

Supervision Requirements for Occupational Therapists

August 2016



Introduction

The Occupational Therapy Board of New Zealand (OTBNZ) is the statutory authority established under the Health Practitioners Competence Assurance Act 2003 (HPCAA). The principal purpose of the HPCAA is to protect the health and safety of members of the public by providing for mechanisms to ensure that practitioners are competent and fit to practise their professions.

All New Zealand occupational therapists are registered within the General Scope of Practice: *Occupational Therapist*. This scope of practice requires that all occupational therapists practice in accordance with the OTBNZ *Code of Ethics for Occupational Therapists (2015)* and *The Competencies for Registration and Continuing Practice (2015)*.

The Registrar of the OTBNZ is responsible for ensuring that practising occupational therapists meet the required standard of competence, with reference to the *Competencies for Registration and Continuing Practice, and Code of Ethics*.

Supervision is a critical component of continuing competence, and is therefore incorporated into the practice of all occupational therapists.

OTBNZ Supervision Requirements:

The OTBNZ requires that all occupational therapists receive *professional supervision* in accordance with the Code of Ethics, and the ePortfolio requirements; and that occupational therapists with a condition on their scope of practice receive *supervision* in accordance with the provisions of the HPCAA.

This document seeks to clarify the different forms of supervision, and the context within which each may be required.



1. Professional Supervision

A fundamental component of the OTBNZ standards of competence and conduct is the requirement that all practising occupational therapists receive **professional supervision** as part of their continuing competence, more specifically as set out below:

The scope of professional supervision should include:

- a. input into client care,
- b. professional development and support, and
- c. professional accountability.

- A. *The Code of Ethics for Occupational Therapists* presents standards of conduct expected of all occupational therapists registered to practise in New Zealand, and requires that all occupational therapists receive effective professional supervision relevant to their work setting (Principle 1.3.8).
- B. *The Competencies for Registration and Continuing Practice* also require an occupational therapist to engage in supervision:
 - You help to improve occupational therapy knowledge, resources, practices and services. This includes networking with your peers and supervising or mentoring your colleagues or students (Competency 5.4).
 - You assess how well your colleagues are supervising, supporting and guiding others. You suggest changes when needed (Competency 5.5).
 - You reflect on how your professional abilities, attitudes, strengths and limitations affect your practice and the services you provide (Competency 5.8).

- C. *The ePortfolio* is the OTBNZ recertification programme, and which also incorporates the supervision requirements of the Code of Ethics. It is mandatory to have supervision around the ePortfolio content to assist with critical reflection, and to provide feedback and guidance in relation to maintaining and developing on ongoing competence.

A. The Code of Ethics

The Code of Ethics defines professional supervision as:

"A structured intentional relationship within which a practitioner reflects critically on her/his work, and receives feedback and guidance from a supervisor, in order to deliver the best possible service to consumers. Professional supervision may incorporate any aspect of a professional role e.g., clinical, managerial, or cultural, and be one to one, one to group" (OTBNZ, 2015a).

This is aligned with the Ministry of Health's (2006) definition of professional supervision, which is *"a formal process that provides professional support to enable practitioners to develop their knowledge and competence, be responsible for their own practice, and promote service user health, outcomes and safety"*.

Professional supervision incorporates clinical, managerial and cultural supervision in various forms. There is no general requirement for monitoring, assessment or reporting.

It aims to develop and maintain practitioners' competent professional functioning and well-being while safeguarding client care.

All registered occupational therapists with a current license to practice are required to actively engage in professional supervision. The frequency and mode of supervision may vary according to individual circumstances and practice context.

B. The Competencies for Registration and Continuing Practice

The Competencies for Registration and Continuing Practice form the basis of the ePortfolio, and require participation in supervision.

C. The ePortfolio

As the OTBNZ recertification program, the ePortfolio requires an occupational therapist “...to adopt and undertake a systematic process for ensuring that the services provided by the practitioner meet the required standard of competence” (section 41(3)(f) of the HPCAA).

The ePortfolio Handbook defines supervision as:

“...an important component both in the process of developing awareness of self and abilities, and in critical reflection. Supervision provides an opportunity to receive feedback and guidance and is a critical component of continuing competence.”

The ePortfolio refers to the mandatory professional supervision requirement under the Code of Ethics.

The ePortfolio allows the practising occupational therapist to provide evidence of their continued competence, operating as a practical, living tool for professional development.

Supervision for the ePortfolio is a formal supportive role to provide guidance aimed at ensuring safe and effective delivery of occupational therapy service and practice, and the maintenance and elevation of competence and performance levels through critical reflection and the integration and application of knowledge to practice. This supervision incorporates educational, managerial, professional, clinical and cultural aspects of practice.

Professional supervision may include specific discussions about the practitioner’s ePortfolio. It is advisable to utilise professional supervision to discuss your

ongoing competency and how you are maintaining and demonstrating this (with the use of your ePortfolio. The ePortfolio provides space to document that discussions are occurring in supervision and feedback has been considered.

Supervisors are required to confirm the practitioners’ ongoing engagement in the supervision process and the practitioners’ engagement in the ePortfolio process. This confirmation occurs within the ePortfolio.

D. Cultural elements of professional supervision

Cultural competence should be included in any professional supervision, and may be in addition to professional supervision.

The purpose of cultural supervision is to strengthen cultural competence, building the occupational therapist’s awareness and knowledge of a specific culture’s values and beliefs. Accordingly, the supervisor may be from a particular culture (Simmons et al, 2012).

Kaupapa Māori Supervision may be in addition to professional supervision.

The purpose of Kaupapa Māori supervision is “*enabling safe and accountable professional practice, cultural development and self-care according to the philosophy, principles and practices derived from a Māori worldview*” (Eruera, 2007).

It is important that those occupational therapists who identify as Māori are supported in their work, and are able to utilise a Kaupapa Māori model to support practice with access to supervisors who are Māori who understand the Māori dimensions of wellbeing.

It is essential that practitioners are fully aware of the OTBNZ professional supervision requirements outlined above, so that they can confidently demonstrate continuing competence, as required by the HPCAA in order to obtain a current license to practice.

2. Who can be a professional supervisor?

"A person who has sufficient self awareness, interpersonal competence, and knowledge of processes relevant to the area of practice of the supervisee to facilitate that person's professional development" (OTBNZ, 2015a).

Further to this the OTBNZ strongly recommends that therapists wishing to undertake the provision of professional supervision participate in further training to enhance their skills in this area. The OTBNZ recommends that supervisees looking for a supervisor consider the importance of appropriately trained supervisors, and the supervisor's capacity to foster critical reflections, challenge and support growth in practice.

By preference you will utilise an occupational therapist that has completed training to develop their supervision skills enabling supervision that is well facilitated.

There may be instances where professional supervision is not required to be provided by an occupational therapist, or where the most appropriate supervisor may be from a different health profession. This supervision should include continuing competence components for the ePortfolio within it. Practitioners may wish to discuss the appropriateness of your selected supervisor with the OTBNZ Professional Advisor.

If your professional supervisor is a registered occupational therapist with a current license to practice and no condition

on their scope of practice, they should also be familiar with your practice and ongoing competency. They may be used to make the third party declaration on your renewal application for a license to practice each year.

3. Tasks of Supervision

Professional supervision can be organised into key tasks that may be facilitative or evaluative in nature.

Facilitative tasks; may include facilitating skills and knowledge application, professional conduct and ethics, professional identity, personal and cultural awareness and the development of self-sustaining practices.

Evaluative tasks; may include the monitoring of practitioner progress and wellbeing, monitoring client care and professional accountability, evaluating and sometimes reporting on competence, and quality assurance (Hewson, 2006).

Further reading is recommended; the supervision guides produced by Te Pou provide some good background reading for both supervisors and supervisees. Written with the nursing profession in mind, these guides are an excellent resource for any health professional. **Te Pou** is an organisation that works to support and develop the mental health, addiction and disability workforces in New Zealand. To achieve this, they provide health organisations with tools, products and resources to help them build a strong and enduring workforce and improve their services. Their professional supervision guidelines help health professionals get the most out of supervision.

4. Supervision Framework

It is recommended that practitioners ensure their professional supervision is set up in such a way that the supervision develop and maintain practitioners' competent professional functioning and well-being, while safe-guarding client care. Supervision should incorporate any evaluation and feedback that may be

required by any standard conditions on the practitioner's scope of practice.

The underlying principles of professional supervision should ensure that supervision:

- is appropriate to both the individual and professional requirements of the practitioner;
- is in accordance with Competencies for Registration and Continuing Practice and the Code of Ethics;
- involves an open and transparent relationship between the supervisor and the supervisee; taking note of the regulatory requirements under the HPCAA;
- includes Kaupapa Māori supervision where appropriate;
- incorporates cultural supervision;
- is a confidential process within the limits of a specified supervision agreement or contract, except as required by OTBNZ reporting policy, or by agreement (e.g. the need for disclosure to protect a client, the public or practitioner safety; which should be included in the supervision agreement);
- includes the ePortfolio content;
- ensures that supervisors and supervisees do not have other role/relationships which may conflict with their supervision relationship;
- includes the development of a supervisory agreement between the supervisee and the supervisor.

Any one of the above points may be given greater emphasis at any point in the supervision process, depending on the context and focal point of supervision, and depending of the type of supervision required by the OTBNZ. This scope is in alignment with the processes and underlying premise of the ePortfolio.

Where appropriate or needed the practitioner will engage in Kaupapa Māori supervision, and/or cultural supervision.

A supervision agreement

A supervision agreement is an important founding document in supervision and it is important that the supervisor and supervisee discuss the expectations and boundaries of supervision and document these in a supervision agreement.

Examples of areas to be considered when drawing up an agreement are details of the intended supervision, such as frequency and length of supervision sessions and where or how supervision will take place, including provision for cancellations. Any agreement will also need to provide a terms for the agreement, make provision for payment of supervision charges, and address supervisor and supervisee responsibilities, confidentiality, record keeping, boundaries of supervision, what functions are included when supervision entails a report to another entity (e.g. the OTBNZ in the case of supervision of those practitioners with conditions). A **supervision agreement example** can be found in the back of this book and on the documents page of our website under the heading 'Supervision'. **This is a sample agreement only.**

A supervision log

A log should be maintained that records the details of the nature and frequency of professional supervision. **A supervision log template** can be found on our Documents page.

A supervision report

The **reporting template** found on the Documents page of our website is to be used for:

1. supervisor's reports required by the OTBNZ for removal of conditions on scope of practice; **or**
2. regular supervisor's reports required by the OTBNZ for ongoing conditions on scope of practice; **or**

3. supervisor's reports required by the OTBNZ when there are no conditions on scope of practice, where a specific template was not already provided.

5. Supervision for Condition on Scope of Practice

The OTBNZ places conditions on the scope of practice of certain practitioners at the point of registration and/or as Board imposed conditions.

A. OTBNZ's Standard conditions for registration are:

1. **New Graduate:** practice is subject to weekly supervision for the first 12 months of practice
2. **Return to Practice in New Zealand:** practice is subject to fortnightly supervision for the first six months of practice
3. **Overseas Qualified Registrant:** practice is subject to fortnightly supervision for the first six months of practice.

In some cases, the standard condition may be personalised. In such cases, the practitioner is advised in writing of the OTBNZ's requirements in relation to the condition.

It is essential to include acknowledgement of this condition and requirement in the initial supervision agreement.

Practitioners with a condition on their scope of practice must receive supervision carried out by a registered occupational therapist with a current license to practice, and no condition on his/her own scope of practice.

Supervision for practitioner with a standardised condition places emphasis on monitoring, evaluation, and reporting on competence for a finite period and frequency of supervision.

Supervision of those practitioners with conditions encompasses the philosophy of professional supervision. It should also

incorporate elements of professional development, support and reflective practice.

Please read the OTBNZ's Policy on [Standard Conditions on Scope of Practice](#) and [the Conditions Fact Sheet](#) found on our website for additional information regarding conditions on scope of practice.

Failure to comply with condition/s on scope of practice:

No health practitioner may perform a health service that forms part of a scope of practice of the profession in respect of which he or she is registered unless he or she is permitted to perform that service by his or her scope of practice; and performs that service in accordance with any conditions stated in his or her scope of practice HPCAA section 8(2).

Removal of conditions on scope of practice

Practitioners must maintain a supervision log. This should record details of the nature and frequency of professional supervision. As practitioners approach the end of their mandatory period of supervision they are encouraged to discuss with their supervisor their readiness to practice without condition.

The supervisor is required to complete a report attesting to the practitioner's ability to practise competently in each of the competency areas without the level of supervision required by the condition on the scope of practice. The practitioner and supervisor will need to discuss/complete this report at the designated time.

B. Supervision for Board imposed conditions

In some circumstances the Board imposes a condition on a practitioner's scope of practice as a result of an Order of the Health Practitioners Disciplinary Tribunal, a competence, conduct or health issue. Supervision in these circumstances is a requirement of the Board imposed

condition. Typically in these scenarios the supervisor is approved by the Board.

This form of supervision includes compulsory monitoring, evaluating and reporting that is in line with the HPCAA definition of supervision.

A Board imposed condition can also require that the occupational therapist undergo other evaluative monitoring processes and activities, such as (but not limited to) peer review, specific course attendance, article reviews, practice audit, written reflections.

Although this supervision sits within the same framework as professional supervision, because of its narrow focus it should not be confused with the traditionally understood, 'professional supervision'.

The practitioner will undergo a period of specified supervision with a Board approved supervisor, directly related to the condition(s) placed on their scope of practice, while engaging in professional supervision at the same time.

The Board approved supervisor could, if approved be the same person used for professional supervision.

The OTBNZ will actively communicate with the supervisor and the supervisee the reason for the supervision in the Board imposed condition, in accordance with the processes outlined in the HPCAA. A contract will be provided by the OTBNZ for the supervisor and the supervisee setting out the purpose and functions of this supervision.

This supervision may couple as professional supervision if provided for in the supervision contract prepared by the OTBNZ, and agreed by all parties.

The OTBNZ is also investigating what other activities (other than supervision) might be used, to both monitor and gather feedback, regarding the competence of a practitioner.

The HPCAA has the following definitions:

Supervision means the monitoring of, and reporting on, the performance of a health practitioner by a professional peer.

Oversight means professional support and assistance provided to a health practitioner by a professional peer for the purposes of professional development.

Professional peer refers to a health practitioner who is registered with the same authority with which the health practitioner is registered.

6. Supervision and Training Services

Training

The OTBNZ recommends any potential supervisor undertake training that develops their supervision skills. There are a number of courses available (both within organisations such as the DHBs, and privately). Peer supervision training is also recommended for those who participate in this form of supervision. It is important to have a firm theoretical platform on which to base the practice of supervision.

A number of courses or institutions providing courses are provided below that may help practitioners' development of their supervision skillset. Please note that this is not an exhaustive list, nor is it a list of OTBNZ "endorsed" courses.

- Te Pou also offer a number of resources at www.tepou.co.nz
- NZ Coaching & Mentoring Centre www.coachingmentoring.co.nz
- Wintec www.wintec.ac.nz/courses/short/supervision-health-social-services.aspx
www.wintec.ac.nz/courses/post-graduate-certificate/professional-supervision.aspx
- Margaret Morrell courses <http://www.margaretmorrell.co.nz/>

If you are aware of any other courses OTBNZ could add to its resource list please email the information to: enquires@otboard.org.nz

Supervisory Services

The cost of supervisory services varies and it is worthwhile considering negotiating the cost of supervision with your potential employer, where such costs may not be standardly absorbed. DHBs tend to offer supervision as part of the employment package, however many non-government organisations (NGOs) and private organisations in New Zealand do not and practitioners may be expected to pay for these themselves unless negotiated otherwise.

A [list of supervisors](#) separated by region can be found in this document and on our website.

Distance supervision

It is becoming increasingly common for health professionals to utilise distance supervision due to the varying and isolated nature of many workplaces. Distance supervision is commonly occurring via Skype (or similar connections) or phone. In some instances the use of email supplements this, with scheduling of face-to-face sessions where possible. As with any supervisory relationship the establishment of the supervision agreement is essential, providing the early discussion about how the supervision will function.

Ensuring there are also good professional networks provides additional support to isolated practitioners (noting that these can also be via e-groups, through blogs and other forms of media sites such as Facebook). Please note care must be taken if these applications are used as some information may be private and of a sensitive nature.

Interested in providing professional supervision?

The OTBNZ periodically receives enquiries from occupational therapists seeking someone to be their professional supervisor. OTBNZ provide a public list of potential supervisors on its website for such practitioners to access. To be eligible to be placed on this list you must be a registered occupational therapist with a current license to practice and no conditions on your scope, and have completed training in the provision of professional supervision. If you would like the OTBNZ to place your name on this list, please complete a [supervisor expression of interest form](#) found on the Documents page of our website.

References:

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Potential Supervisors

Type of Supervision	Definition	Function	Bases for Requirement
Professional	<p>"A structured intentional relationship within which a practitioner reflects critically on her/his work, and receives feedback and guidance from a supervisor, in order to deliver the best possible service to consumers. Professional supervision may incorporate any aspect of a professional role e.g., clinical, managerial, or cultural, and be one to one, one to group" (OTBNZ, 2004).</p>	<p>To enable practitioners to develop their knowledge and competence, be responsible for their own practice, and promote service user health outcomes and safety.</p>	<p>OTBNZ promotes as best practice</p>
Kaupapa Māori	<p>Used to support practice with access to supervisors who are Māori who understand the Māori dimensions of wellbeing.</p>	<p>To enable safe and accountable professional practice, cultural development and self-care according to the philosophy, principles and practices derived from Māori world view.</p>	<p>Cultural Competency to meet the Code of Ethics Treaty of Waitangi</p>
Cultural	<p>Cultural competence should be included in any professional supervision. Cultural supervision may be in addition to professional supervision</p>	<p>To strengthen cultural competence, building the occupational therapists awareness and knowledge of specific cultures values and beliefs.</p>	<p>Cultural Competency to meet the Code of Ethics Treaty of Waitangi This is a requirement for overseas qualified occupational therapists migrating to New Zealand.</p>





Potential Supervisors

Type of Supervision	Definition	Function	Bases for Requirement
Required by HPCAA/Board Imposed	A monitoring activity which is different to how occupational therapists have traditionally understood supervision. To prevent potential confusion the OTBNZ has defined professional supervision as the usual supervision activity that practitioners are engaged in. The 'monitoring of performance' refers to only one component of what might be included in professional supervision.	To assist occupational therapists who have been identified as not meeting standards on their scope of practice in areas of fitness and/or competence.	HPCAA A requirement applied by Health Practitioners Disciplinary Tribunal
Standard Conditions of Practice	Practitioners with a condition on their scope of practice must receive supervision carried out by a registered occupational therapist with a current practising certificate, and no condition on his/her own scope of practice. The supervision is similar to professional supervision but may be tailored to the specific condition placed on the practising certificate.	To ensure that an occupational therapist with an existing condition on their scope of practice is meeting standards required for the condition to be removed.	HPCAA set by the Board
ePortfolio	To assist a practitioner to critically reflect on her/his work and provide feedback and guidance to help the practitioner maintain and develop their ongoing competence.	To assist occupational therapists in identifying areas for development within their practice.	HPCAA Section 41 – recertification programme





Potential Supervisors

Region	First Name	Last Name	Area	Email
Northland	Jill	Secker	Whangarei	Secker.neil.jill@xtra.co.nz
Auckland	Lorna	Crawford	North Shore City	lorna.crawford@xtra.co.nz
	Nerissa	Loveridge	North Shore City	nerissa.l@xtra.co.nz
	Kate	Livesey	Auckland	kate.livesey12@gmail.com
	Alison	Burford	Auckland	alison.burford00@gmail.com
	Eva	Tollemache	Auckland	ot@ranfurly.org.nz
	Wendy	Hindmarsh-Hook	Auckland	wahook@xtra.co.nz
	Rob	Molyneaux	Auckland	r40n44@xtra.co.nz
	Stephen	Malcolm	Auckland	steve.malcolm@lifespanhealth.co.nz
	Jacqueline	Praksim	Auckland	jdabel.nz@gmail.com
	Carolyn	Simmons Carlsson	Auckland	kero.oskar@xtra.co.nz
	Maria	Whitecombe-Shingler	Auckland	hannom@xtra.co.nz
	Elizabeth Ann	Christie	Auckland	tanekaha24@orcon.net.nz
	Raewyn	Knight	Auckland	rkot@ihug.co.nz
	Helen	Falla	Waitemata	colinandhelen1@clear.net.nz
	Marieke	Dijk	Waitakere	marieke@gmx.us
Waikato	Stefanie	Ellis	Raglan	stephanie.ellis@waikatodhb.health.nz
	Carin	Fletcher	Hamilton	carinfechner@slingshot.co.nz
	Kim	Henneker	Hawkes Bay	kim.henneker@hawkesbaydhb.govt.nz
	Mairi	Macinnes	Havelock North	mairi.macinnes@hawkesbaydhb.govt.nz
Wellington	Meiny	Erasmus	Porirua	meiny.erasmus@cavit.co.nz
	Jill	Judson	Wellington	nj.judson@xtra.co.nz
Nelson	Frances	Morgan-Stock	Nelson	morgstock@xtra.co.nz
Christchurch	Annette	van Dongen	Christchurch	a_v_dongen@hotmail.com
	Andri	Pretorious	Christchurch	andri.pretorious@gmail.com
Dunedin	Dion	MacLeod	Dunedin	dionmacleod@gmail.com



Sample Agreement

Example Supervision Agreement

The following example has been provided as a suggested guide only. Practitioners are encouraged to adapt the agreement so it fits their particular circumstances and requirements.

Supervision Agreement

Supervisee name: _____

Contact email: _____ Phone: _____

Supervisor name: _____

Contact email: _____ Phone: _____

Date: _____ Review Date: _____

Expectations

1. Frequency: Participation in supervision will be one of the following:

Tick box that applies

a. Weekly for 12 months

b. Fortnightly for six months

c. Monthly

d. Other (describe frequency) _____

2. Venue: Supervision will occur in a non-public environment where privacy can be maintained.

Our preferred meeting venue will be: _____

3. Content: The agenda will be developed by both the Supervisee and Supervisor (as appropriate) and will reflect the functions of supervision; input into client care/practice, professional development and support, and professional accountability. A time log will be kept if supervisee has a condition on their scope of practice. If agreed a log may also be kept giving areas of supervision.

4. Objectives: Supervisees will set objectives for supervision. Please come prepared. The objectives will specify how the Supervisee wishes to use supervision to develop particular areas of knowledge, skill and self-management, and be reviewed annually.

We agree the following responsibilities for

arrangements and supervision





Sample Agreement

Frequency: Supervision will occur for ____ hour(s) ____ weekly.

Environment: The Supervisor and Supervisee will work to ensure a safe, non-judgemental environment.

Mode: The primary mode of supervision will be via:

Tick box that applies

Face to face

Skype

Email

Phone

Other _____

Records: A record of material brought to supervision and an action or review plan is to be kept. Records should be reviewed at the beginning of each session.

Reviews: There will be ongoing review of predetermined supervisory objectives. After three months, there will be an informal evaluation of the supervision relationship by both parties involved and thereafter an annual review.

Emergency Contact: The Supervisee or Supervisor can request an "urgent" supervision session where necessary. Each will, where possible, be accessible and available. If the Supervisor is unavailable, the Supervisee will contact an alternative experienced practitioner for a consultation which will be documented.

Accountability: The Supervisor is responsible for the advice and information they give in supervision but not for the response taken by the supervisee to the advice/information. The Supervisee is responsible for their own clinical practice.

Conflict resolution: If conflict should arise between Supervisor and Supervisee, an honest intent to work through the conflict will be maintained.





Sample Agreement

Confidentiality: Supervision is a confidential process with the following exceptions:-

- when both parties agree that an issue can be shared outside of supervision
- "supervisor feedback on supervisee" form is required for the supervisee's appraisal and or OTBNZ purposes
- when there is a serious concern regarding the Supervisee's practice (e.g. conduct, competence or health issues) the Supervisor will take this matter to the person. The Supervisor may also report these concerns to the Occupational Therapy Board of New Zealand pursuant to the Health Practitioners Competence Assurance Act 2003.

In any of these circumstances the Supervisee will be informed.

Making supervision work:

What I would like from you as my Supervisor is: _____

What I will contribute as a Supervisee to make our supervision work is: _____

What I would like from you as my Supervisee is: _____

What I will contribute as a Supervisor to make our supervision work is: _____

Signed

Supervisee: _____

Supervisor: _____

Date: _____

