

## Role Descriptor – Primary Care Occupational Therapist

October 2021

**Introduction:** This role descriptor has been provided to support the recruitment or engagement of occupational therapists in primary care. It is based on the *Advanced Practice Primary Care Occupational Therapy Credential* which was devised by a Skills for Health/Health Education England multi-disciplinary Steering Group with representation from Wales, Northern Ireland, Scotland, and England.

The Steering group, with expert patient experience, clinicians and academics was fundamental in ensuring the accuracy of the capabilities, which were then further refined following public consultation. It is the most up to date, accurate descriptor of the capabilities of an advanced practice occupational therapist in primary care.

Primary care employers can design local job descriptions for the relevant occupational therapy roles over a broad range of responsibilities based on local need. However, In England, PCNs must ensure that to be acceptable for reimbursement through the Network Contract DES Additional Roles Reimbursement Scheme, they meet the minimum the role requirements set out in the DES.

**Job Title:** Primary Care Occupational Therapist

**Responsible to/ Accountable to/ Hours of work:** To be determined by the Primary Care Employer

**Salary:** To be determine by the Primary Care Employer (*note: the role outline is based on indicative AfC Band 7*)

**Job Scope:** This post requires an occupational therapist who is highly specialised and can work at an advanced level of practice within primary care, utilising their in-depth, expert knowledge, clinical skills, and experience at a senior level, in the management of patient's, groups and communities' occupational participation needs for example in home and health management, education, work, social participation and leisure activities.

The post holder will provide personalised, biopsychosocial occupational therapy interventions from initial clinical assessment, diagnosis, intervention, and evaluation for agreed patient groups such as older adults, adults with mental health problems and those with vocational needs.

They will provide high level, complex clinical decision-making, and expert care for patients within primary care alongside a comprehensive understanding of how to implement appropriate risk assessment for undifferentiated diagnoses and clinical red flags, including when alternative input is required.

They will work collaboratively with the primary care multi-disciplinary team (MDT) across pathways and systems, including digital delivery, to meet the needs of patients and carers, support the delivery of policy and procedures, and provide occupational therapy leadership across clinical practice, education, and research.

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### Key duties and responsibilities:

1. Lead on the systematic assessment, planning, implementation, and evaluation of occupational therapy intervention plans, which address why patients, groups and communities are not able to engage in occupations that have health benefits, and which aim to increase patients' occupational performance and engagement.
2. Empower patients, families, and groups to self-manage through shared-decision making and peer activation, solving complex problems in innovative ways using occupation and outcomes-focused goals.
3. Co-create and select specifically graded and adapted occupations as therapy that bring about transformative, measurable change working with the impact of the social determinants of health and in collaboration with the third sector.
4. Use initiative and take responsibility to work in partnership with primary care multi-disciplinary team colleagues, alongside the patients' families, carers, and employers, communicating effectively to both specialist and non-specialist audiences in a variety of accessible media.
5. Lead the development of crisis and contingency plans with relevant professionals to prevent admission to or speed discharge from hospital, maximising and maintaining independence in preferred home, work, and community settings.
6. Critically analyse and deliver a wide range of detailed occupational therapy interventions that target the patient (e.g., rehabilitation to rebuild lost skills and restore confidence), their environment (e.g., assistive technology, carer support), and their chosen occupation (e.g., home and work activities).
7. Complete assessments of extrinsic environmental and behavioral risk factors in challenging and unpredictable situations advising and making sound judgements on home, community, and workplace environmental alterations.
8. Enable and advise patients, and their families or carers, about how to engage in occupations that promote physical, psychological, and emotional health including organisations and/or equipment that can help with reduced functional ability for daily activities; loss of ability to cope and social isolation; work stress and sickness absence and cumulative social stressors.
9. In partnership with patients, use collaborative problem solving and goal setting to enhance feelings of control and make informed choices regarding how to manage physical and mental health long-term conditions, across a continuum of care, age and setting.
10. Lead on the development, implementation, and evaluation of broad aspects of a seamless occupational therapy service across primary care, working with health, social care and voluntary sectors, and delivering continuously improving standards of patient care and cross boundary working.
11. Manage a highly complex and specialist caseload independently, flexibly carrying out multifactorial assessment and treatment, demonstrating autonomous clinical judgments where expert opinion differs due to an ambiguous or absent evidence base, incomplete or contradictory information.
12. Lead in standard setting for occupational therapy practice in general practice including anticipatory population analysis for health inequalities and health promotion; triage and coordination of emergency referrals; triangulation of evidence from interview, observation, and standardised measures; developing

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- and making use of the full scope of practice for medicines management.
13. Continue to learn independently and develop professionally to a high level, informed by the forefront of current research and knowledge regarding how to increase engagement in occupations and everyday function and/ when onward referral is required.
  14. Develop and provide accurate and detailed patient and carer information, that outlines for example, levels of occupational performance in the context of everyday living/working and capacity to develop new skills and strategies; viability of independent living or return to work; specific tailored recommendations regarding the level of support needed to carry out chosen occupations in chosen places such as living at home or returning to a particular job.
  15. Proactively use occupational analysis and formulation to identify new ways to pinpoint and resolve underlying issues that result in barriers to participation for the individual, their daily activities, and in their chosen environment.
  16. Facilitate and co-create interprofessional learning about occupational needs and interventions that typically arise or need to be addressed in primary care for primary care staff, to enhance local decision making.
  17. Explore and critically evaluate current and emerging complex issues at societal level to ensure delivery of best occupational therapy practice in clinical practice, caseload management, education, research, and audit, to achieve corporate primary care and local population objectives

### **Administration and professional responsibilities**

18. Demonstrate high standards of personal and professional development, actively participating in mentoring and supervision to develop and share learning with colleagues, promoting peer review and best practice within the work environment, alerting other team members to issues of inequality, quality, and risk.
19. Contributes to and co-creates relevant audit processes, evaluating and implementing ongoing service change to order to and better meet local population need.
20. Maintains accurate, contemporaneous healthcare records appropriate to the consultation, ensuring accurate completion of all necessary documentation associated with patient health care and registration with the practice, and improving these systems where required.

### **Supervision**

The postholder will have access to appropriate clinical supervision and an appropriate named individual in primary care to provide general advice and support on a day-to-day basis.

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### Person Specification

Element	Essential	Desirable
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>• BSc/MSc in Occupational Therapy from a training programme approved by the Royal College of OTs (RCOT) and the HCPC.</li> <li>• Health &amp; Care Professions Council (HCPC) registration.</li> <li>• Able to operate at an advanced level of clinical practice (Level 7 Professional Practice of the RCOT Careers Development Framework)</li> </ul>	<ul style="list-style-type: none"> <li>• Relevant post registration MSc.</li> <li>• Working towards Advanced Clinical Practitioner status across all four pillars.</li> <li>• Mentorship or supervisory skills training.</li> </ul>
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>• Systematic understanding of how to manage a designated, complex, occupational therapy caseload using theoretical and practical experience, completing assessments, planning, implementing occupational therapy interventions, and evaluating outcomes aligned to care plans.</li> <li>• Working knowledge of Microsoft and GP practice data monitoring systems.</li> <li>• Ability to write comprehensive clinical notes, implement and evaluate care plans.</li> <li>• Experience of assessment and treatment delivery in long term conditions and active management for example for older adults, adults with mental health</li> </ul>	<ul style="list-style-type: none"> <li>• Experience of working within a primary care setting and working with social prescribing and IAPT services.</li> <li>• Health coaching, cognitive behavioural and motivational interviewing approaches / skills.</li> <li>• Ability to contribute to fit note processes, advising on and developing return to work plans using the AHP Health and Work Report.</li> <li>• Evidence of developing clinical governance requirements.</li> <li>• Extensive risk assessment experience including use of the Mental Health or Mental Capacity Act.</li> </ul>

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	<p>problems and patients with work and health problems.</p> <ul style="list-style-type: none"> <li>• Awareness of data protection (GDPR) and confidentiality issues particularly within a PCN setting.</li> <li>• Experience of inter-professional and multi-agency team working.</li> </ul>	<ul style="list-style-type: none"> <li>• Experience of delivery of mental health occupational therapy assessment and intervention for those with complex needs.</li> <li>• Experience of delivery of vocational assessment and intervention for those with health and work problems.</li> <li>• Experience of delivery of occupational therapy assessment and intervention for frail, older adults.</li> </ul>
<b>Analytical skills</b>	<ul style="list-style-type: none"> <li>• Ability to evidence a systematic understanding of the NHS principles and values.</li> <li>• Ability to analyse and interpret complex, dynamic, and incomplete information, preempt and evaluate issues, and recommend appropriate course of action to address emergency issues in unfamiliar contexts.</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to develop critical responses, suggest new concepts, undertake substantial investigations to generate transformative solutions.</li> <li>• Analysis of and ability to work across organisational boundaries within health and social care and with wider community partners.</li> <li>• Independent thinker with good judgement, problem-solving and analytical skills, including ability to suggest new approaches.</li> </ul>
<b>Communication</b>	<ul style="list-style-type: none"> <li>• Excellent interpersonal and organisational skills.</li> <li>• Ability to influence and persuade others articulating a balanced view, able to constructively question information and justify</li> </ul>	<ul style="list-style-type: none"> <li>• Clear communicator with excellent writing, report writing and presentation skills capable of constructing and delivering clear ideas and concepts concisely and</li> </ul>

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	<p>alternative approaches when required.</p> <ul style="list-style-type: none"> <li>• Ability to build effective relationships with a range of stakeholders which are based on openness, honesty, trust and confidence.</li> <li>• Evidence of success in efficient and effective project and programme management.</li> <li>• Evidence of inspiring and motivating teams with the ability to communicate passionately, effectively, and persuasively across a diverse set of stakeholders.</li> </ul>	<p>accurately for diverse audiences.</p> <ul style="list-style-type: none"> <li>• Significant post registration experience.</li> <li>• Ability to negotiate effectively and resolve conflict.</li> </ul>
<p><b>Personal attributes &amp; abilities</b></p>	<ul style="list-style-type: none"> <li>• Strong and inspirational leadership, working flexibility and creativity in unfamiliar contexts.</li> <li>• Ability to co-ordinate and prioritise workloads.</li> <li>• Able to multi-task, be self-disciplined and highly motivated, acting with initiative in decision making.</li> <li>• Managing a complex caseload, selecting and applying a wide range of advanced occupational therapy techniques and information sources.</li> <li>• Experience in staff development e.g. supervision,</li> </ul>	<ul style="list-style-type: none"> <li>• High degree of personal credibility, emotional intelligence, patience, and flexibility, including ability to use reflective practice and access support when required.</li> <li>• Ability to cope and adapt autonomously with unpredictable situations.</li> <li>• Confident in facilitating and challenging others</li> <li>• Demonstrates a flexible approach, critical ethical dimension and ability to make connections between known and unknown areas to ensure best patient care is delivered.</li> </ul>