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Home Health “Start of Care” Policy Change: Examining Occupational Therapist Engagement in New Responsibilities

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Title of the Doctoral Presentation: Home Health “Start of Care” Policy Change: Examining Occupational Therapist Engagement in New Responsibilities

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Abstract:

A 2022 federal policy change allowed occupational therapists (OTs) to open home health cases in a process known as the Start of Care or SOC, a responsibility previously limited to nurses, physical therapists, and speech-language pathologists. The American Occupational Therapy Association (AOTA) recognizes the opportunity for increased professional value and service utilization and called upon practitioners to advocate such and to educate home health agencies about the change. Since clinicians’ practice patterns are directly impacted by such policy changes, because current OT participation in and perspective on new responsibilities were unknown, it was important to hear directly from these therapists. Study outcomes and methods were grounded in the Dynamic Capabilities Transformation Process (Uhl-Bien & Arena, 2017), a framework suited for studying responses to change that originates externally: We sought to describe home health occupational therapist participation in data collection and reporting processes before and after the policy change, to identify resources and barriers that impacted engagement in new responsibilities, and to describe perceptions of the policy change as an opportunity. Occupational therapists who have worked U.S.-based home health in the last three years were invited via convenience and snowball sampling to participate in an online survey. A total of 247 U.S.-based occupational therapists from 45 states completed the survey, with 72.1% reporting that they worked in home health for at least six years. Though 80.2% knew about the policy change and 90% have performed non-SOC Medicare-mandated assessments, only 42.5% have performed the SOC. Of those who have performed the SOC ($n = 105$), 60% reported confidence in their ability to perform the SOC. Barriers to accessing SOC training or education were reported by 78.5% of all participants, of whom 59.3% reported agency resistance to occupational therapists performing the SOC. Despite reported challenges, 79.3% viewed the policy change as an opportunity for the occupational therapy profession, and 63.4% as an opportunity for occupational therapists. We see a strong foundation on behalf of occupational therapists to adapt positively to externally driven change. But fewer than half had performed a single SOC. Respondent comments express frustration attached to added responsibility without respective autonomy, adequate time or compensation. Results suggest that additional resources and processes are needed to integrate policy into everyday processes, especially when occupational therapists are not the drivers of change, nor in positions of power to enact or oversee such change.

Uhl-Bien, M. & Arena, M. (2018). Leadership for organizational adaptability: A theoretical synthesis and integrative framework. *The Leadership Quarterly*, 29(1), 89-104
<https://doi.org/10.1016/j.leaqua.2017.12.009>

Synopsis: After Medicare changed its policy to allow occupational therapists (OTs) to open home health cases, we wanted to learn from OTs whether they knew about the policy change, if they were now opening cases, what may have inhibited or helped their participation, and whether they viewed the change positively. The study used an online survey by which OTs reported frustrations and challenges associated with the change; however, OTs generally believe that the change is beneficial to the profession and to providers. Results suggest that additional resources and processes are needed to integrate policy into everyday processes.

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Keywords: Home health; Medicare; Start of care; Occupational therapy; Policy change

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