

School-Based Occupational Therapists: When and When Not To Dismiss Students From Your Caseload



A Unique One-Day Live Online Seminar Presented by

Tara Warwick, OTD, MS, OTR/L
Outstanding Occupational Therapist and National Presenter

**Specifically Designed for Occupational Therapists Serving
Grades PreK-12**

Practical approaches to support students reaching their highest level of independence and moving toward an OT therapy exit plan

Strategic plans and structured steps to take toward dismissal that are individualized and evidence-based

A wealth of practical information, including a dismissal flowchart, portfolio, rubrics, report templates, meeting scripts, graduation certificates, and much more!

Receive an extensive OT services dismissal digital resource handbook filled with step-by-step guides, materials, and resources designed to make your dismissal processes systematic, evidence-based and successful

AOTA CEUs AVAILABLE

LIVE ONLINE SEMINARS

January 22

9 AM Central, 8 AM Mountain,
7 AM Pacific, 10 AM Eastern

January 25

9 AM Eastern, 8 AM Central,
7 AM Mountain, 6 AM Pacific

AOTA CEUs Available

CEUs and Graduate Credit Available
See page 6 for details

CAN'T ATTEND?

Order the recorded version
and take the seminar online at
your convenience (see page 6)

*'This was very much
needed and gave me
so many great ideas
to share with staff. The
resources are phenomenal.'*

– KATHERINE HARDEE, OCCUPATIONAL
THERAPIST/OT-PT TEAM LEAD

Ten Key Benefits of Attending

Absolutely enjoyed the seminar. Tara's Knowledge base is deep and current. She is relatable and mixes theory with reality in a way that makes sense and gives you true tools to add to your toolbox!!"

— DEANNA FINNEY,
OCCUPATIONAL THERAPIST



Who Should Attend

School-Based Occupational
Therapists Serving Grades
PreK-12

- 1. Confidently Explain When and Why a Student Should Be Dismissed From OT Services**
Learn current best practices for dismissal ... Utilize an easy-to-implement portfolio to evidence whether dismissal is warranted
- 2. Follow a Structured Approach to Dismissal**
Receive a flowchart and accompanying materials to consistently take steps toward dismissal ... Leave with a dismissal portfolio, rubrics, report templates, meeting scripts, graduation certificates, and much more!
- 3. Tackle Common Barriers to a Successful OT Services Exit Plan**
Receive national and federal guidance to back your dismissal decision-making ... Problem-solve for students who have a lack of vested interest or noncompliance
- 4. Track Readiness for OT Dismissal**
Monitor several indicators that a student may be ready to discontinue occupational therapy services ... Receive progress monitoring tools to keep tabs on their movement toward dismissal
- 5. Benefit From a Basic Skills or Learning Strategies Approach**
Clearly state whether the dismissal goal is to remediate a lagging skill or teach a strategy to compensate ... Set yourself up to have a clear point at which dismissal should occur
- 6. Effectively Bridge Generalization and Carryover**
Move students from using a skill in structured sessions toward real-life situations ... Receive a generalization toolkit with concrete steps and strategies to employ
- 7. Evidence How a Student's Disability No Longer Affects Their Educational Performance**
Document with confidence how occupational therapy services are or are not warranted ... Use this information to lead discussions regarding dismissal
- 8. Capitalize on Least Restrictive Environment and Inclusive Practices**
Show team members how the student is able to transfer their learned skills to the classroom ... How to support the transition from direct therapy to classroom carryover and success
- 9. Reframe Dismissal as a Positive Outcome for Students**
Help your team create a school culture that embraces dismissal as a positive action ... Celebrate students reaching their highest levels of independence!
- 10. Receive a Detailed OT Services Dismissal Digital Resource Handbook**
Leave with an extensive digital resource handbook, filled with step-by-step guides, materials, and resources designed to help you make your OT services dismissal processes systematic, evidence-based and successful

Outstanding Strategies You Can Use Immediately

Learning Outcomes:

At the end of the seminar you will be able to:

- **Identify and apply criteria** aligned with IDEA and AOTA standards to determine when dismissal from occupational therapy services is and is not educationally appropriate
- **Recognize best use of student performance data, IEP goals, and collaborative input** to support evidence-based decision-making for discharge planning in school-based settings
- **Identify recommended practice of documenting OT dismissal**, including prior written notice, progress summaries, and transition recommendations, in accordance with legal and ethical best practices



Practical Strategies for Occupational Therapy Service Delivery ...

- When and when not to dismiss students from OT ... **Strengthen intentional practices around dismissal**
- Highly effective, **evidence-based approaches for determining and monitoring readiness** for dismissal
- **Numerous dismissal process tools** including a dismissal portfolio, meeting scripts, graduation certificates, and much more!
- **Systematic approaches** that guide school-based OTs through the stages of dismissal
- **Ready-to-use frameworks** for a more structured dismissal process and step-by-step flowcharts to guide your decisions
- **Easy-to-adapt templates** for evaluation reports, goal writing, and rubrics
- Generalization and self-advocacy techniques to **help students achieve their highest level of independence**



"Thank you for all the information and specific rubrics/scripts to use. It was very clear and concise and will be very helpful for working with our IEP teams."

– LISA TRAN, OCCUPATIONAL THERAPIST

Practical Ideas and Strategies

Are you looking for a more structured and evidence-based approach to determine when students have reached their highest level of independence and are ready for dismissal from OT services? Do you experience hurdles when attempting to dismiss students from school-based occupational therapy? Learn ways to make your approach to dismissal more systematic and determine a student's individualized dismissal criteria, as well as how to monitor their progress toward dismissal, and how to successfully guide your team through the dismissal process. In this **NEW** seminar, outstanding OT and national presenter **DR. TARA WARWICK** draws from her experience working with PreK-12 students to share the most current recommendations surrounding dismissal practices. You'll leave with increased confidence in your dismissal decision making. Current best practices for dismissal, including national and federal recommendations, will strengthen your intentional practices around dismissal. Explore the most common hurdles OTs face when attempting to discontinue services, along with a wealth of tangible, use-tomorrow solutions. This is a seminar you won't want to miss!



A Message From Seminar Leader, Tara Warwick



Uniquely Qualified Instructor

DR. TARA WARWICK is an exceptional, highly experienced occupational therapist and international presenter. Tara has worked in a variety of settings and brings to her seminars only the most successful strategies for school-based OTs. With a background including behavior management, sensory processing, assistive technology and more, Tara has designed this interactive, fast-paced seminar to provide you with innovative, yet highly practical solutions to the challenges you face with your most complex students. You will leave this seminar with a wealth of proven techniques and practical strategies that you can implement immediately in working with Grade K-12 students.

Dear Colleague:

As school-based occupational therapists, we know how powerful our services can be in helping students access their education. But what happens when a student no longer needs us? For many OTs, dismissing a student is far more complicated than starting services. Without consistent state guidelines or clear-cut criteria, we're often left navigating gray areas—balancing educational relevance, team expectations, parent concerns, and our own professional judgment. Dismissal isn't just a clinical decision—it's a relational, emotional, and logistical process. And it's not always easy. You may feel pressure to "keep helping" even when the data says otherwise. You might worry about family reaction, or question whether the student is "ready enough." Sometimes the delay in dismissal is simply because the path forward feels unclear.

That's why I created this seminar—a full day of strategies, tools and real talk about the art and science of discontinuing OT services. We'll look at how to plan for dismissal from the very beginning of service delivery, how to define functional progress in ways that support discharge, and how to scaffold student success so that therapy fades out rather than abruptly ends. You'll leave with a concrete toolbox: checklists, documentation tips, team conversation scripts, and ways to support student transition and independence—all rooted in best practices for school-based OTs.

My hope is to provide you with both clarity and confidence so that when the time for dismissal comes, it doesn't feel like a guessing game. Instead, it becomes a natural, supported and student-centered next step. I invite you to join me for a day filled with practical insights, collaborative problem-solving and a shared commitment to helping students thrive at school—with or without us.

Sincerely,

Tara Warwick, OTD, MS, OTR/L

P.S. You'll receive my dismissal digital resource handbook, which includes a dismissal flowchart, portfolio to evidence readiness, rubrics, dismissal report templates, meeting scripts, graduation certificates, and much more, so you can start this work tomorrow!

"Dismissal isn't just a clinical decision, and the path forward often feels unclear. Join me for a full day of strategies, tools and real talk about the art and science of discontinuing OT services."

What Your Colleagues Say About Tara Warwick

*"I really enjoyed this seminar, it is not only highly relevant but highly specific to my discipline (so many PDs are vague) with **practical steps for immediate implementation.**"*

– Hilary Conners, OTR/L

*"So **informative, full of downloadable resources, really interactive and validating** to be able to talk to and hear from other people who truly understand and are experiencing the same day-to-day challenges (and successes) that I am!"*

– Brittany Regula, Occupational Therapist

*"**Great seminar to help increase knowledge around what wording to use and phrases** as well as make it more clear when it is and isn't appropriate for dismissal from OT services."*

– Stephanie Emery, Occupational Therapist

*"I feel **better equipped to justify dismissal of services** and have a clearer picture of when I should dismiss."*

– Lindsey Prato, Occupational Therapist



About BER Seminars

Outstanding Instructors

All programs are led by outstanding, top-rated BER national trainers.

Extensive Digital Resource Handbook

You'll receive an extensive digital Resource Handbook full of practical strategies and resources.

Highly Interactive

You'll be able to ask questions, consult with the instructor, and share ideas with other participants.

Program Guarantee

As we have for 49 years, we guarantee the high quality of our programs. If you are not satisfied, we'll give you a 100% refund.

Special Benefits of Attending



"This was a fantastic training with incredible opportunities for collaboration with the instructor and other professionals across the country, as well as amazing resources to draw upon as we implement what was learned in our home district(s)!"

– MIKAYLA BELEW, MS, OTR/L

On-Site Training

Most BER seminars can be brought to your school or district in-person or online. See the options at www.ber.org/onsite or call 877-857-8964 to speak to one of our On-Site Training Consultants.

Extensive Digital Resource Handbook

Each participant will receive an extensive digital resource handbook giving you access to countless strategies. The handbook includes:

- Guidelines to determine a student's readiness for dismissal
- Materials that support monitoring a student's progress
- Evidence-based strategies to create intentional OT dismissal plans for PreK to Grade 12 students
- Effective strategies for successfully incorporating team members and leading discussions about dismissal
- Practical tools and resources to guide your teamwork and dismissal-planning

AOTA CEUs/Contact Hours Available

Bureau of Education & Research is an AOTA Approved Provider of professional development (APP# 6353). Course approval ID# 15110. This Distance Learning - Interactive/Independent seminar is offered at .5



American
Occupational Therapy
Association

Approved Provider

CEUs/5 Contact Hours per day of attendance. Educational level: Introductory; Category: Occupational Therapy Service Delivery. The assignment of AOTA CEU's does not imply endorsement of specific course content, products, or clinical procedures by AOTA.

You will be required to fully attend the program and complete a program evaluation and a learning outcomes assessment at the end. For more information regarding this program, including a time-ordered agenda, please visit our website at www.ber.org

Financial Disclosure Statement for Tara Warwick, OTD, MS, OTR/L:

Presenter for the Bureau of Education and Research and receives honorarium compensation.

Presenter may also have a financial or non-financial interest in products or services mentioned at this seminar.

Meet Inservice Requirements / Earn State CEUs

Participants of Live Online Seminars, and those completing the Recorded Version online can receive a certificate of participation that may be used to verify five continuing education hours. For details about state CEUs available, visit www.ber.org/ceus

Earn One to Four Graduate Semester Credits



University of
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Global
A nonprofit
affiliate

Up to four graduate-level professional development credits are available with an additional fee and completion of follow up practicum activities. Details may be found at www.ber.org/credit

Can't Attend?

Other Professional Development Options:



Recorded Version of the Seminar

Order the recorded version of this seminar to take online at your convenience. You'll have 90-day access to the entire course and to the extensive digital resource handbook. To enroll, see registration form on page 7, and for optional CEUs and graduate credit, please visit www.ber.org/credit



Related On-Demand Online Courses

A related On-Demand Video-Based Online Learning course, *Practical Interventions for Increasing the Success of Your School-Based Occupational Therapy Outcomes*, for Grades K-12, is available for immediate registration. To enroll, visit www.ber.org/online

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Registration (XTN7W1)

- ☐ **1. January 22, 2027** (Start time: 9 AM Central)
- ☐ **2. January 25, 2027** (Start time: 9 AM Eastern)
— or —
- ☐ **3. I'd like to order the recorded version of this seminar**

FIRST NAME M.I. LAST NAME

POSITION, SUBJECT TAUGHT GRADE LEVEL

SEMINAR NUMBER: _____ (Please see list above)

List additional registrants on a copy of this form

SCHOOL NAME

SCHOOL MAILING ADDRESS

CITY & STATE ZIP CODE

SCHOOL PHONE NUMBER HOME PHONE NUMBER

() ()

Registration confirmations and login details are sent via e-mail

E-MAIL ADDRESS (REQUIRED FOR EACH REGISTRANT)

HOME MAILING ADDRESS

CITY & STATE ZIP CODE

IMPORTANT – PRIORITY ID CODE: XTN7W1

METHOD OF PAYMENT – Team Discount Available

The registration fee is \$295 per person, for teams of three or more registering at the same time, the fee is \$275 per person. **Payment is due prior to the program.** No cash, please.

- ☐ A check (payable to **Bureau of Education & Research**) is attached
- ☐ A purchase order is attached, P.O. # _____
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 **PHONE toll-free: 1-800-735-3503**
(Weekdays 5:30 am - 5:00 pm Pacific Time)

 **FAX this form to: 1-425-453-1134**

 **MAIL this form to: Bureau of Education & Research**
3000 Northup Way • PO Box 96068
Bellevue, WA 98004

Program Hours

All **Live Online Seminars** are scheduled 9:00 AM – 3:30 PM in the time zone indicated. Check in 15 minutes prior. Registrants will be sent login information by email four days before their Live Online Seminar.

Fee

The registration fee is \$295 per person, \$275 per person for groups of three or more registering at the same time. Call us at 1-800-735-3503 for groups of ten or more. **Payment is due prior to the program.**

Fee includes seminar registration, a certificate of participation and an extensive digital resource handbook. The fee is the same for Live Online Seminars or Recorded Seminars.

Cancellation/Substitutions

100% of your paid registration fee will be refunded if you can't attend and notify us at least 10 days before the seminar. Late cancellations made prior to the event date will be refunded less a \$15 service fee. Substitutions may be made at any time without charge.

Program Guarantee

We stand behind the high quality of our programs by providing the following unconditional guarantee: If you are not satisfied with this program, we'll give you a 100% refund of your registration fee.

Further Questions

Call the Bureau of Education & Research (800) 735-3503 or visit us online at **www.ber.org**



XTN7W1

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Includes an extensive digital Resource Handbook

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AOTA CEUs Available

XTN7W1

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