

## Experts Series:

# Deciding Need and Amount of School-based OT & PT Services

with Peggy Morris, OTD, OTR/L, BCP,

Carlo Vialu, PT, MBA, and Sue Cecere, PT, MPH

December 10, 2025, 8:30 am – 3:30 pm ET

Online via Zoom + 60-day access to on-demand version

Full \$259 Early Bird \$229 Early Bird Group \$199

Early bird savings end November 21, 2025

*Elevate your therapy practice!*

Are you looking for more guidance in creating recommendations for school OT or PT services? Do you need more tools and evidence to support your recommendations for services under IDEA?



Apply EBP's Experts Series is here to help. Hear 3 school-based practice experts discuss what are perhaps, 2 of the most critical aspects of your school-based practice:

deciding the student's need for, and the amount of OT and PT services under IDEA. Carlo will start the day with an evidence-informed decision-making tool for determining the student's need for OT or PT services under IDEA. In the next session, Sue will provide you with important considerations for deciding the amount of services. Sue will then lead you through an exploration of 3 dosing tools, so you can compare and contrast their strengths and limitations, and how you may apply lessons from these tools in your own practice. Finally, Peggy will share with you a Clinical Reasoning Model to help you support with evidence your recommendations for direct or indirect services. You will also learn the 5-Step Clinical Reasoning Conversation that you can utilize to get buy-in from the family and educators when presenting your recommendation to the team. Multiple case studies throughout the day will demonstrate application of these tools.

You will leave the course with evidence-informed tools and strategies from Carlo, Sue and Peggy that will help you make school-based OT and PT recommendations with confidence!

**Audience:** OTs, OTAs, PTs, PTAs and Educators

**Educational Level:** Intermediate

### Your Mentors:

**Carlo Vialu, PT, MBA** served as Director of Physical Therapy for the NYC Department of Education, where he oversaw a program with over 700 PTs working in more than 1,500 schools. He is the Founder and Director of Continuing Education of Apply EBP, LLC and a co-founder of SeekFreaks. Carlo has presented nationally and internationally on various pediatric/school-based topics.

**Peggy Morris, OTD, OTR/L, BCP** has 30+ years of peds experience in early intervention, private practice & out-patient, but most of her experience & passion is in school-based practice. She coordinates the post-professional MS and OTD programs & school-based certificate program at Tufts University. She is Board Certified in Pediatrics through the AOTA, and a regular SeekFreaks contributor.

**Sue Cecere, PT, MPH** is the owner of Sequoia School Based Therapy Solutions, LLC, a consulting company that supports districts, agencies and therapists in the practice of school-based therapy services. Her career spans 25 years in the school based and early intervention practice settings as a service provider and program administrator. She co-authored several APTA fact sheets on school practice issues.

Disclosures: Peggy and Sue receive speaking fees from Apply EBP, LLC. Carlo is the owner of Apply EBP, LLC, and receives a speaking fee from Apply EBP, LLC. They have no relevant nonfinancial relationships to disclose.

### Registration

For more info and registration

[Click here!](#)

Or contact Carlo at  
[carlo@applyebp.com](mailto:carlo@applyebp.com)  
646-269-9039

## Agenda

The times below are **Eastern Time** (Note that you may be in a different time zone). *Unable to attend all sessions? Don't worry! All registrants will have 60-day access to the on-demand versions of each session (see details below).*

8:30 am – 10:00 am: Seminar 1: Determining a Student's Needs for OT/PT Services under IDEA | Carlo Vialu, PT, MBA

When is OT or PT the appropriate related service to address the needs of a student? Based on a review of state and local education agency practice guidelines, Carlo will discuss 2 procedural requirements and decision-making questions that the IEP team can utilize when determining need for related services under IDEA. Attendees will then participate in group clinical reasoning activities using provided case studies.

Learning Objectives: At the completion of this course, the learner will be able to

1. Identify 2 procedural requirements for determining a student's need for related services under IDEA
2. Determine 3 questions that the IEP team should discuss when deciding a student's need for related services under IDEA

10:00 am – 10:15 am: Break

10:15 am – 11:45 am: Seminar 2: Dosing Concepts in School-based Practice | Sue Cecere, PT, MHS

Arguably, the hardest decision to make is on the intensity of occupational and physical therapy services in the schools. In this course, Sue will present frames of reference for deciding dosing that can support dosing decisions by therapists and IEP teams. You will leave with a decision-making guidance tool, and learn how to consider such concepts as prognosis, rate of learning, setting, need for expertise, amount of problem-solving needed, and readiness to help determine the amount and type of support the student needs to participate meaningfully in their education.

Learning Objectives: At the completion of this course, the learner will be able to

1. Identify 2 school-based dosing challenges
2. Determine 2 ways frames of reference can support dosing decisions
3. Identify 3 dosing concepts that support decision-making on the amount of therapy support needed by a student to meaningfully participate in their education

11:45 am – 12:15 pm: Lunch (on your own)

12:15 pm – 1:45 pm: Seminar 3: Dosing Tools in School-based Practice | Sue Cecere, PT, MHS

What tools can assist you in determining appropriate dosing for school-based therapy services? In this course, Sue will lead you in an exploration of 3 different tools for deciding dosage (the CERT, the DRRT, APTA's dosing manual) using a case study. You will draw lessons regarding the strengths and limitations of each tool. Based on these lessons, Sue will discuss dosing decisions in relation to different service delivery models, including direct services, integrated services and services on behalf of the student.

Learning Objectives: At the completion of this course, the learner will be able to

1. Identify 3 concepts for making school-based dosing decisions
2. Determine 2 uses of a dosing tool to support decision-making on the amount of therapy support needed by a student to meaningfully participate in their education
3. Identify a strength and a limitation for 2 school-based dosing tools

1:45 pm – 2:00 pm: Break

2:00 pm – 3:30 pm: Evidence-based Practices for Indirect and Direct Services | Peggy Morris, OTD, OTR/L, BCP

Whether you are providing services directly or indirectly, you can be an evidence-based practitioner! In this course, Peggy will utilize a case study to walk therapists through a clinical reasoning model to provide you with evidentiary support for your interventions. You will learn to plan a treatment sequence that closely adheres along the continuum of the least restrictive environment. Peggy will then tie all the concepts learned via a flexible service delivery grid to move your practice forward in promoting your client's participation and occupation. Finally, Peggy will share with you the 5 Steps to presenting to the family, teacher, and other IEP

team members the clinical reasoning for your service recommendations in a way that can help promote understanding & buy-in.

Learning Objectives: At the completion of this course, the learner will be able to

1. Select a service delivery model that supports an occupation-/participation-based area of interest for a client, given a case scenario
  2. Determine the service delivery models that support indirect interventions
  3. Identify the plan of treatment sequence that closely adheres to least restrictive environment continuum, given a case scenario
-

## CEUs

6 hours of continuing education training are awarded to learners who complete this course

## For OTs and OTAs

- Apply EBP, LLC is an AOTA-approved provider of CEUs. You will receive a total of 0.15 AOTA CEUs for each of the seminar, for a total of 0.6 AOTA CEUs.



## For PTs and PTAs

- Apply EBP, LLC is an approved provider of CEUs in IL, NM, NY, OK and TX (APS #: 2703055TX)
- The seminars included in this course are approved in MD (#2025-23 thru 1/8/2029), NJ (#2204-120 thru 1/31/26), AR, and CA.
- These PT state boards accept approval by other state boards or associations: AK, AZ, DC, DE, FL, HI, IN, KS, KY, MA, MI, MT, NC, ND, OR, PA, RI, SD, TN, UT, VT, VA, WI and WY.
- These states do not require pre-approval of courses or have no CE requirements: AL, CO, CT, GA, IA, ID, ME, MO, NE, NH and WA.

If you would like to obtain CEUs for another state, please email [carlo@applyebp.com](mailto:carlo@applyebp.com).

**Cancellation policy:** Registrants may cancel up to 14 days prior to the course for a refund minus a \$75 administration fee. There is no cancellation less than 14 days prior to the course; you can find a substitute or use your registration to attend a future Apply EBP course. There is no cancellation or substitution after you have received any course material; you can use your registration to attend a future presentation of the same course. Email [applyebp@gmail.com](mailto:applyebp@gmail.com) to request to cancel. Apply EBP reserves the right to cancel a course up to 14 days prior to the course due to insufficient registration, with a full refund to registrants. Please do not arrange non-refundable travel arrangements until 13 days prior to the course, as Apply EBP is not responsible for such expenses.

**On-demand access:** You will receive access instructions for the on-demand versions on the day of the course. These on-demand versions are pre-recorded to ensure superior quality for a smooth learning experience. Pre-recordings deliver clear content free from distractions or technical issues common in live sessions. Please note that as a result, the pre-recorded and live versions may differ slightly. *For those attending the live course, your privacy is a priority. Feel confident in participating, knowing that no recordings will be made.*

**Accommodation:** Contact [carlo@applyebp.com](mailto:carlo@applyebp.com) for any requests for accommodation.