

2018 US Occupational Therapy Education Standards (Effective July 1, 2020)

B.1.0. FOUNDATIONAL CONTENT REQUIREMENTS

Program content must be based on a broad foundation in the liberal arts and sciences. A strong foundation in the biological, physical, social, and behavioral sciences supports an understanding of occupation across the lifespan. If the content of the Standard is met through prerequisite coursework, the application of foundational content in the sciences must also be evident in professional coursework. The student will be able to:

B.1.1. Human Body, Development, and Behavior

Demonstrate knowledge of:

- a. The structure and function of the human body to include the biological and physical sciences, neurosciences kinesiology, and biomechanics
- b. Human development throughout the lifespan (infants, children, adolescents, adults, and older adults). Course content must include, but is not limited to, developmental psychology
- c. Concepts of human behaviors to include the behavioral sciences, social sciences, and science of occupation

B.1.2. Sociocultural, Socioeconomic, Diversity Factors, and Lifestyle Choices

Apply and analyze the role of sociocultural, socioeconomic, and diversity factors, as well as lifestyle choices in contemporary society to meet the needs of persons, groups, and populations. Course content must include, but is not limited to, introductory psychology, abnormal psychology, and introductory sociology or introductory anthropology.

B.1.3. Social Determinants of Health

Demonstrate knowledge of the social determinants of health for persons, groups, and populations with or at risk for disabilities and chronic health conditions. This must include an analysis of the epidemiological factors that impact the public health and welfare of populations.

B.1.4. Quantitative Statistics and Qualitative Analysis

Demonstrate the ability to use quantitative statistics and qualitative analysis to interpret tests and measurements for the purpose of establishing and delivering evidence-based practice.

B.2.0. OCCUPATIONAL THERAPY THEORETICAL PERSPECTIVES

Current and relevant interprofessional perspectives including rehabilitation, disability, and developmental as well as person/population-environment-occupation models, theories and frameworks of practice. The program must facilitate the development of the performance criteria listed below. The student will be able to:

B.2.1. Scientific Evidence, Theories, Models of Practice, and Frames of Reference

Apply, analyze, and evaluate scientific evidence, theories, models of practice, and frames of reference that underlie the practice of occupational therapy to guide and inform interventions for persons, groups, and populations in a variety of practice contexts and environments.

B.2.2. Theory Development

Explain the process of theory development and its importance to occupational therapy.

B.3.0. BASIC TENETS OF OCCUPATIONAL THERAPY

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

B.3.1. OT History, Philosophical Base, Theory, and Sociopolitical Climate

Analyze occupational therapy history, philosophical base, theory, and sociopolitical climate and their importance in meeting society's current and future occupational needs as well as how these factors influence and are influenced by practice.

B.3.2. Interaction of Occupation and Activity

Apply, analyze, and evaluate the interaction of occupation and activity, including areas of occupation, performance skills, performance patterns, context(s) and environments, and client factors.

B.3.3. Distinct Nature of Occupation

Explain to consumers, potential employers, colleagues, third-party payers, regulatory boards, policymakers, and the general public the distinct nature of occupation and the evidence that occupation supports performance, participation, health, and well-being.

B.3.4. Balancing Areas of Occupation, Role in Promotion of Health, and Prevention

Apply and analyze scientific evidence to explain the importance of balancing areas of occupation; the role of occupation in the promotion of health; and the prevention of disease, illness, and dysfunction for persons, groups, and populations.

B.3.5. Effects of Disease Processes

Analyze the effects of disease processes including heritable diseases, genetic conditions, mental illness, disability, trauma, and injury on occupational performance.

B.3.6. Activity Analysis

Demonstrate activity analysis in areas of occupation, performance skills, performance patterns, context(s) and environments, and client factors to formulate the intervention plan.

B.3.7. Safety of Self and Others

Demonstrate sound judgment in regard to safety of self and others and adhere to safety regulations throughout the occupational therapy process as appropriate to the setting and scope of practice. This must include the ability to assess and monitor vital signs (e.g., blood pressure, heart rate, respiratory status, and temperature) to ensure that the client is stable for intervention.

B.4.0. REFERRAL, SCREENING, EVALUATION, AND INTERVENTION PLAN

The process of referral, screening, evaluation, and diagnosis as related to occupational performance and participation must be client centered; culturally relevant; and based on theoretical perspectives, models of practice, frames of reference, and available evidence.

INTERVENTION PLAN: FORMULATION AND IMPLEMENTATION

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

B.4.1. Therapeutic Use of Self

Demonstrate therapeutic use of self, including one's personality, insights, perceptions, and judgments, as part of the therapeutic process in both individual and group interaction.

B.4.2. Clinical Reasoning

Demonstrate clinical reasoning to evaluate, analyze diagnose, and provide occupation-based interventions to address client factors, performance patterns, and performance skills.

B.4.3. Occupation-Based Interventions

Utilize clinical reasoning to facilitate occupation-based interventions that address client factors. This must include interventions focused on promotion, compensation, adaptation, and prevention.

B.4.4. Standardized and Non-Standardized Screening and Assessment Tools

Evaluate client(s)' occupational performance, including occupational profile, by analyzing and selecting standardized and non-standardized screenings and assessment tools to determine the need for occupational therapy intervention(s). Assessment methods must take into consideration cultural and contextual factors of the client. Interpret evaluation findings of occupational performance and participation deficits to develop occupation-based intervention plans and strategies. Intervention plans and strategies must be client centered, culturally relevant, reflective of current occupational therapy practice, and based on available evidence.

B.4.5. Application of Assessment Tools and Interpretation of Results

Select and apply assessment tools, considering client needs, and cultural and contextual factors. Administer selected standardized and non-standardized assessments using appropriate procedures and protocols. Interpret the results based on psychometric properties of tests considering factors that might bias assessment results (e.g., culture and disability status related to the person and context).

B.4.6. Reporting Data

Collect, analyze, and report data in a systematic manner for evaluation of client and practice outcomes. Report evaluation results and modify practice as needed.

B.4.7. Interpret Standardized Test Scores

Interpret criterion-referenced and norm-referenced standardized test scores on the basis of an understanding of sampling, normative data, standard and criterion scores, reliability, and validity.

B.4.8. Interpret Evaluation Data

Interpret evaluation data in relation to accepted terminology of the profession and explain the findings to the interprofessional team.

B.4.9. Remediation and Compensation

Design and implement intervention strategies to remediate and/or compensate for functional cognitive deficits, visual deficits, and psychosocial and behavioral health deficits that affect occupational performance.

B.4.10. Provide Interventions and Procedures

Recommend and provide direct interventions and procedures to persons, groups, and populations to enhance safety, health and wellness, and performance in occupations. This must include the ability to select and deliver occupations and activities, preparatory methods and tasks (including therapeutic exercise), education and training, and advocacy.

B.4.11. Assistive Technologies and Devices

Assess the need for and demonstrate the ability to design, fabricate, apply, fit, and train in assistive technologies and devices (e.g., electronic aids to daily living, seating and positioning systems) used to enhance occupational performance and foster participation and well-being.

B.4.12. Orthoses and Prosthetic Devices

Assess the need for orthotics, and design fabricate, apply, fit, and train in orthoses and devices used to enhance occupational performance and participation. Train in the safe and effective use of prosthetic devices.

B.4.13. Functional Mobility

Provide recommendations and training in techniques to enhance functional mobility, including physical transfers, wheelchair management, and mobility devices.

B.4.14. Community Mobility

Evaluate the needs of persons, groups, and populations to design programs that enhance community mobility, and implement transportation transition, including driver rehabilitation and community access.

B.4.15. Technology in Practice

Demonstrate knowledge of the use of technology in practice, which must include:

- a. Electronic documentation systems
- b. Virtual environments
- c. Telehealth technology

B.4.16. Dysphagia and Feeding Disorders

Evaluate and provide interventions for dysphagia and disorders of feeding and eating to enable performance, and train others in precautions and techniques while considering client and contextual factors.

B.4.17. Superficial Thermal, Deep Thermal, and Electrotherapeutic Agents and Mechanical Devices

Demonstrate knowledge and use of the safe and effective application of superficial thermal agents, deep thermal agents, electrotherapeutic agents, and mechanical devices as a preparatory measure to improve occupational performance. This must include indications, contraindications, and precautions.

B.4.18. Grade and Adapt Processes or Environments

Assess, grade, and modify the way persons, groups, and populations perform occupations and activities by adapting processes, modifying environments, and applying ergonomic principles to reflect the changing needs of the client, sociocultural context, and technological advances.

B.4.19. Consultative Process

Demonstrate, evaluate, and plan the consultative process with persons, groups, programs, organizations, or communities in collaboration with inter- and intra-professional colleagues.

B.4.20. Care Coordination, Case Management, and Transition Services

Demonstrate, evaluate, and plan care coordination, case management, and transition services in traditional and emerging practice environments.

B.4.21. Teaching–Learning Process and Health Literacy

Demonstrate, evaluate, and utilize the principles of the teaching-learning process using educational methods and health literacy education approaches:

- a. To design activities and clinical training for persons, groups, and populations
- b. To instruct and train the client, caregiver, family, significant others, and communities at the level of the audience

B.4.22. Need for Continued or Modified Intervention

Monitor and reassess, in collaboration with the client, caregiver, family, and significant others, the effect of occupational therapy intervention and the need for continued or modified intervention.

B.4.23. Effective Communication

Identify occupational needs through effective communication with patients, families, communities, and members of the interprofessional team in a responsive and responsible manner that supports a team approach to the promotion of health and wellness.

B.4.24. Effective Intra–Professional Collaboration

Demonstrate effective intra-professional OT/OTA collaboration to:

- a. Identify the role of the occupational therapist and occupational therapy assistant in the screening and evaluation process
- b. Demonstrate and identify techniques in skills of supervision and collaboration with occupational therapy assistants

B.4.25. Principles of Interprofessional Team Dynamics

Demonstrate knowledge of the principles of interprofessional team dynamics to perform effectively in different team roles to plan, deliver, and evaluate patient- and population- centered care as well as population health programs and policies that are safe, timely, efficient, effective, and equitable.

B.4.26. Referral to Specialists

Evaluate and discuss mechanisms for referring clients to specialists both internal and external to the profession, including community agencies.

B.4.27. Community and Primary Care Programs

Evaluate access to community resources, and design community or primary care programs to support occupational performance for persons, groups, and populations.

B.4.28. Plan for Discharge

Develop a plan for discharge from occupational therapy services in collaboration with the client and members of the interprofessional team by reviewing the needs of the client, caregiver, family, and significant others; available resources; and discharge environment.

B.4.29. Reimbursement Systems and Documentation

Demonstrate knowledge of various reimbursement systems and funding mechanisms (e.g., federal, state, third party, private payer), appeals mechanisms, treatment/diagnosis codes (e.g., CPT®, ICD, DSM® codes), and coding and documentation requirements that affect consumers and the practice of occupational therapy. Documentation must effectively communicate the need and rationale for occupational therapy services.

B.5.0. CONTEXT OF SERVICE DELIVERY, LEADERSHIP, AND MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES

Context of service delivery includes knowledge and understanding of the various contexts, such as professional, social, cultural, political, economic, and ecological, in which occupational therapy services are provided. Management and leadership skills of occupational therapy services include the application of principles of management and systems in the provision of occupational therapy services to persons, groups, populations, and organizations. The program must facilitate development of the performance criteria listed below the student will:

B.5.1. Factors, Policy Issues, and Social Systems

Identify, analyze, and evaluate the contextual factors; current policy issues; and socioeconomic, political, geographic, and demographic factors on the delivery of occupational therapy services for persons, groups, and population to promote policy developments and social systems as they relate to the practice of occupational therapy.

B.5.2. Advocacy

Identify, analyze, and advocate for existing and future service delivery models and policies, and their potential effect on the practice of occupational therapy and opportunities to address societal needs.

B.5.3. Business Aspects of Practice

Demonstrate knowledge of and evaluate the business aspects of practice including, but not limited to, the development of business plans, financial management, program evaluation models, and strategic planning.

B.5.4. Systems and Structures That Create Legislations

Identify and evaluate the systems and structures that create federal and state legislation and regulations and their implications and effects on persons, groups, and populations, as well as practice.

B.5.5. Requirements for Credentialing and Licensure

Provide care and programs that demonstrate knowledge of applicable national requirements for credentialing and requirements for licensure, certification, or registration consistent with federal and state laws.

B.5.6. Market the Delivery of Services

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

B.5.7. Quality Management and Improvement

Demonstrate the ability to design ongoing processes for quality management and improvement (e.g., outcome studies analysis and client engagement surveys) and develop program changes as needed to demonstrate quality of services and direct administrative changes.

B.5.8. Supervision of Personnel

Develop strategies for effective, competency-based legal and ethical supervision of occupational therapy and non-occupational therapy personnel.

B.6.0. SCHOLARSHIP

Promotion of science and scholarly endeavors will serve to describe and interpret the scope of the profession, build research capacity, establish new knowledge, and interpret and apply this knowledge to practice. The program must facilitate development of the performance criteria listed below. The student will be able to:

B.6.1. Scholarly Study

a. Critique quantitative and qualitative research in order to analyze and evaluate scholarly activities, which contribute to the development of a body of knowledge. This includes the:

- (i) Level of evidence
- (ii) Validity of research studies
- (iii) Strength of the methodology
- (iv) Relevance to the profession of occupational therapy

b. Locate, select, analyze, and evaluate scholarly literature to make evidence-based decisions.

c. Participate in scholarly activities that align with current research priorities and advances knowledge translation, professional practice, service delivery, or professional issues (e.g., Scholarship of Integration, Scholarship of Application, Scholarship of Teaching and Learning).

This may include a literature review that requires analysis and synthesis of data. Systematic reviews that require analysis and synthesis of data meet the requirement for this Standard. A research project is not required for this Standard, and *narrative reviews do not meet this Standard*.

B.6.2. Quantitative and Qualitative Methods

Demonstrate an understanding and use of quantitative and qualitative methods for data analysis to include:

- a. Basic descriptive, correlational, and inferential quantitative statistics
- b. Analysis and synthesis of qualitative data

B.6.3. Scholarly Reports

Demonstrate the skills necessary to write a scholarly report in a format for presentation or publication, which may be made available to professional or public audiences.

B.6.4. Locating and Security Grants

Demonstrate an understanding of the process of locating and securing grants and how grants can serve as a fiscal resource for scholarly activities and program development.

B.6.5. Ethical Policies and Procedures for Research

Demonstrate an understanding of the ethical policies and procedures of human-subject research, education research, or research related to population health.

B.6.6. Preparation for Work in an Academic Setting

Demonstrate an understanding and apply the principles of instructional design and teaching an learning in preparation for work in an academic setting.

B.7.0. PROFESSIONAL ETHICS, VALUES, AND RESPONSIBILITIES

Professional ethics values, and responsibilities include an understanding an appreciation of ethics and values of the profession of occupational therapy. Professional behaviors include the ability to advocate for social responsibility and equitable services to support health equity and address social determinants of health; commit to engaging in lifelong learning; and evaluate the outcome of services, which include client engagement, judicious health care utilization, and population health. The program must facilitate development of the performance criteria listed below. The student will be able to:

B.7.1. Ethical Decision Making

Demonstrate knowledge of the American Occupation Therapy Association (AOTA) Occupational Therapy Code of Ethics and AOTA Standards of Practice, and use them as a guide for ethical decision making in professional interactions, client interventions, employment settings, and when confronted with personal and organizational ethical conflicts.

B.7.2. Professional Engagement

Demonstrate knowledge of how the role of a professional is enhanced by participating and engaging in local, national, and international leadership positions in organizations or agencies.

B.7.3. Promote Occupational Therapy

Promote occupational therapy by educating other professionals, service providers, consumers, third-party payers, regulatory bodies, and the public.

B.7.4. Ongoing Professional Development

Identify and develop strategies for ongoing professional development to ensure that practice is consistent with current and accepted standards.

B.7.5. Personal and Professional Responsibilities

Demonstrate knowledge of personal and professional responsibilities related to:

- a. Liability issues under current models of service provision
- b. Varied roles of the occupational therapist providing service on a contractual basis