience as a professional occupational therapist.

\*For positions at the Occupational Therapist IV and V levels that have supervisory responsibilities, the applicant should provide evidence of the ability to supervise others.

**Quality of Experience**

Possession of the required number of years of experience will not in itself be accepted as proof of qualification for a position. The applicant's overall experience must have been of such scope and level of responsibility as to conclusively demonstrate that he/she has the ability to perform the duties of the position for which he/she is being considered.

**Selective Certification**

Specialized knowledge, skills and abilities may be required to perform the duties of some positions. For such positions, Selective Certification Requirements may be established and certification may be restricted to eligibles who possess the pertinent experience and/or training required to perform the duties of the position.

Agencies requesting selective certification must show the connection between the specific training and/or experience on which they wish to base selective certification and the duties of the position to be filled.

**Tests**

Applicants may be required to qualify on an appropriate examination.

**Physical and Medical Requirements**

Applicants must be able to perform the essential functions of the position effectively and safely, with or without reasonable accommodation.

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This is an amendment to the class specifications and minimum qualification specifications for the classes OCCUPATIONAL THERAPIST III, IV and V that were approved on October 4, 2013. The class title has been changed to OCCUPATIONAL THERAPIST SERIES.

Date Approved: 3-5-18

  
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for RYKER WADA, Interim Director  
Department of Human Resources Development