

# NATIONAL PROFILE FOR OCCUPATIONAL THERAPY

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\* new in October

**OCCUPATIONAL THERAPY – REVIEWED PROFILES WITH PREVIOUS LABELS AND PUBLICATION DATE**

<b>Band</b>	<b>Former profile label</b>	<b>New profile label</b>	<b>Comment</b>	<b>Publication Date of former profile</b>
2	Clinical Support Worker (OT) Mental Health		Withdraw, merged with CSW OT	March 03
2	Clinical Support Worker (OT)	Clinical Support Worker (Occupational Therapy)	Replace, see above	August 03
3	OT Technician	Clinical Support Worker Higher Level (Occupational Therapy)	Replace	August 03
4	OT Technician Higher Level	Occupational Therapy Technician	Replace	February 04
5	Occupational Therapist	Occupational Therapist	Replace	August 03
6	Specialist OT (Team Leader)		Withdraw, merged with OT Specialist	February 04
6	Specialist OT	Occupational Therapist Specialist	Replace, see above	December 03
7	Specialist OT (Section/Team Manager)	Occupational Therapist Team Manager	Replace	December 03
7	Highly Specialist OT	Occupational Therapist Advanced	Replace	April 04

**Profile Label  
Job Statement:**

**Clinical Support Worker (Occupational Therapy)**

1. Carries out duties delegated by the Occupational Therapist
2. Undertakes general duties within the department

<b>Factor</b>	<b>Relevant Job Information</b>	<b>JE level</b>
<b>1. Communication &amp; Relationship Skills</b>	<b>Provide and receive routine information requiring tact or persuasive skills</b> Exchanges information with patients requiring tact & re-assurance, persuasive skills	3(a)
<b>2. Knowledge, Training &amp; Experience</b>	<b>Range of routine work procedures requiring job training</b> Understanding of OT procedures and internal policies acquired through job training plus experience	2
<b>3. Analytical &amp; Judgemental Skills</b>	<b>Judgements involving facts or situations some requiring analysis</b> Assesses patients / clients response to activities	2
<b>4. Planning &amp; Organisational Skills</b>	<b>Organise own day to day work tasks or activities/ plan and organise straightforward activities, some ongoing</b> Organises own day to day tasks /organises courses and activities for patients	1/2
<b>5. Physical Skills</b>	<b>Physical skills obtained through practice</b> Driving, keyboard skills, craft skills	2
<b>6. Responsibility for Patient/Client Care</b>	<b>Implements clinical care / care packages</b> Implements occupational therapy treatment plans	4(a)
<b>7. Responsibility for Policy/Service Development</b>	<b>Follows policies in own role, may be required to comment</b> May comment on departmental policies	1
<b>8. Responsibility for Financial &amp; Physical Resources</b>	<b>Personal duty of care in relation to equipment, resources/ Handles cash, valuables</b> Safe use of shared equipment/ handles cash	1-2(a)
<b>9. Responsibility for Human Resources</b>	<b>Demonstrate own activities to new or less experienced employees</b> May demonstrate own duties to new starters	1
<b>10. Responsibility for Information Resources</b>	<b>Record personally generated information</b> Update patient/ client records	1
<b>11. Responsibility for Research &amp; Development</b>	<b>Occasionally participate in R&amp;D</b> Completes e.g. staff surveys	1
<b>12. Freedom to Act</b>	<b>Standard operating procedures, someone available for reference</b> Receives instructions regularly from the occupational therapist; works within established guidelines	2
<b>13. Physical Effort</b>	<b>Frequent light effort for several short periods/ occasional moderate/ frequent moderate effort for several short periods</b> Lifts materials for occupational therapy sessions	2(b)(d)- 3(c)
<b>14. Mental Effort</b>	<b>Frequent concentration; work pattern predictable</b> Observes patients' response to treatment	2(a)
<b>15. Emotional Effort</b>	<b>Occasional distressing or emotional circumstances</b> Provides care for terminally ill patients/ clients	2(a)
<b>16. Working Conditions</b>	<b>Occasional unpleasant/ frequent unpleasant conditions/ occasional highly unpleasant conditions</b> Exposure to dust, dirt, smell, noise/ body fluids	2(a)- 3 (a) (b)
<b>JE Score/Band</b>	<b>JE Score 183-209</b>	<b>Band 2</b>

**Profile Label**  
**Job Statement:**

**Clinical Support Worker Higher Level (Occupational Therapy)**

1. Carries out duties delegated by Occupational Therapist in a variety of settings
2. Supervises and instructs patients/clients in activities relating to their treatment programme

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	<b>Provide and receive routine information; barriers to understanding</b> Exchanges information with patients, clients requiring tact, reassurance, persuasion skills	3(a)
2. Knowledge, Training & Experience	<b>Range of work procedures and practices; base level of theoretical knowledge</b> Knowledge of OT techniques and/or activities relevant to client group; acquired through training, experience within an OT setting to NVQ3 equivalent level	3
3. Analytical & Judgmental Skills	<b>Judgements involving facts or situations some requiring analysis</b> Assesses patients and clients response to activities	2
4. Planning & Organisational Skills	<b>Plan &amp; organise straightforward activities, some ongoing</b> Organises courses and activities for patients	2
5. Physical Skills	<b>Physical skills obtained through practice/ developed physical skills, accuracy important; manipulation of tools, materials</b> Driving, keyboard skills/ craft skills requiring use of fine tools.	2/3(b)
6. Responsibility for Patient/Client Care	<b>Implements clinical care/ care packages</b> Implements occupational therapy treatment plans	4(a)
7. Responsibility for Policy/Service Development	<b>Follows policies in own role, may be required to comment</b> May comment on departmental policies	1
8. Responsibility for Financial & Physical Resources	<b>Handle cash, valuables/safe use of equipment other than equipment used personally /maintain stock control</b> Handles cash; responsible for safe use of equipment; Orders materials/equipment	2(a)(b), (c)
9. Responsibility for Human Resources	<b>Demonstrates own activities to new or less experienced employees</b> May demonstrate new duties to new starters	1
10. Responsibility for Information Resources	<b>Records personally generated information</b> Updates patient/ client records	1
11. Responsibility for Research & Development	<b>Undertake surveys or audits, as necessary to own work</b> Completes e.g. staff surveys	1
12. Freedom to Act	<b>Standard operating procedures, someone available for reference</b> Receives instructions regularly from the occupational therapist; works within established guidelines	2
13. Physical Effort	<b>Frequent light physical effort for several short periods; occasional/ frequent moderate physical effort for several short periods</b> Lifts tools/materials for patient activities	2 (b), (d)/3(c)
14. Mental Effort	<b>Frequent concentration; work pattern predictable</b> Observes patients' during activities; concentrates while operating machinery & when supervising others using machinery	2(a)
15. Emotional Effort	<b>Occasional/ frequent distressing or emotional circumstances</b> Providing care for distressed/ terminally ill patients/clients	2(a)-3(a)
16. Working Conditions	<b>Occasional/ frequent unpleasant working conditions/ occasional highly unpleasant conditions</b> Exposure to dust, dirt, smells, noise/ body fluids	2(a)- 3(a) (b)
JE Score/Band	<b>JE Score 223-252</b>	<b>Band 3</b>

## Profile Label

### Job Statement:

## Occupational Therapy Technician

- 1) Plans and provides programmes of therapeutic activities tailored to client group e.g. those with mental health problems, within the framework laid down by the Occupational Therapist
- 2) Implements and evaluates delegated OT interventions for patients/clients in activities relating to their treatment programme

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	<b>Provide and receive routine information requiring tact or persuasive skills; barriers to understanding; provide and receive complex or sensitive information</b> Exchanges information with patients, clients requiring tact, reassurance, persuasion skills; patient details sensitive; clients with learning disabilities/mental health problems	3(a) (b)
2. Knowledge, Training & Experience	<b>Range of work procedures and practices, majority non-routine; intermediate level theoretical knowledge</b> Practical and teaching knowledge to NVQ3 level plus knowledge skills development, group working for client group – to diploma equivalent level	4
3. Analytical & Judgemental Skills	<b>Judgements involving facts or situations some requiring analysis</b> Assesses patients response to activities and decides on appropriate action e.g. advise Occupational Therapist, summon assistance, alter programme of activities	2
4. Planning & Organisational Skills	<b>Plan &amp; organise straightforward activities, some ongoing</b> Organises courses and activities for patients	2
5. Physical Skills	<b>Highly developed physical skills accuracy important; manipulation of fine tools, materials</b> Craft/practical skills requiring use of fine tools.	3(b)
6. Responsibility for Patient/Client Care	<b>Implement clinical care/ care packages</b> Plans and provides programmes of therapeutic activities within framework established by OT; facilitates group therapy sessions, provides individual support	4(a)
7. Responsibility for Policy/Service Development	<b>Implement policies and propose changes to practices, procedures for own area</b> Reviews policies for own area and proposes revisions	2
8. Responsibility for Financial & Physical Resources	<b>Handle cash, valuables; safe use of equipment other than equipment used personally; maintaining stock control</b> Handles small amounts of cash; responsible for safe use of equipment by patients/clients; orders materials/equipment	2(a) (b), (c)
9. Responsibility for Human Resources	<b>Demonstrate own activities to new or less experienced employees</b> Demonstrates own duties to students, support users, volunteer helpers	1
10. Responsibility for Information Resources	<b>Record personally generated information</b> Maintains records relating to clients, supplies purchases	1
11. Responsibility for Research & Development	<b>Occasionally participate in R &amp; D</b> Completes e.g. staff surveys	1
12. Freedom to Act	<b>Standard operating procedures, someone available for reference</b> Receives instructions regularly from the occupational therapist; works within established guidelines	2
13. Physical Effort	<b>Frequent light effort for several short periods; occasional, frequent moderate effort for several short periods</b> Lifts tools/materials for patient activities	2 (b), (d)/ 3(c)
14. Mental Effort	<b>Frequent concentration work pattern predictable; unpredictable</b> Observes patients' during activities; concentrates while operating machinery & when supervising others using machinery/ unpredictable work pattern depending on client group	2(a)- 3(a)
15. Emotional Effort	<b>Frequent distressing or emotional circumstances</b> Providing care for distressed patients/clients; clients with challenging behaviour	3(a)
16. Working Conditions	<b>Occasional/frequent unpleasant working conditions; occasional highly unpleasant working conditions</b> Dust, dirt, verbal aggression / body fluids	2(a)-3(a) (b)
JE Sore Band	<b>JE Score 277 - 292</b>	<b>Band 4</b>

**Profile Label**  
**Job Statement:**

**Occupational Therapist**

- 1) Assesses & treats own caseload of patients/clients for professional occupational therapy service in a variety of settings
- 2) Provides occupational therapy advice to other disciplines
- 3) May participate in departmental research

<b>Factor</b>	<b>Relevant Job Information</b>	<b>JE level</b>
<b>1. Communication &amp; Relationship Skills</b>	<b>Provide and receive complex, sensitive information; barriers to understanding</b> Receives information concerning patient's/ client's history, sensitive issues, some patients with special needs: requires persuasive, reassurance skills	4 (a)
<b>2. Knowledge, Training &amp; Experience</b>	<b>Expertise within specialism, underpinned by theory</b> Professional knowledge acquired through degree or equivalent	5
<b>3. Analytical &amp; Judgemental Skills</b>	<b>Range of facts or situations requiring comparison of a range of options</b> Skills for assessing clients, appropriate treatment from range of options	3
<b>4. Planning &amp; Organisational Skills</b>	<b>Plan and organise straightforward activities, some ongoing</b> Plans & prioritises own caseload, arranges appointments	2
<b>5. Physical Skills</b>	<b>Physical skills obtained through practice/ developed physical skills; manipulation of objects, people; narrow margins for error/ Highly developed physical skills, accuracy important; manipulation of fine tools, materials</b> Dexterity, co-ordination for driving, keyboard skills, sensory skills; use of specialist equipment and tools, advanced sensory skills, manual and mobilising skills	2/3(a)(b)
<b>6. Responsibility for Patient/Client Care</b>	<b>Develop programmes of care/ care packages</b> Assesses, develops and implements OT programmes, provides advice to clients/ carers and other disciplines	5(a)
<b>7. Responsibility for Policy/Service Development</b>	<b>Follow policies in own role, may be required to comment</b> Follows departmental policies, comments on proposals	1
<b>8. Responsibility for Financial &amp; Physical Resources</b>	<b>Safe use of equipment other than equipment used personally; maintain stock control</b> Responsible for safe use of equipment by others; orders supplies	2 (b)(c)
<b>9. Responsibility for Human Resources</b>	<b>Professional /clinical supervision</b> Supervises work of OT students, support workers	2 (b)
<b>10. Responsibility for Information Resources</b>	<b>Record personally generated information</b> Updates patient/ client records	1
<b>11. Responsibility for Research &amp; Development</b>	<b>Undertake surveys or audits, as necessary to own work/ regularly undertake R &amp; D activity; regularly undertake equipment testing, adaptation</b> Participates in clinical audits/ researches; tests different types of aids	1-2(a), (c)
<b>12. Freedom to Act</b>	<b>Clearly defined occupational policies, work managed, rather than supervised</b> Autonomous practitioner, works within codes of practice & professional guidelines	3
<b>13. Physical Effort</b>	<b>Frequent light; occasional moderate/ frequent moderate effort for several short periods</b> Restricted position treating patients; manoeuvres patients/ clients, carries equipment	2(b), (d)-3(c)
<b>14. Mental Effort</b>	<b>Frequent concentration; work pattern predictable</b> Concentration on patient assessment & therapy	2(a)
<b>15. Emotional Effort</b>	<b>Occasional/ frequent distressing or emotional circumstances</b> Imparting unwelcome news; treating distressed/terminally ill patients	2(a)/3(a)
<b>16. Working Conditions</b>	<b>Occasional/frequent unpleasant working conditions; Occasional highly unpleasant conditions</b> Dust, dirt, smell/ infectious material	2(a)-3(a), (b)
<b>JE Score/Band</b>	<b>JE Score 330-366</b>	<b>Band 5</b>

**Profile label:**  
**Job Statement:**  
individuals

**Occupational Therapy Technical Instructor Higher level**

1. Designs, plans and delivers a range of prescribed therapeutic programmes to  
or groups of patients/clients within an overall care package
2. Assess, evaluates and reports on patient/client responses to prescribed therapeutic programmes
3. Maintains caseload of patients/clients in community or in-patient settings

<b>Factor</b>	<b>Relevant Job Information</b>	<b>JE Level</b>
<b>1. Communication &amp; Relationship Skills</b>	<b>Provide and receive complex information; persuasive, motivational, negotiating, training skills are required</b> Communicates condition related information to patients/clients, carers, other staff, need to persuade patients/clients to engage in therapeutic activities or to reassure	4a
<b>2. Knowledge, Training &amp; Experience</b>	<b>Range of work procedures and practices, majority non routine; intermediate level theoretical knowledge</b> Knowledge of one or more specific technical/ crafts or therapeutic activities plus knowledge of a range of therapeutic interventions plus knowledge of group leading and motivational techniques acquired through formal craft qualification or equivalent plus experience of designing and leading group and individual prescribed therapeutic programmes within an occupational therapy setting	4
<b>3. Analytical &amp; Judgemental Skills</b>	<b>Range of facts or situations requiring comparison of a range of options</b> Judgement required to design relevant programme of therapeutic activities for patients/clients; analysis for assessment of progress	3
<b>4. Planning &amp; Organisational Skills</b>	<b>Plan and organise straightforward activities, some ongoing</b> Designs prescribed therapeutic programmes for individuals or groups; short term adjustments required to accommodate e.g. consent to treatment issues, changes in pathology	2
<b>5. Physical Skills</b>	<b>Developed physical skills; advanced driving; highly developed physical skills; accuracy important; manipulation of fine tools, materials</b> Developed skills for driving passenger vehicles e.g. minibus with client passengers; manipulation of patients/clients during prescribed therapeutic programmes; manipulation of technical/ craft tools	3a b
<b>6. Responsibility for Patient/Client Care</b>	<b>Develop programmes of care/ care packages</b> Devises, delivers and reports on programmes of prescribed therapeutic programmes for individuals and groups	5a
<b>7. Responsibility for Policy/Service Development</b>	<b>Implements policies and propose changes to practices, procedures for own area</b> Implements and suggests changes to policies within the therapy department	2
<b>8. Responsibility for Financial &amp; Physical Resources</b>	<b>Handles cash, valuables; safe use of equipment other than equipment used personally; maintain stock control; authorised signatory, small payments</b> Handles e.g. float for client activities; careful use of craft equipment by patients/client; orders craft equipment and supplies; validates patient expense claims	2abcd
<b>9. Responsibility for Human Resources</b>	<b>Demonstrate own activities to new or less experienced employees/ day to day supervision</b> Demonstrates activities/ allocates work	1- 2(a)
<b>10. Responsibility for Information Resources</b>	<b>Records personally generated information</b> Maintains patient/client records	1
<b>11. Responsibility for Research &amp; Development</b>	<b>Undertake surveys or audits, as necessary to own work</b> Completes e.g. relevant OT service surveys	1
<b>12. Freedom to Act</b>	<b>Clearly defined occupational policies, work is managed, rather than supervised</b> Works autonomously within trust guidelines to manage own caseload of patients/clients	3
<b>13. Physical Effort</b>	<b>Frequent light effort for several short periods; occasional/ frequent moderate effort for several short periods</b> Moving technical/ craft equipment; manoeuvring clients with mechanical aids; moving heavy equipment trollies	2(b) (d) 3(c)
<b>14. Mental Effort</b>	<b>Frequent concentration; work pattern unpredictable</b> Concentration required to lead group therapeutic activities; interruptions to deal with disruptive patients/clients	3a
<b>15. Emotional Effort</b>	<b>Frequent distressing or emotional circumstances; occasional/ frequent highly distressing or emotional circumstances</b> Dealing with difficult family situations/patients or clients with extremely challenging behaviour	3ab – 4b
<b>16. Working Conditions</b>	<b>Frequent unpleasant conditions; occasional highly unpleasant conditions</b> Exposure to dirt, dust, substances during therapeutic activities; exposure to body fluids	3a/b
<b>JE Score/Band</b>	<b>JE Score 327 - 346</b>	<b>Band 5</b>

**Profile Label  
Job Statement:**

**Occupational Therapist Specialist**

- 1) Assesses & treats own specialist caseload of clients for professional OT service in a variety of settings
- 2) Provides specialist OT advice to other disciplines
- 3) Supervises students, support workers
- 4) May lead clinical audit, undertake research

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	<b>Provide and receive complex, sensitive information; barriers to understanding</b> Communicates condition related information, sensitive diagnostic & prognostic information to patients/ clients, carers & relatives, requires empathy & reassurance	4 (a)
2. Knowledge, Training & Experience	<b>Specialist knowledge across range of procedures underpinned by theory</b> Professional knowledge acquired through degree or equivalent, plus short specialist courses, experience to post-graduate equivalent diploma level	6
3. Analytical & Judgemental Skills	<b>Complex facts or situations requiring analysis, interpretation, comparison of a range of options</b> Skills for assessing & interpreting patient /client conditions, appropriate diagnosis, therapy	4
4. Planning & Organisational Skills	<b>Plan and organise straightforward activities, some ongoing/ plan and organise complex activities or programmes, requiring formulation, adjustment</b> Plans & prioritises own & section patient workload, training sessions; plans and organises specialist service	2-3
5. Physical Skills	<b>Physical skills obtained through practice/ developed physical skills; advanced sensory skills</b> Dexterity, co-ordination for driving, keyboard skills, sensory skills/ use of specialist equipment and fine tools, advanced sensory skills, manual & mobilising skills	2 – 3(a) (b)
6. Responsibility for Patient/Client Care	<b>Develop specialist programmes of care/ care packages</b> Assesses, develops & implements occupational therapy programmes within a specialist field e.g. trauma, rehabilitation, mental health	6 (a)
7. Responsibility for Policy/Service Development	<b>Implement policies and propose changes to practices, procedures for own area</b> Proposes and implements policy in own area	2
8. Responsibility for Financial & Physical Resources	<b>Safe use of equipment other than equipment used personally; maintain stock control; authorised signatory, small payments</b> Responsible for equipment used by others; orders supplies; authorises payments	2 (b)(c)(d)
9. Responsibility for Human Resources	<b>Day to day supervision ; professional/ clinical supervision/ teach/ deliver specialist training</b> Allocates work to team members; supervises students/ provides training in specialist area	2 (a) (b)- 3(c)
10. Responsibility for Information Resources	<b>Record personally generated information</b> Updates patient/ client records	1
11. Responsibility for Research & Development	<b>Undertake surveys or audits, as necessary to own work/ regularly undertake R &amp; D activity; regularly undertakes equipment testing, adaptation</b> Participates in clinical audits; researches / tests different types of aids	1 - 2 (a) (c)
12. Freedom to Act	<b>Clearly defined occupational policies, work is managed rather than supervised/ broad occupational policies</b> Autonomous practitioner, works within codes of practice, guidelines/ may be lead specialist, may lead team, may be responsible for a caseload in the community	3-4
13. Physical Effort	<b>Frequent light effort for several short periods; occasional / frequent moderate effort for several short periods</b> Restricted position treating patients; manoeuvres patients/ clients, carries equipment	2 (b)(d)- 3(c)
14. Mental Effort	<b>Frequent concentration; work pattern predictable</b> Concentration on patient assessment & therapy	2 (a)
15. Emotional Effort	<b>Occasional/ frequent distressing or emotional circumstances</b> Imparts unwelcome news, works with terminally ill; clients with complex learning, emotional & behavioural needs	2(a) – 3 (a)
16. Working Conditions	<b>Occasional/frequent unpleasant conditions/ occasional highly unpleasant conditions</b> Dust, dirt, smell; infectious material	2 (a) – 3 (a)(b)
JE Score/Band	<b>JE Score 397 – 464</b>	<b>Band 6</b>



**Profile Label**  
**Job Statement:**

**Occupational Therapist Team Manager**

- 1) Assesses & treats own specialist caseload of patients/clients in a variety of settings
- 2) Provides specialist OT advice to other disciplines
- 3) Manages specialist team of OT's and support workers: supervises staff/students

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	<b>Provide and receive complex, sensitive/ highly complex, sensitive information; barriers to understanding</b> Communicates condition related information to patients, clients and carers: requires empathy & reassurance/ communicates highly complex, sensitive information	4(a)- 5(a)
2. Knowledge, Training & Experience	<b>Specialist knowledge across range of procedures underpinned by theory</b> Professional knowledge acquired through degree plus short specialist courses, post-graduate diploma level or equivalent	6
3. Analytical & Judgemental Skills	<b>Complex facts or situations requiring analysis, interpretation, comparison of a range of options</b> Skills for assessing & interpreting patient /client conditions, appropriate diagnosis, therapy	4
4. Planning & Organisational Skills	<b>Plan &amp; organise complex activities or programmes requiring formulation, adjustment</b> Plans & prioritises own & section patient workload, training sessions; plans and organises specialist service	3
5. Physical Skills	<b>Physical skills obtained through practice/ developed physical skills; advanced sensory skills; highly developed physical skills, accuracy important; accuracy important; manipulation of fine tools, materials</b> Dexterity, co-ordination for driving, keyboard skills, sensory skills/ use of specialist equipment and fine tools, advanced sensory skills, manual & mobilising skills	2/ 3(a)(b)
6. Responsibility for Patient/Client Care	<b>Develops specialist programmes of care/ care packages</b> Assesses, develops & implements occupational therapy programmes within a specialist field e.g. trauma, rehabilitation, mental health	6(a)
7. Responsibility for Policy/Service Development	<b>Propose policy or service changes, impact beyond own area</b> Contributes to policies & procedures which impact on own and other professions	3
8. Responsibility for Financial & Physical Resources	<b>Authorised signatory; purchase of some supplies; hold delegated budget/ budget holder for department /service</b> Signs for expenses, overtime; purchases equipment; holds delegated budget/ holds budget for department	3(a) (b)(d)- 4(a)
9. Responsibility for Human Resources	<b>Line manager for single function or department</b> Line manages a team of staff and students; undertakes appraisal, performance, career development, recruitment	4(a)
10. Responsibility for Information Resources	<b>Record personally generated information</b> Updates patient/ client records	1
11. Responsibility for Research & Development	<b>Undertake surveys or audits, as necessary to own work/ regularly undertake R &amp; D activity; regularly undertake equipment testing, adaptation</b> Participates in clinical audits; researches / tests different types of aids	1 / 2(a)(c)
12. Freedom to Act	<b>Broad occupational policies</b> Works within codes of practice, occupational standards, policies and procedures, manages a team	4
13. Physical Effort	<b>Frequent light; occasional moderate effort for several short; long periods/ frequent moderate effort for several short periods</b> Restricted position treating patients; manoeuvres patients/ clients, carries equipment	2(b)(d) - 3(c)
14. Mental Effort	<b>Frequent concentration; work pattern unpredictable</b> Concentration on patient assessment & therapy, interruptions to deal with patient, staff issues	3(a)
15. Emotional Effort	<b>Frequent distressing or emotional circumstances</b> Works with terminally ill, clients with complex learning, emotional and behavioural needs, staffing issues	3(a)
16. Working Conditions	<b>Occasional/frequent unpleasant conditions; occasional highly unpleasant conditions</b> Dust, dirt, smells; infectious material	2(a)/3 (a) (b)
JE Score Band	<b>JE Score 470 - 523</b>	<b>Band 7</b>

**Profile Label**  
**Job Statement:**

**Occupational Therapist Advanced**

- 1) Assesses & treats own workload of patients/clients, individually and/or in groups, as part of multi-disciplinary team, in a variety of settings
- 2) Leads in specialist area; contributes to development of specialist service and related policies.
- 3) Supervises/manages students and other staff working in own specialist area
- 4) Leads clinical audits, undertakes research

Factor	Relevant Job Information	JE level
1. Communication & Relationship Skills	<b>Provide and receive complex, sensitive information, barriers to understanding</b> Communicates condition related information to patients & relatives: requires empathy & reassurance	4(a)
2. Knowledge, Training & Experience	<b>Highly developed specialist knowledge, underpinned by theory and experience</b> Professional knowledge acquired through degree supplemented by further training, short specialist courses, to master's equivalent level	7
3. Analytical & Judgemental Skills	<b>Complex facts or situations requiring analysis, interpretation, comparison of range of options</b> Skills for assessing & interpreting patient conditions, appropriate diagnosis; service development issues	4
4. Planning & Organisational Skills	<b>Plan and organise complex activities or programmes, requiring formulation, adjustment</b> Project management, multi-disciplinary co-ordination for service, plans specialist service	3
5. Physical Skills	<b>Physical skills obtained through practice/ highly developed physical skills, accuracy important, manipulation of fine tools, materials</b> Dexterity, co-ordination for driving, keyboard skills; use of specialist equipment and tools	2-3(b)
6. Responsibility for Patient/Client Care	<b>Develops specialised programmes of care/ care packages</b> Assesses, develops & implements OT treatment within a specialist field e.g. trauma, rehabilitation, mental health	6(a)
7. Responsibility for Policy/Service Development	<b>Propose policy or service changes, impact beyond own area</b> Contributes to policies & procedures for specialist area, impact on other professions working in field	3
8. Responsibility for Financial & Physical Resources	<b>Safe use of equipment other than equipment used personally; authorised signatory, small payments</b> Responsible for equipment used by others; authorises payments for equipment, expenses	2(b)(d)
9. Responsibility for Human Resources	<b>Day to day supervision; professional/ clinical supervision/ day to day management</b> Allocates work to, supervises support workers, students working with postholder; manages technicians & other OT staff in area	2(a) (b) – 3(a)
10. Responsibility for Information Resources	<b>Record personally generated information</b> Maintains records relating to clients, supplies, purchases	1
11. Responsibility for Research & Development	<b>Regularly undertake R&amp;D activity</b> Undertakes research in specialist field, designs audit methods	2(a)
12. Freedom to Act	<b>Broad occupational policies</b> Accountable for own professional actions, lead specialist	4
13. Physical Effort	<b>Frequent light effort for several short periods/ frequent moderate effort for several short periods</b> Moves, lifts equipment/ manoeuvres patients, clients	2(b)-3(c)
14. Mental Effort	<b>Frequent concentration, work pattern predictable/ unpredictable</b> Concentration on patient assessment & diagnosis/ interruptions from other staff, emergencies	2(a)-3(a)
15. Emotional Effort	<b>Occasional/ frequent distressing or emotional circumstances</b> Imparts unwelcome news, works with terminally ill; clients with complex learning, emotional & behavioural needs	2(a)-3(a)
16. Working Conditions	<b>Occasional/ frequent unpleasant conditions; occasional highly unpleasant conditions</b> Odours, verbal aggression/ body fluids	2(a)/3(a) (b)
JE Score/Band	JE Score 476 – 519	Band 7

**Profile Label:**  
**Job Statement:**

**Occupational Therapist Advanced (Community)**

1. Provides specialist advice to social services, housing departments, clients, carers, other professionals on disability, housing, relevant legal and funding issues
2. Provides occupational therapy service to the community; manages an OT caseload
3. Identifies and assesses needs of clients; assists in meeting these needs through consultation with relevant authorities e.g. housing

Factor	Relevant Job Information	JE Level
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<b>1. Communication &amp; Relationship Skills</b>	<i>Provide and receive complex information; persuasive, motivational, negotiating, training skills required; barriers to understanding</i> Explains complicated issues relating to legal and local authority status of disability housing needs, eligibility for equipment and housing grants; persuades clients and carers of need for significant life changes; there may be communication difficulties; communicates with external agencies	4a
<b>2. Knowledge, Training &amp; Experience</b>	<i>Highly developed specialist knowledge across range of procedures underpinned by theory and experience</i> Specialist knowledge of the full range of OT client groups plus further theoretical study and in depth experience of legislation and policy surrounding disability, housing, building adaptation, funding streams. Acquired through degree or equivalent plus experience of working with OT client groups plus further theoretical study and experience within a community environment to master's level equivalent	7
<b>3. Analytical &amp; Judgemental Skills</b>	<i>Complex facts or situations requiring analysis, interpretation and comparison of a range of options.</i> Initial and ongoing assessment of service user needs and eligibility; suitability of interventions and their cost-effectiveness; judgements on conferring legal disability status on a client, taking into account a range of physiological, psychological and environmental factors	4
<b>4. Planning &amp; Organisational Skills</b>	<b>Plan and organise complex activities requiring formulation, adjustment</b> Initiates and co-ordinates e.g. case conferences with multidisciplinary and agency attendance	3
<b>5. Physical Skills</b>	<b>Physical skills obtained through practice/ developed physical skills, manipulation of objects, people; narrow margins for error</b> Driving, keyboard skills/ manipulation of patients, clients during assessments requiring advanced moving and handling training; hand eye co-ordination for use of computer design programmes	2-3a
<b>6. Responsibility for Patient/Client Care</b>	<b>Develop specialised programmes of care; provide highly specialist advice concerning care</b> Develops specialist OT interventions; provides advice to clients, carers, Social Services departments regarding disability, housing, legislative and funding issues	6ac
<b>7. Responsibility for Policy/Service Development</b>	<b>Propose policy or service changes, impact beyond own area</b> Implements legislation and suggests changes to policies and protocols relating to e.g. disability, housing adaptation, funding, which impact on working practices for social services care staff, finance staff	3
<b>8. Responsibility for Financial &amp; Physical Resources</b>	<b>Authorised signatory</b> Responsible for authorising recommendations for housing adaptation grants	2d - 3a
<b>9. Responsibility for Human Resources</b>	<b>Day to day supervision; clinical supervision; training in own discipline</b> Allocates work to junior OT staff; provides regular clinical supervision to one or more junior OTs; provides practical training to other care staff	2abc
<b>10. Responsibility for Information Resources</b>	<b>Record personally generated information</b> Maintains client records and statistics	1
<b>11. Responsibility for Research &amp; Development</b>	<i>Undertakes surveys and audits as necessary to own job/ regularly undertake R&amp;D activity; equipment testing, adaptation</i> Undertakes annual service provision audit/ undertakes R&D; equipment testing	1-2(a)(c)
<b>12. Freedom to Act</b>	<b>Broad occupational policies</b> Works within trust, social services and legal framework on disability, housing adaptation and funding issues; employs discretion to vary from established practices where required, may request guidance; lead specialist	4
<b>13. Physical Effort</b>	<b>Occasional moderate effort for short periods</b> Moving patients/clients with mechanical aids, assisting patients or clients to stand during assessments	2d
<b>14. Mental Effort</b>	<b>Frequent concentration, work pattern predictable/unpredictable</b> Concentration for preparation of complex funding claims, housing adaptation plans; interruptions for advice	2a-3a
<b>15. Emotional Effort</b>	<i>Frequent distressing or emotional circumstances; occasional highly distressing or emotional circumstances</i> Regularly breaks unwelcome news regarding functional ability or available support to patients/clients and carers; deals with patients/clients or carers with severely challenging behaviour	3ab
<b>16. Working Conditions</b>	<b>Frequent unpleasant working conditions</b> Regular contact with body fluids, odours, dust, dirt, verbal aggression when visiting patients	3b
<b>JE Score/Band</b>	<b>JE Score 481-514</b>	<b>Band 7</b>

**Profile Label**  
**Job Statement**

**Occupational Therapist Principal**

1. Assesses and treats own specialist caseload of patients/clients in a variety of settings
2. Acts as clinical lead for specialist service e.g. neuro-rehabilitation; palliative care
3. Leads in the development of own specialist service; key contributor to development of new services
4. Leads clinical audit, may undertake research

<b>Factor</b>	<b>Relevant Job Information</b>	<b>JE Level</b>
<b>1. Communication &amp; Relationship Skills</b>	<b>Provide and receive highly complex, sensitive or contentious information; agreement or co-operation required developed</b> Communicates specialist information on range of service development issues within organisation and across other providers, developed negotiation and persuasive skills required	5a
<b>2. Knowledge, Training &amp; Experience</b>	<b>Highly developed specialist knowledge, underpinned by theory and experience</b> Professional knowledge acquired through degree, supplemented by further training, short specialist courses Masters equivalent level	7
<b>3. Analytical &amp; Judgemental Skills</b>	<i>Complex facts or situations requiring analysis, interpretation, comparison of a range of options</i> <b>Skills for assessing, decision making and problem solving on a range of clinical, service delivery and development issues; clinical governance issues</b>	4
<b>4. Planning &amp; Organisational Skills</b>	<b>Plan and organise complex activities requiring formulation, adjustment</b> Organises provision of specialist Occupational Therapy service	3
<b>5. Physical Skills</b>	<b>Developed physical skills, accuracy required</b> Dexterity, co-ordination and sensory skills for assessment and treatment of patients, clients	3a
<b>6. Responsibility for Patient/Client Care</b>	<i>Develop specialised programmes of care/care packages</i> <b>Develops specialist care packages</b>	6a
<b>7. Responsibility for Policy/Service Development</b>	<b>Propose policy or service changes, impact beyond own area/responsible for policy development for own area</b> Implements and suggests changes to policies and protocols relating to delivery of occupational therapy; develops policies and protocols related to specialist area	3-4
<b>8. Responsibility for Financial &amp; Physical Resources</b>	<i>Authorised signatory; hold delegated budget</i> Signs e.g. expense forms or timesheets for large amounts; responsible for e.g. training budget	3ad
<b>9. Responsibility for Human Resources</b>	<i>Day to day management; allocate, place and supervise staff or students; responsible for specialist training</i> Manages less experienced staff, students; provides training to less experienced staff or other healthcare professionals or carers within the specialist area	3abc
<b>10. Responsibility for Information resources</b>	<b>Records personally generated information</b> Updates patient/client records	1
<b>11. Responsibility for Research &amp; Development</b>	<i>Regularly undertakes R&amp;D activity/major job requirement</i> Undertakes complex clinical audits, undertakes research in one or more formal research programmes; undertakes research activity as major job requirement	2a-3
<b>12. Freedom to Act</b>	<i>Guided by principles and broad occupational policies/need to establish interpretation</i> Works within wide range of codes of practice and professional guidelines/interprets national professional policies specialist area	4-5
<b>13. Physical Effort</b>	<b>Frequent moderate effort for several short periods during a shift</b> Moves patient equipment; occasional/frequent requirement to lift and move patients during assessments	3c
<b>14. Mental Effort</b>	<b>Frequent requirement for concentration, work pattern unpredictable</b> Concentration required for patient/client assessment, intervention, frequent interruptions	3a
<b>15. Emotional Effort</b>	<i>Frequent exposure to distressing or emotional circumstances; occasional exposure to highly distressing or emotional circumstances</i> Regularly breaks unwelcome news regarding e.g. functional ability to patients/clients and carers; deals with patients/clients or carers with severely challenging behaviour	3ab
<b>16. Working Conditions</b>	<b>Frequent unpleasant/ occasional highly unpleasant working conditions</b> Body odours; body fluids	3b
<b>JE Score/Band</b>	<b>JE Score 541 - 574</b>	<b>Band 8a</b>

**Profile Label**  
**Job Statement**

**Occupational Therapist Consultant**

1. Assesses and treats own complex caseload of patients/clients in a variety of settings
2. Acts as clinical lead for specialist service e.g. neuro-rehabilitation; forensic mental health; intermediate care
3. Responsible for clinical governance, policy, service development; provides expert advice on OT practice within the organisation and externally
4. Undertakes research

<b>Factor</b>	<b>Relevant Job Information</b>	<b>JE Level</b>
<b>1. Communication &amp; Relationship Skills</b>	<b>Provide and receive highly complex, sensitive or contentious information; agreement or co-operation required developed</b> Communicates specialist condition-related information to patients/clients, carers and other health professionals; may be significant barriers to acceptance or understanding	5a
<b>2. Knowledge, Training &amp; Experience</b>	<b>Highly developed specialist knowledge, underpinned by theory and experience</b> Professional knowledge acquired through degree, supplemented by further training, short specialist courses Masters equivalent level	7
<b>3. Analytical &amp; Judgemental Skills</b>	<i>Highly complex facts or situations requiring analysis, interpretation, comparison of a range of options</i> <b>Skills for assessing, developing interventions and monitoring needs for a range of highly complex conditions within the specialist area; clinical governance issues, content of expert advice</b>	5
<b>4. Planning &amp; Organisational Skills</b>	<b>Plan and organise complex activities requiring formulation, adjustment</b> Organises provision of specialist Occupational Therapy service	3
<b>5. Physical Skills</b>	<b>Developed physical skills, accuracy required</b> Dexterity, co-ordination and sensory skills for assessment and treatment of patients, clients	3a
<b>6. Responsibility for Patient/Client Care</b>	<i>Develop specialised programmes of care/care packages; provides highly specialist advice relating to the care of patients/clients</i> <b>Develops and delivers specialist care packages; provides advice and expertise relating to specialist area to patients/clients, carers, other health professionals</b>	6ac
<b>7. Responsibility for Policy/Service Development</b>	<b>Propose policy or service changes, impact beyond own area/responsible for policy development for own area</b> Implements and suggests changes to policies and protocols relating to delivery of occupational therapy/ develops and implements policies and protocols related to specialist area	3-4
<b>8. Responsibility for Financial &amp; Physical Resources</b>	<i>Authorised signatory for small/large amounts; hold delegated budget</i> Signs e.g. expense forms or timesheets for large amounts; responsible for e.g. training budget, specialist service budget	3ad
<b>9. Responsibility for Human Resources</b>	<i>Day to day management; responsible for specialist training/responsible for teaching or devising of training and development programmes</i> Manages less experienced staff; provides training to less experienced staff or other healthcare professionals or carers within the specialist area/develops and delivers training as a significant job responsibility	3ac-4b
<b>10. Responsibility for Information resources</b>	<b>Records personally generated information</b> Records own caseloads and statistics	1
<b>11. Responsibility for Research &amp; Development</b>	<i>Regularly undertakes R&amp;D activity/major job requirement/co-ordinate, implement R&amp;D activity as job requirement</i> Undertakes surveys or audits/as major job requirement; participates in/co-ordinates one or more formal research programmes within work area	2a-3-4
<b>12. Freedom to Act</b>	<i>Guided by principles and policies, need to establish interpretation</i> Interprets national professional policies for specialist area	5
<b>13. Physical Effort</b>	<b>Occasional/frequent moderate effort for several short periods during a shift</b> Moves patient equipment; occasional/frequent requirement to lift and move patients during assessments, treatment	2d-3c
<b>14. Mental Effort</b>	<b>Frequent requirement for concentration, work pattern unpredictable</b> Concentration required for patient/client assessment, frequent interruptions	3a
<b>15. Emotional Effort</b>	<i>Frequent exposure to distressing or emotional circumstances; occasional exposure to highly distressing or emotional circumstances</i> Regularly breaks unwelcome news regarding e.g. functional ability to patients/clients and carers; deals with patients/clients or carers with severely challenging behaviour	3ab
<b>16. Working Conditions</b>	<b>Occasional/frequent unpleasant; occasional highly unpleasant working conditions</b> Body odours; body fluids	2a-3ab
<b>JE Score/Band</b>	<b>JE Score 562 - 614</b>	<b>Band 8a-b</b>