



American  
Occupational Therapy  
Association

**AOTA Approved Provider  
Program: New CE  
Administrator Training**

# Approved Provider Program: Purpose

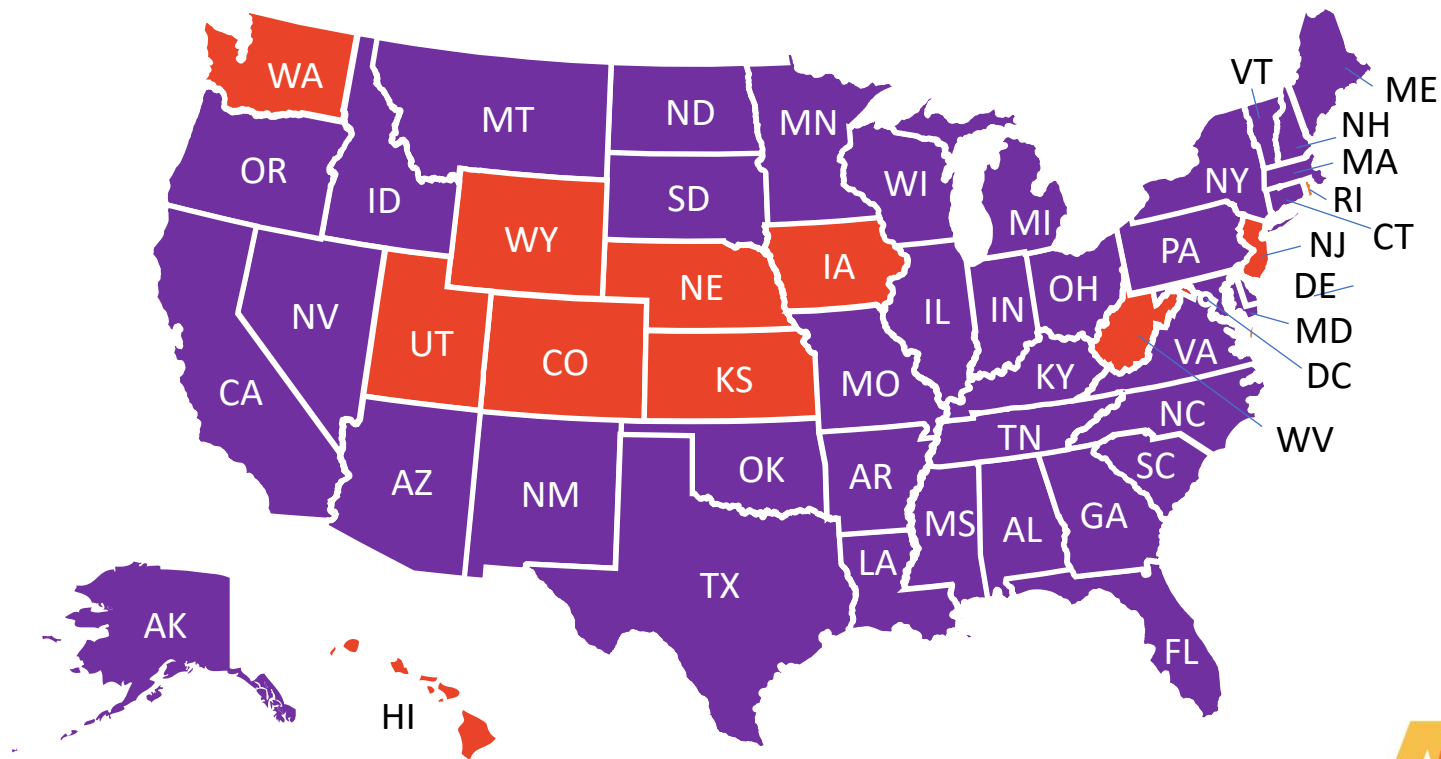
The purpose of the APP is to promote high-quality, evidence based professional development (PD) activities that are relevant to occupational therapy practitioners.

PD activities may include, but are not limited to

- courses,
- webinars,
- podcasts,
- self-study readings,
- journal clubs,
- mentorship,
- conferences, and
- symposiums.



# 40 States Recognize the AOTA APP (8/1/2025)



# Two-step process

**Step 1:** Become a Provider (Submit an Application for Recognition)

**Step 2:** Submit Individual PD Activity Application(s)

**All Professional Development Activities must have an assigned PD activity approval ID#, which will be given after approval. Approval is good for five years. The number must be present on marketing materials AND certificates of completion.**



# Applicant Agreement and Annual Compliance

## **Once approved as a provider the organization must meet Annual Compliance Requirements:**

Due each year on your anniversary (– 1 day) of approval:

- Annual Fees
- Annual Report
  - Providers must report on one PD activity hosted during their last term. The report includes a request for:
    - Brochures or registration link
    - Learning outcome assessment
    - Summary evaluation

\*late fees are applied



# CE Admins Get Familiar!

**New AOTA APP CE Administrators** must get familiar with

- General Information,
- Applicant Agreement,
- APP Criteria and Guidelines,
- Resources, and
- Policies and procedures.



# General Information

**General Information** provides important context such as:

- All PD activities that award AOTA CEUs must be approved prior to the delivery of the activity. Organizations may not award CEUs retroactively.
- All PD activities must be submitted at least 20 business days in advance of the starting date of the PD activity.
- Recognition and approval of the PD activity is granted for a period of 5 years.



# Applicant Agreement

The [Applicant Agreement](#) describes contractual obligations such as

- Applicant and Provider Responsibilities
- Intellectual Property
- Marketing
- Compliance
- Term and Termination
- Rejection of Application, Renewal, or Annual Report
- Waiver, Release, Indemnification and Covenant Not to Sue
- Jurisdiction and Venue
- Notice





# APP Criteria and Guidelines

The [APP Criteria and Guidelines](#) are the cornerstone of the program. All Professional Development (PD) Activities must adhere to the APP Criteria and Guidelines.

There are 17 Criteria and Guidelines.



# Other Policies and Procedures

**Compliance Policies and Procedures** outline expectations for an AOTA Approved Provider as well as how the APP monitors compliance.



# Other Resources

- [\*\*Benefits and Fees\*\*](#) - benefits of becoming an approved provider and maintaining the Approved Provider status as well as the various fees that apply to the program.
- [\*\*Current Provider Resources\*\*](#) - forms, handouts, and other video resources to assist current AOTA Approved Providers with various processes and to support adherence to Criteria and Guidelines.
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# Other Resources

- [States that recognize the APP](#) - a list of states that, as of 2023, that recognize professional development sponsored and/or approved by AOTA Approved Providers, either in regulatory language or by formal written communication to AOTA.
- [Repository of Approved Providers](#) - a list of Approved Provider in good standing.
- [Approved Sponsor](#) - provides information for current AOTA Approved Providers who are interested in becoming Approved Sponsors so that they may partner with non-approved providers to co-sponsor PD activities.



# Other Resources

- [\*\*Create Strong Learning Outcomes and Assessments\*\*](#) - this resource assists Approved Providers to comply with Section 13 and 14 of the APP Criteria, which address learning outcomes and assessment of learning outcomes.
- [\*\*Levels and Strength of Evidence\*\*](#) - this resource assists Providers to comply with Section 12 of the APP Criteria, which requires providers to use the best available evidence when creating PD activities.
- [\*\*Formatting the APP statement\*\*](#) - this resource assist Providers format the APP statement and logo correctly, which are required to be on an approved PD activity's marketing material and certificate of completion.



# Other Resources

## [How to Complete the AOTA APP Professional Development \(PD\) Activity Application](#)

Video: [Application Basics](#)

Video: [APP Categories](#)

Video: [Interventions to Support Occupation](#)

Video: [OT Service Delivery](#)

Video: [Professional Issues and Foundational Knowledge](#)

Video: [Evidence](#)

Video: [Learning Outcomes](#)

Video: [Publications](#)



# AOTA APP Systems and Accounts

The AOTA APP uses two systems to manage your organization's APP status.

## **MyAOTA (Payments, Notices)**

<https://myaota.aota.org/login.aspx?goto=https%3a%2f%2fwww.aota.org/loginreturn>

## **Survey Monkey Apply (Applications and Reports)**

[https://aota.smapply.io/prog/pd\\_activity\\_change\\_in\\_scope\\_annual\\_report\\_](https://aota.smapply.io/prog/pd_activity_change_in_scope_annual_report_)



# AOTA APP Systems and Accounts: MyAOTA

## MyAOTA (payment, notices)

Your organization's MyAOTA account serves as the central hub for managing primary and secondary contacts, as well as handling all notices, invoices and payments with AOTA.

The CE Administrator is responsible for notifying AOTA of any changes to addresses, contact information, or other organizational demographics to ensure records remain accurate and up to date.





# AOTA APP Systems and Accounts: SMA

## [Survey Monkey Apply](#) (SMA) (applications and reports)

To ensure that your SMA account is updated with the changes, you may follow either of the two methods below:

1. Transferring Ownership
2. Updating the SMA Email Address



# SMA Continued

## Transferring Ownership

If you need to change the owner of an application, you can modify it without requiring the owner to provide any new information. This article provides administrators with the steps to transfer ownership of an application:

<https://help.smapply.io/hc/en-us/articles/360037351473-How-to-Transfer-Ownership-of-an-Application>.

If you encounter any difficulties, please contact SMA directly using this form:

<https://aota.smapply.io/helpdesk>.

Unfortunately, AOTA staff cannot assist with email changes, password resets, etc. SMA requires that requests come directly from the organization without users cc'd, to comply with their security policy. Please include the old email address in the request since it will come from the new email address.



# SMA Continued

## Updating the SMA Email Address

To update the email associated with the organization's SMA account log into the account and go to Account Settings. Change the email in the Profile. The user must have access to the email associated with the account (they will receive an email to verify the change). For optimal accessibility, we recommend using a transferable email address (e.g., CE@xyz.com) that all staff can use to access the SMA account. **If you do not have access to the account email address you will not have access to previously submitted applications.**

If you encounter any difficulties, please contact SMA directly using this form: <https://aota.smapply.io/helpdesk>. Unfortunately, AOTA staff cannot assist with email changes, password resets, etc. SMA requires that requests come directly from the organization without users cc'd, to comply with their security policy. Please include the old email address in the request since it will come from the new email address.



# SMA: APP Application Portal!

## **Viewing past applications and reports:**

- Click the "Log in" button.
- Go to **My Applications**

## **Submitting a new application**

- Go to **Programs**
- **Current Applications and Reports**
- **Apply**



# We are here to help!

Please contact [app@aota.org](mailto:app@aota.org) with  
questions.

