Accreditation Council for Occupational Therapy Education (ACOTE®)
Guide to Compliance with the 2006 Master’s-Level OT Standards

PREAMBLE:

The rapidly changing and dynamic nature of contemporary health and human services delivery systems requires the occupational therapist to possess basic skills as a direct care provider, consultant, educator, manager, researcher, and advocate for the profession and the consumer.

A graduate from an ACOTE-accredited master’s-degree-level occupational therapy program must

- Have acquired, as a foundation for professional study, a breadth and depth of knowledge in the liberal arts and sciences and an understanding of issues related to diversity.

- Be educated as a generalist with a broad exposure to the delivery models and systems used in settings where occupational therapy is currently practiced and where it is emerging as a service.

- Have achieved entry-level competence through a combination of academic and fieldwork education.

- Be prepared to articulate and apply occupational therapy theory and evidence-based evaluations and interventions to achieve expected outcomes as related to occupation.

- Be prepared to be a lifelong learner and keep current with evidence-based professional practice.

- Uphold the ethical standards, values, and attitudes of the occupational therapy profession.

- Understand the distinct roles and responsibilities of the occupational therapist and occupational therapy assistant in the supervisory process.

- Be prepared to advocate as a professional for the occupational therapy services offered and for the recipients of those services.

- Be prepared to be an effective consumer of the latest research and knowledge bases that support practice and contribute to the growth and dissemination of research and knowledge.

SECTION A: GENERAL REQUIREMENTS FOR ACCREDITATION

A.1.0. SPONSORSHIP AND ACCREDITATION

Standard A.1.1. The sponsoring institution(s) and affiliates, if any, must be accredited by recognized national, regional, or state agencies with accrediting authority. For programs in countries other than the United States, ACOTE will determine an alternative and equivalent external review process.

THE FOLLOWING IS A LIST OF RECOGNIZED NATIONAL AND REGIONAL ACCREDITING BODIES THAT ACCREDIT OR OTHERWISE RECOGNIZE INSTITUTIONS:

- ACCREDITING BUREAU OF HEALTH EDUCATION SCHOOLS
- ACCREDITING COMMISSION OF CAREER SCHOOLS AND COLLEGES OF TECHNOLOGY
- ACCREDITING COMMISSION OF THE DISTANCE EDUCATION AND TRAINING COUNCIL
- ACCREDITING COUNCIL FOR INDEPENDENT COLLEGES AND SCHOOLS
- COUNCIL ON OCCUPATIONAL EDUCATION
- HIGHER LEARNING COMMISSION OF THE NORTH CENTRAL ASSOCIATION OF COLLEGES AND SCHOOLS
- MIDDLE STATES ASSOCIATION OF COLLEGES AND SCHOOLS
- NEW ENGLAND ASSOCIATION OF SCHOOLS AND COLLEGES
- NORTHWEST COMMISSION ON COLLEGES AND UNIVERSITIES
- SOUTHERN ASSOCIATION OF COLLEGES AND SCHOOLS
- WESTERN ASSOCIATION OF SCHOOLS AND COLLEGES
Evidence:
- Documentation (e.g., catalog, Web page) states that the sponsoring institution(s) holds current accreditation from 1 of the above agencies.

Standard A.1.2. Sponsoring institutions must be authorized under applicable law or other acceptable authority to provide a program of post-secondary education and have appropriate degree-granting authority.

Evidence:
- 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.

Standard A.1.3. Accredited occupational therapy educational programs may be established only in senior colleges, universities, or medical schools.

Evidence:
- Sponsoring institution is recognized as a senior college, university, or medical school.

Standard A.1.4. The sponsoring institution must assume primary responsibility for appointment of faculty, admission of students, and curriculum planning. This would include course content, satisfactory completion of the educational program, and granting of the degree. The sponsoring institution 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.

THE DEGREES MOST COMMONLY CONFERRED ARE THE MASTER OF OCCUPATIONAL THERAPY (MOT), MASTER OF SCIENCE IN OCCUPATIONAL THERAPY (MSOT), AND MASTER OF SCIENCE (MS). PROGRAMS OFFERING COMBINED BACCALAUREATE/MASTER’S (BS/MS OR BS/MOT) DEGREES ARE STRONGLY ENCOURAGED TO AVOID USING “BACCALAUREATE IN OCCUPATIONAL THERAPY” AS THE BACCALAUREATE PORTION OF THE DEGREE NAME TO AVOID CONFUSING THE PUBLIC. DEGREE NAMES FOR THE BACCALAUREATE PORTION OF THE PROGRAM MOST COMMONLY USED ARE “BACCALAUREATE IN HEALTH SCIENCES,” “BACCALAUREATE IN ALLIED HEALTH,” “BACCALAUREATE IN OCCUPATIONAL SCIENCE,” AND “BACCALAUREATE IN HEALTH STUDIES.”

Evidence:
- Documentation in handbooks or policies and procedure manuals that the institution assumes responsibility for the program or department, including functions specified in the Standard.

Standard A.1.5. The sponsoring institution or 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.
- Submit a Letter of Intent to add or change a program degree level at least 1 year prior to the planned admission of students into that level.
- 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., Biennial 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.

THE INSTITUTION AND THE ACCREDITED PROGRAM WILL BE ADVISED THAT THE PROGRAM IS ON ADMINISTRATIVE PROBATIONARY ACCREDITATION WHEN THE PROGRAM DOES NOT COMPLY WITH ONE OR MORE OF THE ABOVE ADMINISTRATIVE REQUIREMENTS FOR MAINTAINING ACCREDITATION. THE POLICIES AND PROCEDURES FOR ADMINISTRATIVE PROBATIONARY ACCREDITATION ARE DETAILED IN ACOTE POLICY IV.C., “CLASSIFICATION OF ACCREDITATION CATEGORIES.”
Evidence:
- A statement that all of the requirements of Standard A.1.5 have been met. (The accreditation department will notify the on-site team if this Standard has not been met.)

A.2.0. ACADEMIC RESOURCES

Standard A.2.1. The program must have a director who is assigned to the occupational therapy educational program on a full-time basis. The director may be assigned other institutional duties that do not interfere with the management and administration of the program. The institution must ensure that the needs of the program are being met.

THE STANDARD DOES NOT ALLOW THE APPOINTMENT OF CODIRECTORS. IF ONE COMPONENT OF THE STANDARD IS NONCOMPLIANT, THE ENTIRE STANDARD WILL BE CITED. THE PROGRAM MUST DEMONSTRATE COMPLIANCE WITH ALL COMPONENTS OF THE STANDARD IN ORDER FOR THE AREA OF NONCOMPLIANCE TO BE REMOVED.

Evidence:
- The program director position is assigned to 1 person.
- If the program director is assigned to other institutional duties, then the program director’s job description must detail major responsibilities and specify the percentage of time allocated to any additional institutional responsibilities. While program directors may have other institutional duties, it must be clearly demonstrated that the majority of their time is devoted to the program and that the program director has sufficient time available to manage the program.

Standard A.2.2. The program director must be an initially certified occupational therapist who is licensed or credentialed according to regulations in the state or jurisdiction in which the program is located. The director must hold academic qualifications comparable to the majority of other program directors within the institutional unit (e.g., division, college, school) to which the program is assigned. By July 1, 2012, the program director must hold a doctoral degree.

IF ONE COMPONENT OF THE STANDARD IS NONCOMPLIANT, THE ENTIRE STANDARD WILL BE CITED. THE PROGRAM MUST DEMONSTRATE COMPLIANCE WITH ALL COMPONENTS OF THE STANDARD IN ORDER FOR THE AREA OF NONCOMPLIANCE TO BE REMOVED.

IF ALL, OR A CLEAR MAJORITY, OF PROGRAM DIRECTORS WITHIN THE UNIT TO WHICH THE PROGRAM IS ASSIGNED HAVE DOCTORATES PRIOR TO JULY 1, 2012, THEN THE OT PROGRAM DIRECTOR MUST ALSO HOLD A DOCTORATE. IF SOME PROGRAM DIRECTORS HAVE DOCTORATES, BUT THE MAJORITY OF THEM HAVE MASTER’S DEGREES, THEN THE OT DIRECTOR WITH A MASTER’S DEGREE IS ACCEPTABLE UNTIL JULY 1, 2012. WHEN ASSESSING "CLEAR MAJORITY," THE CREDENTIALS HELD BY THE OT PROGRAM DIRECTOR ARE CONSIDERED. IF THE DEGREE LEVELS WITHIN THE UNIT (INCLUDING THE OT PROGRAM DIRECTOR), ARE EVENLY DIVIDED, THEN COMPARABILITY WITH THE DEGREES OF PROGRAM DIRECTORS AT THE NEXT HIGHER LEVEL WITHIN THE INSTITUTIONAL STRUCTURE MAY BE CONSIDERED.

THE DOCTORAL-DEGREE REQUIREMENT IS NOT LIMITED TO A DOCTORATE IN OCCUPATIONAL THERAPY.

Evidence:
- Summary of Program Director Credentials (OT Master’s).
- Documentation of initial certification.
- Current license or credential for state or jurisdiction in which the program is located.
- Copy of diploma or transcript indicating degree level obtained.

Standard A.2.3. The program director must have a minimum of 6 years of experience in the field of occupational therapy, including practice as an occupational therapist, administrative or supervisory experience, and at least 2 years of experience in a full-time academic appointment with teaching responsibilities.

THE REQUIREMENT FOR ADMINISTRATIVE EXPERIENCE IS INTENDED TO ENSURE THAT THE DIRECTOR OF AN OCCUPATIONAL THERAPY OR OCCUPATIONAL THERAPY ASSISTANT PROGRAM HAS DOCUMENTED EXPERIENCE IN AREAS NECESSARY FOR THE POSITION, INCLUDING RESPONSIBILITIES FOR AT LEAST THE FOLLOWING:
PROGRAM PLANNING, ADMINISTRATION, EVALUATION, BUDGETING, AND SELECTION AND SUPERVISION OF PERSONNEL. ADMINISTRATIVE EXPERIENCE MAY BE WITHIN OR EXTEND BEYOND THE PARAMETERS OF OCCUPATIONAL THERAPY. IF ONE COMPONENT OF THE STANDARD IS NONCOMPLIANT, THE ENTIRE STANDARD WILL BE CITED. THE PROGRAM MUST DEMONSTRATE COMPLIANCE WITH ALL COMPONENTS OF THE STANDARD IN ORDER FOR THE AREA OF NONCOMPLIANCE TO BE REMOVED.

Evidence:
- Summary of Program Director Credentials (OT Master’s).
- Curriculum vitae indicating work history, experience as an occupational therapist in practice, description of administrative experiences and duties, years of faculty appointment, and courses taught.
- Evidence of at least 6 years of experience as an occupational therapist. (Experience as an occupational therapy assistant cannot be substituted.)
- Evidence of experience in clinical practice as an occupational therapist.
- Evidence of experience in areas necessary for administrative responsibilities, including, at the minimum, experience in program planning, administration, evaluation, budgeting, and selection and supervision of personnel. Administrative experience may be within or extend beyond the parameters of occupational therapy.
- Evidence of at least 2 years of experience in a full-time academic appointment with teaching responsibilities, preferably in occupational therapy.

Standard A.2.4. 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.

Evidence:
- Job description detailing responsibilities of the program director that clearly indicates responsibility for all aspects of management and administration of the program.

Standard A.2.5. 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.

Evidence:
- A statement of how the complement of faculty possesses the necessary practice and academic experience to deliver the program of instruction outlined in the curriculum design and mission of the institution.

Standard A.2.6. The program must document policies and procedures to ensure that the program director and faculty are aware of and abide by the current code of ethics of the profession of occupational therapy.

COMPLIANCE WITH THIS STANDARD MAY BE DOCUMENTED WITH SIGNED STATEMENTS THAT THE PROGRAM DIRECTOR AND EACH FACULTY MEMBER UNDERSTAND AND AGREE TO ABIDE BY THE CURRENT OCCUPATIONAL THERAPY CODE OF ETHICS. THE PROGRAM MUST ALSO HAVE A WRITTEN POLICY AND PROCEDURE FOR HANDLING ANY ETHICAL VIOLATIONS THAT MAY OCCUR.

Evidence:
- A documented policy and procedure for handling ethical violations if they occur. (Signed statements must be available on site that the program director and each faculty member are aware of and agree to abide by the current Occupational Therapy Code of Ethics.)

Standard A.2.7. The program must identify an individual as academic fieldwork coordinator who is specifically responsible for the program’s compliance with the fieldwork requirements of Standards Section B.10.0. This individual must be a licensed or credentialed occupational therapist. Academic fieldwork coordinators who hold a faculty position must meet the requirements of Standard A.2.9.

Evidence:
- Documented job description for the fieldwork coordinator that includes the following responsibilities:
  - Selecting fieldwork sites
  - Ensuring fieldwork is congruent with the curriculum design
  - Ensuring that faculty collaborate to design fieldwork experiences
  - Communicating about the curriculum to fieldwork educators
  - Maintaining contracts and site data
  - Ensuring that academic and fieldwork educators collaborate in establishing fieldwork objectives
  - Communicating with student and fieldwork educator about progress and performance during fieldwork.
- Copy of current license or credential as an occupational therapist.

Standard A.2.8. The faculty must include currently licensed or credentialed occupational therapists.

THE INTENT OF THIS STANDARD IS THAT ALL FACULTY WHO ARE OCCUPATIONAL THERAPISTS OR OCCUPATIONAL THERAPY ASSISTANTS ARE LICENSED. IF A PROGRAM IS OFFERED BY DISTANCE EDUCATION AND A FACULTY MEMBER RESIDES IN A DIFFERENT STATE, OR IF A PROGRAM IS LOCATED NEAR A BORDER AND A FACULTY MEMBER RESIDES IN A NEIGHBORING STATE, THE FACULTY MEMBER MAY HOLD A LICENSE IN THEIR STATE OF RESIDENCE, UNLESS REQUIRED BY THE PROGRAM TO HOLD A LICENSE IN THE STATE IN WHICH THE PROGRAM IS LOCATED. IN A STATE OR JURISDICTION WHERE LICENSING IS NOT AVAILABLE, A CREDENTIAL COMPARABLE TO LICENSING MAY BE USED.

Evidence:
- Copy of the current license or credentials for faculty who are occupational therapists.

Standard A.2.9. All full-time faculty must hold a minimum of a master’s degree. By July 1, 2012, the majority of full-time faculty who are occupational therapists must hold a doctoral degree.

FULL-TIME FACULTY INCLUDES ALL PERSONS WHO ARE EMPLOYED FULL-TIME BY THE INSTITUTION, WHO ARE APPOINTED PRIMARILY TO THE OCCUPATIONAL THERAPY PROGRAM, AND WHOSE JOB RESPONSIBILITIES INCLUDE TEACHING, REGARDLESS OF THE POSITION TITLE (E.G., FULL-TIME INSTRUCTIONAL STAFF, LAB ASSISTANTS, AND CLINICAL INSTRUCTORS WOULD BE CONSIDERED FACULTY). REFER TO STANDARD A.2.7. FOR THE ACADEMIC FIELDWORK COORDINATOR’S DEGREE REQUIREMENTS.

THE DOCTORAL-DEGREE REQUIREMENT IS NOT LIMITED TO A DOCTORATE IN OCCUPATIONAL THERAPY. FOR AN EVEN NUMBER OF FACULTY, AT LEAST HALF MUST HOLD DOCTORATES. FOR AN ODD NUMBER OF FACULTY, HALF PLUS ONE MUST HOLD DOCTORATES. THE PROGRAM DIRECTOR IS COUNTED AS A FACULTY MEMBER.

Evidence:
- List of full-time faculty who are occupational therapy faculty and degrees held.
- Copy of diploma or transcript indicating degree level obtained for each faculty member.

Standard A.2.10. The faculty must have 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 RECENT CONTINUING EDUCATION, RELEVANT EXPERIENCE, FACULTY DEVELOPMENT PLAN REFLECTING ACQUISITION OF NEW CONTENT, INCORPORATION OF FEEDBACK FROM COURSE EVALUATIONS, AND OTHER SOURCES.
Evidence:
- FORM E for all occupational therapy 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.

2006 STANDARDS—FORM E
OUTLINE FOR CURRICULUM VITAE
OCCUPATIONAL THERAPY FACULTY
(except program director, for whom a full CV is required)

I. Name and Credentials: _______________________________________________________
   Title and/or Rank: __________________________________________________________
   Starting Date of Present Employment: _________________________________________
   Teaching Status (F/T, P/T—Hours or % F/T): _________________________________
   Date of Initial Certification (OTR/COTA): _________________________________

II. Job responsibilities as both program and institutional faculty members (e.g., teaching, counseling admissions, administration, committee, community, etc.):
   A. Teaching (list course number and name):
   B. Non-Teaching:

III. Education (professional and other, most recent first):
   A. OT:
   B. Other:

IV. MAJOR non-degree postgraduate/short-term courses related to your assigned responsibilities (most recent first):

V. Work experience relevant to teaching assignments and responsibilities:

VI. Summary of most recent scholarly activities:

VII. Other activities that enhance your effectiveness in your present position (e.g., knowledge of content delivery methods such as distance learning):

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Standard A.2.11. The occupational therapy faculty at each accredited location where the program is offered must be sufficient in number and must possess the expertise necessary to ensure appropriate curriculum design, content delivery, and program evaluation.

THE TERMS “SUFFICIENT IN NUMBER” AND “POSSESS THE EXPERTISE NECESSARY” ARE INTERPRETED IN COMBINATION, AS STATED. THE INTENT IS TO ASSURE DELIVERY OF THE BROAD SCOPE OF OCCUPATIONAL THERAPY PRACTICE BY INDIVIDUALS COMPETENT IN THOSE AREAS. MULTIPLE ADJUNCTS, PART-TIME FACULTY, OR FULL-TIME FACULTY MAY BE CONFIGURED TO MEET THIS GOAL.

Evidence:
- If the program has additional sites at which courses are offered (satellite sites), the program must provide a list of additional faculty for those sites.

Standard A.2.12. Faculty responsibilities must be consistent with and supportive of the mission of the institution.
Evidence:
- FORM F (see Standard A.5.3.) for faculty collectively shows evidence of goals or actions steps that reflect the mission of the institution.

**Standard A.2.13.** The faculty–student ratio must permit the achievement of the purpose and stated objectives for laboratory and lecture courses, be compatible with accepted practices of the institution for similar programs, and ensure student and consumer safety.

Evidence:
- Stated rationale of how the faculty–student ratio ensures achievement of stated goals.
- Stated rationale of how the faculty–student ratio is consistent with accepted practice in similar programs in the institution.
- Stated rationale of how the faculty–student ratio ensures student and consumer safety.

**Standard A.2.14.** Clerical and support staff must be provided to the program, consistent with institutional practice, to meet programmatic and administrative requirements, including support for any portion of the program offered by distance education.

Evidence:
- Stated rationale of how clerical and support staff meet programmatic and administrative requirements.
- Stated rationale of how clerical and support staff is consistent with the institution’s practices.
- If the program uses distance learning, specify support provided to the program for distance learning technology.

**Standard A.2.15.** 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.

Evidence:
- Stated rationale for the budget indicates that it is sufficient to fulfill the objectives of the program and meet the needs of the students.
- FORM D—Financial Resources shows sufficient institutional funds are budgeted and available to fulfill the objectives of the program and meet the needs of the students.
- If grants, gifts, and restricted sources support the program, state a plan for maintaining the program in the event that those sources were removed.

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**2006 STANDARDS FORM D—FINANCIAL RESOURCES**

(Use FORM D, including categories as they are stated in your institution. Please note whether the institution prepares multi-year budgets. If you have no indication of the budget for the next year, please state that.)

1. Indicate fiscal year (e.g., October–September)
2. Obtain or develop a three-year budget utilizing categories appropriate to the program.

<table>
<thead>
<tr>
<th>Budget Categories</th>
<th>Previous Year</th>
<th>Present Year</th>
<th>Next Year (est.)</th>
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<tr>
<td>Faculty Salaries and Benefits</td>
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<tr>
<td>Other Salaries and Benefits</td>
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<tr>
<td>Budget Categories*</td>
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Other funds to which the program has access (Specify how such funds are used)

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<tr>
<th>TOTAL</th>
<th>% Institutional Funds</th>
<th>% Restricted Use Funds</th>
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Please provide information on the following areas: supplies, travel for fieldwork coordinator, travel for continuing education, purchased services, equipment, library books, other. Explain, if appropriate.

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Standard A.2.16. Classrooms and laboratories must be provided that are consistent with the program’s educational objectives, teaching methods, number of students, and safety and health standards of the institution, and must allow for efficient operation of the program. If any portion of the program is offered by distance education, technology and resources must be adequate to support a distance-learning environment.

Evidence:
- Classrooms and laboratories allow the program to:
  - meet its educational objectives
  - use teaching methods described in the curriculum design
  - accommodate the number of students enrolled
  - abide by safety and health standards of the institution.
- During on-site visits, the space must be available for inspection.
- Classrooms and laboratories are consistent with space provided to similar programs within the institution.
- If program includes distance learning, description of support is provided.

Standard A.2.17. Laboratory space provided by the institution must be assigned to the occupational therapy 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.

Evidence:
- Statement describing the process of assigning laboratory space to the program.
- Written and signed agreements for any laboratory space provided by another institution or agency that ensure availability of space for program use.
- During on-site visits, the lab(s) will be available for inspection.

Standard A.2.18. Adequate space must be provided to store and secure equipment and supplies.

Evidence:
- Statement describing how storage space is adequate and how storage space secures equipment and supplies.
- During on-site visits, the space must be available for inspection.

Standard A.2.19. The program director and faculty must have office space consistent with institutional practice.

Evidence:
- Statement explaining how adequate office space assigned to the program and how it is consistent with institutional practice.
- During on-site visits, the space must be available for inspection.

Standard A.2.20. Adequate space must be provided for the private advising of students.
Evidence:
- Statement describing how adequate space is provided for private advising of students.
- During on-site visits, the space must be available for inspection.

**Standard A.2.21.** Appropriate and sufficient equipment and supplies must be provided by the institution for student use and for the didactic and supervised fieldwork components of the curriculum.

Evidence:
- Statement explaining how equipment and supplies are appropriate and sufficient to allow the program to meet the educational objectives and teaching methods described in the curriculum design.
- Statement explaining how the program ensures that the equipment and supplies change as the needs of the program change (e.g., change in enrollment numbers, curriculum design).
- During on-site visits, supplies and materials must be available for inspection.

**Standard A.2.22.** Students must be given access to and have the opportunity to use the evaluative and treatment methodologies that reflect both current practice and practice in the geographic area served by the program.

Evidence:
- List of available evaluative and treatment methodologies.
- Statement describing how students have access to and have opportunity to use evaluative and treatment methodologies.
- Statement describing the program’s process for ensuring that evaluative and treatment methodologies reflect current practice and practice in the geographic area served by the program (e.g., fieldwork site data, student feedback, advisory committee).
- During on-site visits, evaluative and treatment methodologies must be available for inspection.

**Standard A.2.23.** 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, and resource centers.

Evidence:
- List of current and relevant books, journals, periodicals, computers, software, and online services.
- Statement describing how the resources are adequate to meet the needs of the students.
- Statement describing the process for ensuring that reference materials remain current.
- During on-site visits, library resources must be available for inspection.

**Standard A.2.24.** Instructional aids and technology must be available in sufficient quantity and quality to be consistent with the program objectives and teaching methods.

Evidence:
- List of available instructional aids and technology.
- Statement explaining how available instructional aids and technology are sufficient for program objectives and teaching methods.

### A.3.0. STUDENTS

**Standard A.3.1.** Admission of students to the occupational therapy 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.

Evidence:
- Admission materials (e.g., program brochure/flyer, Web site, catalog) specify admission criteria.
- Statement explaining how program admission criteria are consistent with institutional admission criteria.
- If program delivery format is distance learning or other alternative format, admission materials must specify distance learning or other alternative format demands of the program.
Standard A.3.2. 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.

Evidence:
- If used by program, the following policies are in at least 1 publication that is available to prospective students (e.g., Web site, program brochure/flyer, catalog, admissions material):
  - Standards for admission
  - Advanced placement
  - Transfer of credit
  - Credit for experiential learning
  - Prerequisite education requirements
  - Work experience requirements.

Standard A.3.3. Programs 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 master’s Standards.

Evidence:
- Statement describing the system 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 master’s Standard (e.g., course transfer policy, articulation agreements, review of syllabi).
- Records for students receiving credit for previous coursework or experience must be available on site.

Standard A.3.4. Criteria for successful completion of each segment of the educational program and for graduation must be given in advance to each student.

Evidence:
- Program documentation (e.g., handbook, catalog) includes the criteria for successful completion of each segment of the program and for graduation (e.g., courses, credits, retention criteria, retention grade point).

Standard A.3.5. Evaluation content and methods must be consistent with the curriculum design, objectives, and competencies of the didactic and fieldwork components of the program.

Evidence:
- A statement describing evaluation content and methodologies are related to the program’s curriculum design and overall program objectives.

Standard A.3.6. Evaluation must be conducted on a regular basis to provide students and program officials with timely indications of the students’ progress and academic standing.

Evidence:
- Statement describing the regular process for evaluating and monitoring students’ progress and academic standing (e.g., semester review of student grade point average).

Standard A.3.7. Students must be informed of and have access to the student support services that are provided to other students in the institution.

Evidence:
- Program or institution handbook includes description of available support services.
- Students in the program have access to same the support services as other students in the institution.

Standard A.3.8. Advising related to professional coursework and fieldwork education must be the responsibility of the occupational therapy faculty.
Evidence:
- Program materials (e.g., handbook) includes description of system for advisement.
- Evidence in student records of the advisement process by occupational therapy faculty must be available for review on site.

A.4.0. OPERATIONAL POLICIES

Standard A.4.1. All program publications and advertising—including, but not limited to, academic calendars, announcements, catalogs, handbooks, and Web sites—must accurately reflect the program offered.

Evidence:
- Copies of key publications and advertising (e.g., catalog, handbook, Web site, brochure/flyer) are provided.
  - Program information is accurate.
  - Program information is consistent across publications.

Standard A.4.2. Accurate and current information regarding student outcomes must be readily available to the public in at least one publication or Web page. The following data must be reported as an aggregate for the three most recent calendar years and specify the
  - 3-year time period being reported,
  - total number of program graduates during that period,
  - total number of first-time test takers of the national certification examination during that period,
  - total number of first-time test takers who passed the exam during that period, and
  - percentage of the total number of first-time test takers who passed the exam during that period.

CERTIFICATION EXAM RESULTS ARE READILY AVAILABLE TO PROGRAM DIRECTORS FROM THE NATIONAL BOARD FOR CERTIFICATION IN OCCUPATIONAL THERAPY (NBCOT). NBCOT PROVIDES CERTIFICATION EXAM PASS RATE DATA FOR FIRST-TIME TEST TAKERS, WHICH ARE DEFINED AS NEW GRADUATES WHO TOOK THE CERTIFICATION EXAM WITHIN 12 MONTHS AFTER GRADUATION.

PROGRAMS MAY PROVIDE ADDITIONAL DATA REGARDING STUDENT OUTCOMES. PROGRAMS THAT CHOOSE TO PUBLISH ADDITIONAL DATA SUCH AS EXAM PASS RATES IN DIFFERENT FORMATS (E.G., TOTAL PASS RATE, ANNUAL PASS RATE) MUST ALSO REFLECT THE TIMEFRAME FOR THE PASS RATE PERCENTAGE AND INDICATE WHETHER THE PASS RATE INCLUDES FIRST-TIME TEST TAKERS, REPEAT TAKERS, OR BOTH.

IF STUDENT PASS RATE DATA IS PROVIDED AS PART OF THE INSTITUTION’S ASSESSMENT OUTCOMES, IT MAY BE REPORTED IN A FORMAT CONSISTENT WITH THAT OF COMPARABLE PROGRAMS (E.G., TOTAL PASS RATE, ANNUAL PASS RATE).

THE INTENT OF THE STANDARD IS THAT COMPARABLE INFORMATION BE READILY AVAILABLE TO THE PUBLIC. IF THE PROGRAM HAS A WEB PAGE, THE 3-YEAR COHORT FIRST-TIME TEST TAKER PASS RATE INFORMATION MUST BE INCLUDED ON THE PROGRAM’S WEB PAGE, OR A REFERENCE TO THE LOCATION OF THAT PASS RATE INFORMATION MUST BE INCLUDED ON THE WEB PAGE.

Evidence:
- Copies of any publications where outcomes are reported to stakeholders.
- Publication is readily available to the public.
- Outcome data reported accurately and reflects criteria indicated in the Standard.

Standard A.4.3. The program’s accreditation status and the name, address, and telephone number of ACOTE must be published in all of the following used by the institution: catalog, Web site, and program-related brochures or flyers available to prospective students.

SAMPLE WORDING: “THE OCCUPATIONAL THERAPY PROGRAM IS ACCREDITED BY THE ACCREDITATION COUNCIL FOR OCCUPATIONAL THERAPY EDUCATION (ACOTE) OF THE AMERICAN OCCUPATIONAL THERAPY ASSOCIATION (AOTA), LOCATED AT 4720 MONTGOMERY LANE, P.O. BOX 31220, BETHESDA, MD 20824-1220. ACOTE’S TELEPHONE NUMBER C/O AOTA IS (301) 652-AOTA.”
Evidence:
- Copies of catalog, Web site, and program-related brochures or flyers.
- Correct address and phone number stated.
- Correct accreditation status stated.

Standard A.4.4. Faculty recruitment and employment practices, as well as student recruitment and admission procedures, must be nondiscriminatory.

Evidence:
- Copy of institution’s or program’s policies on nondiscrimination in recruitment, employment, and admission practices.

Standard A.4.5. 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.

Evidence:
- Catalog or Web site contains the following:
  - Graduation requirements (e.g., credits, time, courses)
  - Tuition
  - Fees (When published fees are subject to change, a statement to that effect is included.).

Standard A.4.6. The program or sponsoring institution must have a defined and published policy and procedure for processing student and faculty grievances.

Evidence:
- Grievance policies and procedures are published (e.g., institution handbooks or program handbook) and available to students and faculty.

Standard A.4.7. Policies and procedures for handling complaints against the program must be published and made known. The program must maintain a record of student complaints that includes the nature and disposition of each complaint.

Evidence:
- Complaint policies and procedures are published (e.g., institution handbooks or program handbook) and available to students.
- Records of student complaints and the disposition of each complaint are maintained and available for review during the on-site visit.

Standard A.4.8. Policies and processes for student withdrawal and for refunds of tuition and fees must be published and made known to all applicants.

Evidence:
- Policies and procedures for student withdrawal and for refunds of tuition and fees are published (e.g., catalog, Web site) and available to all applicants.


Evidence:
- Policies and procedures for student probation, suspension, and dismissal are published (e.g., institution’s handbooks, program handbook) and available to students and faculty.

Standard A.4.10. Policies and procedures must be published and made known for human-subject research protocol.
Evidence:
- Policies and procedures for human subject research protocol are published and available to students and faculty.

**Standard A.4.11.** Written policies and procedures must be made available to students regarding 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).

Evidence:
- Policies and procedures are published and available to students and faculty.
  - Safety with equipment, supplies, and activities
  - Infection control
  - Evacuation

**Standard A.4.12.** A program admitting students on the basis of ability to benefit (defined by the U.S. Department of Education 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.

Evidence:
- If the institution participates in the program, there must be a publication of objectives, assessment measures, and means of evaluating the student’s ability to benefit.
- If the institution does not participate in the program, the Standard does not apply.

**Standard A.4.13.** Documentation of all progression, retention, graduation, certification, and credentialing requirements must be published and made known to applicants. This must include a statement about the potential impact of a felony conviction on a graduate’s eligibility for certification and credentialing.

SAMPLE WORDING: “GRADUATES OF THE PROGRAM WILL BE ELIGIBLE TO SIT FOR THE NATIONAL CERTIFICATION EXAMINATION FOR THE OCCUPATIONAL THERAPIST ADMINISTERED BY THE NATIONAL BOARD FOR CERTIFICATION OF OCCUPATIONAL THERAPY (NBCOT). AFTER SUCCESSFUL COMPLETION OF THIS EXAM, THE INDIVIDUAL WILL BE AN OCCUPATIONAL THERAPIST, REGISTERED (OTR). IN ADDITION, MOST STATES REQUIRE LICENSURE TO PRACTICE. HOWEVER, STATE LICENSES ARE USUALLY BASED ON THE RESULTS OF THE NBCOT CERTIFICATION EXAMINATION. A FELONY CONVICTION MAY AFFECT A GRADUATE’S ABILITY TO SIT FOR THE NBCOT CERTIFICATION EXAMINATION OR ATTAIN STATE LICENSURE.”

Evidence:
- Policies are published (e.g., program brochure/flyer, catalog, Web site) and available to applicants.
  - Progression, retention and graduation
  - Certification
  - Credentialing
  - Potential impact of felony conviction

**Standard A.4.14.** The program must have a documented and published policy to ensure students complete all graduation and fieldwork requirements in a timely manner. This must include a statement that all Level II fieldwork be completed within a time frame established by the program.

SAMPLE WORDING: “STUDENTS MUST COMPLETE LEVEL II FIELDWORK WITHIN (XX) MONTHS FOLLOWING COMPLETION OF THE DIDACTIC PORTION OF THE PROGRAM.”

Evidence:
- Policy is published (e.g., Program Handbook) and available to students.

**Standard A.4.15.** Records regarding student admission, enrollment, and achievement must be maintained and kept in a secure setting. Grades and credits for courses must be recorded on students’ transcripts and permanently maintained by the sponsoring institution.

Evidence:
- Records are stored in a secure setting.
A.5.0. STRATEGIC PLAN AND PROGRAM ASSESSMENT

Standard A.5.1. The program must document a current strategic plan that articulates the program’s future vision and guides the program development (e.g., faculty recruitment and professional growth, changes in the curriculum design, priorities in academic resources, procurement of fieldwork sites). A program strategic plan must 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 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.

Evidence:
- Documented strategic plan (FORM G) that meets the following criteria:
  - Provides future vision and guides program development
  - Addresses faculty recruitment, faculty professional growth, changes in curriculum design, priorities in academic resources, or procurement of fieldwork sites
  - Based on program evaluation
  - Based on an analysis of external and internal environments
  - Includes long-term goals
  - Includes specific measurable action steps
  - Expected timelines for action steps
  - States person(s) responsible for action steps
  - Periodic updating of actions steps and long-term goals.

---

2006 STANDARDS FORM G—STRATEGIC PLAN

(Program Title)
(College/University Name)
Years: ____________

Analysis of program evaluation, internal and external environments:

<table>
<thead>
<tr>
<th></th>
<th>Program Evaluation Results</th>
<th>Internal Institutional Environment</th>
<th>External Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strengths</td>
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<tr>
<td>Concerns</td>
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<td>Opportunities</td>
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<td>Threats</td>
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</table>

Institution Strategic Goal: ____________________________________________________.

<table>
<thead>
<tr>
<th>Long-Term Program Goal</th>
<th>Action Steps</th>
<th>Person(s) Responsible</th>
<th>Due Date for Action</th>
<th>Results / Update</th>
</tr>
</thead>
<tbody>
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Institution Strategic Goal: ____________________________________________________.

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</table>
**Standard A.5.2.** 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. 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, research, scholarly activity).
- 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 PLAN SHOULD REFLECT 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. SIMILARLY, IF THE FACULTY MEMBER’S PRIMARY ROLE IS RESEARCH, HE OR SHE MAY NOT NEED A GOAL RELATED TO TEACHING EFFECTIVENESS).*

**Evidence:**

- A plan is documented for the program director and each faculty member who teaches 2 or more courses.
- Documented development plans meet the following criteria:
  - Annual goals related to currency in areas of teaching
  - Annual goals related to teaching effectiveness
  - Annual goals related to research skills and development (if designated in job responsibilities)
  - Annual goals related to scholarly activity (if designated in job responsibilities)
  - Specific measurable action steps to achieve stated goals
  - Expected timelines for action steps
  - Evidence of annual updates of action steps and goals
  - Explanation of the results or outcomes related to annual goals
  - Explanation as to how the professional development plan for each faculty member contributes to the attainment of program strategic goals
  - Development plan is signed and dated by the faculty member and their supervisor.

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**2006 STANDARDS FORM F—FACULTY/PROGRAM DIRECTOR PROFESSIONAL DEVELOPMENT PLAN**

*(Completed forms must be signed by both parties in order to be considered valid.)*

*(Program Title)________                (College/University Name)__________*

Name: ___________________________ Date Developed: ___________

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

Supervisor’s Signature: ___________________________ Date ___________

(Signature required) ___________________________ Date ___________

Faculty/PD’s Signature: ___________________________ Date ___________

(Signature required) ___________________________ Date ___________

Date Developed: ___________________________ Date Revised: ________

<table>
<thead>
<tr>
<th>Connection to Program’s Strategic Plan</th>
<th>Goals</th>
<th>Action Steps to Achieve Goal</th>
<th>Timeline</th>
<th>Outcomes/Revisions/Results</th>
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Master’s-Level OT Guide to Compliance 15 December 2007
Standard A.5.3. Programs must routinely secure and document sufficient qualitative and quantitative information to allow for meaningful analysis about the extent to which the program is meeting its stated goals and objectives. This must include, but need not be limited to:

- Faculty effectiveness in their assigned teaching responsibilities.
- Students’ progression through the program.
- 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 based on employer satisfaction.

Evidence:
- Documentation of the evaluation program plan includes the following:
  - Faculty effectiveness in their assigned teaching responsibilities
  - Students’ progression through the program
  - 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 based on employer satisfaction.

--------------------------------------------------------------------------------------------------------------------------------------------

PROGRAM EVALUATION PLAN TEMPLATE

<table>
<thead>
<tr>
<th>Program Goal and Related Outcomes</th>
<th>Measurement Criteria</th>
<th>Assessment Tool</th>
<th>Review Period</th>
<th>Review Process Who Analyzes and Reviews Data</th>
</tr>
</thead>
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Standard A.5.4. The average total pass rate of OT master’s program graduates taking the national certification exam for the first time over the three most recent calendar years must be 70% or higher.

*IF A PROGRAM HAS FEWER THAN 25 FIRST-TIME TAKERS IN THE THREE MOST RECENT CALENDAR YEARS, THE PROGRAM MAY INCLUDE FIRST-TIME TAKERS FROM ADDITIONAL YEARS UNTIL THE TOTAL REACHES 25 OR UNTIL THE 5 MOST RECENT CALENDAR YEARS ARE INCLUDED IN THE TOTAL.*

Evidence:
- Program documents 3-year pass rate for first time takers.

Standard A.5.5. 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.

Evidence:
- Data collected is analyzed on regular basis (at least annually).
- Analyzed data is summarized in a program evaluation report.
### OCCUPATIONAL THERAPY PROGRAM EVALUATION REPORT TEMPLATE

<table>
<thead>
<tr>
<th>Data</th>
<th>Analysis</th>
<th>Action Plan (Changes in Strategic Plan, Curriculum or Course Content)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty effectiveness</td>
<td></td>
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<tr>
<td>Student progression and retention</td>
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<td>Fieldwork performance</td>
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<tr>
<td>Student evaluation of fieldwork experience</td>
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<tr>
<td>Student satisfaction with the program</td>
<td></td>
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<tr>
<td>NBCOT results</td>
<td></td>
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<tr>
<td>Graduate job placement</td>
<td></td>
<td></td>
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<tr>
<td>Performance based on employer satisfaction</td>
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</tbody>
</table>

**Standard A.5.6.** The results of ongoing evaluation must be appropriately reflected in the program’s strategic plan, curriculum, and other dimensions of the program.

**Evidence:**
- As a result of the program evaluation findings, the items identified on the action plan documents changes made to some components of the program (e.g., strategic plan, curriculum design, curriculum content, or course content).

**A.6.0. CURRICULUM FRAMEWORK**

The curriculum framework is a description of the program that includes the program’s mission, philosophy, and curriculum design.

**Standard A.6.1.** The curriculum must include preparation for practice as a generalist with a broad exposure to current practice settings (e.g., school, hospital, community, long-term care) and emerging practice 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 elderly persons in areas of physical and mental health.

**Evidence:**
- Statement describing program’s definition of current practice settings (e.g., school, hospital, community, long-term care) and program’s definition of emerging practice areas (e.g., driver rehabilitation). Statement indicating which courses address current practice settings and which courses address emerging practice areas.
- Statement indicating which courses prepare students to work with children, adolescents, adults, and elderly persons.
- Statement indicating which courses prepare students to work in areas of physical and mental health.

**Standard A.6.2.** 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.
Evidence:
- Statement explaining the system and rationale (e.g., standards for graduate education, standards for professional education, comparability across institutions, comparability within institution) for determining that the length of study is appropriate to the expected learning objectives and competence of the graduate.

**Standard A.6.3.** The statement of philosophy of the occupational therapy program must reflect the current published philosophy of the profession and must include a statement of the program’s fundamental beliefs about human beings and how they learn.

Evidence:
- Philosophy statement describes the program’s definition regarding scope of occupational therapy, and program’s definition reflects current published philosophy of the profession.
- Philosophy statement describes the learning process and the program’s beliefs about how students learn.

**Standard A.6.4.** The statement of the mission of the occupational therapy program must be consistent with and supportive of the mission of the sponsoring institution.

Evidence:
- Statement explaining the consistency between the program’s mission statement and the institution’s mission statement.

**Standard A.6.5.** The curriculum design must reflect the mission and philosophy of both the occupational therapy program and the institution and must provide the basis for program planning, implementation, and evaluation. The design must identify educational goals and describe the selection of the content, scope, and sequencing of coursework.

Evidence:
- 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.

**Standard A.6.6.** The program must have clearly documented assessment measures by which students are regularly evaluated on their acquisition of knowledge, skills, attitudes, and competencies required for graduation.

Evidence:
- Assessment measures are clearly documented in syllabi and on FORM C.
- Assessment measures are consistent with the student learning outcomes for acquisition of knowledge, skills, attitudes, and competencies and with the program’s learning philosophy.

**Standard A.6.7.** 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) and materials used to accomplish course objectives must be documented. Programs must also demonstrate the consistency between course syllabi and the curriculum design.

Evidence:
- Documented syllabi for all courses that include:
  - Course objectives
  - Learning activities
  - Instructional methods and materials.
- Statement of how each course relates to the curriculum design (FORM B).
SECTION B: SPECIFIC REQUIREMENTS FOR ACCREDITATION

The specific requirements for accreditation contain the content that a program must include. 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.

Taxonomies are used to differentiate expected student outcomes for OTA, OT Master’s-Level, and OT Doctoral-Level content standards.

2006 STANDARDS FORM C—COMPARISON OF COURSES WITH 2006 STANDARDS

For each Standard, list no more than two course numbers that primarily satisfy the requirements of that Standard. (Do not include Level II fieldwork.) Indicate the page number(s) on which the related course description (Form B) appears in the Report of Self-Study. Indicate the course objective number from the syllabus that clearly relates to the listed Standard. Indicate the assessment measure(s) that are used for each Standard.

<table>
<thead>
<tr>
<th>Standard</th>
<th>Course # (Only list two)</th>
<th>Form B Page #</th>
<th>Objective # from the Syllabus</th>
<th>Assessment Measure(s)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>B.1.1.</td>
<td>Demonstrate oral and written communication skills.</td>
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</tbody>
</table>

*Assessment Measures:
1. Assignment 5  Project
2. Lab Test 6  Presentation
3. Objective test 7  Demonstration
4. Essay test 8  Other—please specify

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 life span. Coursework in these areas may be prerequisite to or concurrent with professional education and must facilitate development of the performance criteria listed below. The student will be able to:

**Standard B.1.1.** Demonstrate oral and written communication skills.

**Standard B.1.2.** Employ logical thinking, critical analysis, problem solving, and creativity.

**Standard B.1.3.** Demonstrate competence in basic computer use, including the ability to use databases and search engines to access information, word processing for writing, and presentation software (e.g., PowerPoint).

**Standard B.1.4.** Demonstrate knowledge and understanding of the structure and function of the human body to include the biological and physical sciences. Course content must include, but is not limited to, biology, anatomy, physiology, neuroscience, and kinesiology or biomechanics.

**Standard B.1.5.** Demonstrate knowledge and understanding of human development throughout the life span (infants, children, adolescents, adults, and elderly persons). Course content must include, but is not limited to, developmental psychology.
Standard B.1.6. Demonstrate knowledge and understanding of the concepts of human behavior to include the behavioral and social sciences. Course content must include, but is not limited to, introductory psychology, abnormal psychology, and introductory sociology or introductory anthropology.

Standard B.1.7. Demonstrate knowledge and appreciation of the role of sociocultural, socioeconomic, and diversity factors and lifestyle choices in contemporary society. Course content must include, but is not limited to, introductory psychology, abnormal psychology, and introductory sociology or introductory anthropology.

Standard B.1.8. Articulate the influence of social conditions and the ethical context in which humans choose and engage in occupations.

Standard B.1.9. Demonstrate knowledge of global social issues and prevailing health and welfare needs.

Standard B.1.10. Demonstrate the ability to use statistics to interpret tests and measurements.

Evidence:
- FORM B, FORM C, and course syllabi.
  - If content (e.g., oral and written communication skills) is attained as a prerequisite to the program, FORM B and course syllabi are not required. However, state the prerequisite course(s) that addresses the content specified in the Standard.
- Students have received adequate coursework in all the foundational content requirements (Standards B.1.1–B.1.10) through either prerequisite courses or concurrent with the professional courses offered by the program.
- It is not necessary to have a complete course devoted to each content requirement. However, programs must provide evidence that there is sufficient foundational content to ensure that students have acquired the performance criteria listed for each Standard.

B.2.0. BASIC TENETS OF OCCUPATIONAL THERAPY

Coursework must facilitate development of the performance criteria listed below. The student will be able to:

Standard B.2.1. Articulate an understanding of the importance of the history and philosophical base of the profession of occupational therapy.

Standard B.2.2. Explain the meaning and dynamics of occupation and activity, including the interaction of areas of occupation, performance skills, performance patterns, activity demands, context(s), and client factors.

Standard B.2.3. Articulate to consumers, potential employers, colleagues, third-party payers, regulatory boards, policymakers, other audiences, and the general public both the unique nature of occupation as viewed by the profession of occupational therapy and the value of occupation to support participation in context(s) for the client.

Standard B.2.4. Articulate the importance of balancing areas of occupation with the achievement of health and wellness.

Standard B.2.5. Explain the role of occupation in the promotion of health and the prevention of disease and disability for the individual, family, and society.

Standard B.2.6. Analyze the effects of physical and mental health, heritable diseases and predisposing genetic conditions, disability, disease processes, and traumatic injury to the individual within the cultural context of family and society on occupational performance.

Standard B.2.7. Exhibit the ability to analyze tasks relative to areas of occupation, performance skills, performance patterns, activity demands, context(s), and client factors to formulate an intervention plan.
Standard B.2.8. Use sound judgment in regard to safety of self and others, and adhere to safety regulations throughout the occupational therapy process.

Standard B.2.9. Express support for the quality of life, well-being, and occupation of the individual, group, or population to promote physical and mental health and prevention of injury and disease considering the context (e.g., cultural, physical, social, personal, spiritual, temporal, virtual).

Standard B.2.10. Use clinical reasoning to explain the rationale for and use of compensatory strategies when desired life tasks cannot be performed.

Standard B.2.11. Analyze, synthesize, and apply models of occupational performance and theories of occupation.

Evidence:
- FORM B, FORM C, and course syllabi specify course objectives and assessment measures for each Standard.
- Sample course materials (e.g., learning activities, presentations, case studies, assignments, exams) available on site.

B.3.0. OCCUPATIONAL THERAPY THEORETICAL PERSPECTIVES

The program must facilitate the development of the performance criteria listed below. The student will be able to:

Standard B.3.1. Describe theories that underlie the practice of occupational therapy.

Standard B.3.2. Compare and contrast models of practice and frames of reference that are used in occupational therapy.

Standard B.3.3. Discuss how theories, models of practice, and frames of reference are used in occupational therapy evaluation and intervention.

Standard B.3.4. Analyze and discuss how history, theory, and the sociopolitical climate influence practice.

Standard B.3.5. Apply theoretical constructs to evaluation and intervention with various types of clients and practice contexts to analyze and effect meaningful occupation.

Standard B.3.6. Discuss the process of theory development and its importance to occupational therapy.

Evidence:
- FORM B, FORM C, and course syllabi specify course objectives and assessment measures for each Standard.
- Sample course materials (e.g., learning activities, presentations, case studies, assignments, exams) available on site.

B.4.0. SCREENING, EVALUATION, AND REFERRAL

The process of screening, evaluation, and referral as related to occupational performance and participation must be culturally relevant and based on theoretical perspectives, models of practice, frames of reference, and available evidence. The program must facilitate development of the performance criteria listed below. The student will be able to:

Standard B.4.1. Use standardized and nonstandardized screening and assessment tools to determine the need for occupational therapy intervention. These include, but are not limited to, specified screening tools; assessments; skilled observations; checklists; histories; consultations with other professionals; and interviews with the client, family, and significant others.
Standard B.4.2. Select appropriate assessment tools based on client needs, contextual factors, and psychometric properties of tests. These must be relevant to a variety of populations across the life span, culturally relevant, based on available evidence, and incorporate use of occupation in the assessment process.

Standard B.4.3. Use appropriate procedures and protocols (including standardized formats) when administering assessments.

Standard B.4.4. Evaluate client(s)’ occupational performance in activities of daily living (ADL), instrumental activities of daily living (IADL), education, work, play, leisure, and social participation. Evaluation of occupational performance using standardized and nonstandardized assessment tools includes
- The occupational profile, including participation in activities that are meaningful and necessary for the client to carry out roles in home, work, and community environments.
- Client factors, including body functions (e.g., neuromuscular, sensory, visual, perceptual, cognitive, mental) and body structures (e.g., cardiovascular, digestive, integumentary systems).
- Performance patterns (e.g., habits, routines, roles) and behavior patterns.
- Cultural, physical, social, personal, spiritual, temporal, and virtual contexts and activity demands that affect performance.
- Performance skills, including motor (e.g., posture, mobility, coordination, strength, energy), process (e.g., energy, knowledge, temporal organization, organizing space and objects, adaptation), and communication and interaction skills (e.g., physicality, information exchange, relations).

Standard B.4.5. Compare and contrast the role of the occupational therapist and occupational therapy assistant in the screening and evaluation process along with the importance of and rationale for supervision and collaborative work between the occupational therapist and occupational therapy assistant in that process.

Standard B.4.6. Interpret criterion-referenced and norm-referenced standardized test scores based on an understanding of sampling, normative data, standard and criterion scores, reliability, and validity.

Standard B.4.7. Consider factors that might bias assessment results, such as culture, disability status, and situational variables related to the individual and context.

Standard B.4.8. Interpret the evaluation data in relation to accepted terminology of the profession and relevant theoretical frameworks.

Standard B.4.9. Evaluate appropriateness and discuss mechanisms for referring clients for additional evaluation to specialists who are internal and external to the profession.

Standard B.4.10. Document occupational therapy services to ensure accountability of service provision and to meet standards for reimbursement of services, adhering to applicable facility, local, state, federal, and reimbursement agencies. Documentation must effectively communicate the need and rationale for occupational therapy services.

Evidence:
- FORM B, FORM C, and course syllabi specify course objectives and assessment measures for each Standard.
- Sample course materials (e.g., learning activities, presentations, case studies, assignments, exams) available on site.
- A statement on how the program ensures that the process of screening, evaluation, and referral as related to occupational performance and participation is culturally relevant and based on theoretical perspectives, models of practice, frames of reference, and available evidence.
B.5.0. INTERVENTION PLAN: FORMULATION AND IMPLEMENTATION

The process of formulation and implementation of the therapeutic intervention plan to facilitate occupational performance and participation must be culturally relevant; reflective of current occupational therapy practice; based on available evidence; and based on theoretical perspectives, models of practice, and frames of reference. The program must facilitate development of the performance criteria listed below. The student will be able to:

Standard B.5.1. Use evaluation findings based on appropriate theoretical approaches, models of practice, and frames of reference to develop occupation-based intervention plans and strategies (including goals and methods to achieve them) based on the stated needs of the client as well as data gathered during the evaluation process in collaboration with the client and others. Intervention plans and strategies must be culturally relevant, reflective of current occupational therapy practice, and based on available evidence. Interventions address the following components:

- The occupational profile, including participation in activities that are meaningful and necessary for the client to carry out roles in home, work, and community environments.
- Client factors, including body functions (e.g., neuromuscular, sensory, visual, perceptual, cognitive, mental) and body structures (e.g., cardiovascular, digestive, integumentary systems).
- Performance patterns (e.g., habits, routines, roles) and behavior patterns.
- Cultural, physical, social, personal, spiritual, temporal, and virtual contexts and activity demands that affect performance.
- Performance skills, including motor (e.g., posture, mobility, coordination, strength, energy), process (e.g., energy, knowledge, temporal organization, organizing space and objects, adaptation), and communication and interaction skills (e.g., physicality, information exchange, relations).

Standard B.5.2. Select and provide direct occupational therapy interventions and procedures to enhance safety, wellness, and performance in activities of daily living (ADL), instrumental activities of daily living (IADL), education, work, play, leisure, and social participation.

Standard B.5.3. Provide therapeutic use of occupation and activities (e.g., occupation-based activity, practice skills, preparatory methods).

Standard B.5.4. Provide training in self-care, self-management, home management, and community and work integration.

Standard B.5.5. Provide development, remediation, and compensation for physical, cognitive, perceptual, sensory (e.g., vision, tactile, auditory, gustatory, olfactory, pain, temperature, pressure, vestibular, proprioception), neuromuscular, and behavioral skills.

Standard B.5.6. Provide therapeutic use of self, including one’s personality, insights, perceptions, and judgments as part of the therapeutic process in both individual and group interaction.

Standard B.5.7. Describe the role of the occupational therapist in care coordination, case management, and transition services in traditional and emerging practice environments.

Standard B.5.8. Modify environments (e.g., home, work, school, community) and adapt processes, including the application of ergonomic principles.

Standard B.5.9. Articulate principles of and be able to design, fabricate, apply, fit, and train in assistive technologies and devices (e.g., electronic aids to daily living, seating systems) used to enhance occupational performance.

Standard B.5.10. Provide design, fabrication, application, fitting, and training in orthotic devices used to enhance occupational performance and training in the use of prosthetic devices, based on scientific principles of kinesiology, biomechanics, and physics.
Standard B.5.11. Provide recommendations and training in techniques to enhance mobility, including physical transfers, wheelchair management, and community mobility, and address issues related to driver rehabilitation.

Standard B.5.12. Provide management of feeding and eating to enable performance (including the process of bringing food or fluids from the plate or cup to the mouth, the ability to keep and manipulate food or fluid in the mouth, and the initiation of swallowing) and train others in precautions and techniques while considering client and contextual factors.

Standard B.5.13. Explain the use of superficial thermal and mechanical modalities as a preparatory measure to improve occupational performance, including foundational knowledge, underlying principles, indications, contraindications, and precautions. Demonstrate safe and effective application of superficial thermal and mechanical modalities.

SKILLS, KNOWLEDGE, AND COMPETENCIES FOR ENTRY-LEVEL PRACTICE ARE DERIVED FROM AOTA PRACTICE DOCUMENTS AND NBCOT PRACTICE ANALYSIS STUDIES. SUPERFICIAL THERMAL MODALITIES INCLUDE, BUT ARE NOT LIMITED TO, HYDROTHERAPY/WHIRLPOOL, CRYOTHERAPY (COLD PACKS, ICE), FLUIDOTHERAPY™ HOT PACKS, PARAFFIN, WATER, AND INFRARED. MECHANICAL MODALITIES INCLUDE, BUT ARE NOT LIMITED TO, VASOPNEUMATIC DEVICES AND CONTINUOUS PASSIVE MOTION (CPM).

Standard B.5.14. Explain the use of deep thermal and electrotherapeutic modalities as a preparatory measure to improve occupational performance, including indications, contraindications, and precautions.

SKILLS, KNOWLEDGE, AND COMPETENCIES FOR ENTRY-LEVEL PRACTICE ARE DERIVED FROM AOTA PRACTICE DOCUMENTS AND NBCOT PRACTICE ANALYSIS STUDIES. DEEP THERMAL MODALITIES INCLUDE, BUT ARE NOT LIMITED TO, THERAPEUTIC ULTRASOUND AND PHONOPHORESIS. ELECTROTHERAPEUTIC MODALITIES INCLUDE, BUT ARE NOT LIMITED TO, BIOFEEDBACK, NEUROMUSCULAR ELECTRICAL STIMULATION, FUNCTIONAL ELECTRICAL STIMULATION, TRANSCUTANEOUS ELECTRICAL NERVE STIMULATION, ELECTRICAL STIMULATION FOR TISSUE REPAIR, HIGH-VOLTAGE GALVANIC STIMULATION, AND IONTOPHORESIS.

Standard B.5.15. Develop and promote the use of appropriate home and community programming to support performance in the client’s natural environment and participation in all contexts relevant to the client.

Standards B.5.16. Demonstrate the ability to educate the client, caregiver, family, and significant others to facilitate skills in areas of occupation as well as prevention, health maintenance, and safety.

Standard B.5.17. Apply the principles of the teaching–learning process using educational methods to design educational experiences to address the needs of the client, family, significant others, colleagues, other health providers, and the public.

Standard B.5.18. Effectively interact through written, oral, and nonverbal communication with the client, family, significant others, colleagues, other health providers, and the public in a professionally acceptable manner.

Standard B.5.19. Grade and adapt the environment, tools, materials, occupations, and interventions to reflect the changing needs of the client and the sociocultural context.

Standard B.5.20. Select and teach compensatory strategies, such as use of technology, adaptations to the environment, and involvement of humans and nonhumans in the completion of tasks.

Standard B.5.21. Identify and demonstrate techniques in skills of supervision and collaboration with occupational therapy assistants on therapeutic interventions.

Standard B.5.22. Understand when and how to use the consultative process with groups, programs, organizations, or communities.

Standard B.5.23. Refer to specialists (both internal and external to the profession) for consultation and intervention.
Standard B.5.24. 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.

Standard B.5.25. Plan for discharge, in collaboration with the client, by reviewing the needs of the client, caregiver, family, and significant others; resources; and discharge environment. This includes, but is not limited to, identification of client’s current status within the continuum of care and the identification of community, human, and fiscal resources; recommendations for environmental adaptations; and home programming to facilitate the client’s progression along the continuum toward outcome goals.


Standard B.5.27. Terminate occupational therapy services when stated outcomes have been achieved or it has been determined that they cannot be achieved. This includes developing a summary of occupational therapy outcomes, appropriate recommendations and referrals, and discussion with the client and with appropriate others of post-discharge needs.

Standard B.5.28. Document occupational therapy services to ensure accountability of service provision and to meet standards for reimbursement of services. Documentation must effectively communicate the need and rationale for occupational therapy services and must be appropriate to the context in which the service is delivered.

Evidence:
- FORM B, FORM C, and course syllabi specify course objectives and assessment measures for each Standard.
- Sample course materials (e.g., learning activities, presentations, case studies, assignments, exams) available on site.
- A statement on the process that the program uses to ensure that all content provided on formulation and implementation of the therapeutic intervention plan to facilitate occupational performance and participation is culturally relevant, reflective of current occupational therapy practice, and based on available evidence.

B.6.0. CONTEXT OF SERVICE DELIVERY

Context of service delivery includes the knowledge and understanding of the various contexts in which occupational therapy services are provided. The program must facilitate development of the performance criteria listed below. The student will be able to:

Standard B.6.1. Differentiate among the contexts of health care, education, community, and social systems as they relate to the practice of occupational therapy.

Standard B.6.2. Discuss the current policy issues and the social, economic, political, geographic, and demographic factors that influence the various contexts for practice of occupational therapy.

Standard B.6.3. Describe the current social, economic, political, geographic, and demographic factors to promote policy development and the provision of occupational therapy services.

Standard B.6.4. Articulate the role and responsibility of the practitioner to address changes in service delivery policies to effect changes in the system, and to identify opportunities in emerging practice areas.

Standard B.6.5. Articulate the trends in models of service delivery and their potential effect on the practice of occupational therapy, including, but not limited to, medical, educational, community, and social models.

Standard B.6.6. Use national and international resources in making assessment or intervention choices, and appreciate the influence of international occupational therapy contributions to education, research, and practice.

Evidence:
- FORM B, FORM C, and course syllabi specify course objectives and assessment measures for each Standard.
• Sample course materials (e.g., learning activities, presentations, case studies, assignments, exams) available on site.
• Service contexts covered in course content are consistent with the curriculum design and needs of the region that the institution services.

B.7.0. MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES

Management of occupational therapy services includes the application of principles of management and systems in the provision of occupational therapy services to individuals and organizations. The program must facilitate development of the performance criteria listed below. The student will be able to:

Standard B.7.1. Explain how the various practice settings (e.g., medical institutions, community practice, school systems) affect the delivery of occupational therapy services.

Standard B.7.2. Describe and discuss the impact of contextual factors on the management and delivery of occupational therapy services.

Standard B.7.3. Describe the systems and structures that create federal and state legislation and regulation and their implications and effects on practice.

Standard B.7.4. Demonstrate knowledge of applicable national requirements for credentialing and requirements for licensure, certification, or registration under state laws.

Standard B.7.5. Demonstrate knowledge of various reimbursement systems (e.g., federal, state, third-party, private-payer), appeals mechanisms, and documentation requirements that affect the practice of occupational therapy.

Standard B.7.6. Describe the mechanisms, systems, and techniques needed to properly maintain, organize, and prioritize workloads and intervention settings including inventories.

Standard B.7.7. Demonstrate the ability to plan, develop, organize, and market the delivery of services to include the determination of programmatic needs, service delivery options, and formulation and management of staffing for effective service provision.

Standard B.7.8. Demonstrate the ability to design ongoing processes for quality improvement (e.g., outcome studies analysis) and develop program changes as needed to ensure quality of services and to direct administrative changes.


Standard B.7.10. Describe the ongoing professional responsibility for providing fieldwork education and the criteria for becoming a fieldwork educator.

Evidence:
• FORM B, FORM C, and course syllabi specify course objectives and assessment measures for each Standard.
• Sample course materials (e.g., learning activities, presentations, case studies, assignments, exams) available on site.

B.8.0. RESEARCH

Application of research includes the ability to read and understand current research that affects practice and the provision of occupational therapy services. The program must facilitate development of the performance criteria listed below. The student will be able to:
Standard B.8.1. Articulate the importance of research, scholarly activities, and the continued development of a body of knowledge relevant to the profession of occupational therapy.

Standard B.8.2. Effectively locate, understand, and evaluate information, including the quality of research evidence.

Standard B.8.3. Use research literature to make evidence-based decisions.

Standard B.8.4. Understand and use basic descriptive, correlational, and inferential quantitative statistics and code, analyze, and synthesize qualitative data.

Standard B.8.5. Understand and critique the validity of research studies, including designs (both quantitative and qualitative) and methodologies.

Standard B.8.6. Demonstrate the skills necessary to design a research proposal that includes the research question, relevant literature, sample, design, measurement, and data analysis.

Standard B.8.7. Implement one or more aspects of research methodology. These may be simulated or actual and may include, but are not limited to, designing research instruments, collecting data, and analyzing or synthesizing data. These research activities may be completed individually, with a group, or with a faculty member.

THE INTENT OF STANDARD B.8.7 IS TO EMPHASIZE THE “DOING” PART OF THE RESEARCH PROCESS THAT CAN SUPPORT BEGINNING RESEARCH SKILLS IN A PRACTICE SETTING. (COMPLETING A REVIEW OF THE EXISTING LITERATURE WOULD NOT MEET THIS STANDARD, BUT WOULD BE AN APPROPRIATE LEARNING ACTIVITY FOR STANDARD B.8.2. OR B.8.3.)

A CULMINATING PROJECT RELATED TO RESEARCH IS NOT REQUIRED FOR THE MASTER’S LEVEL. IF IT IS CONSISTENT WITH THE PROGRAM’S CURRICULUM DESIGN AND GOALS, THE PROGRAM MAY CHOOSE TO REQUIRE A CULMINATING RESEARCH LEARNING ACTIVITY (E.G., SYSTEMATIC REVIEW OF LITERATURE, FACULTY-LED RESEARCH ACTIVITY, STUDENT RESEARCH PROJECT).

Standard B.8.8. Demonstrate basic skills necessary to write a research report in a format for presentation or publication.

Standard B.8.9. Demonstrate an understanding of the process of locating and securing grants and how grants can serve as a fiscal resource for research and practice.

Evidence:
- FORM B, FORM C, and course syllabi specify course objectives and assessment measures for each Standard.
- Sample course materials (e.g., learning activities, presentations, case studies, assignments, exams) available on site.

B.9.0. 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. The program must facilitate development of the performance criteria listed below. The student will be able to:

Standard B.9.1. Demonstrate a knowledge and understanding of the American Occupational Therapy Association (AOTA) Occupational Therapy Code of Ethics, Core Values and Attitudes of Occupational Therapy Practice, and AOTA Standards of Practice and use them as a guide for ethical decision making in professional interactions, client interventions, and employment settings.

Standard B.9.2. Discuss and justify how the role of a professional is enhanced by knowledge of and involvement in international, national, state, and local occupational therapy associations and related professional associations.
Standard B.9.3. Promote occupational therapy by educating other professionals, service providers, consumers, third-party payers, regulatory bodies, and the public.

Standard B.9.4. Discuss strategies for ongoing professional development to ensure that practice is consistent with current and accepted standards.

Standard B.9.5. Discuss professional responsibilities related to liability issues under current models of service provision.

Standard B.9.6. Discuss and evaluate personal and professional abilities and competencies as they relate to job responsibilities.

Standard B.9.7. Discuss and justify the varied roles of the occupational therapist as a practitioner, educator, researcher, consultant, and entrepreneur.

Standard B.9.8. Explain and justify the importance of supervisory roles, responsibilities, and collaborative professional relationships between the occupational therapist and the occupational therapy assistant.

Standard B.9.9. Describe and discuss professional responsibilities and issues when providing service on a contractual basis.

Standard B.9.10. Explain strategies for analyzing issues and making decisions to resolve personal and organizational ethical conflicts.

Standard B.9.11. Explain the variety of informal and formal ethical dispute-resolution systems that have jurisdiction over occupational therapy practice.

Standard B.9.12. Describe and discuss strategies to assist the consumer in gaining access to occupational therapy services.

Standard B.9.13. Demonstrate professional advocacy by participating in organizations or agencies promoting the profession (e.g., American Occupational Therapy Association, state occupational therapy associations, advocacy organizations).

Evidence:
- FORM B, FORM C, and course syllabi specify course objectives and assessment measures for each Standard.
- Sample course materials (e.g., learning activities, presentations, case studies, assignments, exams) available on site.

B.10.0. FIELDWORK EDUCATION

Fieldwork education is a crucial part of professional preparation and is best integrated as a component of the curriculum design. 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 supervision and for professional role modeling. The academic fieldwork coordinator is responsible for the program’s compliance with fieldwork education requirements. The academic fieldwork coordinator will:

Standard B.10.1. Document the criteria and process for selecting fieldwork sites. Ensure that the fieldwork program reflects the sequence, depth, focus, and scope of content in the curriculum design.

Evidence:
- Statement describing procedure for selecting fieldwork sites.
Standard B.10.2. Ensure that the academic fieldwork coordinator and faculty collaborate to design fieldwork experiences that strengthen the ties between didactic and fieldwork education.

Evidence:
- Statement describing collaboration process and examples.

Standard B.10.3. Provide fieldwork education in settings that are equipped to meet the curriculum goals, provide educational experiences applicable to the academic program, and have fieldwork educators who are able to effectively meet the learning needs of the students.

Evidence:
- Statement describing how settings for Level I and Level II fieldwork are consistent with the curriculum design and goals.

Standard B.10.4. Ensure that the academic fieldwork coordinator is responsible for advocating the development of links between the fieldwork and didactic aspects of the curriculum, for communicating about the curriculum to fieldwork educators, and for maintaining contracts and site data related to fieldwork placements.

Evidence:
- Describe plan for communicating about the curriculum to fieldwork educators.
- Describe procedures for maintaining site data related to fieldwork placements (AOTA data form).
- Review of fieldwork files on site.

Standard B.10.5. Demonstrate that academic and fieldwork educators collaborate in establishing fieldwork objectives, identifying site requirements, and communicating with the student and fieldwork educator about progress and performance during fieldwork.

Evidence:
- Describe the process for collaborating with fieldwork educators to develop fieldwork objectives.
- Describe the plan for contacting fieldwork educators about students’ progress and performance during fieldwork.

Standard B.10.6. Document a policy and procedure for complying with fieldwork site health requirements and maintaining student health records in a secure setting.

Evidence:
- Document policy and procedures for maintaining health records and complying with site requirements.

Standard B.10.7. Ensure that the ratio of fieldwork educators to student(s) enables proper supervision and the ability to provide frequent assessment of student progress in achieving stated fieldwork objectives.

Evidence:
- State the rationale for the ratio of fieldwork educators to student(s).
- If 2 or more students are supervised by 1 fieldwork educator, describe the plan for supervision.

Standard B.10.8. 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.

Evidence:
- On Form A, list fieldwork sites that have been used in the most recent 3 years of Level I and Level II fieldwork placements.
| Name and Location of Facility | Level (I/II) | Date of Current Contract and Date of Last Review | Primary FW Educator’s Professional Qualifications (i.e., OT, PT, etc.) | Primary FW Educator’s Years of Practice Experience | Type of Facility (Use Key Below) |

Type of Facility Key:
1. Community Agency (e.g., Psychosocial Program, Homeless Shelter)
2. Hospital (e.g., Acute Inpatient, Outpatient, Rehab Unit)
3. Nursing Home (e.g., Rehab Unit, Long Term Care)
4. Private Practice (e.g., Pediatrics, Psych., Home Health)
5. Residential Program (e.g., Developmental Delay, Mental Retardation)
6. School (e.g., Public School System)
7. Other

**Standard B.10.9.** For programs in which the academic and fieldwork components of the curriculum are provided by two or more institutions, responsibilities of each sponsoring institution and fieldwork site must be clearly documented in a memorandum of understanding. For active Level I and Level II fieldwork sites, programs must have current fieldwork agreements or memoranda of understanding that are signed by both parties. (Electronic contracts and signatures are acceptable.)

*IF A FIELD TRIP, OBSERVATION, OR SERVICE LEARNING ACTIVITY IS USED TO COUNT TOWARD PART OF LEVEL I FIELDWORK, THEN A MEMORANDUM OF UNDERSTANDING IS REQUIRED. IF A FIELD TRIP, OBSERVATION, OR SERVICE LEARNING ACTIVITY IS NOT USED TO COUNT TOWARD PART OF LEVEL I FIELDWORK, THEN NO MEMORANDUM OF UNDERSTANDING IS REQUIRED.*

**Evidence:**
- On Form A, list the current contract dates for fieldwork sites that have been used in the most recent 3 years for Level I and Level II fieldwork placements.
- Memoranda of understanding are current for all fieldwork sites.

**Standard B.10.10.** Documentation must be provided that each memorandum of understanding between institutions and active fieldwork sites is reviewed at least every 5 years by both parties. Programs must provide documentation that both parties have reviewed the contract.

*DOCUMENTATION THAT BOTH PARTIES HAVE REVIEWED THE CONTRACT MAY INCLUDE A SIGNED AGREEMENT, LETTER, FAX, E-MAIL, OR OTHER WRITTEN DOCUMENTATION. TELEPHONE LOGS DO NOT PROVIDE SUFFICIENT DOCUMENTATION OF AGREEMENT.*

**Evidence:**
- Describe the process for regular review of contracts.
- On Form A, list the most recent contract review date for fieldwork sites that have been used in the most recent 3 years for Level I and Level II fieldwork placements.

The goal of Level I fieldwork is to introduce students to the fieldwork experience, to apply knowledge to practice, and to develop understanding of the needs of clients. The program will:

**Standard B.10.11.** Ensure that Level I fieldwork is integral to the program’s curriculum design and include experiences designed to enrich didactic coursework through directed observation and participation in selected aspects of the occupational therapy process.
Evidence:
- Statement describing how Level I fieldwork experiences relate to courses and the curriculum design.

**Standard B.10.12.** Ensure that qualified personnel supervise Level I fieldwork. Examples may include, but are not limited to, currently licensed or credentialed occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, nurses, and physical therapists.

Evidence:
- On Form A, indicate primary fieldwork educator’s professional qualifications.

**Standard B.10.13.** Document all Level I fieldwork experiences that are provided to students, including mechanisms for formal evaluation of student performance. Ensure that Level I fieldwork is not substituted for any part of Level II fieldwork.

Evidence:
- Statement of how Level I fieldwork experiences are evaluated and provide a copy of the evaluation.
- Statement of the program’s policy that Level I fieldwork cannot be substituted for any part of Level II fieldwork.

The goal of Level II fieldwork is to develop competent, entry-level, generalist occupational therapists. 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 and research, administration, and management of occupational therapy services. It is recommended that the student be exposed to a variety of clients across the life span and to a variety of settings. The program will:

**Standard B.10.14.** Ensure that the fieldwork experience is designed to promote clinical reasoning and reflective practice, to transmit the values and beliefs that enable ethical practice, and to develop professionalism and competence in career responsibilities.

Evidence:
- The program’s Level II fieldwork objectives and assessment measures demonstrate promotion of clinical reasoning and reflective practice.
- The program’s Level II fieldwork objectives and assessment measures demonstrate promotion of ethical practice and professionalism.

**Standard B.10.15.** Provide Level II fieldwork in traditional and/or emerging settings, consistent with the curriculum design. In all settings, psychosocial factors influencing engagement in occupation must be understood and integrated for the development of client-centered, meaningful, occupation-based outcomes. 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 four different settings.

Evidence:
- Statement describing program’s definition of traditional and emerging settings.
- Statement explaining how Level II fieldwork settings (Form A) include traditional and emerging settings.
- Statement explaining how Level II fieldwork experiences include psychosocial factors influencing engagement in occupation and include client-centered, meaningful, and occupation-based outcomes.
- Program’s policy that Level II fieldwork can be completed in a minimum of 1 and maximum of 4 settings.

**Standard B.10.16.** Require a minimum of 24 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 a full-time equivalent at that site.

Evidence:
- Document a policy regarding part-time Level II fieldwork (e.g., fieldwork handbook, program handbook).
**Standard B.10.17.** Ensure that the student is supervised by a currently licensed or credentialed occupational therapist who has a minimum of 1 year of practice experience subsequent to initial certification, and is adequately prepared to serve as a fieldwork educator. The supervising therapist may be engaged by the fieldwork site or by the educational program.

**Evidence:**
- On Form A, indicate primary fieldwork educator’s years of experience.
- Stated process ensures that each supervising therapist has a minimum of 1 year of practice experience subsequent to initial certification.
- A statement describing the process for preparing fieldwork educators.

**Standard B.10.18.** 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).

**Evidence:**
- Describe the mechanism for evaluating the effectiveness of supervision.
- Describe the mechanism for providing resources for enhancing supervision.

**Standard B.10.19.** Ensure that supervision provides protection of consumers and opportunities for appropriate role modeling of occupational therapy practice. Initially, supervision should be direct and then decrease to less direct supervision as is appropriate for the setting, the severity of the client’s condition, and the ability of the student.

**Evidence:**
- Document program’s guidelines regarding fieldwork educators’ use of direct and indirect supervision based on client’s conditions and student’s ability.

**Standard B.10.20.** Ensure that supervision provided in a setting where no occupational therapy services exist includes a documented plan for provision of occupational therapy services and supervision by a currently licensed or credentialed occupational therapist with at least 3 years of professional experience. Supervision must include a minimum of 8 hours per week. Supervision must be initially direct and then may be decreased to less direct supervision as is appropriate for the setting, the client’s needs, and the ability of the student. 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.

**Evidence:**
- Document a plan for supervision where no occupational therapy services exist.

**Standard B.10.21.** Document mechanisms for requiring formal evaluation of student performance on Level II fieldwork (e.g., the American Occupational Therapy Association Fieldwork Performance Evaluation for the Occupational Therapy Student or equivalent).

**Evidence:**
- Document evaluation mechanism used for Level II fieldwork (e.g., program handbook, fieldwork handbook).

**Standard B.10.22.** Ensure 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 1 year of experience in practice. Such fieldwork must not exceed 12 weeks.

**Evidence:**
- Document policy for provision of fieldwork experience outside of the United States. If the program does not offer fieldwork outside of the United States, this Standard does not apply.