



# Example Crosswalk: IEP and Plan of Care Student with Occupational Therapy as a Related Service

FLDOE Program Specialist, [Jennifer.Hykes@fldoe.org](mailto:Jennifer.Hykes@fldoe.org)

## Individual Educational Plan (IEP):

*Developed by the Student's IEP Team with Input from the Therapist*

- **Student's Name:** Sara Jones
- **Present Level Statement/Effects of the Disability**  
(Only included information regarding OT)  
...Results of the Initial Occupational Therapy Evaluation revealed that Sara has deficits in fine motor coordination and motor planning that impact her mastery of fine motor coordination. She needs direct instruction and structured practice to improve her fine motor dexterity as it impacts her attainment of handwriting skills. Consideration should be given to the use of keyboarding as an additional means of written output as it will allow access to literacy software...
- **Special Education and Related Services**
  - Occupational Therapy as a Related Service is indicated / Listed in this section
  - Frequency of services are identified (e.g., 30 minutes per week)
  - Duration of services is identified (e.g., 1 year)
- **IEP Goals and Objectives**  
(Goals are required for all students, but objectives are required only if the student is on Alternate Assessment. There is no rule stating that if students take the FCAT, they cannot have objectives on their IEPs. If there are not objectives on the IEP, a separate Plan of Care must be written to bill for Medicaid.)

### **Curriculum and Learning Annual Goal:**

Sara will follow teacher/therapist given directions to complete written assignments with 70% accuracy using accommodative strategies as needed when provided no more than 1 additional verbal reminder per assignment over 10 consecutive informal assessments.

### **Short-term Objectives:**

1. Sara will complete written assignments with all mistakes completely erased with no more than 1 additional verbal prompt per assignment.
  - 70% over 10 informal assessments.
  - Teacher/Therapist observations. Data and work samples collected by Therapist.
2. Sara will read given directions thoroughly to accurately complete written assignments with no more than 1 additional verbal prompt per assignment.
  - 70% over 10 informal assessments.
  - Teacher/Therapist observations. Data and work samples collected by Therapist/Teacher.
3. Sara will edit her written assignments for accuracy in spacing, letter formation, punctuation, and capitalization with no more than 1 additional verbal prompt per assignment.
  - Over 10 informal assessments.
  - Teacher/Therapist observations. Data collected by Therapist/Teacher.

*This information is intended to be used as an example only.*

IEP Requirements can be found in 34 CFR 300.320, Title 34, Code of Federal Regulations  
(<http://idea.ed.gov/explore/view/p/%2Croot%2Cregs%2C300%2CD%2C300%252E320%2C>)  
and Rule 6A-6.03028, Florida Administrative Code, Provision of FAPE and Development of IEPs for Students with  
Disabilities (<https://www.flrules.org/gateway/ruleNo.asp?id=6A-6.03028>).  
Plan of Care requirements can be found in the Medicaid Certified School Match Coverage and Limitations Handbook  
([http://portal.flmmis.com/FLPublic/Portals/0/StaticContent/Public/HANDBOOKS/Certified\\_School\\_MatchHB.pdf](http://portal.flmmis.com/FLPublic/Portals/0/StaticContent/Public/HANDBOOKS/Certified_School_MatchHB.pdf))

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## Did the information in this IEP contain the components to be used as a Plan of Care?

- **Name**
- **Description of Medical Condition**
  - ✓ Located in the Present Level Statement/Effects of the Disability
    - *"Sara has deficits in fine motor coordination and motor planning that impact her mastery of fine motor coordination."*
- **Achievable, measureable, time-related goals and objectives that are related to the functioning of the student**
  - ✓ Located in Curriculum and Learning Goal and Objectives
  - ✓ Does NOT have to be an occupational therapy goal
  - ✓ Noted that the Therapist assesses the goal and objectives
    - *"Teacher/Therapist observations. Data and work samples collected by Therapist/Teacher."*
  - ✗ Unclear who wrote the goals (therapist must be involved to bill for Medicaid)
  - ✗ Unclear if the expertise of a therapist is needed to meet goals
- **The type of occupational therapy activities the student will need**
  - ✓ Located in the Present Level Statement/Effects of the Disability
    - *"She needs direct instruction and structured practice to improve her fine motor dexterity as it impacts her attainment of handwriting skills."*
    - *"Consideration should be given to the use of keyboarding as an additional means of written output..."*
  - ✗ Unclear if the expertise of a therapist is needed. For this example, more information on type of therapy would be needed (see examples of additional information in chart below)

<input type="checkbox"/> Activities of Daily Living / Self Help Skills (i.e., toileting, dressing, feeding)	<input type="checkbox"/> Adaptive equipment/ Aids /Seating / Positioning for Learning
<input type="checkbox"/> Consult with teachers, parents and community providers as needed	<input type="checkbox"/> Environmental adjustments/task modifications
<input type="checkbox"/> Fine motor/upper extremity dexterity and coordination	<input type="checkbox"/> Gross motor
<input type="checkbox"/> Handwriting /Alternative written communication	<input type="checkbox"/> Motor planning activities
<input type="checkbox"/> Neuromuscular developmental techniques	<input type="checkbox"/> Organizational Skills
<input type="checkbox"/> Prevocational/Vocational strategies	<input type="checkbox"/> Sensory processing strategies
<input type="checkbox"/> Teacher/paraprofessional training	<input type="checkbox"/> Therapeutic exercises
<input type="checkbox"/> Visual perceptual and visual motor strategies	<input type="checkbox"/> Other _____

- **Frequency and estimated length of treatment**
  - ✓ Located under Special Education and Related Services
  - ✓ *Occupational therapy 30 minutes a week for one year*
  - ✗ Did not indicate how therapy would be provided (e.g., group, individual)

A special thanks to Marion, Brevard, Nassau and Hillsborough Counties for submitting examples for inclusion in this handout.

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