

**SELF-STUDY GUIDE FOR EDUCATIONAL PROGRAMS**

**IN OCCUPATIONAL THERAPY**

**2023 STANDARDS**

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**OCCUPATIONAL THERAPY**

**SELF-STUDY GUIDE**

**2023 STANDARDS**

**INTRODUCTION**

Accrediting agencies recognized by the United States Department of Education (USDE) and the Council for Higher Education Accreditation (CHEA) must include a self-study as one of their requirements for granting accreditation to programs and institutions. The Accreditation Council for Occupational Therapy Education (ACOTE®) therefore requires that programs seeking accreditation provide evidence, in the form of a report, that a self-study has been conducted.

The self-study process should begin well in advance of the anticipated site visit to provide ample time for evaluation of all facets of program operations and to reach conclusions concerning the extent to which the program is in compliance with the Standards. The process should involve the various constituencies of the program, including administration and faculty, fieldwork educators, students, graduates, advisory committee members, and employers.

The program may find it useful to appoint several committees, assigning to each the evaluation of aspects of program operations that relate to one or more of the Standards. One individual, usually the program director, should serve as the coordinator and resource to the self-study committees. Committee reports, each containing a summary of the findings relative to compliance with the Standards, should then be used as the basis for the narrative section of the Report of Self-Study.

**THE SELF-STUDY PROCESS**

Self-study refers to a formal process during which an educational program critically examines its structure and substance, judges the program’s overall effectiveness relative to its mission, identifies specific strengths and weaknesses, and indicates a plan for necessary modifications and improvements. The process should flow naturally out of the ongoing program evaluation. It should include a consideration of external factors influencing educational directions as well as an assessment of the extent to which the program is in compliance with the established accreditation Standards.

ACOTE has expectations that:

* The self-study process precedes the preparation of the report. Although the requirements of the final report should be considered in the plan for the study, the initial focus should be on the evaluative process, not the document.
* The self-study process should be comprehensive, examining in sufficient detail all aspects of the program, so that eventual assessment of compliance with the Standards can be accomplished.
* The self-study process begins with a well thought out plan which includes:

- objectives,

- identification of resources,

- individuals to be involved and delegation of responsibilities,

- timeline, and

- reporting mechanisms.

The plan should address how existing information from ongoing evaluation will be included.

* The self-study process is evaluative rather than descriptive. It should include comments, suggestions for program change, particularly the resolution of current problems or weaknesses which are cited in the self-study, and predictions or plans for future change.
* The self-study process involves the entire faculty of the program. Although it is recognized that a small committee or a single individual is generally assigned responsibility for overseeing the process and the preparation of the report, it is expected that the process include input from all faculty and from administration, students, graduates, and fieldwork educators.

ACOTE does not specify how the self-study process is to be conducted. However, guidelines and suggestions are offered below, and a sample timetable is provided.

In general, the occupational therapy staff and faculty should institute the self-study process no less than twelve (12) months and no more than eighteen (18) months before an on-site evaluation. It should be recognized that many staff, faculty, students, and numerous administrative personnel within the institution will become involved with the self-study. Considerable time, generally not allocated to such activities, will be devoted to organizing and analyzing data and completing the required document. Therefore, initial planning must provide sufficient time for individuals, groups, or committees to complete their assignments.

Self-study quite obviously constitutes a substantial financial investment by the institution. Faculty time, clerical support, data gathering procedures, and the preparation of the final document are only a few of the apparent costs. Financial implications and budget should be considered during the planning.

The self-study should be designed to address several questions:

1) What are the program’s mission, philosophy, goals, and strategic plan? Are they consistent with the mission, goals, and plan of the institution? Are they appropriate to the current time, circumstances, and constituencies?

2) Is the curriculum design consistent with the mission?

3) Are all the courses (objectives, teaching-learning strategies, evaluative methods) congruent with the curriculum design?

4) Is there solid evidence that the objectives of the program are being achieved?

5) Are the human, physical, and fiscal resources needed to achieve the program’s goals available now? Are they likely to be available for the foreseeable future?

The logical point at which to begin the self-study is with the mission. Examine the mission of the program for congruence with the mission of the institution. Then go on to review the curriculum design and look at each course in the program to determine whether it reflects the design. Use the form provided to assess whether the courses cover all the required content areas.

Review the current plan for program evaluation and determine whether modifications are needed to incorporate a stronger focus on outcome assessment. Then, proceed to an evaluation of the adequacy of resources and evaluation of the other Standards. After the self-study process is complete, preparation of the report can be undertaken.

**THE REPORT OF SELF-STUDY**

A Report of Self-Study is an evidential document which summarizes the findings of the self-study process. The report provides clear evidence that an identifiable process took place, and summarizes relevant data, conclusions, and plans generated by the study.

**SUGGESTED TIMETABLE FOR SELF-STUDY FOR**

**CONTINUING ACCREDITATION**

**FIRST MONTH**

1. Initiate planning
2. Review immediately available data
3. Review guide
4. Create self-study committee
   1. Select members
   2. Elect/appoint chairperson

**SECOND MONTH**

1. Draft plan
2. Name subcommittees and/or individuals to be charged with tasks

**THIRD TO SIXTH MONTH**

1. Collect data
2. Conduct periodic meetings of self-study committee to review progress

**SEVENTH MONTH**

1. Review and analyze data
2. Develop draft report

**EIGHTH MONTH**

1. Final review of Report of Self-Study
2. Initiate planning for on-site evaluation

**NINTH MONTH**

1. Submit Report of Self-Study

**TENTH TO ELEVENTH MONTH**

1. Post tentative on-site schedule in eAccreditation portal
2. Confirm all interviews

**TWELFTH MONTH**

1. On-site evaluation

**INSTRUCTIONS FOR COMPLETING**

**THE REPORT OF SELF-STUDY**

**OUTLINE FOR THE REPORT OF SELF-STUDY:**

The Report of Self-Study to be submitted using ACOTE online (<https://acote.aota.org>) in advance of the on-site evaluation consists of a written narrative and uploaded supporting documents. **When preparing Reports of Self-Study, ACOTE strongly recommends that program directors review the most recent *ACOTE Standards and Interpretive Guidelines* which is maintained on the ACOTE Accreditation website (www.acoteonline.org).** The outline for the report to be submitted online is as follows:

**OVERVIEW**

1. Provide an overview of the program organized using the headings below. Do not upload the overview as an attachment.

* **Overview** size of the school, location (rural or urban), sponsorship (public or private and by whom), institutional mission (research, public service, adult learner), and if the program will meet a specific need in that area of the state or country
* **Mission and philosophy** of the program
* **Curriculum design and threads**
* **Student cohort** maximum number of new student cohorts admitted per year, maximum number of new students in each cohort, maximum number of new students to be accepted each year, and start dates. (The program must demonstrate appropriate resources to support the maximum cohort size and the total number of students in the program.)
* **Length of the program**
* **Current staffing pattern**
* **Institutional support and approval**
* **Significant findings** from the entire self-study process, including strengths and concerns

1. Upload the organizational chart of the institution showing the relationship between the program and the institution.

**STANDARDS SECTION A**

* 1. Provide a narrative response to summarize how the program meets the requirements of each Standard in Section A: General Requirements.
  2. Upload documents to provide evidence that the program meets the requirements of each Standard in this section.

**STANDARDS SECTION B**

**FOR ALL B STANDARDS:**

In the **Compliance Statement** response box of each B Standard:

* Summarize how the program meets the expected student outcome for each B Standard.

In the **Supporting Material** section of each B Standard:

* Upload evidence (e.g., assignment, test question, project, rubric, etc.) that the program uses to assess the student's ability to meet expected outcomes for each B Standard.
* Evidence must demonstrate that ALL required student outcomes of the Standard are assessed.
* A program may use evidence from up to 3 courses to demonstrate coverage of the Standard.

**FOR STANDARD A.5.5. WRITTEN SYLLABI AND ASSESSMENT STRATEGIES:**

In the "**Compliance Statement**" box, include:

* A brief statement of how each course that appears in the **Curriculum** tab relates to the curriculum design.

In the **Curriculum** tab:

* Complete the **Course Summary** form and upload the related syllabi that include course objectives, learning activities, and instructional methods and materials. (NOTE: Level II fieldwork or the doctoral capstone experience and project syllabi may not be used to document compliance with a B Standard).
* In each **Course Summary**, link up to 3 courses that best exhibit coverage of each content Standard. A maximum of 3 courses can be linked to each Standard. Once linked, those courses will automatically populate the **Courses** section under each B Standard.

In the **Compliance Statement** response box of each B Standard:

* Describe how the program meets the expected outcome for each B Standard.
* In the **Supporting Material** section of each B Standard, upload evidence (e.g., sample assignment, test question, project, etc.) that the program assesses the student's ability to meet the expected outcomes for each B Standard.
* A program may use up to 3 courses to exhibit coverage of this Standard.

**STANDARDS SECTION C**

1. Provide a narrative response to summarize how the program meets the requirements of each Standard in Section C: Fieldwork Education.
2. Upload documents to provide evidence that the program meets the requirements of each Standard in this section.

**INFORMATION TO HAVE AVAILABLE ON-SITE:**

The following materials should be available on-site for the team to review:

1. Sample forms used in the student selection process.
2. Student records.
3. Course materials organized in one place that include syllabi, assignment instructions, and assessment measures. Samples of student work such as papers, completed exams, and assignments may also be provided. (Provide the team with electronic access, i.e., guest pass, to the program’s library and any course materials that are presented online.)
4. Materials such as fieldwork evaluation forms used to evaluate and document students’ progress.
5. Any forms and reports used as part of program evaluation, such as student evaluations of courses, faculty evaluations, fieldwork performance evaluations, student satisfaction of fieldwork experience, student satisfaction with the program, etc.
6. All signed memorandums of understanding and fieldwork information.

Note that the on-site team may also request additional information prior to or during the visit to ensure a complete and accurate assessment of the program.

**AMERICAN OCCUPATIONAL THERAPY ASSOCIATION**

Philosophy of Occupational Therapy Education

**Preamble**

Occupational therapy education prepares occupational therapy practitioners1 to address the occupational needs of individuals, groups, communities, and populations. The education process includes academic and experiential components (fieldwork, capstone, continuing education). The philosophy of occupational therapy education parallels the philosophy of occupational therapy yet remains distinctly concerned with beliefs about knowledge, learning, and teaching.

**What Are the Fundamental Beliefs of Occupational Therapy Education?**

Students are viewed as occupational beings who are in dynamic transaction with the learning context and the teaching–learning process. The learning context includes the curriculum and pedagogy and conveys a perspective and belief system that include a view of humans as occupational beings, occupation as a health determinant, and participation in occupations as a fundamental human right. Education promotes professional and clinical reasoning; critical thinking; cultural understanding; and the integration of professional values, theories, evidence, ethics, and skills. This approach will prepare practitioners to collaborate with clients to achieve health, well-being, and participation in life through engagement in occupation (American Occupational Therapy Association, 2014b). Occupational therapy education is an ongoing process that shapes a practitioner’s professional identity.

**What Are the Values Within Occupational Therapy Education?**

Enacting these beliefs to facilitate the development of a sound reasoning process that is client centered, occupation based, and theory driven while also encouraging the use of best evidence and outcomes data to inform the teaching–learning experience may include supporting

* Active, engaging, diverse, and inclusive learning within and beyond the classroom environment;
* A collaborative process that builds on prior knowledge and experience;
* Continuous professional judgment, evaluation, and self-reflection; and
* Lifelong learning and continuous advocacy for the profession and society’s occupational needs.

1When the term *occupational therapy practitioner* is used in this document, it refers to both occupational therapists and occupational therapy assistants (American Occupational Therapy Association [AOTA], 2015). *Occupational therapists* are responsible for all aspects of occupational therapy service delivery and are accountable for the safety and effectiveness of the occupational therapy service delivery process. *Occupational therapy assistants* deliver occupational therapy services under the supervision of and in partnership with an occupational therapist (AOTA, 2014a).

**References**

American Occupational Therapy Association. (2014a). Guidelines for supervision, roles, and responsibilities during the delivery of occupational therapy services. *American Journal of Occupational Therapy, 68*(Suppl. 3), S16–S22. https://doi.org/10.5014/ajot.2014.686S03

American Occupational Therapy Association. (2014b). Occupational therapy practice framework: Domain and process (3rd ed.). *American Journal of Occupational Therapy, 68*(Suppl. 1), S1–S48. https://doi. org/10.5014/ajot.2014.682006

American Occupational Therapy Association. (2015). Standards of practice for occupational therapy. *American Journal of Occupational Therapy, 69*(Suppl. 3), 6913410057. https://doi.org/10.5014/ajot.2015.696S06

*Adopted by the Representative Assembly Coordinating Council for the Representative Assembly, 2023*

*Note.* This revision replaces the 2015 document *Philosophy of Occupational Therapy Education,* previously published and copyrighted in 2015 by the American Occupational Therapy Association in the *American Journal of Occupational Therapy, 69*(Suppl. 3), 6913410053. https://doi.org/10.5014/ajot.2015.696S17

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*Citation.* American Occupational Therapy Association. (2023). Philosophy of occupational therapy education.

*American Journal of Occupational Therapy, 72*(Suppl. 2), 7212410070. [https://doi.org/10.5014/ajot.2023.72S201](https://doi.org/10.5014/ajot.2018.72S201)

**AMERICAN OCCUPATIONAL THERAPY ASSOCIATION**

**THE PHILOSOPHICAL BASE OF**

**OCCUPATIONAL THERAPY**

Occupations are activities that bring meaning to the daily lives of individuals, families, communities, and populations and enable them to participate in society. All individuals have an innate need and right to engage in meaningful occupations throughout their lives. Participation in these occupations influences their development, health, and well-being across the lifespan. Thus, participation in meaningful occupations is a determinant of health and leads to adaptation.

Occupations occur within diverse social, physical, cultural, personal, temporal, and virtual contexts. The quality of occupational performance and the experience of each occupation are unique in each situation because of the dynamic relationship among factors intrinsic to the individual, the environment, and contexts in which the occupation occurs, and the characteristics of the occupation.

The focus and outcome of occupational therapy are clients’ engagement in meaningful occupations that support their participation in life situations. Occupational therapy practitioners conceptualize occupations as both a means and an end in therapy. That is, there is therapeutic value in occupational engagement as a change agent, and engagement in occupations is also the ultimate goal of therapy.

Occupational therapy is based on the belief that occupations are fundamental to health promotion and wellness, remediation or restoration, health maintenance, disease and injury prevention, and compensation and adaptation. The use of occupation to promote individual, family, community, and population health is the core of occupational therapy practice, education, research, and advocacy.

Adopted by the Representative Assembly Coordinating Council for the Representative Assembly

Note. This revision replaces the 2011 document The Philosophical Base of Occupational Therapy, previously published and copyrighted in 2011 by the American Occupational Therapy Association in the American Journal of Occupational Therapy, 65(Suppl.), S65. https://doi.org/10.5014/ajot.2017.716S06

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Citation. American Occupational Therapy Association. (2017). Philosophical base of occupational therapy. American Journal of Occupational Therapy, 71(Suppl. 2), 7112410045. https://doi.org/10.5014/ajot.2017.716S06

**For additional information and copies of** **required forms and templates please visit the** [**Forms**](https://acoteonline.org/accreditation-explained/forms/) **page of the ACOTE website (**[**https://acoteonline.org/**](https://acoteonline.org/)**).**

**Self-Study Report Templates include the following:**

(Templates are not required)

* Faculty Professional Development Plan Template
* Program Evaluation Plan Template
* Program Evaluation Report Template
* Program Strategic Plan Template
* Scholarship Agenda Template

**Forms embedded in the eAccreditation Self-Study Report include the following:**

* Faculty Profile Form
* Financial Resources Form
* Course Summary
* Fieldwork Sites

**REPORT OF SELF-STUDY TEMPLATE AND GUIDE**

For each Standard, provide a narrative response that addresses the program’s compliance with that Standard and prepare the documents in the “Prepare to Upload” sections. The narrative statements and all requested documentation must then be uploaded to the program’s eAccreditation portal (<https://acote.aota.org>).

\*These Standards are included in the interim report.

|  |  |
| --- | --- |
| SECTION A | |
| A.1.1. Institutional Accreditation  Degree Level: All | |
| Narrative Response: | Indicate sponsoring institution’s accrediting body and year of last full accreditation review. |
| Prepare to Upload: | Documentation (e.g., institutional accreditor’s webpage, copy of accreditation certificate) that the sponsoring institution holds current accreditation from a recognized institutional accrediting agency. |
| A.1.2. Institutional Authority and Setting  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * Evidence (e.g., catalog page) that the program is located in a community, technical, junior, or senior college; university; medical school; vocational school or institution; or military institution. * Documentation that the sponsoring institution is legally authorized to provide a program of postsecondary education and holds appropriate degree granting authority. |
| A.1.3. Sponsoring Institution Responsibilities  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | Documentation in handbooks or policies and procedure manuals that the institution assumes responsibility for the program or department, including functions specified in the Standard. |
| A.1.4. Program Integrity and Policy Adherence  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | N/A |
| \*A.2.1. Program Director  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * Assignment as a full-time faculty member. * Release time from the institution that specifies the numerical release time provided (e.g., signed letter from administration, employment/annual contract, job description that specifies the percentage, credit hours compared to regular faculty hours). * Initial or current certification. * Current license for the state(s) in which the program is located or evidence of regulation otherwise in accordance with regulations in the state(s) or jurisdiction(s) in which the program is located. * Diploma or transcript indicating the highest degree level obtained from an accredited institution. * Curriculum vitae indicating work history, experience as an occupational therapy practitioner, description of administrative experiences and duties, evidence of scholarship (as defined in the Standards Glossary), and years of experience in an academic appointment with teaching responsibilities at the postsecondary level. * Position description indicating responsibility for all aspects of management and administration of the program, including planning, evaluation, budgeting, selection of faculty and staff, maintenance of accreditation, and commitment to strategies for professional development. |
| \*A.2.2. Program Director and Faculty Qualifications  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * Upload evidence as required by the Standard. * Update the faculty profiles in the "FACULTY" tab for the program director and all faculty involved in the program to document evidence of academic preparation, practice experience, related experience, or continuing education for specified teaching responsibilities. |
| \*A.2.3. Academic Fieldwork Coordinator  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * Assignment as a full-time faculty. * Release time from the institution that specifies the numerical release time provided (e.g., signed letter from administration, employment/annual contract, job description that specifies the percentage, credit hours compared to regular faculty hours). * Current license for the state(s) in which the program is located or evidence of regulation otherwise in accordance with regulations in the state(s) or jurisdiction(s) in which the program is located. * Diploma or transcript indicating the highest degree level obtained from an accredited institution. * Documentation of the years of clinical experience and fieldwork education. * Position description indicating responsibility for fieldwork. |
| \*A.2.4. Doctoral Capstone Coordinator  Degree Level: OTD | |
| Narrative Response: |  |
| Prepare to Upload: | * Documentation of full time appointment and responsibility for the capstone program. * Release time from the institution that specifies the numerical release time provided (e.g., signed letter from administration, employment/annual contract, job description that specifies the percentage, credit hours compared to regular faculty hours). * Current license for the state(s) in which the program is located. * Diploma or transcript indicating the highest degree level obtained from an accredited institution. * Documentation of the years of clinical experience, teaching at a post-secondary level, and scholarship. |
| \*A.2.5. OT and OTA Faculty License and Faculty Degrees  Degree Level: All | |
| Narrative Response |  |
| Prepare to  Upload: | * Copy of the current occupational therapy license for all core faculty who are occupational therapy practitioners and teaching occupational therapy content |
| \*A.2.6. Site Coordinator  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * Full-time appointment. * Current license for the state(s) in which the program is located. * Official documentation detailing responsibilities of the site coordinator at each accredited location where the program is offered. |
| \*A.2.7. Sufficient Faculty  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * List of faculty at each location where the program is offered, including degree held, and FTE designation of each faculty member. * Curriculum vitae for all faculty involved in the program. * Evidence that the faculty reflect institutional recruitment and hiring policies regarding diversity, equity, inclusion, and justice. |
| \*A.2.8. Clerical and Support Staff  Degree Level: All (If the program is offered at one or more additional accredited locations) | |
| Narrative Response: | * Explain how the support provided is in alignment with institutional practice and is equally reflective of the support provided to other programs similar to the program at the institution * Describe the support provided for distance learning technology if any portion of the program is offered by distance education. |
| Prepare to Upload: | * Documentation (e.g., job description) for the clerical and support staff provided to the program. |
| A.2.9. Budget  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * Complete the Financial Resources Form to provide the program's 3-year budget for the previous year, present year, and next year (estimated) and upload any additional information in the "Supporting Materials". |
| A.2.10. Adequate Space  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * A floor plan indicating the classroom and laboratory space, including designated space to store and secure equipment and supplies, office space for the program director and faculty, and space for private advising of students. * Documentation that classroom and laboratory space provided by the institution is assigned to the program on a priority basis. * If applicable, a written and signed agreement to ensure assignment of space for program use that is provided by another institution or agency. |
| A.2.11. Equipment, Supplies, and Evaluative and Treatment Methodologies  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * An inventory list of equipment, supplies, and evaluative and treatment methodologies available to the program. |
| \*A.2.12. Resources, Reference Materials, Instructional Aids, and Technology  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * A list of current and relevant books, journals, periodicals, computers, software, other reference materials, online services, and instructional aids and technology that are available to the program at all locations. |
| \*A.2.13. Distance Education Delivery Model  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * Documentation of the process through which the program will verify the identity of the student (e.g., in-person proctored examinations, audio/video conferencing using a webcam and live proctors, biometric/hardware scanning using fingerprint, eye, typing pattern or digital photograph recognition, challenge questions based on third party data). * Documentation of available technology and resources to support a distance learning environment. * A process to ensure that faculty are adequately trained and skilled to use distance education methodologies. |
| \*A.3.1. Admission Criteria  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | Published program admission materials (e.g., program brochure/flyer, website, catalog). |
| \*A.3.2. Admission Policies  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * Standards for admission, advanced placement, transfer of credit, credit for experiential learning (if applicable), and prerequisite educational or work experience requirements (e.g., program brochure/flyer, website, catalog). * Evidence that the admissions process aligns with the institutional mission and vision and reflect efforts to recruit and admit a diverse student population as defined by the program. |
| \*A.3.3. Criteria for Successful Completion  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * Documentation (e.g., handbook, catalog) that includes the criteria for successful completion of each segment of the program and for graduation (e.g., courses, credits, retention criteria, retention grade point). * A statement that all Level II fieldwork and/or the doctoral capstone/baccalaureate project must be completed within a time frame established by the program. |
| \*A.3.4. Student Support Services  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * Documentation that includes a description of available support services as required by the Standard. |
| \*A.3.5. Student Advising by Faculty  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * Documentation of a process for student advisement. * Evidence that advisement occurs on a regular basis. |
| \*A.4.1. Accurate Program Publications  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | Publications and advertising related to the program (e.g., catalog, handbook, website, brochure/flyer). |
| \*A.4.2. Publication of Program Outcomes  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | A screenshot of the program's webpage where outcomes are reported to stakeholders. |
| \*A.4.3. Publication of ACOTE Information  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | Evidence that all publications include accurate ACOTE information. |
| \*A.4.4. Published Policies and Procedures  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | A copy of the institutions or program’s published policies and procedures as identified in the Standard. |
| \*A.4.5. Progression, Retention, Graduation, Certification, and Credentialing Requirements  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | Publications that include progression, retention, graduation, certification, and credentialing requirements, including documentation of a statement on the program's website about the potential impact of a felony conviction on a graduate's eligibility for certification and credentialing. |
| \*A.4.6. Student Records  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | Documentation of the institution's records retention policies that address the requirements of the Standard. |
| A.5.1. Curriculum – Preparation to Practice as a Generalist  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * A list indicating which courses address current practice settings and which courses address emerging practice areas. * A list indicating which courses prepare students to work with infants, children, adolescents, adults, and older adults. * A list indicating which courses prepare students to work in areas of physical and mental health. |
| \*A.5.2. Program Length  Degree Level: All | |
| Narrative Response: | Provide a narrative response explaining the system and rationale (e.g., standards for graduate education, comparability across institutions, comparability within the institution) for determining that the length of study is appropriate to the expected learning objectives and competence of the graduate. |
| Prepare to Upload: | N/A |
| \*A.5.3. Program Mission and Philosophy  Degree Level: All | |
| Narrative Response: | * How the program's mission is consistent with and supportive of the mission of the sponsoring institution. * The unique nature of the program and how it helps fulfill or advance the mission of the sponsoring institution, including religious missions. * How the philosophy statement reflects the current published philosophy of the profession and the program’s fundamental beliefs about human beings and how they learn. |
| Prepare to Upload: | * Mission statement of the program that addresses the requirements of the Standard. * Mission statement of the sponsoring institution. * Program's statement of philosophy. |
| \*A.5.4. Curriculum Design  Degree Level: All | |
| Narrative Response: | Describe the process for ensuring all faculty members understand how the courses they teach relate and support the program's curriculum design |
| Prepare to Upload: | * Major content areas (e.g., threads or themes) to be taught in the curriculum. * Content themes are consistent with the program's mission statement and reflect the essential concepts of the profession's philosophy of occupational therapy. * Content (e.g., threads or themes) and program's beliefs about learning clearly demonstrate the rationale for courses offered, sequencing of courses, and evaluation strategies. * Student learning outcomes (goals) are stated for the curriculum content themes. * Content threads show the scope (depth and breadth) of the program offered. * How the instructional design reflects the curriculum and ensures appropriate content delivery is included. * How to curriculum design provides the basis for program planning, implementation, and evaluation. |
| \*A.5.5. Written Syllabi and Assessment Strategies  Degree Level: All | |
| Narrative Response: | A brief statement of how each course that appears in the Curriculum tab relates to the curriculum design. |
| Prepare to Upload: | * Complete the Course Summary form (embedded in the curriculum tab) and upload the related syllabi that include course objectives, learning activities, and instructional methods and materials. (NOTE: Level II fieldwork or the doctoral capstone experience and project syllabi may not be used to document compliance with a B Standard). * In each Course Summary, link up to 3 courses that best exhibit coverage of each content Standard. A maximum of 3 courses can be linked to each Standard. Once linked, those courses will automatically populate the Courses section under each B Standard. |
| \*A.6.1. Strategic Plan  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | The program’s current strategic plan (see Strategic Plan template) that includes all of the requirements of the Standard. |
| \*A.6.2. Professional Development Plans  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | Copies of current signed professional development plans (see Professional Development Plan template) for the program director and each faculty member who teaches two or more courses. |
| \*A.6.3. Program Evaluation  Degree Level: All | |
| Narrative Response: |  |
| Prepare to Upload: | * Program evaluation plan and summary report that includes all of the requirements of the Standard. * Documentation that as a result of the program evaluation findings, the items identified on the action plan resulted in changes made to some components of the program (e.g., strategic plan, curriculum design, curriculum content, or course content). |
| \*A.6.4. Certification Exam Pass Rate  Degree Level: All | |
| Narrative Response: | Provide a summary of the average pass rate over the 3 most recent calendar years under "Compliance Statement". |
| Prepare to Upload: | A Copy of NBCOT’s report of the program’s most recent 3-year exam pass rate data. |
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| A.6.5. Graduation Rates  Degree Level: All | | |
| Narrative Response: | | Provide a summary of the average program graduation rate over the 3 most recent calendar years. |
| Prepare to Upload: | | Upload an institutional document that supports the data. |

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| **SECTION B** | |
| **B.1.1. Human Body, Development, and Behavior**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.1.2. Sociocultural, Socioeconomic, and Diversity Factors; and Lifestyles**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.1.3. Social Determinants of Health**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.1.4. Quantitative Statistics and Qualitative Analysis**  Degree Level: OTD, OTM | |
| Narrative: |  |
| Course # |  |
| **B.2.1. Scientific Evidence, Theories, Models of Practice, and Frames of Reference**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.2.2. OT History, Philosophical Base, Theory, and Sociopolitical Climate**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.2.3. Interaction of Occupation and Activity**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.2.4. Communicate the Distinct Nature of Occupation**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.2.6. Effects of Disease Processes**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.2.7. Activity Analysis**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.2.8. Safety of Self and Others**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **\*B.2.9. Personal and Professional Responsibilities**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **\*B.2.10. Ethics and Professional Interactions**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **\*B.2.11. Leadership**  Degree Level: All | | |
| Narrative: | |  |
| Course # | |  |
|  | | |
| **\*B.2.12. Principles of Instructional Design**  Degree Level: All | | |
| Narrative: | |  |
| Course # | |  |
| **B.3.1. Therapeutic Use of Self**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.2. Professional Reasoning**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.3. Standardized and Nonstandardized Screening and Assessment Tools**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.4. Application of Assessment Tools and Interpretation of Results**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.5. Reporting Data**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.6. Provide Interventions and Procedures**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.7. Need for Continued or Modified Intervention**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.8. Grade and Adapt Processes or Environments**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.9. Establish, Restore, and Modify**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.10. Plan for Discharge**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.11. Community Mobility**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.12. Functional Mobility**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.13. Dysphagia and Feeding**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.14. Superficial Thermal, Deep Thermal, and Electrotherapeutic Agents and Mechanical Devices**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.15. Assistive Technologies and Devices**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.16. Orthoses and Prosthetic Devices**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.17. Referral to Specialists**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.18. Technology in Practice**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.19. Teaching–Learning Process and Health Literacy**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.20. Community and Primary Care Programs**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.21. Effective Communication**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.3.22. Principles of Interprofessional Team Dynamics**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.4.1. Factors, Policy Issues, and Social Systems**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.4.2. Advocacy**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.4.3. Documentation of Services**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.4.4. Business Aspects of Practice**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.4.5. Requirements for Credentialing and Licensure**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.4.6. Care Coordination, Case Management and Consultation**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.4.7. Evolving Service Delivery Models**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.4.8. Quality Management and Improvement**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.4.9. Supervision of Personnel**  Degree Level: All | | |
| Narrative: | |  |
| Course # | |  |
| **\*B.5.1. Evidence Synthesis / Professional Literature and Scholarly Activities**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.5.2. Scholarly Study**  Degree Level: OTD, OTM | |
| Narrative: |  |
| Course # |  |
| **B.5.3. Quantitative and Qualitative Methods**  Degree Level: All | |
| Narrative: |  |
| Course # |  |
| **B.5.4. Ethical Policies and Procedures for Research**  Degree Level: OTD, OTM | |
| Narrative: |  |
| Course # |  |

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| SECTION C | | |
| \*C.1.1. Fieldwork Program Reflects the Curriculum Design  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | Documentation of how the fieldwork program reflects the sequence and scope of content in the curriculum design. | |
| \*C.1.2. Student access to Fieldwork Site Information  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | Evidence that supports the process (policies, procedures, handbook, etc.). | |
| \*C.1.3. Fieldwork Objectives  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | Upload documentation under supporting material. | |
| C.1.4. Sufficient Fieldwork Agreements  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | Using the "Fieldwork Sites" tab above, prepare a list of fieldwork sites that have been used in the most recent 3 years of Level I and Level II fieldwork placements or upload the list of fieldwork sites as a sortable Excel spreadsheet under the "Supporting Material" section. | |
| \*C.1.5. Level I and II Fieldwork Selection Process and Written Agreements  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | * Documentation of the process and criteria for selecting fieldwork sites. * Documentation of the process for ensuring that valid written agreements are in effect and signed by both parties prior to the onset and through the duration of the Level I and Level II fieldwork experiences. * A sample copy of a current written agreement for a Level I and Level II fieldwork site. | |
| \*C.1.6. Fieldwork in Mental Health, Behavioral Health, or Psychosocial Factors  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | Documentation that at least one fieldwork experience (either Level I or Level II) has a primary focus on the role of occupational therapy practitioners addressing mental health, behavioral health, or psychosocial aspects of client performance to support their engagement in occupations (student objectives, assignments, etc.). | |
| \*C.1.7. Ratio of Fieldwork Educators to Students  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | Documentation of the ratio of fieldwork educators is appropriate to ensure proper supervision and frequent assessment of progress. | |
| \*C.1.8. Evaluating the Effectiveness of Supervision  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | * Documentation of how the fieldwork supervision is evaluated. * Documentation of the process for the educational program providing support to enhance fieldwork educator supervision. | |
| C.1.9. Communication of Student Progress  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | * A process for communication with the student and fieldwork educator as required by the Standard. * All aspects of the student’s progress and performance are addressed and the fieldwork educator is aware of resources that support student well-being. | |
| \*C.1.10. Qualified Level I Fieldwork Educators  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | Documentation that all personnel who supervise Level I fieldwork are educated in and informed of the curriculum and fieldwork program design and how this is accomplished, as well as the supervisor's acknowledgement of their ability to support the fieldwork experience. Acknowledgement must occur prior to the commencement of the fieldwork experience. | |
| \*C.1.11. Level I Fieldwork  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | * Documentation of all Level I fieldwork experiences that are provided to students, including mechanisms for formal evaluation of student performance and means of ensuring that Level I fieldwork is not substituted for any part of Level II fieldwork. * Documentation that all students have similar Level I fieldwork experiences (e.g., learning activities, objectives, assignments, and outcome measures). | |
| \*C.1.12. Length of Level II Fieldwork  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | * A documented policy requiring a minimum of 24 weeks' full-time Level II fieldwork, which may be completed on a part-time basis as long as it is at least 50% of an FTE at that site. Documentation should include whether or not a student can complete Level II fieldwork in a minimum of one setting if it is reflective of more than one practice area, or in a maximum of four different settings. | |
| C.1.13. Qualified Level II Fieldwork Educators  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | * Documentation of the process for ensuring that each supervising therapist is a currently licensed or otherwise regulated occupational therapist who has a minimum of 1 year full-time (or its equivalent) of practice experience as a licensed or otherwise regulated occupational therapist prior to the onset of the Level II fieldwork. * Documentation of the process for ensuring that each supervising therapist is adequately prepared to serve as a fieldwork educator prior to the Level II fieldwork. | |
| C.1.14. Level II Fieldwork Supervision  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | Evidence that demonstrates Level II fieldwork supervision is direct and then decreases as appropriate. | |
| C.1.15. Evaluation of Student Performance on Level II Fieldwork  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | Documentation of the evaluation mechanisms used for Level II fieldwork (e.g., program handbook, fieldwork handbook). | |
| \*C.1.16. Fieldwork Supervision Where No OT Services Exist  Degree Level: All | | |
| Narrative Response: |  | |
| Prepare to Upload: | Documentation of a plan for supervision where no occupational therapy services exist. | |
| SECTION D | |
| \*D.1.1. Collaboration for Designing the Doctoral Capstone/ \*D.1.1. Collaboration for Designing the Baccalaureate Project  Degree Level: OTD, OTA-B | |
| Narrative Response: |  |
| Prepare to Upload: | Evidence of how collaboration occurs between the individuals as required by the Standard. |
| D.1.2. Content Expert for Doctoral Capstone/ D.1.2. Content Expert for Baccalaureate Project  Degree Level: OTD, OTA-B | |
| Narrative Response: |  |
| Prepare to Upload: | * Evidence that the content expert is informed of the plan. * Evidence that the content expert has the expertise (i.e. CV). |
| \*D.1.3. Design and Preparation of Doctoral Capstone/ \*D.1.3. Design and Preparation of Baccalaureate Project  Degree Level: OTD, OTA-B | |
| Narrative Response: |  |
| Prepare to Upload: | * OTD: Documentation that the doctoral capstone experience is an integral part of the curriculum design, meets the requirement of the Standard, and is started after completion of all coursework and level II fieldwork. * OTA-B: Documentation that the baccalaureate project is an integral part of the curriculum design and meets the requirement of the Standard. |
| \*D.1.4. Experiential Plan and Written Agreements for Doctoral Capstone  Degree Level: OTD | |
| Narrative Response: |  |
| Prepare to Upload: | * Evidence that the program has a process for ensuring that valid written agreements are in effect and signed by both parties prior to and for the duration of the capstone experience. * Evidence that there is a valid plan for the capstone experience that meets all the requirements of the Standard. |
| \*D.1.5. Length of Doctoral Capstone Experience  Degree Level: OTD | |
| Narrative Response: |  |
| Prepare to Upload: | * Documentation that the length of the doctoral experience meets the requirement of the Standard. * Documentation that prior fieldwork or work experience is not substituted for the doctoral capstone experience. |
| \*D.1.6. Doctoral Capstone Project/ \*D.1.6. Baccalaureate Project  Degree Level: OTD, OTA-B | |
| Narrative Response: |  |
| Prepare to Upload: | Documentation of how the projects are completed and disseminated. |
| \*D.1.7. Evaluation of Doctoral Capstone Experiences/ \*D.1.7. Evaluation of Baccalaureate Project  Degree Level: OTD, OTA-B | |
| Narrative Response: |  |
| Prepare to Upload: | Documentation of the mechanism utilized for objective evaluation of the student’s performance during and at the completion of the doctoral capstone experience. |