

**OTA ASSOCIATE-DEGREE-LEVEL**

**SELF-STUDY GUIDE**

 **2018 STANDARDS**

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**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 precede 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 assistant 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 of 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 of 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 actually 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

* Select members
* Elect/appoint chairperson

 **SECOND MONTH**

(1) Draft plan

(2) Name subcommittees and/or individuals to be charged with tasks

 **THIRD TO SIXTH MONTHS**

(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 MONTHS**

(1) Post tentative on-site schedule in ACOTE Online

(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:

**1. OVERVIEW**

 Provide an overview of the program organized using the headings below. Respond within the provided narrative box.

* Overview: size of the school, location (rural or urban), sponsorship (public or private and by whom), 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
* Number of student cohorts, number of students in each cohort, and start dates
* Length of the program
* Current staffing pattern
* Institutional support and approval
* Significant findings from the entire self-study process, including strengths and concerns

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

**2. 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.

**3. STANDARDS SECTION B**

a. For all of the B content Standards:

* Complete the Course Summary form in the “Curriculum” tab and upload the related syllabi that include course objectives, learning activities, and instructional methods and materials. (NOTE: Level II fieldwork 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, summarize how the program meets each B Standard.
* In the "Supporting Material" section, upload an example of a learning activity used to teach the content of this Standard and a specific example to document the assessment measure(s) used to meet this Standard (e.g., sample assignment, test question, project, etc.).

b. In the “Compliance Statement” box of Standard A.5.7, include a brief statement of how each course that appears in the "Curriculum" tab relates to the curriculum design.

**4. 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.

|  |
| --- |
| **Informative Official Documents** |

**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

**Authors**

Temor Amin-Arsala, MS, OTR/L

Nancy Carson, PhD, OTR/L, FAOTA

Tina DeAngelis, EdD, OTR/L

Deborah Fitzcharles, MSHS, COTA

Lenin C. Grajo, PhD, EdM, OTR

Susan Higgins, OTD, OTR/L

Douglene Jackson, PhD, OTR/L, LMT

Julie McLaughlin Gray, PhD, OTR/L, FAOTA

Kim Qualls, OTD, MS, OTR/L

Michele Stoll, BS, COTA, CMT

Neil Harvison, PhD, OTR, FAOTA, AOTA *Staff Liaison*

**for**

**The Commission on Education:**

Steven Taff, PhD, OTR/L, FAOTA, *Chairperson*

*Adopted by the Representative Assembly Coordinating Council for the Representative Assembly, 2018*

*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. (2018). Philosophy of occupational therapy education.

*American Journal of Occupational Therapy, 72*(Suppl. 2), 7212410070. 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.

Authors

The Commission on Education

Steven Taff, PhD, OTR/L, FAOTA, Chairperson (2016–2019)

Temor Amin-Arsala

Nancy Carson, PhD, OTR/L, FAOTA

Tina DeAngelis, EdD, OTR/L

Deborah FitzCharles, MSHS, COTA

Lenin C. Grajo, PhD, EdM, OTR

Susan Higgins, OTD, OTR/L

Douglene Jackson, PhD, OTR/L, LMT

Julie McLaughlin Gray, PhD, OTR/L, FAOTA

Maureen S. Nardella, MS, OTR/L, FAOTA

Michele Stoll, BS, COTA, CMT

Neil Harvison, PhD, OTR, FAOTA, AOTA Staff Liaison

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.2011. 65S65](https://doi.org/10.5014/ajot.2011.%2065S65)

Copyright © 2017 by the American Occupational Therapy Association.

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.716S06

**OTA ASSOCIATE-DEGREE-LEVEL STANDARDS**

**SECTION A: GENERAL REQUIREMENTS**

**OTA ASSOCIATE-DEGREE-LEVEL STANDARDS SECTION A: GENERAL REQUIREMENTS**

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 should then be uploaded to ACOTE Online (<https://acote.aota.org>).

|  |
| --- |
| SECTION A: GENERAL REQUIREMENTS |
| *A.1.0. SPONSORSHIP AND ACCREDITATION* |
| *A.1.1. Institutional Accreditation* | *The sponsoring institution(s) and affiliates, if any, must be accredited by a recognized regional or national accrediting authority.* |
| Narrative Response: | (Indicate the sponsoring institution’s accrediting body and year of last full accreditation review). |
| Prepare to Upload: | Documentation (e.g., printout of institutional accreditor's webpage, copy of accreditation certificate) that the sponsoring institution holds current accreditation from a recognized regional or national accrediting authority. |
| *A.1.2. Institutional Authority* | *Sponsoring institution(s) must be authorized under applicable law or other acceptable authority to provide a program of postsecondary education and have appropriate degree-granting authority, or the institution must be a program offered within the military services.* |
| Narrative Response: |  |
| Prepare to Upload: | Documentation that the sponsoring institution is legally authorized to provide a program of postsecondary education and holds degree-granting authority that is appropriate to the degree offered. |
| *A.1.3. Institutional Setting* | *Accredited occupational therapy assistant educational programs must be established in community, technical, junior, and senior colleges; universities; medical schools; vocational schools or institutions; or military institutions.* |
| 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. |
| *A.1.4. Sponsoring Institution Responsibili-ties* | *The sponsoring institution(s) must assume primary responsibility for appointment of faculty, admission of students, and curriculum planning at all locations where the program is offered. This would include course content, satisfactory completion of the educational program, and granting of the degree. The sponsoring institution(s) must also be responsible for the coordination of classroom teaching and supervised fieldwork practice and for providing assurance that the practice activities assigned to students in a fieldwork setting are appropriate to the program.* |
| 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.1.5. Notification Requirements* | *The program must** *Inform ACOTE of the transfer of program sponsorship or change of the institution’s name within 30 days of the transfer or change.*
* *Inform ACOTE within 30 days of the date of notification of any adverse accreditation action taken to change the sponsoring institution’s accreditation status to probation or withdrawal of accreditation.*
* *Notify and receive ACOTE approval for any significant program changes prior to the admission of students into the new/changed program.*
* *Inform ACOTE within 30 days of the resignation of the program director or appointment of a new or interim program director.*
* *Pay accreditation fees within 90 days of the invoice date.*
* *Submit a Report of Self-Study and other required reports (e.g., Interim Report, Plan of Correction, Progress Report) within the period of time designated by ACOTE. All reports must be complete and contain all requested information.*
* *Agree to a site visit date before the end of the period for which accreditation was previously awarded.*
* *Demonstrate honesty and integrity in all interactions with ACOTE.*
* *Comply with the current requirements of all ACOTE policies.*
 |
| Narrative Response: |  |
| Prepare to Upload: | Documentation of the program’s policies/procedures/processes for maintaining compliance with the requirements of this Standard. |
| *A.2.0. ACADEMIC RESOURCES* |
| *A.2.1. Program Director* | *The program must identify an individual as the program director who is assigned to the occupational therapy educational program as a full-time core faculty member as defined by ACOTE. The director may be assigned other institutional duties that do not interfere with the management and administration of the program. The institution must document that the program director has sufficient release time to ensure that the needs of the program are being met.****The program director must be an initially certified occupational therapist or occupational therapy assistant who is licensed or otherwise regulated according to regulations in the state(s) or jurisdiction(s) in which the program is located. The program director must hold a minimum of a master’s degree awarded by an institution that is accredited by a regional accrediting body recognized by the U.S. Department of Education (USDE). The master’s degree is not limited to a master’s degree in occupational therapy. For degrees from institutions in countries other than the United States, ACOTE will determine an alternative and equivalent external review process.****The program director must have a minimum of 5 years of documented experience in the field of occupational therapy. This experience must include:** *Clinical practice as an occupational therapist or occupational therapy assistant.*
* *Administrative experience including, but not limited to, program planning and implementation, personnel management, evaluation, and budgeting.*
* *Scholarship (e.g., scholarship of application, scholarship of teaching and learning).*
* *Understanding of and experience with occupational therapy assistants.*
* *At least 2 years of experience in a full-time academic appointment with teaching responsibilities at the postsecondary level.*

*The program director must be responsible for the 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. The program director position cannot be shared.* |
| Narrative Response: |  |
| Prepare to Upload: | * Documentation that the program director is assigned as a full-time core faculty member to the occupational therapy educational program and evidence of release time provided for that position. Release time documentation must be from the institution (e.g., signed letter from administration, employment/annual contract, job description). The document must specify the numerical release time provided (e.g., percentage, credit hours compared to regular faculty hours).
* Documentation of the program director's initial or current certification.
* Copy of the program director's current occupational therapy license for the state(s) in which the program is located.
* Copy of the program director's diploma or transcript indicating the highest degree level obtained from a regionally accredited institution.
* The program director’s curriculum vitae indicating work history, experience as an occupational therapist or occupational therapy assistant in practice, description of administrative experiences and duties, evidence of scholarship (as defined in the Standards Glossary), and years of experience in a full-time academic appointment with teaching responsibilities at the postbaccalaureate level.
* A complete position description for the program director that clearly indicates 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. FTE Faculty Composition* | *The program must have at least two full-time equivalent (FTE) faculty positions at each accredited location where the program is offered. At a minimum, each program must have a core faculty who is an occupational therapist and a core faculty who is an occupational therapy assistant.* |
| Narrative Response: |  |
| Prepare to Upload: | * Documentation of two full-time equivalent faculty positions at each accredited location.
* Documentation that at minimum, there is one core faculty member who is primarily practicing as an occupational therapist and one core faculty member who is primarily practicing as an occupational therapy assistant. For the purpose of this Standard, practice is considered either OT/OTA clinical practice or OT/OTA education.
 |
| *A.2.3.Program Director and Faculty Qualifications* | *The program director and faculty must possess:** *The academic and experiential qualifications and backgrounds (identified in documented descriptions of roles and responsibilities) that are necessary to meet program objectives and the mission of the institution.*
* *Documented expertise in their area(s) of teaching responsibility and knowledge of the content delivery method (e.g., distance learning). Evidence of expertise in teaching assignments might include documentation of continuing professional development, relevant experience, faculty development plan reflecting acquisition of new content, incorporation of feedback from course evaluations, and other sources.*
* *The expertise necessary to ensure appropriate curriculum design, content delivery, and program evaluation.*
 |
| Narrative Response: |  |
| Prepare to Upload: | * Documentation that the faculty as a whole possesses the qualifications and backgrounds necessary to meet program objectives and the mission of the institution. In the compliance statement response box, provide a summary of program faculty, their degrees, the courses they are teaching, and their areas of expertise.
* Ensure that the Faculty Profiles in the "FACULTY" tab for the program director and all occupational therapy assistant faculty involved in the program document evidence of academic preparation, practice experience, related experience, or continuing education for specified teaching responsibilities. If the program uses distance learning, evidence of experience or training in distance learning must also be documented.
 |
| *A.2.4. Academic Fieldwork Coordinator* | *The program must identify an individual for the role of academic fieldwork coordinator who is specifically responsible for the program’s compliance with the fieldwork requirements of Standards Section C.1.0 and is assigned to the occupational therapy educational program as a full-time core faculty member as defined by ACOTE. The academic fieldwork coordinator may be assigned other institutional duties that do not interfere with the management and administration of the fieldwork program. The institution must document that the academic fieldwork coordinator has sufficient release time and support to ensure that the needs of the fieldwork program are being met.**This individual must be an occupational therapist or occupational therapy assistant who is licensed or otherwise regulated according to regulations in the state(s) or jurisdiction(s) in which the program is located. The academic fieldwork coordinator must have at least 2 years of clinical practice experience as an occupational therapist or occupational therapy assistant and hold a minimum of a baccalaureate degree awarded by an institution that is accredited by a USDE-recognized regional or national accrediting body. For degrees from institutions in countries other than the United States, ACOTE will determine an alternative and equivalent external review process.* |
| Narrative Response: |  |
| Prepare to Upload: | * Official documentation detailing responsibilities of the academic fieldwork coordinator that reflects all requirements of the Standard, including full-time core faculty status and an indication of release time provided for that position. Release time documentation must be from the institution (e.g., signed letter from administration, employment/annual contract, job description). The document must specify the numerical release time provided (e.g., percentage, credit hours compared to regular faculty hours).
* Copy of the academic fieldwork coordinator's current occupational therapy or occupational therapy assistant license for the state(s) in which the program is located.
* Documentation of the academic fieldwork coordinator's years of clinical experience as an occupational therapist or occupational therapy assistant.
* Copy of the academic fieldwork coordinator's diploma or transcript indicating the highest degree level obtained from a regionally or nationally accredited institution.
 |
| *A.2.6.Licensed OT and OTA Faculty* | *Core faculty who are occupational therapy practitioners and teaching occupational therapy content must be currently licensed or otherwise regulated in the state or jurisdiction as an occupational therapist or occupational therapy assistant.* *Faculty in residence and teaching at additional locations must be currently licensed or otherwise regulated according to regulations in the state(s) or jurisdiction(s) in which the additional location is located.**For programs outside of the United States or its jurisdictions, core faculty who are occupational therapists or occupational therapy assistants and who are teaching occupational therapy content must be currently licensed or regulated in accordance with their country’s regulations.* |
| 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.2.7.Faculty Degrees* | *All full-time core faculty who are occupational therapy practitioners teaching in the program must hold a minimum of a baccalaureate degree awarded by an institution that is accredited by a USDE-recognized regional or national accrediting body. The degrees are not limited to occupational therapy.**For degrees from institutions in countries other than the United States, ACOTE will determine an alternative and equivalent external review process.* |
| Narrative Response: |  |
| Prepare to Upload: | * List of full-time core faculty members indicating their highest obtained degree.
* Copy of each full-time core faculty members' diploma or transcript indicating the highest degree level obtained from a regionally or nationally accredited institution.
 |
| *A.2.8.Site Coordinator* | *For programs with additional location(s), the program must identify a full-time core faculty member who is an occupational therapy practitioner as site coordinator at each location who is responsible for ensuring uniform implementation of the program and ongoing communication with the program director.* |
| Narrative Response: |  |
| Prepare to Upload: | (If the program is offered at one or more additional accredited locations) * Official documentation detailing responsibilities of the site coordinator at each accredited location where the program is offered.
* Copy of the site coordinator’s current occupational therapy or occupational therapy assistant license for the state(s) in which the additional location is located.
* Copy of the site coordinator's diploma or transcript indicating the highest degree level obtained from an accredited institution.
 |
| *A.2.9. Sufficient Faculty* | *The occupational therapy assistant faculty at each location where the program is offered must be sufficient in number to ensure appropriate curriculum design, content delivery, and program evaluation. Multiple adjuncts, part-time faculty, or full-time faculty may be configured to meet this goal.* |
| 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 OTA program.
 |
| *A.2.10.Clerical and Support Staff* | *Clerical and support staff must be provided to the program, consistent with institutional practice, to meet programmatic, administrative, and fieldwork requirements, including support for any portion of the program offered by distance education.* |
| Narrative Response: |  |
| Prepare to Upload: | * Documentation (e.g., job description) for the clerical and support staff provided to the OTA program.
* In the narrative, please 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 OTA program at the institution. In addition, please describe the support provided for distance learning technology if any portion of the program is offered by distance education.
 |
| *A.2.11.Budget* | *The program must be allocated a budget of regular institutional funds, not including grants, gifts, and other restricted sources, sufficient to implement and maintain the objectives of the program and to fulfill the program’s obligation to matriculated and entering students.* |
| Narrative Response: |  |
| Prepare to Upload: | Provide a narrative response indicating whether sufficient institutional funds are budgeted and available to fulfill the objectives of the program and meet the needs of the students. Complete the Financial Resources Form to provide the program's 3-year budget for the previous year, present year, and next year (estimated). |
| *A.2.12.Adequate Space* | * *Adequate classroom and laboratory space, including storing and securing of equipment and supplies, must be provided by the institution and assigned to the occupational therapy assistant program on a priority basis. If laboratory space is provided by another institution or agency, there must be a written and signed agreement to ensure assignment of space for program use.*
* *The program director and faculty must have office space consistent with institutional practice.*
* *Adequate space must be provided for the private advising of students.*
 |
| Narrative Response: |  |
| Prepare to Upload: | * A floor plan indicating the classroom and laboratory space, including designated space to store and secure OTA equipment and supplies, office space for the OTA 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 OTA 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.2.13.Equipment, Supplies, and Evaluative and Treatment Methodology* | * *Appropriate and sufficient equipment and supplies must be provided by the institution for student use during the didactic, and fieldwork components of the curriculum.*
* *Students must be given access and opportunity to use the evaluative and treatment methodologies that reflect current evidence-based practice in the geographic area served by the program.*
 |
| Narrative Response: |  |
| Prepare to Upload: | * An inventory list of equipment, supplies, and evaluative and treatment methodologies available to the OTA program.
 |
| *A.2.14. Library, Reference Materials, Instructional Aids, and Technology* | * *Students must have ready access to a supply of current and relevant books, journals, periodicals, computers, software, and other reference materials needed to meet the requirements of the curriculum. This may include, but is not limited to, libraries, online services, interlibrary loan, support, and resource centers.*
* *Instructional aids and technology must be available in sufficient quantity and quality to be consistent with the program objectives and teaching methods. Student support services must also be available.*
 |
| 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 OTA program.
 |
| *A.2.15.Distance Education* | *If any portion of the program is offered through distance education, it must include:** *A process through which the program establishes that the student who registers in a distance education course or program is the same student who participates in and completes the program and receives academic credit.*
* *Technology and resources that are adequate to support a distance-learning environment.*
* *A process to ensure that faculty are adequately trained and skilled to use distance education methodologies.*

*The program must provide documentation of the processes involved and evidence of implementation.* |
| 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.3.0. STUDENTS* |
| *A.3.1.Admission Criteria* | *Admission of students to the occupational therapy assistant program must be made in accordance with the practices of the institution. There must be stated admission criteria that are clearly defined and published and reflective of the demands of the program.* |
| Narrative Response: |  |
| Prepare to Upload: | A scanned copy of published OTA program admission materials (e.g., program brochure/flyer, website, catalog). If any portion of the program is offered by distance education, include the admission criteria that inform students of technology and required competencies for those components of the program. |
| *A.3.2.Admission Policies* | *Policies pertaining to standards for admission, advanced placement, transfer of credit, credit for experiential learning (if applicable), and prerequisite educational or work experience requirements must be readily accessible to prospective students and the public.* |
| Narrative Response: |  |
| Prepare to Upload: | A scanned copy of 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). |
| *A.3.3.Credit for Previous Courses/ Work Experience* | *The program must document implementation of a mechanism to ensure that students receiving credit for previous courses and/or work experience have met the content requirements of the appropriate associate’s Standards.* |
| Narrative Response: |  |
| Prepare to Upload: | Documentation of the mechanism for giving credit for previous coursework and/or work experience and an explanation of how the program ensures that the student has met the content requirements for the relevant OTA associate’s Standards (e.g., course transfer policy, articulation agreements, review of syllabi). |
| *A.3.4.Criteria for Successful Completion* | *Criteria for successful completion of each segment of the educational program and for graduation must be given in advance to each student.* |
| 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.3.5.Evaluation on a Regular Basis* | *Evaluation must occur on a regular basis and feedback must be provided in a timely fashion in the following areas:** *Student progress*
* *Professional behaviors*
* *Academic standing*
 |
| Narrative Response: |  |
| Prepare to Upload: | * Documentation of the regular process for evaluating and monitoring students’ progress and academic standing (e.g., semester review of student grade point average).
* Documentation of evaluation on a regular basis of students’ professional behaviors.
 |
| *A.3.6.Student Support Services* | *Students must be informed of and have access to the student support services that are provided to other students in the institution. Distance students must have access to the same resources as campus students.* |
| Narrative Response: |  |
| Prepare to Upload: | Documentation (e.g., program or institution handbook) that includes a description of available support services. |
| *A.3.7.Advising by Faculty* | *Advising related to coursework in the occupational therapy assistant program, professional behaviors, and fieldwork education must be the responsibility of the occupational therapy assistant faculty.* |
| Narrative Response: |  |
| Prepare to Upload: | Documentation (e.g., handbook) that includes a description of system for advisement. |
| *A.4.0. PUBLIC INFORMATION AND POLICIES* |
| *A.4.1.Accurate Program Publications* | *All program publications and advertising—including, but not limited to, academic calendars, announcements, catalogs, handbooks, and websites—must accurately reflect the program offered.* |
| Narrative Response: |  |
| Prepare to Upload: | Scanned copies of key publications and advertising related to the OTA program (e.g., catalog, handbook, website, brochure/flyer). |
| *A.4.2.Publication of Program Outcomes* | *Accurate and current information regarding student and program outcomes must be readily available to the public on the program’s web page. At a minimum, the following data must be reported separately as well as totaled for each of the previous 3 years:** *Program graduates*
* *Graduation rates*

*The program must provide the direct link to the National Board for Certification in Occupational Therapy (NBCOT®) program data results on the program’s home page.* |
| Narrative Response: |  |
| Prepare to Upload: | Scanned copy of the program’s webpage where outcomes are reported to stakeholders. |
| *A.4.3.Publication of ACOTE Information* | *The program’s accreditation status and the name, address, and telephone number of ACOTE must be published in all of the following materials used by the institution: catalog, website, and program-related brochures or flyers available to prospective students. An active link to www.acoteonline.org must be provided on the program’s home page.* |
| Narrative Response: |  |
| Prepare to Upload: | Scanned pages from the catalog, website, and program-related brochures or flyers that include the program’s accreditation status and the name, address, telephone number, and web link of ACOTE. |
| *A.4.4.Published Policies and Procedures* | *The program must have documented policies and procedures, which are made available to students and ensure the consistent application of each of the following:** *Policy and procedures for processing student and faculty grievances must be defined and published.*
* *Student withdrawal and refunds of tuition and fees must be published and made known to all applicants.*
* *Student probation, suspension, and dismissal must be published and made known.*
* *Appropriate use of equipment and supplies and for all educational activities that have implications for the health and safety of clients, students, and faculty (including infection control and evacuation procedures) must be documented and made known.*
* *Graduation requirements, tuition, and fees must be accurately stated, published, and made known to all applicants. When published fees are subject to change, a statement to that effect must be included. This includes fees associated with distance education.*
 |
| Narrative Response: |  |
| Prepare to Upload: | * A copy of the institution’s or program’s published policies and procedures as identified in the Standard.
 |
| *A.4.5Ability to Benefit* | *A program admitting students on the basis of ability to benefit (defined by the USDE as admitting students who do not have either a high school diploma or its equivalent) must publicize its objectives, assessment measures, and means of evaluating the student’s ability to benefit.* |
| Narrative Response: |  |
| Prepare to Upload | If the program admits students on the basis of ability to benefit, a copy of the institution’s or program’s publicly available objectives, assessment measures, and means of evaluating the student’s ability to benefit. |
| *A.4.6.Progression, Retention, Graduation, Certification, and Credentialing Requirements* | *Documentation of all progression, retention, graduation, certification, and credentialing requirements must be published and made known to applicants. A statement on the program’s website about the potential impact of a felony conviction on a graduate’s eligibility for certification and credentialing must be provided.* |
| Narrative Response: |  |
| Prepare to Upload: | Scanned copies of 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.4.7.Completion in a Timely Manner* | *The program must have a documented and published policy to ensure that students complete all graduation and fieldwork requirements in a timely manner. This policy must include a statement that all Level II fieldwork must be completed within a time frame established by the program.* |
| Narrative Response: |  |
| Prepare to Upload: | A scanned copy of the policy to ensure that students complete all graduation and fieldwork requirements in a timely manner. The policy must include a statement that all Level II fieldwork must be completed within a timeframe established by the program. |
| *A.4.8.Student Records* | *Records regarding student admission, enrollment, fieldwork, and achievement must be maintained and kept in a secure setting consistent with Family Educational Rights and Privacy Act regulations. Grades and credits for courses must be recorded on students’ transcripts and permanently maintained by the sponsoring institution.* |
| Narrative Response: |  |
| Prepare to Upload: | Documentation of the institution’s records retention policies that address the requirements of the Standard. |
| *A.5.0. CURRICULUM FRAMEWORK**The curriculum framework is a description of the program that includes the program’s mission, philosophy, and curriculum design.* |
| *A.5.1.Curriculum – Preparation to Practice as a Generalist* | *The curriculum must include preparation for practice as a generalist with a broad exposure to practice settings (e.g., school, hospital, community, long-term care) and practice areas, including new and emerging areas (as defined by the program). The curriculum must prepare students to work with a variety of populations including, but not limited to, children, adolescents, adults, and older adults in areas of physical and mental health.* |
| Narrative Response: |  |
| Prepare to Upload: | * A list indicating which courses address current practice settings and which courses address new and 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.5.3.Program Length* | *The program must document a system and rationale for ensuring that the length of study of the program is appropriate to the expected learning and competence of the graduate.* |
| Narrative Response: |  |
| Prepare to Upload: | Provide a statement explaining the system and rationale (e.g., standards for professional 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. |
| *A.5.4.Program Mission and Philosophy* | *The statement of the mission of the occupational therapy assistant program must:** *Be consistent with and supportive of the mission of the sponsoring institution.*
* *Explain the unique nature of the program and how it helps fulfill or advance the mission of the sponsoring institution, including religious missions.*

*The statement of philosophy of the occupational therapy assistant program must:** *Reflect the current published philosophy of the profession.*
* *Include a statement of the program’s fundamental beliefs about human beings and how they learn.*
 |
| Narrative Response: |  |
| Prepare to Upload: | * The mission statement of the occupational therapy assistant program that addresses the requirements of the Standard.
* The mission statement of the sponsoring institution.
* The OTA program’s philosophy statement that describes the program’s definition regarding scope of occupational therapy (consistent with the current published philosophy of the profession) and describes the learning process and the program’s beliefs about how students learn.
 |
| *A.5.5.Curriculum Design* | *The curriculum design must reflect the mission and philosophy of both the occupational therapy assistant program and the institution and must provide the basis for program planning, implementation, and evaluation. The design must identify curricular threads and educational goals and describe the selection of the content, scope, and sequencing of coursework.**The instructional design must reflect the curriculum and ensure appropriate content delivery.* |
| Narrative Response: |  |
| Prepare to Upload: | The program’s curriculum design that includes the following elements:* Curriculum design identifies major content areas (e.g., “threads” or themes) to be taught in the curriculum.
* Curriculum design content themes are consistent with the program’s mission statement.
* Curriculum design content themes reflect the essential concepts of the profession’s philosophy of occupational therapy.
* Curriculum design 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.
* The curriculum design (content threads) show the scope (depth and breadth) of the program offered.
* A description of how the instructional design reflects the curriculum and ensures appropriate content delivery is included.
 |
| *A.5.6.Scholarship Agenda* | *The program must have a documented agenda of scholarship that reflects the curriculum design and mission of the program and institution.* |
| Narrative Response: |  |
| Prepare to Upload: | * A statement describing the scholarship agenda for the program and how this reflects the curriculum design and mission of the program and institution.
* Explain how the concepts of scholarship will be included in the curriculum and their relationship to the mission of the program and institution.
 |
| *A.5.7.Written Syllabi and Assessment Strategies* | *The program must have written syllabi for each course that include course objectives and learning activities that, in total, reflect all course content required by the Standards. Instructional methods (e.g., presentations, demonstrations, discussion) used to accomplish course objectives must be documented. Programs must also demonstrate the consistency between course syllabi and the curriculum design.* *Assessment strategies to assure the acquisition of knowledge, skills, attitudes, professional behaviors, and competencies must be aligned with course objectives and required for progress in the program and graduation.* |
| Narrative Response: |  |
| Prepare to Upload: | * Complete the Course Summary form in the “Curriculum” tab and upload the related syllabi that include course objectives, learning activities, and instructional methods and materials. (NOTE: Level II fieldwork 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, summarize how the program meets each B Standard.
* In the “Supporting Material” section, upload an example of a learning activity used to teach the content of this Standard and a specific example to document the assessment measure(s) used to meet the Standard (e.g., sample assignment, test question, project, etc.).
 |
| *A.6.0. STRATEGIC PLAN AND PROGRAM ASSESSMENT**For programs that are offered at more than one location, the program’s strategic plan, evaluation plan, and results of ongoing evaluation must address each program location as a component of the overall plan.* |
| *A.6.1.Strategic Plan* | *The program must document a current strategic plan that articulates the program’s future vision and scholarship agenda, which guides the program (e.g., faculty recruitment and professional growth, scholarship, changes in the curriculum design, priorities in academic resources, procurement of fieldwork sites). A program strategic plan must reflect a minimum of a 3-year period and include, but need not be limited to:** *Evidence that the plan is based on program evaluation and an analysis of external and internal environments.*
* *Long-term goals that address the vision and mission of both the institution and the program, as well as specific needs of the program.*
* *Specific measurable action steps with expected timelines by which the program will reach its long-term goals.*
* *Person(s) responsible for action steps.*
* *Evidence of periodic updating of action steps and long-term goals as they are met or as circumstances change.*
 |
| Narrative Response: |  |
| Prepare to Upload: | The program's strategic plan (see Strategic Plan Template) that addresses all of the requirements of Standard A.6.1. |
| *A.6.2.Professional Development Plans* | *The program director and each faculty member who teaches two or more courses must have a current written professional growth and development plan. Each plan must contain the signature of the faculty member and supervisor (electronic/typed signature is acceptable). At a minimum, the plan must include, but need not be limited to,** *Goals to enhance the faculty member’s ability to fulfill designated responsibilities (e.g., goals related to currency in areas of teaching responsibility, teaching effectiveness, scholarly activity).*
* *Evidence of currency in the areas of teaching responsibilities.*
* *Specific measurable action steps with expected timelines by which the faculty member will achieve the goals.*
* *Evidence of annual updates of action steps and goals as they are met or as circumstances change.*
* *Identification of the ways in which the faculty member’s professional development plan will contribute to attaining the program’s strategic goals.*
* *The individual faculty member’s designated responsibilities (e.g., every plan does not need to include scholarly activity if this is not part of the faculty member’s responsibilities).*
 |
| Narrative Response: |  |
| Prepare to Upload: | Upload a signed faculty development plan (see Professional Development Plan Template) for the program director and each faculty member who teaches two or more courses. |
| *A.6.3.Program Evaluation* | *Programs must routinely secure and document sufficient qualitative and quantitative information to allow for analysis about the extent to which the program is meeting its stated goals and objectives to inform strategic changes. This must include, but need not be limited to:** *Faculty effectiveness in their assigned teaching responsibilities.*
* *Effectiveness of instructional design.*
* *Students’ competency in professional behaviors.*
* *Students’ progression through the program.*
* *Student retention rates.*
* *Fieldwork performance evaluation.*
* *Student evaluation of fieldwork experience.*
* *Student satisfaction with the program.*
* *Graduates’ performance on the NBCOT certification exam.*
* *Graduates’ job placement and performance as determined by employer satisfaction.*

*Programs must routinely and systematically analyze data to determine the extent to which the program is meeting its stated goals and objectives. An annual report summarizing analysis of data and planned action responses must be maintained.**The results of ongoing evaluation must be appropriately reflected in the program’s strategic plan, curriculum, and other dimensions of the program.* |
| Narrative Response: |  |
| Prepare to Upload: | * The current program evaluation plan (see Program Evaluation Plan Template) that includes all of the requirements of the Standards.
* The current program evaluation report (see Program Evaluation Report Template) that includes all of the requirements of the Standards.
* 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* | *The average pass rate over the 3 most recent calendar years for graduates attempting the national certification exam within 12 months of graduation from the program must be 80% or higher (regardless of the number of attempts). If a program has fewer than 25 test takers in the 3 most recent calendar years, the program may include test takers from additional years until it reaches 25 or until the 5 most recent calendar years are included in the total. Programs that did not have candidates who sat for the exam in each of the 3 most recent calendar years must meet the required 80% pass rate each year until data for 3 calendar years are available.* |
| Narrative Response: |  |
| Prepare to Upload: | A scanned copy NBCOT’s report of the program’s most recent 3-year exam pass rate data.  |

**OTA ASSOCIATE-DEGREE-LEVEL FORMS**

**SECTION A: GENERAL REQUIREMENTS**

**FACULTY PROFILE**

*(Provide the following data in the Faculty Profile form within the FACULTY tab of ACOTE Online (*[*https://acote.aota.org*](https://acote.aota.org)*) for the program director and all OT/OTA faculty involved in the program to document evidence of academic preparation, practice experience, related experience, or continuing education for specified teaching responsibilities. If program uses distance learning, evidence of experience or training in distance learning must also be documented.)*

**Salutation (e.g., Dr., Ms., Mr.)**

**First Name:**

**Last Name:**

**Position Title (e.g., Associate Professor):**

**Faculty Credentials (e.g., PhD, OTR/L):**

**Faculty Status\*:**

 **Full-time Core Faculty**

 **Part-time Core Faculty**

 **Adjunct Faculty**

*\*(Core Faculty: Faculty members employed in the occupational therapy educational program whose job responsibilities, at a minimum, include curriculum design, teaching, and student advisement, regardless of the position title. Adjunct Faculty: Persons who are responsible for teaching or instruction on a part-time basis. These faculty are considered non-salaried, non-tenure-track faculty members who are paid for each class they teach.)*

**Primary Campus\*:**

*\*(Where faculty member spends most of his/her teaching time.)*

**Additional Campus Info (optional):**

**E-mail:**

**Gender (response optional):**

 **Male**

 **Female**

**Ethnicity (response optional):**

 **Non-Hispanic/Non-Latino**

 **Hispanic/Latino**

**Race (response optional):**

 **American Indian or Alaska Native**

 **Asian**

 **Black or African American**

 **Native Hawaiian or Other Pacific Islander**

 **White**

 **Other**

**Highest Degree Earned:**

 **Associates**

 **Bachelors**

 **Masters**

 **Doctorate**

 **Other**

 **If Other, please specify:**

**If Doctorate, Degree Type** *(Select all that apply):*

 **PhD**

 **OTD**

 **DSc**

 **EdD**

 **Other**

 **If Other, please specify:**

**Month, year highest degree was earned:**

**Institution where highest degree was earned:**

**Accrediting body of institution where highest degree was earned (select from the following):**

**a. Regional**

 Higher Learning Commission of the North Central Association of Colleges and Schools (HLC)

  Middle States Association of Colleges and Schools, Commission on Higher Education (MSCHE)

  New England Commission of Higher Education (NECHE)

  Northwest Commission on Colleges and Universities (NWCCU)

 Southern Association of Colleges and Schools, Commission on Colleges (SACS)

  Western Association of Schools and Colleges, Accrediting Commission for Community and Junior Colleges (WASC/ACCJC)

  Western Association of Schools and Colleges, Accrediting Commission for Senior Colleges and Universities (WASC/ACSCU)

**b. National**

 Accrediting Bureau of Health Education Schools (ABHES)

  Accrediting Commission of Career Schools and Colleges (ACCSC)

  Accrediting Council for Continuing Education and Training (ACCET)

  Accrediting Council for Independent Colleges and Schools (ACICS)

 Council on Occupational Education (COE)

 Distance Education Accrediting Commission (DEAC)

  New York State Board of Regents

**c. Other:**

**Professional Education and Other (list most recent first):**

**a. OT/OTA:**

**b. Other:**

**c. MAJOR non-degree postgraduate/short-term courses related to assigned responsibilities:**

**Experience:**

**a. Number of years primarily employed in practice:**

**b. Number of years primarily employed in academia:**

**c. Starting Date of Present Employment:**

**d. Date (month, year) of Initial Certification (OTR/COTA)**

**Job Responsibilities:**

**a. Teaching (list course number and name):**

**b. Non-Teaching (e.g., counseling admissions, administration, committee, community, etc.):**

**c. Work experience relevant to teaching assignments and responsibilities.***(Please include information about relevant positions, job responsibilities, and approximate time in each position):*

**d. Summary of most recent scholarly activities:**

**e. Other activities that enhance effectiveness in present position:**

**OT/OTA License(s) Held:**

|  |  |  |  |
| --- | --- | --- | --- |
| **State** | **Number** | **Degree Type (OT/OTA/Other)** | **Expiration Date** |
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**FINANCIAL RESOURCES**

***(Using the online Financial Resources Form, key in the following information):***

**1. Indicate fiscal year (e.g., October-September)**

1. **Obtain or develop a three-year budget utilizing categories appropriate to the program.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Budget Categories** | **Previous Year** | **Present Year** | **Next Year (est.)** |
|  | **FY:** | **FY:** | **FY:** |
| **Faculty Salaries and Benefits** |  |  |  |
| **Other Salaries and Benefits** |  |  |  |
| **Supplies** |  |  |  |
| **Travel for Fieldwork Coordinator** |  |  |  |
| **Travel for Continuing Education** |  |  |  |
| **Purchased Services** |  |  |  |
| **Equipment** |  |  |  |
| **Library Resources** |  |  |  |
| **Instructional Aids** |  |  |  |
| **Technology** |  |  |  |
| **Other funds\* to which the program has access**  |  |  |  |
| **\*(Specify how such funds are used)** |  |  |  |
| **TOTAL** |  |  |  |
| **% Institutional Funds** |  |  |  |
| **% Restricted Use Funds (i.e., grants, special program funds)** |  |  |  |

|  |
| --- |
| **SCHOLARSHIP AGENDA**A Scholarship Agenda captures scholarship in the areas of teaching, research, and/or service. It engages faculty in academically relevant works that simultaneously meet campus mission and goals, meet the needs of the program, and are reflected in the curriculum design. This can take a myriad of forms based on the curriculum design of the occupational therapy program. Please provide a narrative below that identifies the program’s scholarship agenda and illustrates how it aligns with the mission of the program and institution as well as the curriculum design.  |
| **School Name:**  | **Program (OT/OTA - Select one):**  |
| **Submitted By:**  | **Date:**  |
| **Title:**  |
| **Mission of the Program and Institution**  | **Curriculum Design** | **Scholarship Agenda** |
|  |  |  |

**PROGRAM STRATEGIC PLAN**

 *(Program Title)*

 *(College/University Name)*

Years: \_\_\_\_\_\_\_\_\_\_\_\_

Analysis of program evaluation, internal and external environments:

|  |  |  |  |
| --- | --- | --- | --- |
|  | Program Evaluation Results  | Internal Institutional Environment | External Environment |
| Strengths |  |  |  |
| Weaknesses |  |  |  |
| Opportunities |  |  |  |
| Threats |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Long-Term Program Goal | Action Steps | Person(s) Responsible | Due Date for Action | Results / Update |
|  |  |  |  |  |
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| --- | --- | --- | --- | --- |
| Long-Term Program Goal | Action Steps | Person(s) Responsible | Due Date for Action | Results / Update |
|  |  |  |  |  |
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**FACULTY/PROGRAM DIRECTOR PROFESSIONAL DEVELOPMENT PLAN**

*(Completed forms must be signed by both parties in order to be considered valid. Electronic/typed signature is acceptable.)*

 *(Program Title)*

 *(College/University Name)*

Name: Title:

Number of Hours worked *(FTE equivalent)*: Number of Credits Taught *(per academic year)*:

Supervisor's Signature:

 *(Signature required)* Date

Faculty/PD's Signature:

 *(Signature required)* Date

Date Developed: Date Revised:

| Connection to Program’s Strategic Plan | Goals | Action Steps To Achieve Goal | Timeline | Outcomes | Revised Goal |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |

**PROGRAM EVALUATION PLAN TEMPLATE**

| Program Goal and Related Outcomes | Measurement Criteria | Assessment Tool | Review Period | Review ProcessWho analyzes and reviews data |
| --- | --- | --- | --- | --- |
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**PROGRAM EVALUATION REPORT TEMPLATE (OTA-Associate) Year: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

| **Data** | **Analysis (Based on individual data reports for each area)** | **Action Plan** **(Changes in strategic plan, curriculum or course content)** |
| --- | --- | --- |
| Faculty effectiveness in their assigned teaching responsibilities |  |  |
| Effectiveness of instructional design |  |  |
| Students’ competency in professional behaviors |  |  |
| Students’ progression through the program |  |  |
| Student retention rates |  |  |
| Fieldwork performance evaluation |  |  |
| Student evaluation of fieldwork experience |  |  |
| Student satisfaction with the program |  |  |
| Graduates’ performance on the NBCOT certification exam |  |  |
| Graduates’ job placement and performance as determined by employer satisfaction |  |  |

**OTA ASSOCIATE-DEGREE-LEVEL STANDARDS**

**SECTION B: CONTENT REQUIREMENTS**

**COMPARISON OF COURSES TO 2018 OTA ASSOCIATE-DEGREE-LEVEL STANDARDS
SECTION B: CONTENT REQUIREMENTS**

Instructions for documenting compliance with the B content Standards in ACOTE Online (<https://acote.aota.org>):

* Complete the Course Summary form in the “Curriculum” tab and upload the related syllabi that include course objectives, learning activities, and instructional methods and materials. (NOTE: Level II fieldwork syllabi may not be used to document compliance with a B Standard. Level II fieldwork course syllabi should be uploaded under Standard C.1.1. FW Program Reflects the Curriculum Design.)
* 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, summarize how the program meets each B Standard.
* In the "Supporting Material" section, upload an example of a learning activity used to teach the content of the Standard and a specific example to document the assessment measure(s) used to meet the Standard (e.g., sample assignment, test question, project, etc.).

The following form may be used as a worksheet to identify the 1-3 courses that best exhibit coverage of each content Standard.

| **Standard** | **Title** | **2018 OTA Associate-Level Standard** | **Course #** **(Max. of 3 courses)** |
| --- | --- | --- | --- |
| **SECTION B** | **CONTENT REQUIREMENTS** **The content requirements are written as expected student outcomes. Faculty are responsible for developing learning activities and evaluation methods to document that students meet these outcomes. Level II Fieldwork, the Baccalaureate Project, or the Doctoral Capstone Experience and Project syllabi may not be used to document compliance with a section B content Standard.** |
| **B.1.0.** | **FOUNDATIONAL CONTENT REQUIREMENTS****Program content must be based on a broad foundation in the liberal arts and sciences. A strong foundation in the biological, physical, social, and behavioral sciences supports an understanding of occupation across the lifespan. If the content of the Standard is met through prerequisite coursework, the application of foundational content in the sciences must also be evident in professional coursework. The student will be able to:** |
| B.1.1. | Human Body, Development, and Behavior | Demonstrate knowledge of: * The structure and function of the human body to include the biological and physical sciences, neurosciences, kinesiology, and biomechanics.
* Human development throughout the lifespan (infants, children, adolescents, adults, and older adults). Course content must include, but is not limited to, developmental psychology.
* Concepts of human behavior to include the behavioral sciences, social sciences, and science of occupation.
 |  |
| B.1.2. | Sociocultural, Socioeconomic, Diversity Factors, and Lifestyle Choices | Explain the role of sociocultural, socioeconomic, and diversity factors, as well as lifestyle choices in contemporary society to meet the needs of persons, groups, and populations (e.g., principles of psychology, sociology, and abnormal psychology). |  |
| B.1.3. | Social Determinants of Health | Demonstrate knowledge of the social determinants of health for persons, groups, and populations with or at risk for disabilities and chronic health conditions. This must include an understanding of the epidemiological factors that impact the public health and welfare of populations. |  |
| **B.2.0.** | **OCCUPATIONAL THERAPY THEORETICAL PERSPECTIVES** **Current and relevant interprofessional perspectives including rehabilitation, disability, and developmental as well as person/population-environment-occupation models, theories and frameworks of practice. The program must facilitate the development of the performance criteria listed below. The student will be able to:** |
| B.2.1. | Scientific Evidence, Theories, Models of Practice, and Frames of Reference | Apply scientific evidence, theories, models of practice, and frames of reference that underlie the practice of occupational therapy to guide and inform interventions for persons, groups, and populations in a variety of practice contexts and environments. |  |
| B.2.2. | Theory Development | Define the process of theory development and its importance to occupational therapy. |  |
| **B.3.0.** | **BASIC TENETS OF OCCUPATIONAL THERAPY** **Coursework must facilitate development of the performance criteria listed below. The student will be able to:** |
| B.3.1.  | OT History, Philosophical Base, Theory, and Sociopolitical Climate | Apply knowledge of occupational therapy history, philosophical base, theory, and sociopolitical climate and their importance in meeting society’s current and future occupational needs as well as how these factors influence and are influenced by practice. |  |
| B.3.2. | Interaction of Occupation and Activity | Demonstrate knowledge of and apply the interaction of occupation and activity, including areas of occupation, performance skills, performance patterns, context(s) and environments, and client factors. |  |
| B.3.3. | Distinct Nature of Occupation | Explain to consumers, potential employers, colleagues, third-party payers, regulatory boards, policymakers, and the general public the distinct nature of occupation and the evidence that occupation supports performance, participation, health, and well-being. |  |
| B.3.4.  | Balancing Areas of Occupation, Role in Promotion of Health, and Prevention | Demonstrate knowledge of scientific evidence as it relates to the importance of balancing areas of occupation; the role of occupation in the promotion of health; and the prevention of disease, illness, and dysfunction for persons, groups, and populations. |  |
| B.3.5. | Effects of Disease Processes | Demonstrate knowledge of the effects of disease processes including heritable diseases, genetic conditions, mental illness, disability, trauma, and injury on occupational performance. |  |
| B.3.6. | Activity Analysis | Demonstrate activity analysis in areas of occupation, performance skills, performance patterns, context(s) and environments, and client factors to implement the intervention plan. |  |
| B.3.7. | Safety of Self and Others | Demonstrate sound judgment in regard to safety of self and others and adhere to safety regulations throughout the occupational therapy process as appropriate to the setting and scope of practice. This must include the ability to assess and monitor vital signs (e.g., blood pressure, heart rate, respiratory status, and temperature) to ensure that the client is stable for intervention. |  |
| **B.4.0.** | **SCREENING, EVALUATION, AND INTERVENTION PLANThe process of screening and evaluation as related to occupational performance and participation must be conducted under the supervision of and in cooperation with the occupational therapist and must be client centered; culturally relevant; and based on theoretical perspectives, models of practice, frames of reference, and available evidence. These processes must consider the needs of persons, groups, and populations.****INTERVENTION AND IMPLEMENTATIONThe process of intervention to facilitate occupational performance and participation must be done under the supervision of and in cooperation with the occupational therapist and must be client centered, culturally relevant, reflective of current occupational therapy practice, and based on available evidence.The program must facilitate development of the performance criteria listed below. The student will be able to:** |
| B.4.1.  | Therapeutic Use of Self | Demonstrate therapeutic use of self, including one’s personality, insights, perceptions, and judgments, as part of the therapeutic process in both individual and group interaction. |  |
| B.4.2. | Clinical Reasoning | Demonstrate clinical reasoning to address occupation-based interventions, client factors, performance patterns, and performance skills.  |  |
| B.4.3. | Occupation-Based Interventions | Utilize clinical reasoning to facilitate occupation-based interventions that address client factors. This must include interventions focused on promotion, compensation, adaptation, and prevention. |  |
| B.4.4. | Standardized and Non-standardized Screening and Assessment Tools | Contribute to the evaluation process of client(s)’ occupational performance, including an occupational profile, by administering standardized and nonstandardized screenings and assessment tools and collaborating in the development of occupation-based intervention plans and strategies.Explain the importance of using psychometrically sound assessment tools when considering client needs, and cultural and contextual factors to deliver evidence-based intervention plans and strategies.Intervention plans and strategies must be client centered, culturally relevant, reflective of current occupational therapy practice, and based on available evidence.  |  |
| B.4.6. | Reporting Data | Under the direction of an occupational therapist, collect, organize, and report on data for evaluation of client outcomes. |  |
| B.4.9. | Remediation and Compensation | Demonstrate an understanding of the intervention strategies that remediate and/or compensate for functional cognitive deficits, visual deficits, and psychosocial and behavioral health deficits that affect occupational performance. |  |
| B.4.10. | Provide Interventions and Procedures | Provide direct interventions and procedures to persons, groups, and populations to enhance safety, health and wellness, and performance in occupations. This must include the ability to select and deliver occupations and activities, preparatory methods and tasks (including therapeutic exercise), education and training, and advocacy.  |  |
| B.4.11. | Assistive Technologies and Devices | Explain the need for and demonstrate strategies with assistive technologies and devices (e.g., electronic aids to daily living, seating and positioning systems) used to enhance occupational performance and foster participation and well-being. |  |
| B.4.12. | Orthoses and Prosthetic Devices | Explain the need for orthotics, and design, fabricate, apply, fit, and train in orthoses and devices used to enhance occupational performance and participation.Train in the safe and effective use of prosthetic devices. |  |
| B.4.13. | Functional Mobility | Provide training in techniques to enhance functional mobility, including physical transfers, wheelchair management, and mobility devices. |  |
| B.4.14. | Community Mobility | Provide training in techniques to enhance community mobility, and address transportation transitions, including driver rehabilitation and community access. |  |
| B.4.15. | Technology in Practice | Demonstrate knowledge of the use of technology in practice, which must include:* Electronic documentation systems
* Virtual environments
* Telehealth technology
 |  |
| B.4.16. | Dysphagia and Feeding Disorders | Demonstrate interventions that address dysphagia and disorders of feeding and eating, and train others in precautions and techniques while considering client and contextual factors. |  |
| B.4.17. | Superficial Thermal, Deep Thermal, and Electro-therapeutic Agents and Mechanical Devices | Define the safe and effective application of superficial thermal agents, deep thermal agents, electrotherapeutic agents, and mechanical devices as a preparatory measure to improve occupational performance. This must include indications, contraindications, and precautions. |  |
| B.4.18. | Grade and Adapt Processes or Environments | Assess, grade, and modify the way persons, groups, and populations perform occupations and activities by adapting processes, modifying environments, and applying ergonomic principles to reflect the changing needs of the client, sociocultural context, and technological advances. |  |
| B.4.19. | Consultative Process | Engage in the consultative process with persons, groups, programs, organizations, or communities in collaboration with inter- and intraprofessional colleagues. |  |
| B.4.20. | Care Coordination, Case Management, and Transition Services | Understand and articulate care coordination, case management, and transition services in traditional and emerging practice environments. |  |
| B.4.21. | Teaching–Learning Process and Health Literacy | Demonstrate the principles of the teaching–learning process using educational methods and health literacy education approaches:* To design activities and clinical training for persons, groups, and populations.
* To instruct and train the client, caregiver, family, significant others, and communities at the level of the audience.
 |  |
| B.4.22. | Need for Continued or Modified Intervention | Monitor and reassess, in collaboration with the client, caregiver, family, and significant others, the effect of occupational therapy intervention and the need for continued or modified intervention, and communicate the identified needs to the occupational therapist. |  |
| B.4.23. | Effective Communication | Identify occupational needs through effective communication with patients, families, communities, and members of the interprofessional team in a responsive and responsible manner that supports a team approach to the promotion of health and wellness. |  |
| B.4.24.  | Effective Intra-professional Collaboration | Demonstrate effective intraprofessional OT/OTA collaboration to explain the role of the occupational therapy assistant and occupational therapist in the screening and evaluation process. |  |
| B.4.25.  | Principles of Interprofessional Team Dynamics | Demonstrate awareness of the principles of interprofessional team dynamics to perform effectively in different team roles to plan, deliver, and evaluate patient- and population-centered care as well as population health programs and policies that are safe, timely, efficient, effective, and equitable. |  |
| B.4.26. | Referral to Specialists | Identify and communicate to the occupational therapist the need to refer to specialists both internal and external to the profession, including community agencies. |  |
| B.4.27.  | Community and Primary Care Programs | Identify and communicate to the occupational therapist the need to design community and primary care programs to support occupational performance for persons, groups, and populations. |  |
| B.4.28. | Plan for Discharge | Implement a discharge plan from occupational therapy services that was developed by the occupational therapist in collaboration with the client and members of the interprofessional team by reviewing the needs of the client, caregiver, family, and significant others; available resources; and discharge environment.  |  |
| B.4.29.  | Reimbursement Systems and Documentation | Demonstrate knowledge of various reimbursement systems and funding mechanisms (e.g., federal, state, third party, private payer), treatment/diagnosis codes (e.g., CPT®, ICD, DSM® codes), and coding and documentation requirements that affect consumers and the practice of occupational therapy. Documentation must effectively communicate the need and rationale for occupational therapy services. |  |
| **B.5.0.** | **CONTEXT OF SERVICE DELIVERY, LEADERSHIP, AND MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES****Context of service delivery includes knowledge and understanding of the various contexts, such as professional, social, cultural, political, economic, and ecological, in which occupational therapy services are provided. Management and leadership skills of occupational therapy services include the application of principles of management and systems in the provision of occupational therapy services to persons, groups, populations, and organizations.** **The program must facilitate development of the performance criteria listed below. The student will:** |
| B.5.1. | Factors, Policy Issues, and Social Systems | Identify and explain the contextual factors; current policy issues; and socioeconomic, political, geographic, and demographic factors on the delivery of occupational therapy services for persons, groups, and populations and social systems as they relate to the practice of occupational therapy. |  |
| B.5.2. | Advocacy | Explain the role and responsibility of the practitioner to advocate for changes in service delivery policies, effect changes in the system, recognize opportunities in emerging practice areas, and advocate for opportunities to expand the occupational therapy assistant’s role. |  |
| B.5.3. | Business Aspects of Practice | Explain an understanding of the business aspects of practice including, but not limited to, financial management, billing, and coding.  |  |
| B.5.4. | Systems and Structures That Create Legislation | Define the systems and structures that create federal and state legislation and regulations, and their implications and effects on persons, groups, and populations, as well as practice. |  |
| B.5.5. | Requirements for Credentialing and Licensure | Provide care and programs that demonstrate knowledge of applicable national requirements for credentialing and requirements for licensure, certification, or registration consistent with federal and state laws. |  |
| B.5.6. | Market the Delivery of Services | Identify the need and demonstrate the ability to participate in the development, marketing, and management of service delivery options. |  |
| B.5.7. | Quality Management and Improvement | Participate in the documentation of ongoing processes for quality management and improvement (e.g., outcome studies analysis and client engagement surveys) and implement program changes as needed to demonstrate quality of services. |  |
| B.5.8. | Supervision of Personnel | Define strategies for effective, competency-based legal and ethical supervision of occupational therapy assistants and non-occupational therapy personnel. |  |
| **B.6.0.** | **SCHOLARSHIP** Promotion of science and scholarly endeavors will serve to describe and interpret the scope of the profession, build research capacity, establish new knowledge, and interpret and apply this knowledge to practice. The program must facilitate development of the performance criteria listed below. The student will be able to: |
| B.6.1. | Scholarly Study | * Locate and demonstrate understanding of professional literature, including the quality of the source of information, to make evidence-based practice decisions in collaboration with the occupational therapist.
* Explain how scholarly activities and literature contribute to the development of the profession.
 |  |
| B.6.2. | Quantitative and Qualitative Methods | Understand the difference between quantitative and qualitative research studies.  |  |
| B.6.3. | Scholarly Reports | Demonstrate the skills to understand a scholarly report. |  |
| B.6.6. | Preparation for Work in an Academic Setting | Understand the principles of teaching and learning in preparation for work in an academic setting. |  |
| **B.7.0.** | **PROFESSIONAL ETHICS, VALUES, AND RESPONSIBILITIES** **Professional ethics, values, and responsibilities include an understanding and appreciation of ethics and values of the profession of occupational therapy. Professional behaviors include the ability to advocate for social responsibility and equitable services to support health equity and address social determinants of health; commit to engaging in lifelong learning; and evaluate the outcome of services, which include client engagement, judicious health care utilization, and population health. The program must facilitate development of the performance criteria listed below. The student will be able to:** |
| B.7.1. | Ethical Decision Making | Demonstrate knowledge of the American Occupational Therapy Association (AOTA) *Occupational Therapy Code of Ethics* and AOTA *Standards of Practice* and use them as a guide for ethical decision making in professional interactions, client interventions, employment settings, and when confronted with personal and organizational ethical conflicts. |  |
| B.7.2. | Professional Engagement | Demonstrate knowledge of how the role of a professional is enhanced by participating and engaging in local, national, and international leadership positions in organizations or agencies.  |  |
| B.7.3. | Promote Occupational Therapy | Promote occupational therapy by educating other professionals, service providers, consumers, third-party payers, regulatory bodies, and the public. |  |
| B.7.4. | Ongoing Professional Development | Identify and develop strategies for ongoing professional development to ensure that practice is consistent with current and accepted standards. |  |
| B.7.5. | Personal and Professional Responsibilities | Demonstrate knowledge of personal and professional responsibilities related to: * Liability issues under current models of service provision.
* Varied roles of the occupational therapy assistant providing service on a contractual basis.
 |  |

**OTA ASSOCIATE-DEGREE-LEVEL FORMS**

**SECTION B: CONTENT REQUIREMENTS**

**COURSE SUMMARY**

***Using the online Course Summary form, key in the following data for each course in the OT/OTA curriculum that addresses the content requirements of Standards Section B. The course syllabus used by the program must be uploaded. Syllabi are expected to document the required course content in course objectives, topical outlines, and/or teaching/learning experiences.***

**Course Title:**

**Course Number:**

**Assigned Credits:**

**Course Level: Graduate:** [ ]  **Yr 1** [ ]  **Yr 2** [ ]  **Yr 3** [ ]  **Yr 4** [ ]  **Yr 5** [ ]  **Yr 6**

 **Undergraduate:** [ ]  **Yr 1** [ ]  **Yr 2** [ ]  **Yr 3** [ ]  **Yr 4**

 **Associate:** [ ]  **Yr 1** [ ]  **Yr 2**

**Delivery model:** [ ]  **Classroom** [ ]  **Online** [ ]  **Blended**

 **Comments:**

**Session:** [ ]  **Winter** [ ]  **Summer** [ ]  **Spring** [ ]  **Fall**

 **Comments:**

**Required:** [ ]  **Yes** [ ]  **No**

 **Comments:**

**Is there a LEVEL I FIELDWORK experience attached to this course?**

[ ]  **Yes** [ ]  **No**

 **Comments:**

**Clock Hours Per Week in: Lecture Lab FWI**

**Average faculty/student ratio: :**

**Faculty member(s) responsible:**

***(Cite as many as necessary. Only required for courses in the major.)***

**COURSE OBJECTIVES:**

**COURSE ASSESSMENT MEASURES:**

[ ]  **Assignment** [ ]  **Lab Test** [ ]  **Objective Test** [ ]  **Essay Test**

[ ]  **Project** [ ]  **Presentation** [ ]  **Demonstration** [ ]  **Other**

**If other, please specify:**

**COURSE-STANDARDS MAPPING
Indicate related ACOTE Standard number(s):**

**OTA ASSOCIATE-DEGREE-LEVEL STANDARDS**

**SECTION C: FIELDWORK EDUCATION**

**OTA ASSOCIATE-DEGREE-LEVEL STANDARDS SECTION C: FIELDWORK EDUCATION**

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 should then be uploaded to ACOTE Online (<https://acote.aota.org>). Fieldwork sites may be added using the “Fieldwork Sites” tab or uploaded as an Excel spreadsheet under the Supporting Material section of Standard C.1.5. Sufficient Fieldwork Agreements.

|  |  |
| --- | --- |
|  | *SECTION C: FIELDWORK EDUCATION* |
| *C.1.0.* FIELDWORK EDUCATION*Fieldwork education is a crucial part of professional preparation and is best integrated as a component of the curriculum design. The fieldwork experience is designed to promote clinical reasoning and reflective practice, transmit the values and beliefs that enable ethical practice, and develop professionalism and competence in career responsibilities. Fieldwork experiences should be implemented and evaluated for their effectiveness by the educational institution. The experience should provide the student with the opportunity to carry out professional responsibilities under the supervision of qualified personnel serving as a role model. The academic fieldwork coordinator is responsible for the program’s compliance with fieldwork education requirements. The academic fieldwork coordinator will:* |
| *C.1.1.Fieldwork Program Reflects the Curriculum Design* | *Ensure that the fieldwork program reflects the sequence and scope of content in the curriculum design, in collaboration with faculty, so that fieldwork experiences in traditional, nontraditional, and emerging settings strengthen the ties between didactic and fieldwork education.* |
| Narrative Response: |  |
| Prepare to Upload: | Documentation of how the fieldwork program (traditional, nontraditional and emerging settings) reflects the sequence and scope of content in the curriculum design.  |
| *C.1.2.Criteria and Process for Selecting Fieldwork Sites* | *Document the criteria and process for selecting fieldwork sites, to include maintaining memoranda of understanding, complying with all site requirements, maintaining site objectives and site data, and communicating this information to students prior to the start of the fieldwork experience.* |
| Narrative Response: |  |
| Prepare to Upload: | Documentation of the criteria and procedure for selecting fieldwork sites, including maintaining memoranda of understanding, complying with all site requirements, maintaining site objectives and site data, and communicating this information to students prior to the start of the fieldwork experience. |
| *C.1.3.Fieldwork Objectives* | *Document that academic and fieldwork educators agree on established fieldwork objectives prior to the start of the fieldwork experience, and communicate with the student and fieldwork educator about progress and performance throughout the fieldwork experience.**Ensure that fieldwork objectives for all experiences include a psychosocial objective.* |
| Narrative Response: |  |
| Prepare to Upload: | Documentation of agreement and collaboration between the academic and fieldwork educators in establishing fieldwork objectives prior to start of fieldwork and a plan for communication with the student and fieldwork educator about progress and performance during fieldwork. Documentation that fieldwork objectives for all experiences include a psychosocial objective. |
| *C.1.4.Ratio of Fieldwork Educators to Students* | *Ensure that the ratio of fieldwork educators to students enables proper supervision, and provides protection of consumers, opportunities for appropriate role modeling of occupational therapy practice, and the ability to provide frequent assessment of student progress in achieving stated fieldwork objectives.* |
| Narrative Response: |  |
| Prepare to Upload: | Documentation of the ratio of fieldwork educators to students and how it enables proper supervision, ensures protection of consumers, provides appropriate role modeling, and the ability to provide frequent assessment of student progress in achieving stated fieldwork objectives. |
| *C.1.5.Sufficient Fieldwork Agreements* | *Ensure that fieldwork agreements are sufficient in scope and number to allow completion of graduation requirements in a timely manner, in accordance with the policy adopted by the program as required by Standard A.4.7.* |
| Narrative Response: |  |
| Prepare to Upload: | Using the "Fieldwork Sites" tab in ACOTE Online, 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.1.6.Level I and II Fieldwork MOUs* | *The program must have evidence of valid memoranda of understanding in effect and signed by both parties from the onset to conclusion of the Level I fieldwork and the Level II fieldwork if it involves an entity outside of the academic program. (Electronic memoranda of understanding and signatures are acceptable.) Responsibilities of the sponsoring institution(s) and each fieldwork site must be clearly documented in the memorandum of understanding.* |
| Narrative Response: |  |
| Prepare to Upload: | * Evidence that the program has a process for ensuring that valid memoranda of understanding are in effect and signed by both parties at the time the student is completing the Level I or Level II fieldwork experience.
* A sample copy of a current memorandum of understanding for a Level I and Level II fieldwork site.
 |
| *C.1.7.Fieldwork in Behavioral Health or Psychological and Social Factors* | *At least one fieldwork experience (either Level I or Level II) must address practice in behavioral health, or psychological and social factors influencing engagement in occupation.* |
| Narrative Response: |  |
| Prepare to Upload: | Documentation that at least one fieldwork experience (either Level I or Level II) has as its focus behavioral health or psychological and social factors that influence engagement in occupation. (Examples of possible evidence of compliance with Standard C.1.7 include documented student learning outcomes for fieldwork placement that focus on behavioral health or psychological and social factors influencing engagement in occupation; population(s) served in the fieldwork placement; and assignments linked to the fieldwork placement). |
| *Level I FieldworkThe goal of Level I fieldwork is to introduce students to fieldwork, apply knowledge to practice, and develop understanding of the needs of clients. The program will:* |
| *C.1.8.Qualified Level I Fieldwork Supervisors* | *Ensure that personnel who supervise Level I fieldwork are informed of the curriculum and fieldwork program design and affirm their ability to support the fieldwork experience. This must occur prior to the onset of the Level I fieldwork. Examples include, but are not limited to, currently licensed or otherwise regulated occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, physicians, speech language pathologists, nurses, and physical therapists.* |
| 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.1.9.Level I Fieldwork* | *Document that Level I fieldwork is provided to students and is not substituted for any part of the Level II fieldwork. Ensure that Level I fieldwork enriches didactic coursework through directed observation and participation in selected aspects of the occupational therapy process, and includes mechanisms for formal evaluation of student performance.**The program must have clearly documented student learning objectives expected of the Level I fieldwork.**Level I fieldwork may be met through one or more of the following instructional methods:** *Simulated environments*
* *Standardized patients*
* *Faculty practice*
* *Faculty-led site visits*
* *Supervision by a fieldwork educator in a practice environment*

*All Level I fieldwork must be comparable in rigor.* |
| 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. |
| *Level II Fieldwork The goal of Level II fieldwork is to develop competent, entry-level, generalist occupational therapy assistants. Level II fieldwork must be integral to the program’s curriculum design and must include an in-depth experience in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation. It is recommended that the student be exposed to a variety of clients across the lifespan and to a variety of settings. The program will:* |
| *C.1.10.Length of Level II Fieldwork* | *Require a minimum of 16 weeks’ full-time Level II fieldwork. This may be completed on a part-time basis, as defined by the fieldwork placement in accordance with the fieldwork placement’s usual and customary personnel policies, as long as it is at least 50% of an FTE at that site.**The 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 three different settings.* |
| Narrative Response: |  |
| Prepare to Upload: | A documented policy requiring a minimum of 16 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 three different settings |
| *C.1.11.Qualified Level II Fieldwork Supervisors* | *Document and verify that the student is supervised by a currently licensed or otherwise regulated occupational therapist or occupational therapy assistant (under the supervision of an 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 or occupational therapy assistant prior to the onset of the Level II fieldwork.* *Ensure that the student supervisor is adequately prepared to serve as a fieldwork educator prior to the Level II fieldwork. The supervising therapist may be engaged by the fieldwork site or by the educational program.* |
| Narrative Response: |  |
| Prepare to Upload: | * Documentation of the process for ensuring that each supervising therapist is a currently licensed or otherwise regulated occupational therapist or occupational therapy assistant who has a minimum of 1 year full-time (or its equivalent) of practice experience as a licensed or otherwise regulated occupational therapist or occupational therapy assistant 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.1.12.Evaluating the Effectiveness of Supervision* | *Document a mechanism for evaluating the effectiveness of supervision (e.g., student evaluation of fieldwork) and for providing resources for enhancing supervision (e.g., materials on supervisory skills, continuing education opportunities, articles on theory and practice).* |
| Narrative Response: |  |
| Prepare to Upload: | * Documentation of how the fieldwork supervision is evaluated.
* Documentation of the process for the educational program providing resources to enhance fieldwork educator supervision.
 |
| *C.1.13.Level II Supervision* | *Ensure that Level II fieldwork supervision is direct and then decreases to less direct supervision as appropriate for the setting, the severity of the client’s condition, and the ability of the student to support progression toward entry-level competence.* |
| Narrative Response: |  |
| Prepare to Upload: | A documented policy that ensures Level II fieldwork supervision is direct and then decreases as appropriate. |
| *C.1.14.Fieldwork Supervision Where no OT Services Exist* | *Document and verify that supervision provided in a setting where no occupational therapy services exist includes a documented plan for provision of occupational therapy assistant services and supervision by a currently licensed or otherwise regulated occupational therapist or occupational therapy assistant (under the direction of an occupational therapist) with at least 3 years’ full-time or its equivalent of professional experience prior to the Level II fieldwork. Supervision must include a minimum of 8 hours of direct supervision each week of the fieldwork experience. An occupational therapy supervisor must be available, via a variety of contact measures, to the student during all working hours. An on-site supervisor designee of another profession must be assigned while the occupational therapy supervisor is off site.* |
| Narrative Response: |  |
| Prepare to Upload: | Documentation of a plan for supervision where no occupational therapy services exist. |
| *C.1.15.Evaluation of Student Performance on Level II Fieldwork* | *Document mechanisms for requiring formal evaluation of student performance on Level II fieldwork (e.g., the AOTA Fieldwork Performance Evaluation for the Occupational Therapy Assistant Student or equivalent).* |
| 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 Outside the U.S.* | *Document and verify that students attending Level II fieldwork outside the United States are supervised by an occupational therapist who graduated from a program approved by the World Federation of Occupational Therapists and has at least 1 year of experience in practice prior to the onset of Level II fieldwork.* |
| Narrative Response: |  |
| Prepare to Upload: | Documentation of a policy for provision of fieldwork experience outside of the United States. |

**OTA ASSOCIATE-DEGREE-LEVEL FORMS**

**SECTION C: FIELDWORK EDUCATION**

**FIELDWORK SITES FOR**

***(Using the online Fieldwork Sites form, or a similar Excel spreadsheet, complete the following data for each fieldwork site that has been used for a Level I or Level II fieldwork placement in the most recent 3 years. For multiple fieldwork practice settings within the same institution, please list each one separately).***

|  |
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| **Fieldwork Practice Settings (Type of Facility):**  |
| **1. Hospital-based settings**1.1In-Patient Acute1.2In-Patient Rehab1.3SNF/ Sub-Acute/ Acute Long-Term Care 1.4General Rehab Outpatient1.5Outpatient Hands1.6Pediatric Hospital/Unit1.7Pediatric Hospital Outpatient1.8In-Patient Psych | **2. Community-based settings**2.1 Pediatric Community2.2 Behavioral Health Community2.3 Older Adult Community Living2.4 Older Adult Day Program2.5 Outpatient/hand private practice2.6 Adult Day Program for DD2.7 Home Health2.8 Pediatric Outpatient Clinic | **3. School-based settings**3.1 Early Intervention3.2 School**4. Other** |
| Name of Facility | City | State | Level (I/II) | Primary FW Educator's Professional Qualifications*(e.g., OT, PT, etc.)* | Type of Facility *(Use Key Above)* |
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