

AOTA FELLOWSHIP PROGRAM CRITERIA AND INTERPRETIVE GUIDELINES

SECTION A: PROGRAM ELIGIBILITY		
CATEGORY	CRITERION	INTERPRETIVE GUIDELINES
A1. Sponsoring Organization	The fellowship program must be sponsored by an appropriately accredited or licensed organization. If the fellowship program is sponsored by more than one organization, a Memorandum of Agreement (MOA) or comparable document delineating the roles and responsibilities of each organization is required.	Key Term: Sponsoring Organization
A.2 AOTA Membership	The fellowship program must be associated with an active AOTA membership, either through an organizational level membership held by the sponsoring organization or through an individual membership held by the Fellowship Coordinator.	Key Terms: AOTA Membership, Fellowship Coordinator, Individual, Organizational Level, Sponsoring Organization
A.3 Focused Area of Practice	The fellowship program must focus on an area of occupational therapy practice in which the sponsoring organization can provide significant engagement through didactic and clinical education with occupational therapy staff with appropriate expertise, and through the regular delivery of relevant patient or client services. The name of the fellowship program must be reflective of the focused area of practice.	<p>The fellowship program name must include the term occupational therapy, the sponsoring organization's name, and the focused area of practice.</p> <p>Example: Cascade Haven Occupational Therapy Mental Health Fellowship Program.</p> <p>Key Terms: Focused Area of Practice, Sponsoring Organization</p>

SECTION B: RESOURCES AND SUSTAINABILITY		
CATEGORY	CRITERION	INTERPRETIVE GUIDELINES
B.1 Program Finances	The sponsoring organization must demonstrate that sufficient funding and organizational support are available to implement and maintain the objectives of the program, to fulfill the program's obligation to fellows, and to obtain and maintain AOTA Fellowship Program accreditation.	<p>The first-year budget for the fellowship program must include essential expenses such as fellow and fellowship coordinator salaries, insurance, memberships, curriculum, protected time, and conferences.</p> <p>Additionally, it is crucial to have a contingency plan to ensure the fellow is supported through their fellowship year. These components are mandatory to ensure the effective support and smooth operation of the fellowship program.</p> <p>Key Terms: Fellow, Fellowship Coordinator, Objective, Sponsoring Organization, Curriculum</p>
B.2 Fellowship Coordinator	<p>The sponsoring organization must hire or appoint a qualified occupational therapy practitioner (OTP) to serve as the Fellowship Coordinator.</p> <p>The Fellowship Coordinator is responsible for the management and administration of the program, including the program curriculum, selection of staff and fellows, program evaluation, and maintenance of AOTA accreditation.</p> <p>The Fellowship Coordinator must:</p> <ul style="list-style-type: none"> • be an initially certified occupational therapy practitioner (OTP), • be licensed or otherwise regulated according to the state(s) or jurisdiction(s) in which the fellowship is offered, • have at least 3 years of documented experience in the field of occupational therapy, and 	<p>The sponsoring organization may determine the official title of the individual holding the Fellowship Coordinator position; however, external communication to interested parties should use the term Fellowship Coordinator.</p> <p>If a Fellowship Coordinator is also a primary mentor, the Fellowship Coordinator must also meet the requirements for the mentor role (see B.3. Mentors).</p> <p>The Fellowship Coordinator job description must include general occupational therapy and fellowship program responsibilities. If the Fellowship Coordinator responsibilities are shared between two employees of the sponsoring organization, one co-coordinator must be designated as the principal, fully meet</p>

	<ul style="list-style-type: none"> • have knowledge in the program's focused area of practice. 	<p>the AOTA requirements for the position, and be the primary contact for AOTA. The second co-coordinator may or may not fully meet the AOTA requirements for the position.</p> <p>Key Terms: Curriculum, Fellow, Fellowship Coordinator, Focused Area of Practice, Mentor, OTP, Primary Mentor, Program Evaluation, Sponsoring Organization</p>
B.3 Mentors	<p>The sponsoring organization must appoint a primary mentor with appropriate expertise to provide synchronous mentorship to fellows throughout the fellowship or during specific rotations. The primary mentor must be an occupational therapist. All mentors must undergo a comprehensive training and onboarding process, which includes effective mentorship strategies. Additionally, a clear succession plan will be established to identify and prepare future mentors.</p>	<p>The expertise of a primary mentor may be substantiated through combinations of (a) years of practice, (b) certifications or on-going competency in the focused area of practice, (c) leadership/research roles, and (d) professional engagement.</p> <p>There must be a comprehensive training and onboarding process for all mentors. This process should include clear criteria defining mentor qualifications, a method for evaluating these qualifications, and a detailed succession plan to ensure continuity in the event of a mentor's departure.</p> <p>Key Terms: Fellow, Focused Area of Practice, Primary Mentor, Mentors, Sponsoring Organization</p>
B.4 Sufficient Fellowship Staff	<p>The sponsoring organization must ensure that the staff responsible for developing and delivering the program are sufficient in number and have the necessary expertise in the focused area of practice to successfully deliver the fellowship program as developed and on schedule. The organization must document that staff have sufficient release time to ensure that the needs of the fellowship program are met.</p>	<p>Key Terms: Fellowship Staff, Release Time, Sponsoring Organization</p>

B.5 Learning Environment and Resources	<p>The sponsoring organization must provide accessible learning facilities, resources, reference materials, and instructional aids and equipment that are consistent with</p> <ul style="list-style-type: none"> • current evidence-based interventions in the program's focused area of practice, • program goals, • Fellowship Program Learning Objectives (FPLOs), • curriculum, and • identified learning supports. <p>The organization must ensure that the learning environment accommodates learning styles and meets the needs of all learners, fostering a supportive atmosphere.</p>	<p>The program must ensure the fellow has adequate environmental support (e.g., personal, lab, didactic space) and evidence-based practice resources to support learning.</p> <p>Key Terms: Curriculum, Fellow, Focused Area of Practice, FPLOs, Program Goal, Sponsoring Organization</p>
SECTION C: FELLOWS		
CATEGORY	CRITERION	INTERPRETIVE GUIDELINES
C.1 Program Publications	<p>The fellowship program must publish consistent, accurate program information on the sponsoring organization's website, ensuring accessibility for potential applicants. This must include, but is not limited to:</p> <ul style="list-style-type: none"> • program description that indicates the focused area of practice • program goals • program contact details • program start and end dates • program eligibility requirements • application requirements, fees, and deadlines • selection process • additional fees payable by an accepted fellow, if applicable • form of compensation (e.g., salary or stipend, etc.). <p>All program publications and documents must be consistent.</p>	<p>All program publications and documents must be consistent. Screenshots of unpublished webpage(s) or a webpage mock-up may be submitted in lieu of a web address to published webpage(s). Webpages must be published prior to the first site visit.</p> <p>AOTA does not require the program to disclose the range of compensation in materials published for the public.</p> <p>Key Terms: Fellow, Focused Area of Practice, Program Goals, Sponsoring Organization</p>

C.2 Fellow Eligibility and Application Requirements	<p>The fellowship program must have eligibility and application requirements that are reflective of the demands of the program and aligned with the selection process and criteria.</p> <p>The eligibility requirements must include that the applicant be:</p> <ul style="list-style-type: none"> • a graduate of an occupational therapy educational program accredited by the Accreditation Council for Occupational Therapy Education (ACOTE) or World Federation of Occupational Therapists WFOT, and • licensed, or be eligible for licensure, in applicable jurisdiction(s) in which the program is offered. 	<p>The program must be able to articulate eligibility and application requirements and the selection process.</p> <p>The program may opt to accept applications from graduates of an occupational therapy educational program approved by the World Federation of Occupational Therapists (WFOT).</p>
C.3 Non-Discrimination Policy	<p>A clear and comprehensive non-discrimination policy—aligned with that of the sponsoring organization—must be established, upheld, and readily accessible to both prospective and accepted fellows throughout the entire fellowship experience. The selection process should reflect a commitment to holistic evaluation, applicant's experiences, personal attributes, and potential contributions.</p>	<p>Key Terms: Fellow, Sponsoring Organization</p>
C.4 Performance Expectations	<p>The fellowship program must have established performance expectations, corrective action, and termination policies. The performance expectations and program policies must be provided to fellows prior to the start of a fellowship.</p> <p>A remediation plan must outline specific actions, timelines, and responsibilities aimed at improving identified areas, ensuring that FPLOs and performance expectations are met.</p>	<p>Key Term: Fellow, FPLO, Remediation Plan</p>
C.5 Fellow Compensation	<p>The fellowship program must provide an offer letter with detailed compensation and benefits information to applicants offered a fellowship position.</p>	<p>The offer letter should be consistent with other program resources and publications.</p>

		Key Term: Fellow
C.6 Malpractice Insurance	The fellowship program must provide each fellow with comprehensive malpractice insurance that is the same or comparable to the malpractice insurance provided to occupational therapists employed by the sponsoring organization.	Key Terms: Fellow, Sponsoring Organization
SECTION D. CURRICULUM & EVALUATION		
CATEGORY	CRITERION	INTERPRETIVE GUIDELINES
D1. Program Hours	<p>The fellowship program must consist of a minimum of 1,400 hours, completed over 11-13 months. Programs with timeframes other than 11-13 months must provide rationale and justification. The program must include components of occupational therapy (OT) service delivery, mentored practice, and education.</p> <p>Of the 1,400 hours:</p> <ul style="list-style-type: none"> • Mentored Practice: 200 hours must involve synchronous mentored practice in the focused area, directly related to the occupational therapy (OT) domain and process. This mentored practice must be conducted by a licensed OT practitioner (OTP). • Education: 150 hours must be dedicated to education in the focused area of practice and the OT domain and process. These educational hours can be delivered by fellowship staff, with at least 50 hours being conducted synchronously. The remaining hours can be delivered asynchronously. 	<p>Programs must provide a rationale and justification to deliver the program in timeframes other than 11-13 months.</p> <p>200 hours of mentored practice must be conducted by a licensed OT practitioner.</p> <p>150 hours of education may be delivered by a combination of occupational therapy practitioners (OTP) and fellowship staff.</p> <p>Key Terms: Fellowship Staff, Focused Area of Practice, OT Domain and Process, OTP, Mentored Practice, Education, Synchronous Education, Asynchronous Education</p>
D.2 Mission Statement	The fellowship program must have a mission statement that aligns with the mission of its sponsoring organization, reflecting the current Occupational Therapy Practice Framework (OTPF) and the purpose of the organization's fellowship program.	Key Terms: Mission, OTPF, Sponsoring Organization

D.3 Program Goals	The fellowship program must establish program goals that encapsulate its educational and professional purposes and reflect its intent to provide advanced practice training in a focused area of practice.	The program goals should inform the development of the fellowship program modules. Each program goal may correspond in part or in whole to one or more modules. Key Terms: Advanced Practice, Focused Area of Practice, Module, Program Goals
D.4 Adult Learning	The fellowship program must consider the needs of adult learners and identify appropriate educational theories in the construction and delivery of its curriculum, specifically with regards to: <ul style="list-style-type: none"> • instructional strategies, • provision of learning resources, and • educational and environmental support, including when implementation of a remediation plan may be necessary. 	Key Terms: Curriculum, Instructional Strategy, Remediation Plan
D.5 AOTA Fellowship Program Learning Objectives	The fellowship program must integrate the AOTA Fellowship Program Learning Objectives into the curriculum and assess the fellow's achievement of each FPLO. Assessment information must include the <ul style="list-style-type: none"> • method (e.g., test, competency checklist) • criteria • and the time frame (period in which the FPLO will be assessed). 	Key Terms: Criteria, Curriculum, Method, Fellow, FPLO
D.6 Curriculum	The fellowship program must deliver fellowship program modules that provide education, clinical activities and experiences to facilitate the attainment of the program's goals and FPLOs. A Module Plan Template or comparable documentation must include:	Programs may use the AOTA Module Plan Template or their own. Each module may align completely or partially with a program's goal(s). The modules must be directly linked to the FPLOs and the fellowship program goals.

	<ul style="list-style-type: none"> • A brief description of the module • Rationale for the module's inclusion in the program and placement in the program timeline • Content, scope, and schedule of delivery of the module that aligns with the caseload, mentoring activities and FPLOs • Instructional strategies, materials and resources that are consistent with the module content, learning objectives, and current evidence-based occupational therapy practices • Module-specific objectives that are: <ul style="list-style-type: none"> ○ Congruent with the module content and instructional strategies ○ Clear, concise, observable, and measurable • Assessment method(s) and criteria appropriately aligned to the FPLOs • Related clinical caseload assignments. 	<p>The documentation must include all the information required by the Module Plan Template, and all the required details must be consistently presented and easily located. Full course content is not required.</p> <p>Key Terms: Criteria, Method, Curriculum, Education, FPLO, Instructional Strategy, Module, Objective, Program Goals, Schedule of Delivery</p>
D.7 Mentorship	<p>The fellowship program must document education and mentored practice components.</p> <p>The program must document the following for each session:</p> <ul style="list-style-type: none"> • date • duration • allocated hours for education (i.e., synchronous or asynchronous) and name and credentials of instructor • allocated hours for mentored practice and name of mentor • session focus 	<p>Programs may use the <i>AOTA Mentored Practice Tracker</i> or develop their own form to document the required information. The <i>AOTA Mentored Practice Tracker</i> may be modified to document additional information.</p> <p>Education may be delivered by an OT practitioner (OTP) or fellowship staff. The mentor must be an OTP, and the primary mentor must be a licensed occupational therapist.</p> <p>Key Terms: Asynchronous, Education, Fellowship Staff, Mentored Practice, OTP, Primary Mentor, Session Focus, Synchronous</p>
D.8 Clinical Caseload	<p>The fellowship program must ensure and accurately document that the majority of the fellow's assigned caseload is consistent with the:</p>	<p>Key Terms: Curriculum, Fellow, Focused Area of Practice, Mentored Practice</p>

	<ul style="list-style-type: none"> • program's focused area of practice, • curriculum content and progression, and • plans for mentored practice. 	
D.9 Program Evaluation	<p>The fellowship program must routinely document sufficient qualitative and quantitative information to allow for analysis of program effectiveness. The information must be analyzed at regular intervals and used to inform program improvement. The fellowship program's evaluation plan must include:</p> <ul style="list-style-type: none"> • evaluation of learning facilities, resources, reference materials, instructional aids, and equipment • assessment of program goals • assessment of module-specific learning objectives • assessment of the fellow's achievement of the FPLOs • fellow evaluation of the fellowship coordinator(s), primary mentor, and mentors. • fellow exit evaluation • coordinator and mentor evaluations of program strengths and areas for development 	<p>A program evaluation plan must specify (1) what information or data will be collected, (2) the frequency at which the information will be collected and analyzed, (3) the criteria for analysis, and (4) how the analysis will be used to maintain or improve the quality of the program.</p> <p>Evaluation of learning facilities, resources, reference materials, instructional aids, and equipment may be integrated into other assessments.</p> <p>Key Terms: Fellow, Fellowship Coordinator, FPLOs, Module, Objective, Primary Mentor, Mentor, Program Evaluation, Program Goals</p>

Key Terms

The key terms and definitions below are for the purposes of this document and other AOTA Fellowship Program documents only.

Advanced Practice: Utilizing evidence-based occupational therapy practice and strong clinical decision-making and reasoning to achieve optimal clinical outcomes.

Asynchronous Education: Refers to a learning format where instruction and participation do not occur in real-time. Fellows access course materials, such as pre-recorded lectures, readings, or assignments, at their own pace and schedule. Communication and feedback between mentors and fellows may happen through discussion boards, emails, or other platforms, allowing for flexibility and self-directed learning. Educational hours may be delivered by a combination of occupational therapy practitioners (OTPs) and fellowship staff.

AOTA Membership

- **Individual:** Includes all membership types for an individual initially certified to practice as an Occupational Therapist or licensed or regulated by a U.S. state, commonwealth, district, or territory to practice as an occupational therapist.
- **Organizational Level** (e.g., Organizational Associate): Membership open to health organizations and institutions, and to nonprofit facilities, libraries and educational programs.

Assessment

- **Administration:** A statement on when and how often within the fellowship schedule a specific assessment is given.
- **Criteria:** A standard that serves as a measurable threshold for deciding whether requirements have been met.

Curriculum: structured educational program that provides didactic and clinical activities and experiences to facilitate the attainment of the program goals.

Education: Delivered synchronously or asynchronously, focused on knowledge transmission typically through interprofessional education, presentations, and reading materials. This approach emphasizes theory and foundational knowledge, preparing fellows for practical application. Education must focus on occupation-centered service delivery, supporting client health and participation, diagnoses or conditions relevant to OT practice, and topics providing necessary context or background. Educational hours may be delivered by a combination of occupational therapy practitioners (OTPs) and fellowship staff.

Fellow: A mentee who is actively engaged in a structured learning experience under the guidance of a mentor. The fellow benefits from mentorship, gaining specialized knowledge, skills, and professional development in a specific field or discipline.

Fellowship Coordinator: The Fellowship Coordinator is responsible for the management and administration of the program, including the program curriculum, selection of staff and fellows, program evaluation, and maintenance of AOTA accreditation.

Fellowship Program Learning Objectives (FLPOs): Required curriculum objectives for all AOTA-approved fellowship programs which are drawn from the AOTA Standards of Continuing Competence.

Fellowship Staff: Individuals responsible for developing and delivering the program which may include fellowship coordinator, mentors, and professionals from various disciplines.

Focused Area of Practice: A recognized area of occupational therapy practice around which a fellowship program is designed.

Instructional Strategy: A method, technique or process used to convey learning content, activities and experiences.

Mentor(s): Licensed occupational therapy practitioner(s) (OT or OTA).

Mentored Practice: A structured, experiential learning process in which a less experienced or less knowledgeable fellow(s) receives guidance from a more experienced or knowledgeable occupational therapy practitioner(s) (mentor(s)) with expertise in the focused area of practice. This relationship involves communication and feedback and occurs synchronously, fostering professional growth and skill development.

Mission: A statement that explains the unique nature of a program or organization and how it helps fulfill or advance the goals of the program or organization.

Module: Term used here to denote connote closely connected content (e.g., didactic instruction, learning activities, and experiences) delivered over a discrete period of time within the fellowship program. Depending on the program structure, “module” may be substituted by “rotation” or “course”.

Objective: A brief, clear statement that articulates what a fellow should know, be able to do or exhibit by the end of the program, module or activity.

OT Domain and Process: Occupations, contexts, performance patterns and skills, and client factors that transact with evaluation, intervention, and outcomes and occur throughout OT service delivery to support engagement, participation, and health (AOTA, 2020).

Occupational Therapy Practice Framework (OTPF): is an official document of the American Occupational Therapy Association (AOTA) intended for occupational therapy practitioners and students, other health care professionals, educators, researchers, payers, policymakers, and consumers, presenting a summary of interrelated constructs that describe occupational therapy practice.

Occupational Therapy Practitioner (OTP): A licensed occupational therapist (OT) or licensed occupational therapy assistant (OTA).

Primary Mentor: A licensed occupational therapist who is responsible for providing the majority of mentorship.

Program Evaluation: A continuing system for routinely and systematically analyzing data to determine the extent to which the program is meeting its stated goals and objectives.

Program Goal: A statement about the general aim or purpose of the fellowship program that is broader and intended to be achieved over a longer period of time than an objective. Goals should directly inform the curriculum.

Release Time: Period when a person is freed from regular duties, especially clinical practice, to allow time for other professional tasks or activities.

Remediation Plan: A remediation plan is a structured approach designed to address and correct deficiencies or gaps in performance or knowledge.

Schedule of Delivery: The placement and duration of a didactic component within one cycle of the fellowship program.

Session Focus: A brief note or bullet point on the purpose of the mentorship session that is more specific to the particular session than the mentored practice category.

Sponsoring Organization: An identified legal entity that assumes the financial, curricular, and operational responsibility for the fellowship program, consistent with the AOTA Fellowship Program Criteria and Interpretative Guidelines. The organization must operate or partner with an operator of an accredited, licensed or regulated practice setting.

Synchronous (mentored practice and education): Refers to a learning format where instruction and interaction between mentors and fellows occur in real-time. This may occur in person or through virtual platforms, such as live online classes, webinars, or video conferences. Fellow and mentor engage simultaneously, allowing for immediate feedback, discussion, and collaboration, fostering an interactive learning environment.

References

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