



Competency Review & Evaluation: Step 2 Preparation

Required preparation

- Arrange a four hour period to participate in the peer assessment.
- Choose a location that is confidential and quiet. You may request a location that is outside your practice setting, however, you will be required to bring 10 discharge client records to the assessment. You are responsible for booking the location and for any costs related to booking a location, such as a library or community centre. The College reserves the right to approve or direct the assessment location.
- Arrange access to client records for the last 10 consecutively discharged clients. You are advised to follow the necessary process established at your practice setting and to obtain permission to either photocopy or allow the College to access the client records.

Recommended preparation

Registrants are encouraged to review the following documents prior to the assessment. These documents are posted on the College's website at www.coto.org and are included in the Registrants Resource Binder:

- *Essential Competencies of Practice for Occupational Therapists in Canada, 2nd Edition*
- *Standards for Occupational Therapy Assessment*
- *Practice Guideline: Client Records*
- *A Guide to the Health Care Consent and Substitute Decisions Legislation for Occupational Therapists*
- *Guideline on the Controlled Acts and Delegation*
- *Position Statement: Use of Title*
- *Code of Ethics*
- *Professional Misconduct Regulation: Official Regulations*
- Any other regulations or College practice guidelines relevant to your scope of practice.

Required document submission

1. Pre-questionnaire
2. Availability and Conflict of Interest form

Documents required on the day of the assessment

As part of the Chart Review and the Case-based questions interview, you are asked to review all your OT records with the peer assessor. Examples of specific documents to be reviewed include:

- Progress and assessment notes
- Flow sheets
- Master signature sheet
- Referral forms
- Consent forms and related documentation
- Discharge note/referrals
- Final reports
- Care protocols
- Service visit records/ appointment records
- Advertising materials, billing and/or business card