

191

THE AMERICAN OCCUPATIONAL THERAPY ASSOCIATION, INC.
6000 Executive Blvd., Rockville, MD 20852

EDUCATING THE OCCUPATIONAL THERAPY ASSISTANT

A GUIDE

HISTORY

Occupational Therapy is a health profession which contributes to the independence and well-being of an individual through the use of purposeful activities, planned and directed to bring about specific changes in physical and/or emotional behavior.

Occupational therapy is unique to the extent that in its application, the patient is an active participant in the use and development of basic manual and social skills related to his immediate living experience and ultimate life goals. Through patient performance and/or response, the occupational therapist is able to evaluate work habits, endurance, motivation, abilities and underlying cultural and psychological factors which influence patient goals, potential and achievement.

Occupational therapy services are provided in a variety of health care facilities including hospitals, rehabilitation centers, long term care facilities, home health care agencies and schools.

The American Occupational Therapy Association (here after referred to as AOTA) first established basic educational standards at the professional level in 1923. The demand for occupational therapy services increased more rapidly than qualified personnel could be supplied in the years which followed. Acknowledging the potential value of supportive personnel, the AOTA established standards for the education and recognition of occupational therapy assistants in 1958.

During the first decade following this action thirty-four programs were initiated and 1213 occupational therapy assistants were graduated.

The requirements developed to provide the framework on which to build a detailed program for the preparation of the occupational therapy assistant have been revised frequently as have guidelines for program implementation. These revisions have been based on changing concepts in the utilization of the occupational therapist and the experience gained since the concept of the occupational therapy assistant was initiated. In the education of the occupational therapy assistant emphasis is placed on the adult with physical and psychosocial dysfunction. Provision is also made for the inclusion of material related to children, the aged and the retarded.

The AOTA establishes minimal standards for the preparation and recognition of occupational therapy assistants, provides consultation in the development of educational programs and formally approves programs based on these standards to enable graduates to apply for certification as occupational therapy assistants and membership in the association.

Certified occupational therapy assistants (COTA's) are prepared in these programs to work with the registered occupational therapist (OTR) in order to improve the quality of occupational therapy services through more efficient use of time and personnel.

CERTIFICATION OF OCCUPATIONAL THERAPY ASSISTANTS

Professional qualification of occupational therapy assistants is certification with the professional organization (AOTA). Eligibility for certification is based upon successful completion of an occupational therapy assistant program approved by the AOTA and upon the recommendation of the program director.

APPROVAL OF PROGRAMS

An approval procedure has been established by the AOTA for occupational therapy assistant programs and is available upon request. The AOTA Accreditation Committee is responsible for this service. A list of approved programs is published and distributed by the AOTA. This procedure has been planned in order to assure the inclusion of current trends in practice and to strengthen the preparation of the assistant.

STANDARDS AND GUIDELINES

INTRODUCTION

The standards should be regarded as minimal requirements for the development of an educational program. To develop a quality program it is important to use a creative approach to teaching, give attention to sequence of subject matter and related learning experiences and effectively correlate classroom and laboratory learning with the work situation. The standards have been developed for the information of program planners, employers of occupational therapy personnel, students, and the public. The guide for educating the occupational therapy assistant and the approval of programs provide a standard preparation of the assistant or technical level of personnel, and a recognizable qualification for the certification and employment of the graduate.

The standards or requirements which follow appear in large type, with guidelines or interpretations in small type.

I. ADMINISTRATION

OCCUPATIONAL THERAPY ASSISTANT PROGRAMS SHALL BE LOCATED IN COMMUNITIES WITH A POTENTIAL FOR EMPLOYING CERTIFIED OCCUPATIONAL THERAPY ASSISTANTS AND WITH A VARIETY OF HEALTH FACILITIES AND AGENCIES WHICH PROVIDE OCCUPATIONAL THERAPY SERVICES SUITABLE FOR CLINICAL TEACHING AND SUPERVISED PRACTICAL EXPERIENCE.

PRACTICAL EXPERIENCE CENTERS SHALL PROVIDE THE SETTING, CASE LOAD AND PROGRAM TO AFFORD A WELL DEFINED LEARNING SITUATION AND SHALL BE CAREFULLY SELECTED BY THE DIRECTOR OF THE PROGRAM AND/OR AN APPROPRIATE COMMITTEE. THE USE OF CENTERS BY OTHER DISCIPLINES IS AN INDICATION OF EDUCATIONAL COMMITMENT.

Occupational Therapy Assistant programs may be conducted in educational institutions or in settings offering analogous technical and clinical education which meet applicable accreditation procedures.

II. NEED FOR OCCUPATIONAL THERAPY ASSISTANTS

THERE SHALL BE A DOCUMENTED NEED AND POTENTIAL EMPLOYMENT OPPORTUNITY FOR THE OCCUPATIONAL THERAPY ASSISTANT IN THE GEOGRAPHICAL AREA WHERE A PROGRAM IS PROPOSED.

Data should be collected by an objective method and should include documentation of community involvement, professional commitment to their appropriate utilization, fiscal readiness and job opportunities.

III. FINANCIAL RESOURCES

ADEQUATE FINANCIAL SUPPORT SHALL BE ASSURED NOT ONLY FOR IMPLEMENTATION BUT ALSO FOR CONTINUANCE OF THE PROGRAM.

- A. Provision should be made for faculty, secretarial salaries and consultant fees; permanent and expendable equipment to include reference materials and teaching aids. Other expenses which should be anticipated are associated with faculty supervision of the practical experience phase of the program, attendance at professional meetings and program approval.
- B. When governmental or other grant funds are the prime implementing financial resource, an alternative and ongoing resource should be built into the original plan if employment of graduates seems to justify continuation of the program.
- C. Tuition should not be expected to meet total budgetary needs.

IV. PLANNING, IMPLEMENTING AND CONSULTING BODIES

PROFESSIONAL AND COMMUNITY RESOURCES SHALL BE UTILIZED DURING THE PLANNING, IMPLEMENTING AND ONGOING PHASES OF A PROGRAM. AREAS OF CONCERN INCLUDE PLANNING, IMPLEMENTATION AND CONSULTATION OF PROFESSIONAL, EDUCATIONAL, FINANCIAL AND PUBLIC RELATIONS MATTERS.

- A. Appropriate members of advisory groups are:
 1. Representatives of employers of occupational therapy personnel, health and other agencies, labor organizations and fiscal intermediaries.
 2. Physicians, educators, laymen, occupational therapists and members of other health professions.
 3. The director of the program or his representative serves ex-officio on all advisory bodies.
- B. It is recommended that for each advisory group there should be a written statement of policy to include its purpose and goals, a plan for rotation of membership, frequency of meetings and the necessity for a written record of meetings.
- C. Communication with AOTA, through the Director of Technical Educational Services, should be continuously maintained, to insure current interpretation of standards and reflection of trends in clinical practice. On-site consultation service may be requested.

V. FACULTY AND STAFF

THE FACULTY SHALL INCLUDE NOT LESS THAN TWO REGISTERED OCCUPATIONAL THERAPISTS ONE OF WHOM SHALL BE EMPLOYED FULL-TIME AND BE DESIGNATED THE DIRECTOR OF THE PROGRAM. OTHER FACULTY AND SUPPORTIVE STAFF SHALL BE QUALIFIED IN THEIR PROFESSION OR WHERE APPROPRIATE BY EDUCATION AND EXPERIENCE.

- A. Occupational Therapy Faculty.
 1. The director should be prepared by education and demonstrated professional involvement and have not less than 3 years of recent relevant experience. He should be employed at least 3 to 6 months prior to the beginning of the program for

development of curriculum and teaching materials, identification and confirmation of practical experience centers, student selection and participation in general planning and administrative direction.

2. The second occupational therapist should have not less than one year of recent clinical experience which complements that of the director of the program. A well coordinated program can best be provided by a full-time faculty appointment. Timing of the employment of the second occupational therapist should be based on the type, location and length of the program. Under certain circumstances it may be advisable to appoint several part-time occupational therapy instructors in lieu of one full-time instructor.
3. Supervisors of occupational therapy services used as practical experience centers should be registered occupational therapists with a minimum of 2 years experience. They should be considered extra mural members of the faculty and be informed about other phases of the program.

B. Other Faculty.

1. Therapists or others having competency or specialized knowledge may be selected as special or visiting lecturers to enrich the program.
2. For effective coordination and integration of content, occupational therapist members of the faculty should audit lectures and classes conducted by other specialists.

C. Staff.

Adequate secretarial and maintenance services should be provided.

VI. FACILITIES AND EQUIPMENT

- A. ADEQUATE FACILITIES FOR EFFICIENT TEACHING, ADMINISTRATION AND COUNSELING SHALL INCLUDE LECTURE AND LABORATORY AREAS, AN INDIVIDUAL OFFICE FOR THE DIRECTOR, OFFICE SPACE FOR FACULTY AND STAFF.

The placement of sinks, electrical outlets, telephones and toilet facilities should be considered in the overall planning of space.

- B. AN EASILY ACCESSIBLE LIBRARY SHALL CONTAIN CURRENT BOOKS, PAMPHLETS AND PERIODICALS TO ENHANCE CLASSROOM TEACHING. PROVISION SHALL BE MADE FOR ANNUAL ACQUISITIONS AND SUBSCRIPTIONS.
- C. PERMANENT AND EXPENDABLE EQUIPMENT SHALL BE AVAILABLE IN SUFFICIENT QUANTITY FOR THE TEACHING/LEARNING PROCESS.

VII. ADMISSION TO PROGRAM

- A. THE NUMBER OF STUDENTS ADMITTED TO THE PROGRAM SHALL BE DETERMINED BY THE PROGRAM DIRECTOR IN COLLABORATION WITH APPROPRIATE ADMINISTRATIVE AND ADVISORY BODIES.

Among factors to be considered are the number of faculty,

gram and the resources of the cooperating patient care facilities used as practical experience centers.

- B. TO PERMIT EFFECTIVE COORDINATION AND INTEGRATION OF CONTENT THERE SHALL BE A MAXIMUM OF 15 STUDENTS PER INSTRUCTOR IN LABORATORY SESSIONS.
- C. IN ADDITION TO MEETING INSTITUTIONAL ADMISSION REQUIREMENTS, SELECTION FOR THE OCCUPATIONAL THERAPY ASSISTANT PROGRAM SHALL BE BASED ON PRE-DEFINED CRITERIA DETERMINED BY A COMMITTEE MADE UP OF REPRESENTATIVES OF THE INSTITUTION AND OCCUPATIONAL THERAPISTS, INCLUDING THE DIRECTOR OF THE PROGRAM.
1. Criteria may include:
 - a) Personal history, motivation and commitment to work
 - b) Personal or employment references
 - c) Scholastic profile
 - d) Assessment of physical and emotional health
 - e) A personal interview by the program director or his designate(s)
 2. The student should be notified in writing whether or not he has been accepted for the program.
- D. WHEN THERE ARE SPECIAL FACTORS SUCH AS A PHYSICAL HANDICAP TO BE CONSIDERED FINAL ACCEPTANCE OF THE STUDENT TO THIS PROGRAM SHALL REST WITH THE DIRECTOR OF THE PROGRAM.
- E. AFTER CONSULTING WITH OTHER APPROPRIATE FACULTY, THE PROGRAM DIRECTOR SHALL RESERVE THE RIGHT TO TERMINATE A STUDENT AT ANY TIME FOR ANY CAUSE DEEMED SUFFICIENT.

VIII. CURRICULUM

A. LENGTH OF PROGRAM.

NO PROGRAM SHALL BE LESS THAN TWENTY (20) WEEKS IN LENGTH.

1. The duration of the program will be determined by the administrative setting, i.e. junior/community college, technical institute, hospital or other agency. The following have been demonstrated as effective:
 - a) A hospital or agency based program using a work day schedule - 22 to 25 weeks full-time.
 - b) A technical program based in an educational institution and operated on a school class schedule - one academic year of 9 to 11 months.
 - c) An associate degree program, adding degree requirements - two academic years.

B. REQUIRED SUBJECT MATTER.

THE SPECIFIC OCCUPATIONAL THERAPY SUBJECT MATTER LISTED BELOW REPRESENTS A MINIMUM OF 750 CLOCK HOURS TO BE ALLOCATED AS FOLLOWS:

ACADEMIC INSTRUCTION	260 hours
SKILLS INSTRUCTION	230 hours
PRACTICAL EXPERIENCE	250 hours

The distribution of suggested hours which follows is an indication of their relative importance and need not be followed exactly. The sequence of topics may also be adjusted to meet the requirements of the setting and the teaching methods used.

1. ORIENTATION

30 hours

a) INTRODUCTION TO COURSE

- 1) PURPOSE
- 2) GENERAL INFORMATION
- 3) HOW TO STUDY

b) MAN'S NEED FOR WORK AND LEISURE

c) OCCUPATIONAL THERAPY

1) HISTORY AND PHILOSOPHY

TO INCLUDE ORIENTATION TO STATE, AREA, NATIONAL AND INTERNATIONAL PROFESSIONAL ORGANIZATIONS

2) ROLE AND FUNCTION

TO INCLUDE ETHICS AND WHY, WHERE, BY WHOM AND UNDER WHAT AUSPICES OCCUPATIONAL THERAPY IS ADMINISTERED. THE CONTRIBUTION AND TRAINING OF VOLUNTEERS SHOULD ALSO BE COVERED.

d) TO OTHER SERVICES IN THE INSTITUTION AND COMMUNITY.

TO INCLUDE SUCH AREAS AS THE INSTITUTION AS A SOCIAL SYSTEM, ADMINISTRATION, FOOD SERVICE AND DIETETICS, NURSING, PHYSICAL THERAPY, CHAPLAINCY, PSYCHOLOGY, SOCIAL SERVICE, VOCATIONAL COUNSELING, AND OTHERS AS APPROPRIATE.

e) THE LAW AS IT RELATES TO THE PATIENT, INSTITUTION AND EMPLOYEE.

2. HEALTH CONCEPTS

110 hours

a) MEDICAL TERMINOLOGY

b) NORMAL GROWTH AND DEVELOPMENT

TO INCLUDE CHILDHOOD, ADOLESCENCE, ADULTHOOD AND AGING

1) PHYSICAL

2) PERSONALITY DEVELOPMENT - INCLUDING NORMAL DEFENSE MECHANISMS

c) NORMAL BODY STRUCTURE AND FUNCTION

d) INFORMATION ON AND MANAGEMENT OF CLINICAL CONDITIONS COMMONLY REFERRED TO OCCUPATIONAL THERAPY

1) PHYSICAL DYSFUNCTION

TO INCLUDE PSYCHOLOGICAL ASPECTS WITH COVERAGE OF GENERAL MEDICINE AND SURGERY, NEUROLOGY, ORTHOPEDICS AND OTHERS

2) PSYCHO-SOCIAL DYSFUNCTION

TO INCLUDE PHYSICAL ASPECTS WITH COVERAGE OF PSYCHOSES, NEUROSES, CHARACTER AND PERSONALITY DISORDERS, DEVELOPMENTAL DEFECTS AND OTHERS.

e) EMERGENCY CARE AND ACCIDENT PREVENTION

3. OCCUPATIONAL THERAPY THEORY AND ITS APPLICATION

120 hours

TO EMPHASIZE PSYCHOSOCIAL AND PHYSICAL DYSFUNCTION AT EACH STAGE OF HUMAN DEVELOPMENT. HOW AND WHAT TO OBSERVE AND REPORT SHOULD BE INCLUDED.

4. SKILLS

230 hours

a) SKILL IN INTERPERSONAL RELATIONSHIPS

TO INCLUDE KNOWLEDGE AND UNDERSTANDING OF SELF, ONE-TO-ONE INTERACTION, THE GROUP PROCESS AND GROUP TECHNIQUES.

b) TECHNIQUES OF TEACHING

c) ACTIVITIES OF DAILY LIVING

TO INCLUDE SELF CARE, COMMUNICATIONS, POSITIONING, TRANSFER, HOMEMAKING, AVOCATIONAL PURSUITS AND OTHER PERTINENT ACTIVITIES.

d) MEDIA

THE NUMBER OF HOURS DEVOTED TO A PARTICULAR SKILL SHOULD BE DETERMINED BY THE DEMANDS OF THE AREA CULTURE AND PRACTICE. EMPHASIS SHOULD BE PLACED ON THE USE AND ACQUISITION OF EQUIPMENT AND MATERIALS AS WELL AS ON PREPARATION. EACH SKILL SHOULD BE DEVELOPED TO A POINT WHICH PERMITS FOLLOW-THROUGH ON THE ACTIVITY.

1) WOODWORKING

2) APPLIED DESIGN AND CREATIVE ARTS

3) CERAMICS

4) LEATHERWORK

5) JEWELRY AND METALWORK

6) SEWING, NEEDLEWORK, WEAVING AND MINOR SKILLS

7) SOCIALIZATION AND RECREATION

8) SURPLUS MATERIALS

e) UTILIZATION OF VOLUNTEERS AND COMMUNITY RESOURCES

Note:

Other topics of general or particular importance may be included such as First Aid and Remotivation.

5. SUPERVISED PRACTICAL EXPERIENCE

250 hours

MUST INCLUDE AT LEAST 2 TYPES OF EXPERIENCE DIVIDED EVENLY BETWEEN PSYCHOSOCIAL AND PHYSICAL DYSFUNCTION. WHEN ADDITIONAL ASSIGNMENTS ARE DESIRED, PRACTICAL EXPERIENCE MAY BE EXTENDED.

a) This requirement may appropriately be satisfied through the use of any of the following plans, depending on the facilities available in the community.

- 1) As part of a coordinated course such as described in VIII, C 5.- Fundamentals of O.T. This means continuous participation in an occupational therapy service program. This plan requires the proximity of a number of occupational therapy service programs. Field trips, demonstrations, and other clinically oriented instruction are not considered supervised practical experience. Consultation should be requested prior to implementation of this plan.
- 2) One experience as described on Pg.8., VIII B,5 a) 1) with one or more full-time assignments at the end of the technical program.
- 3) Continuous half day assignments during the second half of the program.
- 4) Two or more full-time block assignments to complete the program.

b) Procedural Suggestions:

- 1) Confirmation of the selection of the centers should be made in writing and should include the number of students to be assigned at a level in keeping with good educational practice to insure an optimum learning experience for each student.
- 2) Regularly scheduled conferences of program faculty and supervisors of practical experience are recommended.
- 3) Pertinent information concerning the student shall be made available to the supervisor of practical experience prior to his arrival.
- 4) Reports covering the student's performance, adjustment, and attendance shall be submitted to the program director upon completion of the practical experience.

- 5) The ratio of registered occupational therapists to occupational therapy assistant students shall be maintained at a level in keeping with good educational practice to insure an optimum learning experience for each student.
- 6) Whenever possible, student assistants should be provided the opportunity of an experience in a clinical setting where professional level occupational therapy students are affiliating.

6. EVALUATION AND COUNSELING

TO INCLUDE INDIVIDUAL AND GROUP COUNSELING AND A FINAL ASSESSMENT OF EACH STUDENT'S KNOWLEDGE AND PERFORMANCE.

- a) In addition to frequent quizzes and course examinations a final examination of a problem-solving nature is strongly recommended.
- b) A formal evaluation of supervised practical experience should be planned and agreed upon by faculty and supervising therapists.
- c) Time should be provided to allow for individual or group counseling by occupational therapy faculty.

C. PLANNING COLLEGE COURSES

Specific occupational therapy subject matter requirements are listed in VIII B. This subject matter content has been summarized below to facilitate the development of discreet courses. Because of differences in course offerings it may sometimes be advisable to include portions of the subject matter described in C.1, through C.4 in the laboratory course designated as Fundamentals of O.T.

1. Body Structure and Function

To provide the student with an understanding of body systems with emphasis on skeletal, muscular, nervous and circulatory systems.

2. Growth and Development

To provide the student with an understanding of the continuum of growth and development emphasizing childhood and adolescence and including the adult years and the aging process.

3. Personality Development

To provide the student with a knowledge and understanding of personality development, including normal defense mechanisms.

4. Interpersonal Relationships

To provide the student with a knowledge and understanding of self, one-to-one interaction, the group process and group techniques.

5. Fundamentals of Occupational Therapy

This is intended as a coordinated lecture laboratory - supervised clinical practice teaching-learning situation.

- a) To provide the student with appropriate knowledge and understanding of clinical conditions and occupational therapy theory.
- b) To enable the student to acquire proficiency in appropriate therapeutic activities. (Can be a separate occupational therapy skills laboratory course)
- c) To provide the student with supervised practical experience, with patients/clients, in an occupational therapy setting. (Can be scheduled in other ways as described in Pg. 9., VIII B, 5 a)

D. ASSOCIATE DEGREE PROGRAM

Requirements for the associate degree are determined by the college. When combined with required technical courses an associate degree program can be planned in two academic years. The primary goal of the program should be to prepare the student for employment. At the same time articulation with the professional curriculum should be considered to provide an educational ladder with a maximum of transfer credit. Technical courses should be designed toward this end as far as is possible. It is expected that counseling will be available so that the program can be tailored to the individual background, needs and abilities of the student, as far as requirements permit.

No suggested curriculum is included because of the diversity of college offerings and community resources. The following recommendations are based on observations of successful programs.

1. Normal human growth and development and normal body structure and function are basic areas of knowledge which should be scheduled as early as possible in the curriculum.
2. Exposure to and involvement with the clinical setting should be planned throughout the program.
3. Courses which transfer readily to an advanced college program include biological, physical and social sciences, the humanities and a limited number of skills.
4. Early contact with professional level curricula in the region facilitates the inclusion of appropriate transfer courses.