



PEICOT QUALITY ASSURANCE INSTRUCTION SHEET

This Quality Assurance (QA) program helps occupational therapists reflect on their professional roles and responsibilities. This program allows registrants to develop new areas of learning and then participate in continuous quality improvement activities that reflect evolving practice and the expectations for safe, effective and ethical services.

This is the **Instruction Sheet with Appendices, including examples**, for completing your QA annual requirements. Please read all information below very carefully and follow the steps listed.

SELF ASSESSMENT TOOL

The Self-Assessment Tool reflects the Competencies for Occupational Therapists in Canada. See our website for the full document. <https://www.peiot.org/competencies>

***NOTE:** Occupational Therapists in both clinical and non-clinical roles will use the same tool and apply it to their unique practice; however, there may be areas for non-clinical occupational therapists to insert “not applicable”.*

STEPS FOR COMPLETING SELF-ASSESSMENT TOOL:

1. Use the fillable **Self-Assessment Tool form** on our website under Quality Assurance OR print off a copy from our website and fill out by hand.
2. Read each **Domain, Competency and the Indicators in that Competency**, reflecting on your current practice and knowledge.
3. Use the **Rating Scale on the front page of the Self-Assessment Tool** when reviewing each Domain, Competency and Indicator to identify your competence (*Area of Growth, Fundamental Competence, Proficient Competence, Not Applicable*).
4. Review the Self-Assessment tool carefully and indicate your level of competence in each Domain ([example in Appendix A](#)).
 - You can use the **“Reflective Comments”** at the end of each Domain to make notes or start to develop goals.
5. This Self-Assessment Tool **DOES NOT need to be uploaded to your account on HMS (database)**, it is for your records only.

PROFESSIONAL LEARNING GOALS

STEPS FOR COMPLETING PROFESSIONAL LEARNING GOALS FORM:

1. Choose **two (2) Learning Goals** based on your reflection in areas of practice or knowledge where you feel you have gaps or would like to become more competent. You may have indicated these as “Areas of Growth” or “Fundamental Competence” on the Self-Assessment Tool.

2. To help guide or facilitate your own goal development, see **examples of Professional Learning Goals** in the attached document ([examples in Appendix B](#)).
NOTE: The 2 goals can come from the same Domain or Competency OR they could be from a different domain or competency.
3. Once you have decided on **two (2) Learning Goals**, find the Professional Learning Goals fillable form on our website under Quality Assurance.
4. You will **complete two (2) Professional Learning Goals forms – one for each Goal.**
5. Complete all areas on each of the **Professional Learning Goals Fillable Form**:
 - a. Name, Licence # and Registration year
 - b. Indicating your goal and Goal #1 or Goal #2
 - c. Indicating the Domain and Competency from drop down boxes
 - d. Checking the boxes for which Learning Activities/Resource area you will choose to achieve the goal and the target completion date
 - e. Choose anywhere from 2 to 3 learning activities or resources
 - f. Complete the Reflection Area at the bottom of the Learning Goals Forms
 - g. Sign and Date
6. See example of Professional Learning Goals Form ([Appendix C](#)).
7. **Upload BOTH Professional Learning Goals** form to your account on HMS (database) under Quality Assurance (this will be located with Continuing Education).
8. This will need to be **completed before end of renewal March 15th, 2025.**

COMPLETED LEARNING ACTIVITIES

******This Form is to be completed next renewal year 2026-2027, once you have completed your learning activities for this year 2025/2026.***

NOTE: The completed learning activities you choose at renewal can be modified if new learning resources become available or the ones you chose cannot be completed. Indicate any changes on this form.

STEPS FOR COMPLETING THE COMPLETED LEARNING ACTIVITIES FORM:

1. The **Completed Learning Activities form** is to be filled out throughout the year to assist you in recording your completed learning activities for each of your Professional Learning Goals.
2. You have one year to complete your Learning Activities based on your Professional Learning Goals from the previous year.
3. Find the Completed Learning Activities fillable form on our website under Quality Assurance.
4. You will **complete two (2) Completed Learning Activities forms – one for each goal.**
5. Complete all areas on each of the **Completed Learning Activities Form**:
 - a. Name, Licence # and Registration year
 - b. Indicating your goal and if Goal #1 or Goal #2
 - c. Checking the boxes for the Learning Activities/Resource area that you completed to achieve the goal and the completion date
 - d. Complete the Description of the Completed Learning Activity at the bottom of form
 - e. Sign and Date
6. See example of Completed Learning Goals Form ([Appendix D](#)).
7. **Upload BOTH Completed Learning Activities** forms under Quality Assurance on your HMS account (this will be located with Continuing Education).
8. This will need to be **completed before end of renewal March 15th, 2026.**



Self Assessment Tool

Name: _____ Registration #: _____ Registration Year: _____

This **Self-Assessment Tool** reflects the Competencies for Occupational Therapists in Canada and will be the tool you use to **develop two (2) Professional Learning Goals**. Occupational Therapists in both clinical and non-clinical roles will use the same tool and apply it to the practice uniquely; however, there may be areas for non-clinical occupational therapists to insert “not applicable”.

How to use this document to develop Professional Learning Goals:

1. Print off a copy of this self assessment or use the fillable form on our website.
2. Read each Domain and Indicators in that Domain reflecting on your current practice and knowledge.
3. Use the Rating Scale (see below) for each Domain and Indicator to identify your competence.
4. Choose two (2) Learning Goals based on this reflection in areas of practice or knowledge where you feel you have gaps or would like to become more competent.
5. Add these two (2) Learning Goals to the **Professional Learning Goals Fillable Form** on our website and complete the form. Upload these two Learning Goals to your account on HMS.
6. This self assessment does NOT need to be uploaded on your account on HMS, this is for your records only.

The **Self Assessment Tool** has 6 Domains (A-F), 22 competencies (A1-F4) and related indicators to each competency (i.e. A1.1, A1.2) from the competency document.

Rating Scale

1) Area for Growth (AG):	I can explain and discuss key issues and concepts in general but have little or no practical experience. I do not do well with this skill and should refine it to meet the expectations of my job.
2) Fundamental Competence (FC):	I can integrate knowledge and skills with a limited degree of consistency, in a specific routine situation. I use the skill or practice infrequently but should be applying it to all situations in my practice. I am a new therapist to this practice area and will get better with experience.
3) Proficient Competence (PC):	I can demonstrate, apply, and integrate knowledge and skills with the highest degree of consistency and effectiveness in a variety of routine and complex situations. In addition, I may engage in routine teaching, mentoring and supervision activities in this area
4) Not Applicable (N/A):	This competency is not applicable to my practice setting.



Domain A: Occupational Therapy Expertise	N/A	AG	FC	PC	Identified for Learning
A1. Establish trusted professional relationships with clients					
A1.1 Co-create with clients a shared understanding of scope of services, expectations, and priorities.					
A1.2 Use a mutually respectful approach to determine the nature of the services to be delivered.					
A1.3 Respond to requests for service promptly and clearly.					
A1.4 Support clients to make informed decisions, discussing risks, benefits, and consequences.					
A2. Use occupational analysis throughout practice					
A2.1 Keep clients' occupations at the centre of practice.					
A2.2 Facilitate clients' use of their strengths and resources to sustain occupational participation.					
A2.3 Address the strengths and barriers in systems such as health care that could affect occupational participation.					
A2.4 Apply knowledge, evidence, and critical thinking from social, behavioural, biological, and occupational sciences to analyze occupational participation.					
A2.5 Share rationale for decisions.					
A3. Determine clients' needs and goals for occupational therapy services					
A3.1 Respond to the context that influences the client's request for occupational therapy service.					
A3.2 Develop a shared understanding of the client's occupational challenges and goals.					
A3.3 Decide whether occupational therapy services are appropriate at this time.					
A3.4 Evaluate risks with the client and others.					
A3.5 Periodically review the client's expectations with them.					
A4. Assess occupational participation					
A4.1 Agree on the assessment approach.					
A4.2 Select assessment tools and methods that fit the approach.					
A4.3 Take into account the impact of the client's context on the assessment process and outcome.					
A4.4 Incorporate the client's perspectives and opportunities throughout the assessment process.					
A4.5 Analyze the assessment results in context.					
A5. Develop plans with clients to facilitate occupational participation					
A5.1 Agree on the assessment approach.					
A5.2 Select assessment tools and methods that fit the approach.					
A5.3 Take into account the impact of the client's context on the assessment process and outcome.					
A5.4 Incorporate the client's perspectives and opportunities throughout the assessment process.					
A5.5 Analyze the assessment results in context.					



Domain A: Occupational Therapy Expertise	N/A	AG	FC	PC	Identified for Learning
A6. Implement the occupational therapy plan					
A6.1 Support clients in accessing and using the resources to implement their plans.					
A6.2 Confirm shared understandings and progress of the plan.					
A6.3 Evaluate the results with the client and others involved in the plan.					
A6.4 Adjust occupational therapy services based on the evaluation.					
A6.5 Plan for concluding services, ongoing services, or a transition to other services.					
A7. Manage the assignment of services to assistants and others					
A7.1 Identify practice situations where clients may benefit from services assigned to assistants or others.					
A7.2 Assign services only to assistants and others who are competent to deliver the services.					
A7.3 Monitor the safety and effectiveness of assignments through supervision, mentoring, teaching, and coaching.					
A7.4 Follow the regulatory guidance for assigning and supervising services.					
Domain A: Reflective Comments					



Domain B: Communication & Collaboration	N/A	AG	FC	PC	Identified for Learning
B1. Communicate in a respectful and effective manner					
B1.1 Organize thoughts, prepare content, and present professional views clearly.					
B1.2 Foster the exchange of information to develop mutual understanding.					
B1.3 Employ communication approaches and technologies suited to the <i>context</i> and client needs.					
B1.4 Adjust to power imbalances that affect relationships and communication.					
B2. Maintain professional documentation					
B2.1 Maintain clear, accurate, and timely records.					
B2.2 Maintain confidentiality, security, and data integrity in the sharing, transmission, storage, and management of information.					
B2.3 Use electronic and digital technologies responsibly.					
B3. Collaborate with clients, other professionals, and stakeholders					
B3.1 Partner with clients in decision-making. Advocate for them when appropriate.					
B3.2 Share information about the occupational therapist's role and knowledge.					
B3.3 Identify practice situations that would benefit from collaborative care.					
B3.4 Negotiate shared and overlapping roles and responsibilities.					
B3.5 Maintain mutually supportive working relationships.					
B3.6 Participate actively and respectfully in collaborative decision-making.					
B3.7 Participate in team evaluation and improvement initiatives.					
B3.8 Support evidence-informed team decision making.					
B3.9 Recognize and address real or potential conflict in a fair, respectful, supportive, and timely manner.					
Domain B: Reflective Comments					



Domain C: Culture, Equity, and Justice	N/A	AG	FC	PC	Identified for Learning
C1. Promote equity in practice					
C1.1 Identify the ongoing effects of colonization and settlement on occupational opportunities and services for Indigenous Peoples.					
C1.2 Analyse the effects of systemic and historical factors on people, groups, and their <i>occupational possibilities</i> .					
C1.3 Challenge biases and social structures that <i>privilege</i> or marginalize people and communities.					
C1.4 Respond to the social, structural, political, and ecological determinants of health, wellbeing, and occupational opportunities.					
C1.5 Work to reduce the effects of the unequal distribution of power and resources on the delivery of occupational therapy services.					
C1.6 Support the factors that promote health, well-being, and occupations.					
C2. Promote anti-oppressive behavior and culturally safer, inclusive relationships					
C2.1 Contribute to a practice environment that is culturally safer, <i>anti-racist, anti-ableist</i> , and inclusive.					
C2.2 Practise self-awareness to minimize personal bias and inequitable behaviour based on <i>social position and power</i> .					
C2.3 Demonstrate respect and <i>humility</i> when engaging with clients and integrate their understanding of health, well-being, healing, and occupation into the service plan.					
C2.4 Seek out resources to help develop culturally safer and inclusive approaches.					
C2.5 Collaborate with local partners, such as interpreters and leaders.					
C3. Contribute to equitable access to occupational participation and occupational therapy					
C3.1 Raise clients' awareness of the role of and the right to occupation.					
C3.2 Facilitate clients' participation in occupations supporting health and well-being.					
C3.3 Assist with access to support networks and resources.					
C3.4 Navigate systemic barriers to support clients and self.					
C3.5 Engage in critical dialogue with other stakeholders on social injustices and inequitable opportunities for occupations.					
C3.6 Advocate for environments and policies that support sustainable occupational participation.					
C3.7 Raise awareness of limitations and bias in data, information, and systems.					



Domain C: Culture, Equity, and Justice

Domain C: Reflective Comments



Domain D: Excellence in Practice	N/A	AG	FC	PC	Identified for Learning
D1. Engage in ongoing learning and professional development					
D1.1 Develop professional development plans.					
D1.2 Engage in professional development activities to improve practice and ensure continuing competence.					
D1.3 Enhance knowledge, skills, behaviour, and attitudes.					
D1.4 Ensure that skills are adequate to meet practice needs.					
D2. Improve practice through self-assessment and reflection					
D2.1 Self-evaluate using performance and quality indicators.					
D2.2 Learn from varied sources of information and feedback.					
D2.3 Provide useful feedback to others.					
D2.4 Manage work resources and demands effectively.					
D2.5 Be mindful of occupational balance and well-being.					
D3. Monitor developments in practice					
D3.1 Stay aware of political, social, economic, environmental, and technological effects on occupational therapy practice.					
D3.2 Keep up to date with research, guidelines, protocols, and practices.					
D3.3 Appraise evidence related to knowledge and skills for practice.					
D3.4 Integrate relevant evidence into practice.					
D3.5 Consider the social, economic, and ecological costs of care.					
Domain D: Reflective Comments:					



Domain E: Professional Responsibility	N/A	AG	FC	PC	Identified for Learning
E1. Meet legislative and regulatory requirements					
E1.1 Respect the laws, codes of ethics, rules and regulations that govern occupational therapy.					
E1.2 Work within personal scope of practice and area of expertise.					
E1.3 Obtain and maintain informed consent in a way that is appropriate for the practice context.					
E1.4 Protect client privacy and confidentiality.					
E1.5 Respond to ethical dilemmas based on ethical frameworks and client values.					
E1.6 Take action to address real or potential conflicts of interest.					
E1.7 Be accountable for all decisions and actions made in the course of practice.					
E1.8 When observed, respond to and report unprofessional, unethical, or oppressive behaviour, as required.					
E1.9 Respect professional boundaries.					
E2. Demonstrate a commitment to minimizing risk					
E2.1 Follow organizational policies and procedures and take action if they are in conflict with professional standards, client values, protocols, or evidence.					
E2.2 Respect clients' occupational rights and choices while minimizing risks.					
E2.3 Take preventive measures to reduce risks to self, clients, and the public.					
Domain E: Reflective Comments					



Domain F: Engagement with the Profession	N/A	AG	FC	PC	Identified for Learning
F1. Contribute to the learning of occupational therapists and others					
F1.1 Contribute to entry-to-practice education, such as fieldwork placements.					
F1.2 Facilitate continuing professional development activities.					
F1.3 Act as a mentor or coach.					
F2. Show leadership in the workplace					
F2.1 Support assistants, students, support staff, volunteers, and other team members.					
F2.2 Influence colleagues to progress towards workplace values, vision, and goals.					
F2.3 Support improvement initiatives at work.					
F2.4 Serve as a role model.					
F2.5 Act responsibly when there are environmental or social impacts to their own behaviour or advice, or that of the team.					
F3. Contribute to the development of occupational therapy					
F3.1 Help build the occupational therapy body of knowledge.					
F3.2 Contribute to research in occupational therapy and occupational science, innovative practices, and emerging roles. Participate in quality improvement initiatives, as well as data collection and analysis.					
F3.3 Collaborate in research with individuals, communities, and people from other disciplines.					
F4. Show leadership in the profession throughout career					
F4.1 Promote the value of occupation and occupational therapy in the wider community.					
F4.2 Advocate for an alignment between occupational therapy standards and processes, organizational policies, social justice, and emerging best practices.					
F4.3 Take part in professional and community activities such as volunteering for events and committees.					
F4.4 Influence the profession and its contribution to society.					
Domain F: Reflective Comments					



PEICOT QUALITY ASSURANCE
Professional Learning Goals Examples
Appendix B

Domain A: Occupational Therapy Expertise	
Related Indicators to goal below	A1. Establish trusted professional relationships with clients A1.2 Use a mutually respectful approach to determine the nature of services to be delivered A4. Assess Occupational participation A4.2 Select tools and methods that fit the approach
Example Learning Goal #1	<i>It is a goal to become more aware of the social determinants of health and needs that may affect marginalized communities. Specifically, I will focus on understanding the most respectful and de-colonized approach to offering services to Indigenous people in my practice.</i>
Related Indicator to goal below	A4.2 Select tools and methods that fit the approach
Example Learning Goal #2	<i>Research most used standardized occupational therapy assessments in long term care in Canada. Incorporate use of two of these standardized assessments into my practice on a regular basis.</i>
Related Indicators to goal below	A7. Manage the assignment of services to assistants and others A7.2 Assign services only to assistants and others who are competent to deliver services
Example Learning Goal #3	<i>It is a goal to communicate with assistants to create a list, to be used for reference, of all trainings they have completed to ensure suitability of task assignment.</i>
Related Indicator to goal below	A7.3 Monitor the safety and effectiveness of assignments through supervision, mentoring, teaching and coaching.
Example Learning Goal #4	<i>Develop feedback form to use with rehab assistance to review their work performance. Meet with each rehab assistant quarterly to discuss performance and areas for development.</i>

Domain B: Communication and Collaboration	
Related Indicators to goal below	B2. Maintain professional documentation B2.1 Maintain clear, accurate, and timely records
Example Learning Goal #1	<i>It is a goal to schedule time into daily work schedule to ensure completion of chart notes in a timely manner.</i>
Related Indicators to goal below	B3. Collaborate with clients, other professionals, and stakeholders
Example Learning Goal #2	<i>It is a goal to communicate with other professionals to inquire about setting up a regularly schedule case review meeting to ensure collaborative care and sharing of overlapping roles.</i>

Domain C: Culture, Equity, and Justice	
Related Indicators to goal below	C1. Promote equity in practice C1.4 Respond to the social, structural, political, and ecological determinants of health, wellbeing, and occupational opportunities C1.6 Support the factors that promote health, well-being, and occupations C3.2 Facilitate clients' participation in occupations supporting health and well-being C3.3 Assist with access to support networks and resources C2.4 Seek out resources to help develop culturally safer and inclusive approaches
Example Learning Goal #1	<i>It is a goal to compile a list of free or low-cost community resources for fitness/exercise that may benefit wheelchair users or those living with mobility challenges that can be shared with clients.</i>
Related Indicators to goal below	C1. Promote equity in practice C1.1 Identify the ongoing effects of colonization and settlement on occupational opportunities and services for Indigenous Peoples C1.2 Analyse the effects of systemic and historical factors on people, groups, and their occupational possibilities
Example Learning Goal #2	<i>It is a goal to self-reflect on the biases and privilege I hold as a non-Indigenous person and to engage in further learning on the effects of colonization in healthcare.</i>

Domain D: Excellence in Practice	
Related Indicators to goal below	D1. Engage in ongoing learning and professional development

	D1.3 Enhance knowledge, skills, behaviour, and attitudes. D3. Monitor developments in practice D3.2 Keep up to date with research, guidelines, protocols, and practices D3.4 Integrate relevant evidence into practice
Example Learning Goal #1	<i>It is a goal to find at least one source for academic research articles and to engage in reading at least two articles per month that may help inform my practice.</i>
Related Indicator to goal below	D3.2 Keep up to date with research guidelines, protocols and practices.
Example Learning Goal #2	<i>It is a goal to read two articles per month in OT Now or another OT journal and attempt to apply knowledge gained from articles into daily OT practice.</i>
Related Indicators to goal below	D1. Engage in ongoing learning and professional development D1.1 Develop professional development plans D1.2 Engage in professional development activities to improve practice and ensure continuing competence
Example Learning Goal #3	<i>It is a goal to check in with my progress toward learning goals in 6 months and to schedule time into work day on a monthly basis for continued professional development.</i>

Domain E: Professional Responsibility

Related Indicators to goal below	E1. Meet legislative and regulatory requirements E1.3 Obtain and maintain informed consent in a way that is appropriate for the practice context
Example Learning Goal #1	<i>It is a goal to review each client chart to ensure that consent forms are documented and saved appropriately and to take action if not documented appropriately.</i>
Related Indicators to goal below	E2. Demonstrate a commitment to minimizing risk E2.3 Take preventive measures to reduce risks to self, clients, and the public.
Example Learning Goal #2	<i>It is a goal to meet with fellow clinicians and review emergency plans, muster points, and protocols for any emergency or risk. If not already documented, it will be a goal to create a resource for fellow clinicians with this information.</i>

Domain F: Engagement with the Profession

Related Indicators to goal below	F1. Contribute to the learning of occupational therapists and others
----------------------------------	--

	<p>F1.1 Contribute to entry-to-practice education, such as fieldwork placements</p> <p>F1.3 Act as a mentor or coach</p>
Example Learning Goal #1	<i>It is a goal to engage with education or training on becoming a mentor or fieldwork placement supervisor to ensure readiness for this task.</i>
Related Indicators to goal below	<p>F4. Show leadership in the profession throughout career</p> <p>F4.3 Take part in professional and community activities such as volunteering for events and committees</p> <p>F4.4 Influence the profession and its contribution to society</p>
Example Learning Goal #2	<i>It is a goal to volunteer 5 to 10 hours throughout the year in a way that puts occupation at the centre and is meaningful to me and the wider community.</i>



Professional Learning Goals

Name: _____ Registration #: _____ Registration Year: _____

Once you have reviewed the Self Assessment Tool (competencies/indicators identified for learning), choose two (2) Professional Learning Goals based on areas of practice or knowledge gaps that you identify. The following form is provided for you to keep a record of your learning goals and potential learning activities. Both Learning Goals are to be uploaded under Quality Assurance on your HMS account.

Professional Learning Goal:

What new knowledge/goal do you want to achieve based on your self-assessment?

This goal is pertinent to the following **DOMAIN**:

This goal is pertinent to the following **COMPETENCY**:

Learning Activities/Resources

What do I have to do and/or what do I need to achieve my goal?

- | | |
|---|--|
| <input type="checkbox"/> Collaborate with other OTs/colleagues | <input type="checkbox"/> Join committees or working groups |
| <input type="checkbox"/> Conference | <input type="checkbox"/> Provide or receive mentorship |
| <input type="checkbox"/> Course/Webinar | <input type="checkbox"/> Research/Literature |
| <input type="checkbox"/> Develop Tool and resources (e.g. handouts) | <input type="checkbox"/> Provide Education |
| <input type="checkbox"/> Media (audiobooks or podcasts) | <input type="checkbox"/> Other |

Target Completion Date:

Target Completion Date:

Target Completion Date:

Reflections

Please reflect on how you anticipate your learning activities and resources will develop your skills, attitudes and/or judgement with your selected learning goal.

Signature: _____ Date: _____



Completed Learning Activities

Name: _____ Registration #: _____ Registration Year: _____

This Completed Learning Activities form is to be filled out throughout the year to assist you in recording your completed learning activities for each of your Professional Learning Goals. You have one year to complete your Learning Activities based on your Learning Goals from the previous year. This form is due at registration renewal and is to be uploaded to your HMS account.

Professional Learning Goal: #
What was your Learning Goal from the previous year?

Learning Activities/Resources	
What did I do to achieve my goal?	
<input type="checkbox"/> Collaborate with other OTs/colleagues <input type="checkbox"/> Join committees or working groups <input type="checkbox"/> Conference <input type="checkbox"/> Provide or receive mentorship <input type="checkbox"/> Course/Webinar <input type="checkbox"/> Research/Literature <input type="checkbox"/> Develop Tool and resources (e.g. handouts) <input type="checkbox"/> Provide Education <input type="checkbox"/> Media (audiobooks or podcasts) <input type="checkbox"/> Other	
	Completion Date
	Completion Date
	Completion Date

Description of Completed Learning Activity #1
Please describe your completed Learning Activity.



Description of Completed Learning Activity #2

Please describe your completed Learning Activity.

Description of Completed Learning Activity #3

Please describe your completed Learning Activity.

Reflections

Please reflect on how your learning activities and resources developed your knowledge, skills, attitudes and/or judgement with your selected learning goal.

Signature: _____ Date: _____