

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

March 26, 2026, 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 March 6, 2026

*Elevate your therapy practice!*

Are you looking for clearer guidance on when to recommend school-based OT or PT services—or when it's appropriate to discontinue them? Do you need stronger tools and evidence to support your recommendations under IDEA?

Apply EBP's Experts Series is here to help. Join Carlo, Sue, and Peggy as they tackle two of the most critical aspects of school-based practice:



determining a student's need for OT or PT services and deciding the appropriate amount and type of service delivery.

Carlo will begin the day by introducing an evidence-informed decision-making tool to help you determine whether a student requires OT or PT services under IDEA. Next, Sue will guide you through an exploration of 3 dosing tools (CERT, DRTT, & DoSES), highlighting their strengths, limitations, and practical applications.

In the afternoon, Peggy will present a Clinical Reasoning Model designed to help you clearly justify recommendations for direct and indirect services. You will also learn a 5-Step Clinical Reasoning Conversation to build understanding and buy-in from families and educators. To close the day, Carlo will address 3 common reasons for discontinuing services, sharing strategies to present data effectively and navigate common pushbacks. Multiple case studies throughout the course will bring these tools and strategies to life.

Leave this course with evidence-informed frameworks, practical language, and renewed confidence to make—and defend—school-based OT and PT service recommendations with clarity and professionalism.

**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 & outpatient, 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 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 DRTT, 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

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

12:15 pm – 1:45 pm: Seminar 3: 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

1:45 pm – 2:00 pm: Break

2:00 pm – 3:30 pm: Navigating Discontinuation of School OT or PT Services | Carlo Vialu, PT, MBA

When is it time to discontinue services—and how can you gain support from parents and educators when making that recommendation? These conversations can be challenging, but the right knowledge and approach

make all the difference. Carlo begins by highlighting research on factors that influence parent satisfaction with the IEP process and teacher perspectives on collaboration with related service providers. From this foundation, he shares six essential best practices to support clear communication, establish your role, and build trust with families and educators. Carlo then addresses when discontinuation is appropriate, reviewing legal and professional guidance and focusing on three common scenarios: when goals have been met, when benefits have been maximized, and when a student chooses to conclude services. You'll learn practical strategies for presenting data, responding to common pushbacks, and reframing "discontinuation" as graduation to support a more positive, student-centered conversation. Leave this course with practical strategies to navigate these important discussions with clarity, confidence, and professionalism.

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

1. Identify 3 factors that influence parents' level of satisfaction in the IEP process and meeting
2. Determine 3 reasons for recommending graduation from related services for a student with disabilities
3. Apply 3 best practices that can get buy-in from the IEP team when recommending a student's graduation from related services on 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.

 <p style="margin: 0;"><b>American Occupational Therapy Association</b></p> <hr style="width: 50%; margin: 5px auto;"/> <p style="text-align: center;"><b>Approved Provider</b></p> <p style="font-size: small; margin: 10px 0;">Apply EBP, LLC is an AOTA Approved Provider of Professional Development. Course Approval ID # 345. This Distance Learning-Interactive Course is offered at 0.15 AOTA CEUs. Intermediate, OT Service Delivery.</p> <p style="font-size: x-small; margin: 0;">AOTA does not endorse specific course content, products, or clinical procedures.</p>	 <p style="margin: 0;"><b>American Occupational Therapy Association</b></p> <hr style="width: 50%; margin: 5px auto;"/> <p style="text-align: center;"><b>Approved Provider</b></p> <p style="font-size: small; margin: 10px 0;">Apply EBP, LLC is an AOTA Approved Provider of Professional Development. Course Approval ID # 419. This Distance Learning-Interactive Course is offered at 0.15 AOTA CEUs. Intermediate, OT Service Delivery.</p> <p style="font-size: x-small; margin: 0;">AOTA does not endorse specific course content, products, or clinical procedures.</p>
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Determining a Student's Need for SB OT or PT

Dosing Tools

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EBP for Indirect and Direct Services

Navigating Discontinuation of OT/PT Services

### 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), AR, and CA.
- The live course is approved in NJ (#2512-132).
- 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, SC, SD, 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).

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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.