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I. INTRODUCTION
I. INTRODUCTION

INTRODUCTION TO ACCREDITATION

Accreditation is a system for recognizing educational institutions and professional programs affiliated with those institutions for a level of performance, integrity, and quality which entitles them to the confidence of the educational community and the public they serve. In the United States, this recognition is extended primarily through nongovernmental, voluntary institutional or professional associations. These groups establish criteria for accreditation, arrange site visits, evaluate those institutions and professional programs which desire accredited status, and publicly designate those which meet their criteria.

In most other countries, the establishment and maintenance of educational standards is the responsibility of a central government bureau. In the United States, however, public authority in education is constitutionally reserved to the states. This system of voluntary nongovernmental evaluation, called accreditation, has evolved to promote both regional and national approaches to the determination of educational quality. Although accreditation is basically a private, voluntary process, accrediting decisions are used as a consideration in many formal actions—by governmental funding agencies, scholarship commissions, foundations, employers, counselors, and potential students. Accrediting agencies, therefore, come to be viewed as quasi-public entities with certain responsibilities to the many groups which interact with the educational community.

In America, accreditation at the postsecondary level performs a number of important functions, including the encouragement of efforts toward maximum educational effectiveness. The accrediting process requires institutions and programs to examine their goals, activities, and achievements; to consider the expert criticism and suggestions of a visiting team; and to determine internal procedures for action on recommendations from the accrediting agency. Since accreditation status is reviewed on a periodic basis, recognized institutions and professional programs are encouraged to maintain continuous self-study and improvement mechanisms.

Accreditation of educational programs for the occupational therapist and the occupational therapy assistant is granted by the Accreditation Council for Occupational Therapy Education (ACOTE®) of the American Occupational Therapy Association (AOTA). ACOTE is recognized as the accrediting agency for occupational therapy education by the United States Department of Education (USDE) and the Council for Higher Education Accreditation (CHEA).

Accreditation by an agency recognized by the USDE is one of the conditions qualifying an educational institution or program (freestanding) to participate in federal funding programs. Placement on the list of recognized accrediting agencies also serves consumer interests by acknowledging an accrediting body’s ability to identify institutions or programs of quality.

Federal legislation requires the U.S. Secretary of Education to publish a list of the accrediting agencies the Secretary recognizes as reliable authorities concerning the quality of education offered by educational institutions or programs. The criteria and procedures developed by the Department for its evaluations and the list of agencies granted national recognition are published in the Federal Register.
PURPOSES OF ACCREDITATION

Accreditation has two fundamental purposes: to assure the quality of the institution or program and to assist in the improvement of the institution or program ...

In fulfilling its two purposes, quality assurance and institutional and program improvement, accreditation provides service of value to several constituencies:

To the PUBLIC, the value of accreditation includes:

a. an assurance of external evaluation of the institution or program, and a finding that there is conformity to general expectations in higher education or the professional field;

b. an identification of institutions and programs which have voluntarily undertaken explicit activities directed at improving the quality of the institution and its professional programs, and are carrying them out successfully;

c. an improvement in the professional services available to the public, as accredited programs modify their requirements to reflect changes in knowledge and practice generally accepted in the field;

d. a decreased need for intervention by public agencies in the operations of educational institutions, since their institutions through accreditation are providing privately for the maintenance and enhancement of educational quality.

To STUDENTS, accreditation provides:

a. an assurance that the educational activities of an accredited institution or program have been found to be satisfactory, and therefore meet the needs of students;

b. assistance in the transfer of credits between institutions, or in the admission of students to advanced degrees through the general acceptance of credits among accredited institutions when the performance of the student has been satisfactory and the credits to be transferred are appropriate to the receiving institution;

c. a prerequisite in many cases for entering a profession.

INSTITUTIONS OF HIGHER EDUCATION benefit from accreditation through:

a. the stimulus provided for self-evaluation and self-directed institutional and program improvement;

b. the strengthening of institutional and program self-evaluation by the review and counsel provided through the accrediting agency;

c. the application of criteria of accrediting agencies, generally accepted throughout higher education, which help guard against external encroachments harmful to institutional or program quality by providing benchmarks independent of forces that might impinge on individual institutions;

d. the enhancing of the reputation of an accredited institution or program because of public regard for accreditation;

e. the use of accreditation as one means by which an institution can gain eligibility for the participation of itself and its students in certain programs of governmental aid to postsecondary education; accreditation is also usually relied upon by private foundations as a highly desirable indicator of institutional and program quality.
Accreditation serves the **PROFESSIONS** by:

a. providing a means for the participation of practitioners in setting the requirements for preparation to enter the professions;

b. contributing to the unity of the professions by bringing together practitioners, teachers and students in an activity directed at improving professional preparation and professional practice.

(Adopted by the Council on Postsecondary Accreditation Board April 15, 1982). (Affirmed by the Commission on Recognition of Postsecondary Accreditation January 16, 1994).

The specific purposes of the ACOTE accreditation process are:

1. to encourage continuous self-analysis and improvement of the occupational therapy educational program by representatives of the institution’s administrative staff, teaching faculty, students, governing body, and other appropriate constituencies, with the ultimate aim of assuring students of quality education in this profession and assuring patients of appropriate occupational therapy care.

2. to determine whether the occupational therapy educational program meets the appropriate approved educational standards.

3. to encourage faculty to anticipate and accommodate new trends and developments in the practice of occupational therapy that should be incorporated into the educational process.

4. to assure the educational community, the general public, and other agencies or organizations that the program has both clearly defined and appropriate objectives, maintains conditions under which these objectives can reasonably be expected to be achieved, appears to be accomplishing them substantially, and can be expected to continue to do so.

**HISTORY OF AOTA ACCREDITATION**

The National Society for the Promotion of Occupational Therapy was founded in 1917 and incorporated under the laws of the District of Columbia.

The object of the Association as set forth in its Constitution “shall be to study and advance curative occupations for invalids and convalescents; to gather news of progress in occupational therapy and to use such knowledge to the common good; to encourage original research, to promote cooperation among occupational therapy societies, and with other agencies of rehabilitation.”

About 3 years after its incorporation, the Association was urged by several leading physicians and authorities on hospital administration to establish a national register or directory of occupational therapists “for the protection of hospitals and institutions from unqualified persons posing as occupational therapists.”

After careful consideration and on the advice of other national organizations in the field of medicine, the Association decided that the first step toward the establishment of a national register or directory was the establishment of minimum standards of training for occupational therapists.

In 1921, the name of the Association was changed to the American Occupational Therapy Association (AOTA). In 1923, accreditation of educational programs became a stated function of the American Occupational Therapy Association, and basic educational standards were developed.

AOTA approached the Council on Medical Education of the American Medical Association (AMA) in 1933 to request cooperation in the development and improvement of educational programs for occupational therapists.
The “ESSENTIALS OF AN ACCEPTABLE SCHOOL OF OCCUPATIONAL THERAPY” were adopted by the AMA House of Delegates in 1935. This action represented the first cooperative accreditation activity by the AMA.

In 1958, AOTA assumed responsibility for approval of educational programs for the occupational therapy assistant. The standards on which accreditation was based were modeled after the Essentials established for baccalaureate programs.

In 1964, the AOTA/AMA collaborative relationship in accreditation was officially recognized by the National Commission on Accrediting (NCA). The NCA was a private agency serving as a coordinating agency for accrediting activities in higher education. Although it had no legal authority, it had great influence on educational accreditation through the listing of accrediting agencies it recommended to its members. The NCA continued its activities in merger with the Federation of Regional Accrediting Commissions of Higher Education since January 1975. The new organization was the Council on Postsecondary Accreditation (COPA).

In 1990, AOTA petitioned the Committee on Allied Health Education and Accreditation (CAHEA) to include the accreditation of the occupational therapy assistant programs in the CAHEA system. After approval of the change by the AMA Council on Medical Education, CAHEA petitioned both COPA and the USDE for recognition as the accrediting body for occupational therapy assistant education.

In 1991, occupational therapy assistant programs with approval status from the AOTA Accreditation Committee became accredited by CAHEA/AMA in collaboration with the AOTA Accreditation Committee.

On January 1, 1994, the AOTA Accreditation Committee changed its name to the AOTA Accreditation Council for Occupational Therapy Education (ACOTE) and became operational as an accrediting agency independent of CAHEA/AMA.

During 1994, ACOTE became listed by the USDE as a nationally recognized accrediting agency for professional programs in the field of occupational therapy. ACOTE was also granted initial recognition by the Commission on Recognition of Postsecondary Accreditation (CORPA). CORPA was the nongovernmental recognition agency for accrediting bodies that was formed when COPA dissolved in 1994.

On March 1, 1994, 197 previously accredited/approved and developing occupational therapy and occupational therapy assistant educational programs were transferred into the ACOTE accreditation system.

In a ballot election concluded October 31, 1994, the AOTA membership approved the proposed AOTA Bylaws Amendment that reflected the creation of AOTA’s new accrediting body and establishment of ACOTE as a standing committee of the AOTA Executive Board. At that time, responsibility for review and revision of the educational standards (Essentials) was transferred from the AOTA Commission on Education (COE) Educational Standards Review Committee (ESRC) to ACOTE. The authority for final approval of the educational standards, which previously required acceptance by both the AOTA Representative Assembly and CAHEA/AMA, was also transferred to ACOTE. This action allowed ACOTE to meet the recognition criteria of both USDE and CORPA.

The Council on Higher Education Accreditation (CHEA) is presently the nongovernmental agency for accrediting bodies that replaced CORPA. In February 1997, CHEA voted to accept CORPA’s recognition status of ACOTE.

In August 1997, ACOTE voted to open its accreditation process to occupational therapy programs located outside the United States. In December 1998, ACOTE accredited its first non-U.S. program: Queen Margaret University College in Edinburgh, Scotland.

At its April 1998 meeting, ACOTE adopted the following position statement regarding the draft accreditation standards: Given the demands, complexity, and diversity of contemporary occupational therapy practice, ACOTE’s position is that the forthcoming educational standards are most likely to be achieved in post-baccalaureate degree programs.
In December 1998, ACOTE adopted the Standards for an Accredited Educational Program for the Occupational Therapist and Standards for an Accredited Educational Program for the Occupational Therapy Assistant. These Standards, which went into effect on July 1, 2000, replaced the 1991 Essentials–Updated.

At AOTA’s April 1999 Annual Conference & Expo, the Representative Assembly passed Resolution J, “Movement to Required Postbaccalaureate Level of Education.” This resolution called for the eventual installation of a postbaccalaureate requirement for entry-level occupational therapy education. After an exhaustive evaluation of the short- and long-term impact of the decision to move to postbaccalaureate-degree entry, ACOTE voted at its August 1999 meeting that professional entry-level occupational therapy programs must be offered at the postbaccalaureate level by January 1, 2007 to receive or maintain ACOTE accreditation status.

In August of 2004, ACOTE voted to transition from accreditation of occupational therapy educational programs to accreditation of occupational therapy program degree levels, effective January 1, 2005. Any institution adding a new degree level or changing the current occupational therapy degree level was required to apply for and receive formal accreditation status for that degree level prior to the admission of students into the program.

In August 2006, ACOTE formally adopted new Accreditation Standards for Master’s-Degree-Level Educational Programs for the Occupational Therapist and new Accreditation Standards for Educational Programs for the Occupational Therapy Assistant. In December 2006, ACOTE formally adopted Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist. An effective date of January 1, 2008, was established for all sets of 2006 ACOTE Standards.

At its April 2008 meeting, AOTA’s Representative Assembly (RA) established that the official position of AOTA is one that supports the associate degree as the requirement for entry to the field as an occupational therapy assistant. The RA further recommended that ACOTE implement a 5-year timeline for the existing 3 certificate-level programs to transition to the associate degree level. This transition period may be extended for good cause.

In response to the RA’s action, ACOTE adopted a policy at its April 2008 meeting that effective July 1, 2013, all occupational therapy assistant educational programs must be offered at the associate degree level in order to retain ACOTE accreditation. In addition, ACOTE voted that effective May 10, 2008, ACOTE will only accept applications for new occupational therapy assistant (OTA) programs that are offered at the associate degree level.

At its August 2015 meeting, ACOTE voted on the entry-level degree for the occupational therapist and the occupational therapy assistant as follows:

- **Occupational Therapist:** ACOTE determined that the entry-level-degree requirement for the occupational therapist will remain at both the master’s and the doctoral degree. The Council’s decision was based on a comprehensive review of available literature, specific reports, and extensive commentary from stakeholders. The overarching justifications for the Council’s decision were: (1) limited outcomes differentiate master’s and doctorally prepared graduates; (2) the academic infrastructure of many institutions is not sufficient to meet the occupational therapy doctorate standards, especially with respect to faculty resources and institutional support; (3) the readiness and capability of institutions to deliver quality fieldwork and experiential components of the program is constrained; and (4) retaining two entry levels allows for flexibility of the profession to assess and address the changing health care needs of individuals and populations.

- **Occupational Therapy Assistant:** ACOTE determined that the entry-level-degree for the occupational therapy assistant will be offered at both the associate and bachelor’s degree. The Council’s decision was based on a number of findings, which were informed in significant part by information and commentary from stakeholders, including: (1) the ability to better prepare individuals for further academic advancement and leadership positions; (2) the expansion of opportunities within the current scope of practice; and (3) two entry levels permits additional flexibility to assess and address the changing health care needs of individuals and populations. The option for programs to seek accreditation for the entry-level-degree for the OTA at the baccalaureate level will become active after baccalaureate entry-level Standards are written and adopted by ACOTE.
ACOTE PURPOSE STATEMENT

ACOTE®: Associated Advisory Council of the Board (2017 AOTA Bylaws Article V. Section 10.)

Purpose: To accredit occupational therapy educational programs and occupational therapy assistant educational programs. ACOTE® establishes, approves, and administers educational standards to evaluate occupational therapy and occupational therapy assistant educational programs. ACOTE® shall have complete autonomy in establishing standards for educational programs; developing and implementing policies, rules, and procedures for conducting accreditation reviews; and making accreditation decisions.

ACOTE VISION STATEMENT

The Accreditation Council for Occupational Therapy Education (ACOTE®) is committed to the establishment, promotion, and evaluation of standards of quality in occupational therapy education. To this end, ACOTE will lead in the development of effective collaborative partnerships with the communities of interest, both internal and external to the profession of occupational therapy, which are affected by its activities.

ACOTE MISSION STATEMENT

The Accreditation Council for Occupational Therapy Education (ACOTE®) ensures quality occupational therapy education by developing accreditation standards and verifying implementation to support the preparation of competent occupational therapists and occupational therapy assistants.

REVIEW OF ACCREDITATION POLICIES

ACOTE periodically reviews its policies and procedures to ensure that:

- they are consistent with the requirements of the USDE,
- they facilitate an impartial and objective judgment of each program’s compliance with the Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, Master’s-Degree-Level Educational Program for the Occupational Therapist, or Associate-Degree-Level Educational Program for the Occupational Therapy Assistant,
- they assure due process, and
- they minimize, as much as possible, the burden of the documentation required.

PROCEDURES IN ACCREDITATION

The accreditation process is continuously evolving. The trend has been from quantitative to qualitative criteria, from the early days of simple checklists to an increasing interest and emphasis on measuring the outcomes of educational experiences.

For new programs, the accreditation process begins with submission of the Candidacy Application. Upon review of this application, ACOTE either grants, defers action on, or denies Candidacy Status. If Candidacy Status is granted, the program may admit its first class of students and proceed to the second step of the process, the preaccreditation review. In this step, the program conducts a programmatic self-study, a comprehensive self-assessment of the program’s compliance with established ACOTE standards. Upon review of this report, ACOTE grants, defers action on, or denies Preaccreditation Status, a decision that reflects ACOTE’s opinion of how likely the program is to meet the ACOTE standards by the time of the initial on-site evaluation.
In preparation for the initial or reaccreditation on-site evaluation, trained evaluators conduct a complete review of the Report of Self-Study submitted by the program. This serves as the basis for evaluation of the program by an on-site team. At the conclusion of the on-site evaluation, the team prepares an evaluation report, which is reviewed by the program for factual accuracy. The Evaluators’ Report of On-Site Evaluation and any response from the program are then reviewed by ACOTE. ACOTE uses these materials as the basis for action regarding the accreditation status of the program. Details regarding these procedures are contained in this manual.

### LISTING OF EDUCATIONAL PROGRAMS IN OCCUPATIONAL THERAPY

As required by the USDE, AOTA annually publishes a list of accredited occupational therapy educational programs, which includes a section devoted to developing programs that have entered the accreditation process and sections devoted to programs that have voluntarily or involuntarily withdrawn from the accreditation process. The fact that the program is included as an accredited educational program in the listing indicates that it is in substantial compliance with the *Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist*, *Master’s-Degree-Level Educational Program for the Occupational Therapist*, or *Associate-Degree-Level Educational Program for the Occupational Therapy Assistant*. It should not be construed as indicating the rank or degree to which the program exceeds the *Standards*. 
II. STANDARDS
## ACCREDITATION STANDARDS FOR A DOCTORAL-DEGREE-LEVEL EDUCATIONAL PROGRAM FOR THE OCCUPATIONAL THERAPIST

<table>
<thead>
<tr>
<th>STANDARD NUMBER</th>
<th>ACCREDITATION STANDARDS FOR A DOCTORAL-DEGREE-LEVEL EDUCATIONAL PROGRAM FOR THE OCCUPATIONAL THERAPIST</th>
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<tr>
<td></td>
<td>The rapidly changing and dynamic nature of contemporary health and human services delivery systems provides challenging opportunities for the occupational therapist to use knowledge and skills in a practice area as a direct care provider, consultant, educator, manager, leader, researcher, and advocate for the profession and the consumer.</td>
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<tr>
<td></td>
<td>A graduate from an ACOTE-accredited doctoral-degree-level occupational therapy program must</td>
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<td></td>
<td>- 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.</td>
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<td></td>
<td>- 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.</td>
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<td>- Have achieved entry-level competence through a combination of academic and fieldwork education.</td>
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<td>- Be prepared to articulate and apply occupational therapy theory and evidence-based evaluations and interventions to achieve expected outcomes as related to occupation.</td>
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<td>- Be prepared to articulate and apply therapeutic use of occupations with individuals or groups for the purpose of participation in roles and situations in home, school, workplace, community, and other settings.</td>
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<td>- Be able to plan and apply occupational therapy interventions to address the physical, cognitive, psychosocial, sensory, and other aspects of performance in a variety of contexts and environments to support engagement in everyday environments to support engagement in everyday</td>
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<td></td>
<td>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.</td>
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<td></td>
<td>A graduate from an ACOTE-accredited master’s-degree-level occupational therapy program must</td>
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<td>- 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.</td>
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<td>- 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.</td>
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<td>- Have achieved entry-level competence through a combination of academic and fieldwork education.</td>
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<td>- Be prepared to articulate and apply therapeutic use of occupations with individuals or groups for the purpose of participation in roles and situations in home, school, workplace, community, and other settings.</td>
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<td>- Be able to plan and apply occupational therapy interventions to address the physical, cognitive, psychosocial, sensory, and other aspects of performance in a variety of contexts and environments to support engagement in everyday environments to support engagement in everyday</td>
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## ACCREDITATION STANDARDS FOR A MASTER’S-DEGREE-LEVEL EDUCATIONAL PROGRAM FOR THE OCCUPATIONAL THERAPIST

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<thead>
<tr>
<th>STANDARD NUMBER</th>
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<td>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.</td>
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<td>A graduate from an ACOTE-accredited master’s-degree-level occupational therapy program must</td>
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<td>- 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.</td>
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<td>- 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.</td>
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<td>- Have achieved entry-level competence through a combination of academic and fieldwork education.</td>
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<td>- Be able to plan and apply occupational therapy interventions to address the physical, cognitive, psychosocial, sensory, and other aspects of performance in a variety of contexts and environments to support engagement in everyday environments to support engagement in everyday</td>
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## ACCREDITATION STANDARDS FOR AN ASSOCIATE-DEGREE-LEVEL EDUCATIONAL PROGRAM FOR THE OCCUPATIONAL THERAPY ASSISTANT

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<tr>
<th>STANDARD NUMBER</th>
<th>ACCREDITATION STANDARDS FOR AN ASSOCIATE-DEGREE-LEVEL EDUCATIONAL PROGRAM FOR THE OCCUPATIONAL THERAPY ASSISTANT</th>
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<tr>
<td></td>
<td>The rapidly changing and dynamic nature of contemporary health and human services delivery systems requires the occupational therapy assistant to possess basic skills as a direct care provider, educator, and advocate for the profession and the consumer.</td>
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<tr>
<td></td>
<td>A graduate from an ACOTE-accredited associate-degree-level occupational therapy assistant program must</td>
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<td>- Have acquired an educational foundation in the liberal arts and sciences, including a focus on issues related to diversity.</td>
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<td>- 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.</td>
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<td>- Have achieved entry-level competence through a combination of academic and fieldwork education.</td>
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<td>- Be prepared to articulate and apply occupational therapy principles and intervention tools to achieve expected outcomes as related to occupation.</td>
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<td>- Be prepared to articulate and apply therapeutic use of occupations with individuals or groups for the purpose of participation in roles and situations in home, school, workplace, community, and other settings.</td>
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<td>- Be able to apply occupational therapy interventions to address the physical, cognitive, psychosocial, sensory, and other aspects of performance in a variety of contexts and environments to support engagement in everyday environments to support engagement in everyday</td>
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<td>environments to support engagement in everyday life activities that affect health, well-being, and quality of life.</td>
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<td>• Be prepared to be a lifelong learner and keep current with evidence-based professional practice.</td>
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<td>• Uphold the ethical standards, values, and attitudes of the occupational therapy profession.</td>
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<td>• Understand the distinct roles and responsibilities of the occupational therapist and occupational therapy assistant in the supervisory process.</td>
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<td>• Be prepared to effectively communicate and work interprofessionally with those who provide care for individuals and/or populations in order to clarify each member’s responsibility in executing components of an intervention plan.</td>
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<td>• Be prepared to advocate as a professional for the occupational therapy services offered and for the recipients of those services.</td>
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<td>• 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.</td>
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<td>• Demonstrate in-depth knowledge of delivery models, policies, and systems related to the area of practice in settings where occupational therapy is currently practiced and where it is emerging as a service.</td>
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<td>• Demonstrate thorough knowledge of evidence-based practice.</td>
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<td>• Demonstrate active involvement in professional development, leadership, and advocacy.</td>
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<td>• Relate theory to practice and demonstrate synthesis of advanced knowledge in a practice area through completion of a culmination project.</td>
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<td>A.1.0. SPONSORSHIP AND ACCREDITATION</td>
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<tr>
<td>A.1.1. The sponsoring institution(s) and affiliates, if any, must be accredited by the recognized regional accrediting authority. For programs in countries other than the United States, ACOTE will determine an alternative and equivalent external review process.</td>
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<td>A.1.2. Sponsoring institution(s) must be authorized under applicable law or other acceptable authority to provide a program of postsecondary education and have appropriate doctoral degree-granting authority.</td>
<td>Sponsoring institution(s) must be authorized under applicable law or other acceptable authority to provide a program of postsecondary education and have appropriate degree-granting authority.</td>
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<td>A.1.3. Accredited occupational therapy educational programs may be established only in senior colleges, universities, or medical schools.</td>
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<td>A.1.4. The sponsoring institution(s) must assume primary responsibility for appointment of faculty, admission of students, and curriculum planning at all locations where the program is offered. This would include course content, satisfactory completion of the educational program, and granting of the degree. The sponsoring institution(s) 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.</td>
<td>The sponsoring institution(s) must assume primary responsibility for appointment of faculty, admission of students, and curriculum planning at all locations where the program is offered. This would include course content, satisfactory completion of the educational program, and granting of the degree. The sponsoring institution(s) 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.</td>
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For all standards listed below, 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.

SECTION A: GENERAL REQUIREMENTS

A.1.0. SPONSORSHIP AND ACCREDITATION

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

A.1.2. Sponsoring institution(s) must be authorized under applicable law or other acceptable authority to provide a program of postsecondary education and have appropriate doctoral degree-granting authority.

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

A.1.4. The sponsoring institution(s) must assume primary responsibility for appointment of faculty, admission of students, and curriculum planning at all locations where the program is offered. This would include course content, satisfactory completion of the educational program, and granting of the degree. The sponsoring institution(s) 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 Occupational Therapy Doctorate (OTD) and Doctor of Occupational Therapy (D.O.T.).
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| A.1.5. | The 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.  
- Notify and receive ACOTE approval for any significant program changes prior to the admission of students into the new/changed program.  
- 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., Interim 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 program must  
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- Notify and receive ACOTE approval for any significant program changes prior to the admission of students into the new/changed program.  
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- 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 PROGRAM IS ALSO RESPONSIBLE FOR COMPLYING WITH THE CURRENT REQUIREMENTS OF ALL ACOTE POLICIES, INCLUDING THE REQUIREMENT FOR THE PROGRAM TO SUBMIT A LETTER OF INTENT TO SEEK ACCREDITATION FOR AN ADDITIONAL LOCATION AT LEAST 12 MONTHS PRIOR TO THE PLANNED ADMISSION OF STUDENTS INTO THAT ADDITIONAL LOCATION.

A.2.0. ACADEMIC RESOURCES

A.2.1. The program must identify an individual as the program 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
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<td>A.2.2.</td>
<td>The program director must be an initially certified occupational therapist who is licensed or otherwise regulated according to regulations in the state(s) or jurisdiction(s) in which the program is located. The program director must hold a doctoral degree awarded by an institution that is accredited by a regional accrediting body recognized by the U.S. Department of Education (USDE). The doctoral degree is not limited to a doctorate in occupational therapy.</td>
<td>The program director must be an initially certified occupational therapist who is licensed or otherwise regulated according to regulations in the state(s) or jurisdiction(s) in which the program is located. The program director must hold a doctoral degree awarded by an institution that is accredited by a regional accrediting body recognized by the U.S. Department of Education (USDE). The doctoral degree is not limited to a doctorate in occupational therapy.</td>
<td>The program director must be an initially certified occupational therapist or occupational therapy assistant who is licensed or otherwise regulated according to regulations in the state(s) or jurisdiction(s) in which the program is located. The program director must hold a minimum of a master’s degree awarded by an institution that is accredited by a national or regional accrediting body recognized by the U.S. Department of Education (USDE). The master’s degree is not limited to a master’s degree in occupational therapy.</td>
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<td>A.2.3.</td>
<td>The program director must have a minimum of 8 years of documented experience in the field of occupational therapy. This experience must include - Clinical practice as an occupational therapist; - Administrative experience including, but not limited to, program planning and implementation, personnel management, evaluation, and budgeting; - Scholarship (e.g., scholarship of application, scholarship of teaching and learning); and - At least 3 years of experience in a full-time academic appointment with teaching responsibilities at the postbaccalaureate level.</td>
<td>The program director must have a minimum of 8 years of documented experience in the field of occupational therapy. This experience must include - Clinical practice as an occupational therapist; - Administrative experience including, but not limited to, program planning and implementation, personnel management, evaluation, and budgeting; - Scholarship (e.g., scholarship of application, scholarship of teaching and learning); and - At least 3 years of experience in a full-time academic appointment with teaching responsibilities at the postsecondary level.</td>
<td>The program director must have a minimum of 5 years of documented experience in the field of occupational therapy. This experience must include - Clinical practice as an occupational therapist or occupational therapy assistant; - Administrative experience including, but not limited to, program planning and implementation, personnel management, evaluation, and budgeting; - Understanding of and experience with occupational therapy assistants; and - At least 1 year of experience in a full-time academic appointment with teaching responsibilities at the postsecondary level.</td>
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The teaching component of the full-time academic appointment may be met through responsibility for at least one postsecondary (e.g., OTA) or postbaccalaureate (e.g., OTM/OTD) course that includes implementation of the course syllabus, course content, and course evaluation methods. The academic appointment must be full-time and the teaching responsibilities requirement may be met through one course that is not limited to the occupational therapy educational program.
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<td>A.2.4.</td>
<td>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.</td>
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<td>A.2.5.</td>
<td>(No related Standard)</td>
<td>(No related Standard)</td>
<td>In addition to the program director, the program must have at least one full-time equivalent (FTE) faculty position at each accredited location where the program is offered. This position may be shared by up to three individuals who teach as adjunct faculty. These individuals must have one or more additional responsibilities related to student advisement, supervision, committee work, program planning, evaluation, recruitment, and marketing activities.</td>
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<td>A.2.6.</td>
<td>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.</td>
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<td>A.2.7.</td>
<td>The program must identify an individual for the role of academic fieldwork coordinator who is specifically responsible for the program’s compliance with the fieldwork requirements of Standards Section C.1.0 and is assigned to the occupational therapy educational program as a full-time faculty member as defined by ACOTE. The academic fieldwork coordinator may be assigned other institutional duties that do not interfere with the management and administration of the fieldwork program. The institution must document that the academic fieldwork coordinator has sufficient release time to ensure that the needs of the fieldwork program are being met. This individual must be a licensed or otherwise regulated occupational therapist. Coordinators must hold a doctoral degree awarded by an institution that is accredited by a USDE-recognized regional accrediting body.</td>
<td>The program must identify an individual for the role of academic fieldwork coordinator who is specifically responsible for the program’s compliance with the fieldwork requirements of Standards Section C.1.0 and is assigned to the occupational therapy educational program as a full-time faculty member as defined by ACOTE. The academic fieldwork coordinator may be assigned other institutional duties that do not interfere with the management and administration of the fieldwork program. The institution must document that the academic fieldwork coordinator has sufficient release time to ensure that the needs of the fieldwork program are being met. This individual must be a licensed or otherwise regulated occupational therapist. Coordinators must hold a minimum of a master’s degree awarded by an institution that is accredited by a USDE-recognized regional accrediting body.</td>
<td>The program must identify an individual for the role of academic fieldwork coordinator who is specifically responsible for the program’s compliance with the fieldwork requirements of Standards Section C.1.0 and is assigned to the occupational therapy educational program as a full-time faculty member as defined by ACOTE. The academic fieldwork coordinator may be assigned other institutional duties that do not interfere with the management and administration of the fieldwork program. The institution must document that the academic fieldwork coordinator has sufficient release time to ensure that the needs of the fieldwork program are being met. This individual must be a licensed or otherwise regulated occupational therapist or occupational therapy assistant. Coordinators must hold a minimum of a baccalaureate degree awarded by an institution that is accredited by a USDE-recognized regional or national accrediting body.</td>
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**A DOCTORAL DEGREE THAT WAS AWARDED PRIOR TO JULY 1, 2015, FROM AN INSTITUTION THAT WAS NOT REGIONALLY ACCREDITED IS CONSIDERED ACCEPTABLE TO MEET THIS STANDARD ONLY IF THE INSTITUTION IS SEEKING OR HAS BEEN AWARDED**

**A MASTER’S DEGREE THAT WAS AWARDED PRIOR TO JULY 1, 2015, FROM AN INSTITUTION THAT WAS NOT REGIONALLY ACCREDITED IS CONSIDERED ACCEPTABLE TO MEET THIS STANDARD ONLY IF THE INSTITUTION IS SEEKING OR HAS BEEN AWARDED**

**A BACCALAUREATE DEGREE THAT WAS AWARDED PRIOR TO JULY 1, 2015, FROM AN INSTITUTION THAT WAS NOT REGIONALLY OR NATIONALLY ACCREDITED IS CONSIDERED ACCEPTABLE TO MEET THIS STANDARD ONLY IF THE INSTITUTION IS SEEKING OR HAS BEEN AWARDED**
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<td>A.2.8.</td>
<td>Core faculty who are occupational therapists or occupational therapy assistants must be currently licensed or otherwise regulated according to regulations in the state or jurisdiction in which the program is located. Faculty in residence and teaching at additional locations must be currently licensed or otherwise regulated according to regulations in the state or jurisdiction in which the additional location is located.</td>
<td>Core faculty who are occupational therapists or occupational therapy assistants must be currently licensed or otherwise regulated according to regulations in the state or jurisdiction in which the program is located. Faculty in residence and teaching at additional locations must be currently licensed or otherwise regulated according to regulations in the state or jurisdiction in which the additional location is located.</td>
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<td>A.2.9.</td>
<td>(No related Standard)</td>
<td>(No related Standard)</td>
<td>In programs where the program director is an occupational therapy assistant, an occupational therapist must be included on faculty and contribute to the functioning of the program through a variety of mechanisms including, but not limited to, teaching, advising, and committee work. In a program where there are only occupational therapists on faculty who have never practiced as an occupational therapy assistant, the program must demonstrate that an individual who is an occupational therapy assistant or an occupational therapist who has previously practiced as an occupational therapy assistant is involved in the program as an adjunct faculty or teaching assistant.</td>
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<td><strong>IN A PROGRAM WHERE THERE ARE ONLY OCCUPATIONAL THERAPISTS ON FACULTY WHO HAVE NEVER PRACTICED AS AN OCCUPATIONAL THERAPY ASSISTANT, THE PROGRAM MUST DEMONSTRATE THAT AN OCCUPATIONAL THERAPY ASSISTANT OR AN OCCUPATIONAL THERAPIST WHO HAS PREVIOUSLY PRACTICED AS AN OCCUPATIONAL THERAPY ASSISTANT HAS AN ONGOING INSTRUCTIONAL ROLE IN THE DELIVERY OF PROGRAMMATIC CONTENT THAT REFLECTS THE ROLE OF THE OCCUPATIONAL THERAPY ASSISTANT THROUGHOUT THE OCCUPATIONAL THERAPY PROCESS. THIS REQUIREMENT MAY BE FILLED BY ONE OR MORE PERSONS.</strong></td>
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<td>A.2.10.</td>
<td>All full-time faculty teaching in the program must hold a doctoral degree awarded by an institution that is accredited by a USDE-recognized regional accrediting body. The doctoral degree is not limited to a doctorate in occupational therapy.</td>
<td>The majority of full-time faculty who are occupational therapists or occupational therapy assistants must hold a doctoral degree. All full-time faculty must hold a minimum of a master’s degree. All degrees must be awarded by an institution that is accredited by a USDE-recognized regional accrediting body. The degrees are not limited to occupational therapy. For an even number of full-time faculty, at least half must hold doctorates. The program director is counted as a faculty member.</td>
<td>All occupational therapy assistant faculty who are full-time must hold a minimum of a baccalaureate degree awarded by an institution that is accredited by a USDE-recognized regional or national accrediting body.</td>
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<td>A.2.11.</td>
<td>The faculty must have documented expertise in their area(s) of teaching responsibility and knowledge of the content delivery method (e.g., distance learning).</td>
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<td>A.2.12.</td>
<td>For programs with additional accredited location(s), the program must identify a faculty member who is an occupational therapist as site coordinator at each location who is responsible for ensuring uniform implementation of the program and ongoing communication with the program director.</td>
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<td>A.2.13.</td>
<td>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 faculty must include individuals competent to ensure delivery of the broad scope of occupational therapy practice. Multiple adjuncts, part-time faculty, or full-time faculty may be configured to meet this goal. Each accredited additional location must have at least one full-time equivalent (FTE) faculty member.</td>
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<td>A.2.14.</td>
<td>Faculty responsibilities must be consistent with and supportive of the mission of the institution.</td>
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<td>A.2.15.</td>
<td>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.</td>
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<td>A.2.16.</td>
<td>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.</td>
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<td>A.2.17.</td>
<td>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.</td>
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<td>A.2.18.</td>
<td>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 they must allow for efficient operation of the program.</td>
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</tr>
</tbody>
</table>
| A.2.19.         | If the program offers distance education, it must include:  
• A process through which the program establishes that the student who registers in a distance education course or program is the same student who participates in and completes the program and receives academic credit,  
• Technology and resources that are adequate to support a distance-learning environment, and  
• A process to ensure that faculty are adequately trained and skilled to use distance education methodologies. | If the program offers distance education, it must include:  
• A process through which the program establishes that the student who registers in a distance education course or program is the same student who participates in and completes the program and receives academic credit,  
• Technology and resources that are adequate to support a distance-learning environment, and  
• A process to ensure that faculty are adequately trained and skilled to use distance education methodologies. | If the program offers distance education, it must include:  
• A process through which the program establishes that the student who registers in a distance education course or program is the same student who participates in and completes the program and receives academic credit,  
• Technology and resources that are adequate to support a distance-learning environment, and  
• A process to ensure that faculty are adequately trained and skilled to use distance education methodologies. |
<p>| A.2.20.         | Laboratory space provided by the institution must be assigned to the occupational therapy program on a priority basis. If laboratory space for occupational therapy lab classes is provided by another institution or agency, there must be a written and signed agreement to ensure assignment of space for program use. | Laboratory space provided by the institution must be assigned to the occupational therapy program on a priority basis. If laboratory space for occupational therapy lab classes is provided by another institution or agency, there must be a written and signed agreement to ensure assignment of space for program use. | Laboratory space provided by the institution must be assigned to the occupational therapy assistant program on a priority basis. If laboratory space for occupational therapy assistant lab classes is provided by another institution or agency, there must be a written and signed agreement to ensure assignment of space for program use. |</p>
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<tr>
<td>A.2.21.</td>
<td>Adequate space must be provided to store and secure equipment and supplies.</td>
<td>Adequate space must be provided to store and secure equipment and supplies.</td>
<td>Adequate space must be provided to store and secure equipment and supplies.</td>
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<tr>
<td>A.2.22.</td>
<td>The program director and faculty must have office space consistent with institutional practice.</td>
<td>The program director and faculty must have office space consistent with institutional practice.</td>
<td>The program director and faculty must have office space consistent with institutional practice.</td>
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<tr>
<td>A.2.23.</td>
<td>Adequate space must be provided for the private advising of students.</td>
<td>Adequate space must be provided for the private advising of students.</td>
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<tr>
<td>A.2.24.</td>
<td>Appropriate and sufficient equipment and supplies must be provided by the institution for student use and for the didactic, supervised fieldwork, and experiential components of the curriculum.</td>
<td>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.</td>
<td>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.</td>
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<tr>
<td>A.2.25.</td>
<td>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.</td>
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<tr>
<td>A.2.26.</td>
<td>Students must have ready access to a supply of current and relevant books, journals, periodicals, computers, software, and other reference materials needed for the practice areas and to meet the requirements of the curriculum. This may include, but is not limited to, librari es, online services, interlibrary loan, and resource centers.</td>
<td>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.</td>
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<td>A.2.27.</td>
<td>Instructional aids and technology must be available in sufficient quantity and quality to be consistent with the program objectives and teaching methods.</td>
<td>Instructional aids and technology must be available in sufficient quantity and quality to be consistent with the program objectives and teaching methods.</td>
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A.3.0. STUDENTS

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.

A.3.2. Institutions must require that program applicants hold a baccalaureate degree or higher prior to admission to the program.

ACOTE VOTED IN AUGUST 2018 TO ALLOW OTD PROGRAMS TO WAIVE THE REQUIREMENT IN 2011 STANDARD A.3.2 FOR PROGRAM APPLICANTS TO HOLD A BACCALAUREATE DEGREE OR HIGHER PRIOR TO ADMISSION TO THE PROGRAM.
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<td>A.3.3.</td>
<td>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.</td>
<td>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.</td>
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<td>A.3.4.</td>
<td>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 doctoral Standards.</td>
<td>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.</td>
<td>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 occupational therapy assistant Standards.</td>
</tr>
<tr>
<td>A.3.5.</td>
<td>Criteria for successful completion of each segment of the educational program and for graduation must be given in advance to each student.</td>
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<td>A.3.6.</td>
<td>Evaluation content and methods must be consistent with the curriculum design, objectives, and competencies of the didactic, fieldwork, and experiential components of the program.</td>
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<td>A.3.7.</td>
<td>Evaluation must be conducted on a regular basis to provide students and program officials with timely indications of the students’ progress and academic standing.</td>
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<td>A.3.8.</td>
<td>Students must be informed of and have access to the student support services that are provided to other students in the institution.</td>
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<tr>
<td>A.3.9.</td>
<td>Advising related to professional coursework, fieldwork education, and the experiential component of the program must be the responsibility of the occupational therapy faculty.</td>
<td>Advising related to professional coursework and fieldwork education must be the responsibility of the occupational therapy faculty.</td>
<td>Advising related to coursework in the occupational therapy assistant program and fieldwork education must be the responsibility of the occupational therapy assistant faculty.</td>
</tr>
</tbody>
</table>

**A.4.0. OPERATIONAL POLICIES**

| 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. | All program publications and advertising—including, but not limited to, academic calendars, announcements, catalogs, handbooks, and Web sites—must accurately reflect the program offered. | All program publications and advertising—including, but not limited to, academic calendars, announcements, catalogs, handbooks, and Web sites—must accurately reflect the program offered. |
| A.4.2.          | Accurate and current information regarding student and program outcomes must be readily available to the public on the program’s Web page. At a minimum, the following data must be reported for the previous 3 years:  
- Total number of program graduates  
- Graduation rates. | Accurate and current information regarding student and program outcomes must be readily available to the public on the program’s Web page. At a minimum, the following data must be reported for the previous 3 years:  
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<td>A.4.3.</td>
<td>The program’s accreditation status and the name, address, and telephone number of ACOTE must be published in all of the following materials used by the institution: catalog, Web site, and program-related brochures or flyers available to prospective students. A link to <a href="http://www.acoteonline.org">www.acoteonline.org</a> must be provided on the program’s home page.</td>
<td>The program’s accreditation status and the name, address, and telephone number of ACOTE must be published in all of the following materials used by the institution: catalog, Web site, and program-related brochures or flyers available to prospective students. A link to <a href="http://www.acoteonline.org">www.acoteonline.org</a> must be provided on the program’s home page.</td>
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<td>A.4.4.</td>
<td>All practices within the institution related to faculty, staff, applicants, and students must be nondiscriminatory.</td>
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<td>A.4.5.</td>
<td>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.</td>
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<td>A.4.6.</td>
<td>The program or sponsoring institution must have a defined and published policy and procedure for processing student and faculty grievances.</td>
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<td>A.4.7.</td>
<td>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.</td>
<td>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.</td>
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<td>A.4.8.</td>
<td>Policies and processes for student withdrawal and for refunds of tuition and fees must be published and made known to all applicants.</td>
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**SAMPLE WORDING:**

"THE OCCUPATIONAL THERAPY/OCCUPATIONAL THERAPY ASSISTANT PROGRAM IS ACCREDITED BY THE ACCREDITATION COUNCIL FOR OCCUPATIONAL THERAPY EDUCATION (ACOTE) OF THE AMERICAN OCCUPATIONAL THERAPY ASSOCIATION (AOTA), LOCATED AT 4720 MONTGOMERY LANE, SUITE 200, BETHESDA, MD 20814-3449. ACOTE’S TELEPHONE NUMBER: C/O AOTA, IS (301) 652-AOTA AND ITS WEB ADDRESS IS WWW.ACOOTEONLINE.ORG.*

THE PROGRAM MUST PROVIDE AN ACTIVE LINK TO WWW.ACOOTEONLINE.ORG ON THE PROGRAM’S HOME PAGE.

**COMPLIANCE WITH STANDARD A.4.4 IS DEMONSTRATED BY THE PRESENCE OF A POLICY ENSURING NONDISCRIMINATORY PRACTICES.**

*https://www.nbcot.org/eduleaders/home#schoolperformance (PREFERRED LINK) OR HTTPS://SECURE.NBCOT.ORG/DATA/SCHOOLSTATS.ASPX.*
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<td>A.4.10.</td>
<td>Policies and procedures for human-subject research protocol must be published and made known.</td>
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<td>Policies and procedures for human-subject research protocol must be published and made known (if applicable to the program).</td>
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<tr>
<td>A.4.11.</td>
<td>Programs must make available to students written policies and procedures 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).</td>
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<td>A.4.12.</td>
<td>A program admitting students on the basis of ability to benefit (defined by the USDE 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.</td>
<td>A program admitting students on the basis of ability to benefit (defined by the USDE 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.</td>
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<td>A.4.13.</td>
<td>Documentation of all progression, retention, graduation, certification, and credentialing requirements must be published and made known to applicants. A statement on the program’s Web site about the potential impact of a felony conviction on a graduate’s eligibility for certification and credentialing must be provided.</td>
<td>Documentation of all progression, retention, graduation, certification, and credentialing requirements must be published and made known to applicants. A statement on the program’s Web site about the potential impact of a felony conviction on a graduate’s eligibility for certification and credentialing must be provided.</td>
<td>Documentation of all progression, retention, graduation, certification, and credentialing requirements must be published and made known to applicants. A statement on the program’s Web site about the potential impact of a felony conviction on a graduate’s eligibility for certification and credentialing must be provided.</td>
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<td>A.4.14.</td>
<td>The program must have a documented and published policy to ensure that students complete all graduation, fieldwork, and experiential component requirements in a timely manner. This policy must include a statement that all Level II</td>
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<td>A.5.1.</td>
<td>include a statement that all Level II fieldwork and the experiential component of the program must be completed within a time frame established by the program.</td>
<td>fieldwork must be completed within a time frame established by the program.</td>
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<td>A.5.0. STRATEGIC PLAN AND PROGRAM ASSESSMENT</td>
<td>For programs that are offered at more than one location, the program’s strategic plan, evaluation plan, and results of ongoing evaluation must address each program location as a component of the overall plan.</td>
<td>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, scholarship, changes in the curriculum design, priorities in academic resources, procurement of fieldwork and experiential component sites). A program strategic plan must be for a minimum of a 3-year period and include, but need not be limited to,</td>
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<td>Evidence that the plan is based on program evaluation and an analysis of external and internal environments.</td>
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<td>Evidence that the plan is based on program evaluation and an analysis of external and internal environments.</td>
<td>Long-term goals that address the vision and mission of both the institution and the program, as well as specific needs of the program.</td>
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<td>Long-term goals that address the vision and mission of both the institution and the program, as well as specific needs of the program.</td>
<td>Specific measurable action steps with expected timelines by which the program will reach its long-term goals.</td>
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<td>Person(s) responsible for action steps.</td>
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<td>Person(s) responsible for action steps.</td>
<td>Evidence of periodic updating of action steps and long-term goals as they are met or as circumstances change.</td>
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*THE TIMELINE SHOULD REFLECT THE ACTUAL DUE DATE WHEN THE PROGRAM EXPECTS TO REACH EACH LONG-TERM GOAL. "ANNUALLY" AND "ONGOING" ARE NOT ACCEPTABLE TIMELINES, WHEREAS "DECEMBER 2017" WOULD BE AN ACCEPTABLE TIMELINE.*
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| 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.  
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  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.  
  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.  
  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.  |
| 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.  
  • Student retention rates.  
  • Fieldwork and experiential component performance evaluation.  
  • Student evaluation of fieldwork and the experiential component experience.  
  • Student satisfaction with the program.  
  • Graduates' performance on the NBCOT certification exam.  
  • Graduates' job placement and performance as determined by employer satisfaction.  
  • Graduates' scholarly activity (e.g., presentations, publications, grants obtained, state and national leadership positions, awards).  
  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.  
  • Student retention rates.  
  • 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 as determined by employer satisfaction.  
  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.  
  • Student retention rates.  
  • 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 as determined by employer satisfaction.  |

**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). THE TIMELINE SHOULD REFLECT THE ACTUAL DUE DATE WHEN THE FACULTY MEMBER WILL ACHIEVE EACH GOAL. “ANNUALLY” AND “ONGOING” ARE NOT ACCEPTABLE TIMELINES, WHEREAS “DECEMBER 2017” WOULD BE AN ACCEPTABLE TIMELINE.**
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<tr>
<td>A.5.4.</td>
<td>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.</td>
<td>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.</td>
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<td>A.5.5.</td>
<td>The results of ongoing evaluation must be appropriately reflected in the program’s strategic plan, curriculum, and other dimensions of the program.</td>
<td>The results of ongoing evaluation must be appropriately reflected in the program’s strategic plan, curriculum, and other dimensions of the program.</td>
<td>The results of ongoing evaluation must be appropriately reflected in the program’s strategic plan, curriculum, and other dimensions of the program.</td>
</tr>
<tr>
<td>A.5.6.</td>
<td>The average pass rate over the 3 most recent calendar years for graduates attempting the national certification exam within 12 months of graduation from the program must be 80% or higher (regardless of the number of attempts). If a program has less than 25 test takers in the 3 most recent calendar years, the program may include test takers from additional years until it reaches 25 or until the 5 most recent calendar years are included in the total.</td>
<td>The average pass rate over the 3 most recent calendar years for graduates attempting the national certification exam within 12 months of graduation from the program must be 80% or higher (regardless of the number of attempts). If a program has less than 25 test takers in the 3 most recent calendar years, the program may include test takers from additional years until it reaches 25 or until the 5 most recent calendar years are included in the total.</td>
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**PROGRAMS THAT DID NOT HAVE CANDIDATES WHO SAT FOR THE EXAM IN EACH OF THE 3 MOST RECENT CALENDAR YEARS MUST MEET THE REQUIRED 80% PASS RATE EACH YEAR UNTIL DATA FOR 3 CALENDAR YEARS ARE AVAILABLE.**

### A.6.0. CURRICULUM FRAMEWORK

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

#### A.6.1.

The curriculum must ensure preparation to 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.

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.

#### A.6.2.

The curriculum must include course objectives and learning activities demonstrating preparation beyond a generalist level in, but not limited to, practice skills, research skills, administration, professional development, leadership, advocacy, and theory.

(No related Standard)
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<td>A.6.3.</td>
<td>The occupational therapy doctoral degree must be awarded after a period of study such that the total time to the degree, including both preprofessional and professional preparation, equals at least 6 FTE academic years. 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.</td>
<td>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.</td>
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</tr>
<tr>
<td>A.6.4.</td>
<td>The curriculum must include application of advanced knowledge to practice through a combination of experiential activities and a culminating project.</td>
<td>(No related Standard)</td>
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</tr>
<tr>
<td>A.6.5.</td>
<td>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.</td>
<td>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.</td>
<td>The statement of philosophy of the occupational therapy assistant 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.</td>
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<tr>
<td>A.6.6.</td>
<td>The statement of the mission of the occupational therapy program must be consistent with and supportive of the mission of the sponsoring institution. The program’s mission statement should explain the unique nature of the program and how it helps fulfill or advance the mission of the sponsoring institution, including religious missions.</td>
<td>The statement of the mission of the occupational therapy program must be consistent with and supportive of the mission of the sponsoring institution. The program’s mission statement should explain the unique nature of the program and how it helps fulfill or advance the mission of the sponsoring institution, including religious missions.</td>
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<td>A.6.7.</td>
<td>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 curricular threads and educational goals and describe the selection of the content, scope, and sequencing of coursework.</td>
<td>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 curricular threads and educational goals and describe the selection of the content, scope, and sequencing of coursework.</td>
<td>The curriculum design must reflect the mission and philosophy of both the occupational therapy assistant program and the institution and must provide the basis for program planning, implementation, and evaluation. The design must identify curricular threads and educational goals and describe the selection of the content, scope, and sequencing of coursework.</td>
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<td>A.6.8.</td>
<td>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.</td>
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### 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 sciences must also be evident in professional coursework. The student will be able to

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<td>A.6.9.</td>
<td>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.</td>
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<td>B.1.1.</td>
<td>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.</td>
<td>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.</td>
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</tr>
<tr>
<td>B.1.2.</td>
<td>Demonstrate knowledge and understanding of human development throughout the lifespan (infants, children, adolescents, adults, and older adults). Course content must include, but is not limited to, developmental psychology.</td>
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<td>B.1.3.</td>
<td>Demonstrate knowledge and understanding of the concepts of human behavior to include the behavioral sciences, social sciences, and occupational science. Course content must include, but is not limited to, introductory psychology, abnormal psychology, and introductory sociology or introductory anthropology.</td>
<td>Demonstrate knowledge and understanding of the concepts of human behavior to include the behavioral sciences, social sciences, and occupational science. Course content must include, but is not limited to, introductory psychology, abnormal psychology, and introductory sociology or introductory anthropology.</td>
<td>Demonstrate knowledge and understanding of the concepts of human behavior to include the behavioral sciences, social sciences, and occupational science (e.g., principles of psychology, sociology, abnormal psychology) and occupational science.</td>
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<tr>
<td>B.1.4.</td>
<td>Apply knowledge of the role of sociocultural, socioeconomic, and diversity factors and lifestyle choices in contemporary society to meet the needs of individuals and communities. Course content must include, but is not limited to, introductory psychology, abnormal psychology, and introductory sociology or introductory anthropology.</td>
<td>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.</td>
<td>Demonstrate knowledge and appreciation of the role of sociocultural, socioeconomic, and diversity factors and lifestyle choices in contemporary society (e.g., principles of psychology, sociology, and abnormal psychology).</td>
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<td>B.1.5.</td>
<td>Demonstrate an understanding of the ethical and practical considerations that affect the health and wellness needs of those who are experiencing or are at risk for social injustice, occupational deprivation, and disparity in the receipt of services.</td>
<td>Demonstrate an understanding of the ethical and practical considerations that affect the health and wellness needs of those who are experiencing or are at risk for social injustice, occupational deprivation, and disparity in the receipt of services.</td>
<td>Articulate the ethical and practical considerations that affect the health and wellness needs of those who are experiencing or are at risk for social injustice, occupational deprivation, and disparity in the receipt of services.</td>
</tr>
<tr>
<td>B.1.6.</td>
<td>Demonstrate knowledge of global social issues and prevailing health and welfare needs of populations with or at risk for disabilities and chronic health conditions.</td>
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<td>B.1.7.</td>
<td>Apply quantitative statistics and qualitative analysis to interpret tests, measurements, and other data for the purpose of establishing and/or delivering evidence-based practice.</td>
<td>Demonstrate the ability to use statistics to interpret tests and measurements for the purpose of delivering evidence-based practice.</td>
<td>Articulate the importance of using statistics, tests, and measurements for the purpose of delivering evidence-based practice.</td>
</tr>
<tr>
<td>B.1.8.</td>
<td>Demonstrate an understanding of the use of technology to support performance, participation, health and well-being. This technology may include, but is not limited to, electronic documentation systems, distance communication, virtual environments, and telehealth technology.</td>
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<td>B.2.0.</td>
<td>BASIC TENETS OF OCCUPATIONAL THERAPY Coursework must facilitate development of the performance criteria listed below. The student will be able to</td>
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<tr>
<td>B.2.1.</td>
<td>Explain the history and philosophical base of the profession of occupational therapy and its importance in meeting society’s current and future occupational needs.</td>
<td>Articulate an understanding of the importance of the history and philosophical base of the profession of occupational therapy.</td>
<td>Articulate an understanding of the importance of the history and philosophical base of the profession of occupational therapy.</td>
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<tr>
<td>B.2.2.</td>
<td>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 environments, and client factors.</td>
<td>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 environments, and client factors.</td>
<td>Describe the meaning and dynamics of occupation and activity, including the interaction of areas of occupation, performance skills, performance patterns, activity demands, context(s) and environments, and client factors.</td>
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<tr>
<td>B.2.3.</td>
<td>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</td>
<td>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</td>
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<td>B.2.4.</td>
<td>Articulate the importance of balancing areas of occupation with the achievement of health and wellness for the clients.</td>
<td>Articulate the importance of balancing areas of occupation with the achievement of health and wellness for the clients.</td>
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<td>B.2.5.</td>
<td>Explain the role of occupation in the promotion of health and the prevention of disease and disability for the individual, family, and society.</td>
<td>Explain the role of occupation in the promotion of health and the prevention of disease and disability for the individual, family, and society.</td>
<td>Explain the role of occupation in the promotion of health and the prevention of disease and disability for the individual, family, and society.</td>
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<td>B.2.6.</td>
<td>Analyze the effects of heritable diseases, genetic conditions, disability, trauma, and injury to the physical and mental health and occupational performance of the individual.</td>
<td>Analyze the effects of heritable diseases, genetic conditions, disability, trauma, and injury to the physical and mental health and occupational performance of the individual.</td>
<td>Understand the effects of heritable diseases, genetic conditions, disability, trauma, and injury to the physical and mental health and occupational performance of the individual.</td>
</tr>
<tr>
<td>B.2.7.</td>
<td>Demonstrate task analysis in areas of occupation, performance skills, performance patterns, activity demands, context(s) and environments, and client factors to formulate an intervention plan.</td>
<td>Demonstrate task analysis in areas of occupation, performance skills, performance patterns, activity demands, context(s) and environments, and client factors to formulate an intervention plan.</td>
<td>Demonstrate task analysis in areas of occupation, performance skills, performance patterns, activity demands, context(s) and environments, and client factors to implement the intervention plan.</td>
</tr>
<tr>
<td>B.2.8.</td>
<td>Use 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.</td>
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<tr>
<td>B.2.9.</td>
<td>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, personal, temporal, virtual) and environment.</td>
<td>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, personal, temporal, virtual) and environment.</td>
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<tr>
<td>B.2.10.</td>
<td>Use clinical reasoning to explain the rationale for and use of compensatory strategies when desired life tasks cannot be performed.</td>
<td>Use clinical reasoning to explain the rationale for and use of compensatory strategies when desired life tasks cannot be performed.</td>
<td>Explain the need for and use of compensatory strategies when desired life tasks cannot be performed.</td>
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**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:

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<tr>
<th>B.3.1.</th>
<th>Evaluate and apply theories that underlie the practice of occupational therapy.</th>
<th>Apply theories that underlie the practice of occupational therapy.</th>
<th>Describe basic features of the theories that underlie the practice of occupational therapy.</th>
</tr>
</thead>
<tbody>
<tr>
<td>B.3.2.</td>
<td>Compare, contrast, and integrate a variety of models of practice and frames of reference that are used in occupational therapy.</td>
<td>Compare and contrast models of practice and frames of reference that are used in occupational therapy.</td>
<td>Describe basic features of models of practice and frames of reference that are used in occupational therapy.</td>
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<tr>
<td>B.3.3.</td>
<td>Use theories, models of practice, and frames of reference to guide and inform evaluation and intervention.</td>
<td>Use theories, models of practice, and frames of reference to guide and inform evaluation and intervention.</td>
<td>(No related Standard)</td>
</tr>
<tr>
<td>B.3.4.</td>
<td>Analyze and discuss how occupational therapy history, occupational therapy theory, and the sociopolitical climate influence and are influenced by practice.</td>
<td>Analyze and discuss how occupational therapy history, occupational therapy theory, and the sociopolitical climate influence practice.</td>
<td>Discuss how occupational therapy history and occupational therapy theory, and the sociopolitical climate influence practice.</td>
</tr>
<tr>
<td>B.3.5.</td>
<td>Apply theoretical constructs to evaluation and intervention with various types of clients in a variety of practice contexts and environments, including population-based approaches, to analyze and effect meaningful occupation outcomes.</td>
<td>Apply theoretical constructs to evaluation and intervention with various types of clients in a variety of practice contexts and environments to analyze and effect meaningful occupation outcomes.</td>
<td>(No related Standard)</td>
</tr>
<tr>
<td>B.3.6.</td>
<td>Articulate the process of theory development in occupational therapy and its desired impact and influence on society.</td>
<td>Discuss the process of theory development and its importance to occupational therapy.</td>
<td>(No related Standard)</td>
</tr>
<tr>
<td>B.4.0.</td>
<td><strong>SCREENING, EVALUATION, AND REFERRAL</strong>&lt;br&gt;The process of screening, evaluation, referral, and diagnosis 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. In addition, this process must consider the continuum of need from individuals to populations. The program must facilitate development of the performance criteria listed below. The student will be able to</td>
<td><strong>SCREENING, EVALUATION, AND REFERRAL</strong>&lt;br&gt;The process of screening, evaluation, referral, and diagnosis 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. In addition, this process must consider the continuum of need from individuals to populations. The program must facilitate development of the performance criteria listed below. The student will be able to</td>
<td><strong>SCREENING AND EVALUATION</strong>&lt;br&gt;The process of screening and evaluation as related to occupational performance and participation must be conducted under the supervision of and in cooperation with the occupational therapist and 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</td>
</tr>
<tr>
<td>B.4.1.</td>
<td>Use standardized and nonstandardized screening and assessment tools to determine the need for occupational therapy intervention. These tools include, but are not limited to, specified screening tools; assessments; skilled observations; occupational histories; consultations with other professionals; and interviews with the client, family, significant others, and community.</td>
<td>Use standardized and nonstandardized screening and assessment tools to determine the need for occupational therapy intervention. These tools include, but are not limited to, specified screening tools; assessments; skilled observations; occupational histories; consultations with other professionals; and interviews with the client, family, significant others, and community.</td>
<td>Gather and share data for the purpose of screening and evaluation using methods including, but not limited to, specified screening tools; assessments; skilled observations; occupational histories; consultations with other professionals; and interviews with the client, family, and significant others.</td>
</tr>
<tr>
<td>B.4.2.</td>
<td>Select appropriate assessment tools on the basis of client needs, contextual factors, and psychometric properties of tests. These must be culturally relevant, based on available evidence, and incorporate use of occupation in the assessment process.</td>
<td>Select appropriate assessment tools on the basis of client needs, contextual factors, and psychometric properties of tests. These must be culturally relevant, based on available evidence, and incorporate use of occupation in the assessment process.</td>
<td>Administer selected assessments using appropriate procedures and protocols (including standardized formats) and use occupation for the purpose of assessment.</td>
</tr>
<tr>
<td>B.4.3.</td>
<td>Use appropriate procedures and protocols (including standardized formats) when administering assessments.</td>
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| B.4.4.          | Evaluate client(s)’ occupational performance in activities of daily living (ADLs), instrumental activities of daily living (IADLs), education, work, play, rest, sleep, 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 values, beliefs, spirituality, body functions (e.g., neuromuscular, sensory and pain, visual, perceptual, cognitive, mental) and body structures (e.g., cardiovascular, digestive, nervous, genitourinary, integumentary systems).  
- Performance patterns (e.g., habits, routines, rituals, roles).  
- Context (e.g., cultural, personal, temporal, virtual) and environment (e.g., physical, social).  
- Performance skills, including motor and praxis skills, sensory–perceptual skills, emotional regulation skills, cognitive skills, and communication and social skills. | Evaluate client(s)’ occupational performance in activities of daily living (ADLs), instrumental activities of daily living (IADLs), education, work, play, rest, sleep, 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 values, beliefs, spirituality, body functions (e.g., neuromuscular, sensory and pain, visual, perceptual, cognitive, mental) and body structures (e.g., cardiovascular, digestive, nervous, genitourinary, integumentary systems).  
- Performance patterns (e.g., habits, routines, rituals, roles).  
- Context (e.g., cultural, personal, temporal, virtual) and environment (e.g., physical, social).  
- Performance skills, including motor and praxis skills, sensory–perceptual skills, emotional regulation skills, cognitive skills, and communication and social skills. | Gather and share data for the purpose of evaluating client(s)’ occupational performance in activities of daily living (ADLs), instrumental activities of daily living (IADLs), education, work, play, rest, sleep, leisure, and social participation. Evaluation of occupational performance 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 values, beliefs, spirituality, body functions (e.g., neuromuscular, sensory and pain, visual, perceptual, cognitive, mental) and body structures (e.g., cardiovascular, digestive, nervous, genitourinary, integumentary systems).  
- Performance patterns (e.g., habits, routines, rituals, roles).  
- Context (e.g., cultural, personal, temporal, virtual) and environment (e.g., physical, social).  
- Performance skills, including motor and praxis skills, sensory–perceptual skills, emotional regulation skills, cognitive skills, and communication and social skills. |
<p>| 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. | 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. | Articulate the role of the occupational therapy assistant and occupational therapist in the screening and evaluation process along with the importance of and rationale for supervision and collaborative work between the occupational therapist assistant and occupational therapist in that process. |
| B.4.6.          | 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. | 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. | (No related 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. | Consider factors that might bias assessment results, such as culture, disability status, and situational variables related to the individual and context. | (No related Standard) |
| B.4.8.          | Interpret the evaluation data in relation to accepted terminology of the profession, relevant theoretical frameworks, and interdisciplinary knowledge. | Interpret the evaluation data in relation to accepted terminology of the profession and relevant theoretical frameworks. | (No related Standard) |</p>
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<tr>
<td>B.4.9.</td>
<td>Evaluate appropriateness and discuss mechanisms for referring clients for additional evaluation to specialists who are internal and external to the profession.</td>
<td>Evaluate appropriateness and discuss mechanisms for referring clients for additional evaluation to specialists who are internal and external to the profession.</td>
<td>Identify when to recommend to the occupational therapist the need for referring clients for additional evaluation.</td>
</tr>
<tr>
<td>B.4.10.</td>
<td>Document occupational therapy services to ensure accountability of service provision and to meet standards for reimbursement of services, adhering to the requirements of applicable facility, local, state, federal, and reimbursement agencies. Documentation must effectively communicate the need and rationale for occupational therapy services.</td>
<td>Document occupational therapy services to ensure accountability of service provision and to meet standards for reimbursement of services, adhering to the requirements of applicable facility, local, state, federal, and reimbursement agencies. Documentation must effectively communicate the need and rationale for occupational therapy services.</td>
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</tr>
<tr>
<td>B.4.11.</td>
<td>Articulate screening and evaluation processes for all practice areas. Use evidence-based reasoning to analyze, synthesize, evaluate, and diagnose problems related to occupational performance and participation.</td>
<td>(No related Standard)</td>
<td>(No related Standard)</td>
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</table>
| 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 and emerging occupational therapy practice; based on available evidence; and based on theoretical perspectives, models of practice, and frames of reference. In addition, this process must consider the continuum of need from individual- to population-based interventions. The program must facilitate development of the performance criteria listed below. The student will be able to | 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 | INTERVENTION AND IMPLEMENTATION  
The process of intervention to facilitate occupational performance and participation must be done under the supervision of and in cooperation with the occupational therapist and must be culturally relevant, reflective of current occupational therapy practice, and based on available evidence. The program must facilitate development of the performance criteria listed below. The student will be able to |
| B.5.1.          | Use evaluation findings to diagnose occupational performance and participation based on appropriate theoretical approaches, models of practice, frames of reference, and interdisciplinary knowledge. Develop occupation-based intervention plans and strategies (including goals and methods to achieve them) on the basis of 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. | 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) on the basis of 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. | Assist with the development of occupation-based intervention plans and strategies (including goals and methods to achieve them) on the basis of 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 values, beliefs, |
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<td>B.5.2.</td>
<td>Select and provide direct occupational therapy interventions and procedures to enhance safety, health and wellness, and performance in ADLs, IADLs, education, work, play, rest, sleep, leisure, and social participation.</td>
<td>Select and provide direct occupational therapy interventions and procedures to enhance safety, health and wellness, and performance in ADLs, IADLs, education, work, play, rest, sleep, leisure, and social participation.</td>
<td>Select and provide direct occupational therapy interventions and procedures to enhance safety, health and wellness, and performance in ADLs, IADLs, education, work, play, rest, sleep, leisure, and social participation.</td>
</tr>
<tr>
<td>B.5.3.</td>
<td>Provide therapeutic use of occupation, exercises, and activities (e.g., occupation-based intervention, purposeful activity, preparatory methods).</td>
<td>Provide therapeutic use of occupation, exercises, and activities (e.g., occupation-based intervention, purposeful activity, preparatory methods).</td>
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<td>B.5.4.</td>
<td>Design and implement group interventions based on principles of group development and group dynamics across the lifespan.</td>
<td>Design and implement group interventions based on principles of group development and group dynamics across the lifespan.</td>
<td>Implement group interventions based on principles of group development and group dynamics across the lifespan.</td>
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<tr>
<td>B.5.6.</td>
<td>Provide development, remediation, and compensation for physical, mental, cognitive, perceptual, neuromuscular, behavioral skills, and sensory functions (e.g., vision, tactile, auditory, gustatory, olfactory, pain, temperature, pressure, vestibular, proprioception).</td>
<td>Provide development, remediation, and compensation for physical, mental, cognitive, perceptual, neuromuscular, behavioral skills, and sensory functions (e.g., vision, tactile, auditory, gustatory, olfactory, pain, temperature, pressure, vestibular, proprioception).</td>
<td>Provide development, remediation, and compensation for physical, mental, cognitive, perceptual, neuromuscular, behavioral skills, and sensory functions (e.g., vision, tactile, auditory, gustatory, olfactory, pain, temperature, pressure, vestibular, proprioception).</td>
</tr>
<tr>
<td>B.5.7.</td>
<td>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.</td>
<td>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.</td>
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<tr>
<td>B.5.8.</td>
<td>Develop and implement intervention strategies to remediate and/or compensate for cognitive deficits that affect occupational performance.</td>
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<td>Implement intervention strategies to remediate and/or compensate for cognitive deficits that affect occupational performance.</td>
</tr>
<tr>
<td>B.5.9.</td>
<td>Evaluate and adapt processes or environments (e.g., home, work, school, community) applying ergonomic principles and principles of environmental modification.</td>
<td>Evaluate and adapt processes or environments (e.g., home, work, school, community) applying ergonomic principles and principles of environmental modification.</td>
<td>Adapt environments (e.g., home, work, school, community) and processes, including the application of ergonomic principles.</td>
</tr>
<tr>
<td>B.5.10.</td>
<td>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 and positioning systems) used to enhance occupational performance and foster participation and well-being.</td>
<td>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 and positioning systems) used to enhance occupational performance and foster participation and well-being.</td>
<td>Articulate principles of and demonstrate strategies with 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.</td>
</tr>
<tr>
<td>B.5.11.</td>
<td>Provide design, fabrication, application, fitting, and training in orthotic devices used to enhance occupational performance and participation. Train in the use of prosthetic devices, based on scientific principles of kinesiology, biomechanics, and physics.</td>
<td>Provide design, fabrication, application, fitting, and training in orthotic devices used to enhance occupational performance and participation. Train in the use of prosthetic devices, based on scientific principles of kinesiology, biomechanics, and physics.</td>
<td>Provide fabrication, application, fitting, and training in orthotic devices used to enhance occupational performance and participation, and training in the use of prosthetic devices.</td>
</tr>
<tr>
<td>B.5.12.</td>
<td>Provide recommendations and training in techniques to enhance functional mobility, including physical transfers, wheelchair management, and mobility devices.</td>
<td>Provide recommendations and training in techniques to enhance functional mobility, including physical transfers, wheelchair management, and mobility devices.</td>
<td>Provide training in techniques to enhance functional mobility, including physical transfers, wheelchair management, and mobility devices.</td>
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<tr>
<td>B.5.13.</td>
<td>Provide recommendations and training in techniques to enhance community mobility, including public transportation, community access, and issues related to driver rehabilitation.</td>
<td>Provide recommendations and training in techniques to enhance community mobility, including public transportation, community access, and issues related to driver rehabilitation.</td>
<td>Provide training in techniques to enhance community mobility, including public transportation, community access, and issues related to driver rehabilitation.</td>
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<tr>
<td>B.5.14.</td>
<td>Provide management of feeding, eating, and swallowing 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 swallowing assessment and management) and train others in precautions and techniques while considering client and contextual factors.</td>
<td>Provide management of feeding, eating, and swallowing 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 swallowing assessment and management) and train others in precautions and techniques while considering client and contextual factors.</td>
<td>Enable feeding and eating 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.</td>
</tr>
<tr>
<td>B.5.15.</td>
<td>Demonstrate safe and effective application of superficial thermal and mechanical modalities as a preparatory measure to manage pain and improve occupational performance, including foundational knowledge, underlying principles, indications, contraindications, and precautions.</td>
<td>Demonstrate safe and effective application of superficial thermal and mechanical modalities as a preparatory measure to manage pain and improve occupational performance, including foundational knowledge, underlying principles, indications, contraindications, and precautions.</td>
<td>Recognize the use of superficial thermal and mechanical modalities as a preparatory measure to improve occupational performance. On the basis of the intervention plan, demonstrate safe and effective administration of superficial thermal and mechanical modalities to achieve established goals while adhering to contraindications and precautions.</td>
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<td>B.5.16.</td>
<td>Explain the use of deep thermal and electrotherapeutic modalities as a preparatory measure to improve occupational performance, including indications, contraindications, and precautions.</td>
<td>Explain the use of deep thermal and electrotherapeutic modalities as a preparatory measure to improve occupational performance, including indications, contraindications, and precautions.</td>
<td>(No related Standard)</td>
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<tr>
<td>B.5.17.</td>
<td>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.</td>
<td>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.</td>
<td>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.</td>
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<tr>
<td>B.5.18.</td>
<td>Demonstrate an understanding of health literacy and the ability to educate and train the client, caregiver, family and significant others, and communities to facilitate skills in areas of occupation as well as prevention, health maintenance, health promotion, and safety.</td>
<td>Demonstrate an understanding of health literacy and the ability to educate and train the client, caregiver, family and significant others, and communities to facilitate skills in areas of occupation as well as prevention, health maintenance, health promotion, and safety.</td>
<td>Demonstrate an understanding of health literacy and the ability to educate and train the client, caregiver, family and significant others to facilitate skills in areas of occupation as well as prevention, health maintenance, health promotion, and safety.</td>
</tr>
<tr>
<td>B.5.19.</td>
<td>Apply the principles of the teaching–learning process using educational methods to design experiences to address the needs of the client, family, significant others, communities, colleagues, other health providers, and the public.</td>
<td>Apply the principles of the teaching–learning process using educational methods to design experiences to address the needs of the client, family, significant others, colleagues, other health providers, and the public.</td>
<td>Use the teaching–learning process with the client, family, significant others, colleagues, other health providers, and the public. Collaborate with the occupational therapist and learner to identify appropriate educational methods.</td>
</tr>
<tr>
<td>B.5.20.</td>
<td>Effectively interact through written, oral, and nonverbal communication with the client, family, significant others, communities, colleagues, other health providers, and the public in a professionally acceptable manner.</td>
<td>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.</td>
<td>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.</td>
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<tr>
<td>B.5.21.</td>
<td>Effectively communicate, coordinate, and work interprofessionally with those who provide services to individuals, organizations, and/or populations in order</td>
<td>Effectively communicate and work interprofessionally with those who provide services to individuals, organizations, and/or populations in order to clarify</td>
<td>Effectively communicate and work interprofessionally with those who provide services to individuals and groups in order to clarify each member’s</td>
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<td>B.5.22.</td>
<td>Refer to specialists (both internal and external to the profession) for consultation and intervention.</td>
<td>Refer to specialists (both internal and external to the profession) for consultation and intervention.</td>
<td>Recognize and communicate the need to refer to specialists (both internal and external to the profession) for consultation and intervention.</td>
</tr>
<tr>
<td>B.5.23.</td>
<td>Grade and adapt the environment, tools, materials, occupations, and interventions to reflect the changing needs of the client, the sociocultural context, and technological advances.</td>
<td>Grade and adapt the environment, tools, materials, occupations, and interventions to reflect the changing needs of the client, the sociocultural context, and technological advances.</td>
<td>Grade and adapt the environment, tools, materials, occupations, and interventions to reflect the changing needs of the client and the sociocultural context.</td>
</tr>
<tr>
<td>B.5.24.</td>
<td>Select and teach compensatory strategies, such as use of technology and adaptations to the environment, that support performance, participation, and well-being.</td>
<td>Select and teach compensatory strategies, such as use of technology and adaptations to the environment, that support performance, participation, and well-being.</td>
<td>Teach compensatory strategies, such as use of technology and adaptations to the environment, that support performance, participation, and well-being.</td>
</tr>
<tr>
<td>B.5.25.</td>
<td>Identify and demonstrate techniques in skills of supervision and collaboration with occupational therapy assistants and other professionals on therapeutic interventions.</td>
<td>Identify and demonstrate techniques in skills of supervision and collaboration with occupational therapy assistants and other professionals on therapeutic interventions.</td>
<td>Demonstrate skills of collaboration with occupational therapists and other professionals on therapeutic interventions.</td>
</tr>
<tr>
<td>B.5.26.</td>
<td>Demonstrate use of the consultative process with groups, programs, organizations, or communities.</td>
<td>Understand when and how to use the consultative process with groups, programs, organizations, or communities.</td>
<td>Understand when and how to use the consultative process with specific consumers or consumer groups as directed by an occupational therapist.</td>
</tr>
<tr>
<td>B.5.27.</td>
<td>Demonstrate care coordination, case management, and transition services in traditional and emerging practice environments.</td>
<td>Describe the role of the occupational therapist in care coordination, case management, and transition services in traditional and emerging practice environments.</td>
<td>Describe the role of the occupational therapy assistant in care coordination, case management, and transition services in traditional and emerging practice environments.</td>
</tr>
<tr>
<td>B.5.28.</td>
<td>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.</td>
<td>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.</td>
<td>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, and communicate the identified needs to the occupational therapist.</td>
</tr>
<tr>
<td>B.5.29.</td>
<td>Plan for discharge, in collaboration with the client, by reviewing the needs of the client, caregiver, family, and significant others; available resources; and discharge environment. This process includes, but is not limited to, identification of client’s current status within the continuum of care; 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.</td>
<td>Plan for discharge, in collaboration with the client, by reviewing the needs of the client, caregiver, family, and significant others; available resources; and discharge environment. This process includes, but is not limited to, identification of client’s current status within the continuum of care; 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.</td>
<td>Facilitate discharge planning by reviewing the needs of the client, caregiver, family, and significant others; available resources; and discharge environment, and identify those needs to the occupational therapist, client, and others involved in discharge planning. This process includes, but is not limited to, identification of community, human, and fiscal resources; recommendations for environmental adaptations; and home programming.</td>
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<td>B.5.31.</td>
<td>Terminate occupational therapy services when stated outcomes have been achieved or it has been determined that they cannot be achieved. This process includes developing a summary of occupational therapy outcomes, appropriate recommendations, and referrals and discussion of postdischarge needs with the client and with appropriate others.</td>
<td>Terminate occupational therapy services when stated outcomes have been achieved or it has been determined that they cannot be achieved. This process includes developing a summary of occupational therapy outcomes, appropriate recommendations, and referrals and discussion of post-discharge needs with the client and with appropriate others.</td>
<td>Recommend to the occupational therapist the need for termination of occupational therapy services when stated outcomes have been achieved or it has been determined that they cannot be achieved. Assist with developing a summary of occupational therapy outcomes, recommendations, and referrals.</td>
</tr>
<tr>
<td>B.5.32.</td>
<td>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.</td>
<td>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.</td>
<td>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.</td>
</tr>
<tr>
<td>B.5.33.</td>
<td>Provide population-based occupational therapy intervention that addresses occupational needs as identified by a community.</td>
<td>(No related Standard)</td>
<td>(No related Standard)</td>
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**B.6.0. CONTEXT OF SERVICE DELIVERY**

Context of service delivery includes the knowledge and understanding of the various contexts, such as professional, social, cultural, political, economic, and ecological, in which occupational therapy services are provided. The program must facilitate development of the performance criteria listed below. The student will be able to:

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</tr>
</thead>
<tbody>
<tr>
<td>B.6.1.</td>
<td>Evaluate and address the various contexts of health care, education, community, political, and social systems as they relate to the practice of occupational therapy.</td>
<td>Evaluate and address the various contexts of health care, education, community, political, and social systems as they relate to the practice of occupational therapy.</td>
<td>Describe the contexts of health care, education, community, and social systems as they relate to the practice of occupational therapy.</td>
</tr>
<tr>
<td>B.6.2.</td>
<td>Analyze the current policy issues and the social, economic, political, geographic, and demographic factors that influence the various contexts for practice of occupational therapy.</td>
<td>Analyze the current policy issues and the social, economic, political, geographic, and demographic factors that influence the various contexts for practice of occupational therapy.</td>
<td>Identify the potential impact of current policy issues and the social, economic, political, geographic, or demographic factors on the practice of occupational therapy.</td>
</tr>
<tr>
<td>B.6.3.</td>
<td>Integrate current social, economic, political, geographic, and demographic factors to promote policy development and the provision of occupational therapy services.</td>
<td>Integrate current social, economic, political, geographic, and demographic factors to promote policy development and the provision of occupational therapy services.</td>
<td>(No related Standard)</td>
</tr>
<tr>
<td>B.6.4.</td>
<td>Advocate for changes in service delivery policies, effect changes in the system, and identify opportunities to address societal needs.</td>
<td>Articulate the role and responsibility of the practitioner to advocate for changes in service delivery policies, to effect changes in the system, and to identify opportunities in emerging practice areas.</td>
<td>Identify the role and responsibility of the practitioner to advocate for changes in service delivery policies, to effect changes in the system, and to recognize opportunities in emerging practice areas.</td>
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<tr>
<td>B.6.5.</td>
<td>Analyze the trends in models of service delivery, including, but not limited to, medical, educational, community, and social models, and their potential effect on the practice of occupational therapy.</td>
<td>Analyze the trends in models of service delivery, including, but not limited to, medical, educational, community, and social models, and their potential effect on the practice of occupational therapy.</td>
<td>(No related Standard)</td>
</tr>
<tr>
<td>B.6.6.</td>
<td>Integrate national and international resources in education, research, practice, and policy development.</td>
<td>Utilize national and international resources in making assessment or intervention choices and appreciate the influence of international occupational therapy contributions to education, research, and practice.</td>
<td>(No related Standard)</td>
</tr>
<tr>
<td>B.7.0. LEADERSHIP AND MANAGEMENT</td>
<td>Leadership and management skills include principles and applications of leadership and management theory. The program must facilitate development of the performance criteria listed below. The student will be able to</td>
<td>MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES</td>
<td>ASSISTANCE WITH MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES</td>
</tr>
<tr>
<td>B.7.1.</td>
<td>Identify and evaluate the impact of contextual factors on the management and delivery of occupational therapy services for individuals and populations.</td>
<td>Describe and discuss the impact of contextual factors on the management and delivery of occupational therapy services.</td>
<td>Identify the impact of contextual factors on the management and delivery of occupational therapy services.</td>
</tr>
<tr>
<td>B.7.2.</td>
<td>Identify and evaluate the systems and structures that create federal and state legislation and regulations and their implications and effects on practice and policy.</td>
<td>Describe the systems and structures that create federal and state legislation and regulations and their implications and effects on practice.</td>
<td>Identify the systems and structures that create federal and state legislation and regulations and their implications and effects on practice.</td>
</tr>
<tr>
<td>B.7.3.</td>
<td>Demonstrate knowledge of applicable national requirements for credentialing and requirements for licensure, certification, or registration under state laws.</td>
<td>Demonstrate knowledge of applicable national requirements for credentialing and requirements for licensure, certification, or registration under state laws.</td>
<td>Demonstrate knowledge of applicable national requirements for credentialing and requirements for licensure, certification, or registration under state laws.</td>
</tr>
<tr>
<td>B.7.4.</td>
<td>Demonstrate knowledge of various reimbursement systems (e.g., federal, state, third party, private payer), appeals mechanisms, and documentation requirements that affect society and the practice of occupational therapy.</td>
<td>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.</td>
<td>Demonstrate knowledge of various reimbursement systems (e.g., federal, state, third party, private payer) and documentation requirements that affect the practice of occupational therapy.</td>
</tr>
<tr>
<td>B.7.5.</td>
<td>Demonstrate leadership skills in 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.</td>
<td>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.</td>
<td>Demonstrate the ability to participate in the development, marketing, and management of service delivery options.</td>
</tr>
<tr>
<td>B.7.6.</td>
<td>Demonstrate leadership skills in 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.</td>
<td>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.</td>
<td>Participate in the documentation of ongoing processes for quality improvement and implement program changes as needed to ensure quality of services.</td>
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<tr>
<td>B.7.8.</td>
<td>Describe the ongoing professional responsibility for providing fieldwork education and the criteria for becoming a fieldwork educator.</td>
<td>Describe the ongoing professional responsibility for providing fieldwork education and the criteria for becoming a fieldwork educator.</td>
<td>Describe the ongoing professional responsibility for providing fieldwork education and the criteria for becoming a fieldwork educator.</td>
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<tr>
<td>B.7.9.</td>
<td>Demonstrate knowledge of and the ability to write program development plans for provision of occupational therapy services to individuals and populations.</td>
<td>(No related Standard)</td>
<td>(No related Standard)</td>
</tr>
<tr>
<td>B.7.10.</td>
<td>Identify and adapt existing models or develop new service provision models to respond to policy, regulatory agencies, and reimbursement and compliance standards.</td>
<td>(No related Standard)</td>
<td>(No related Standard)</td>
</tr>
<tr>
<td>B.7.11.</td>
<td>Identify and develop strategies to enable occupational therapy to respond to society’s changing needs.</td>
<td>(No related Standard)</td>
<td>(No related Standard)</td>
</tr>
<tr>
<td>B.7.12.</td>
<td>Identify and implement strategies to promote staff development that are based on evaluation of the personal and professional abilities and competencies of supervised staff as they relate to job responsibilities.</td>
<td>(No related Standard)</td>
<td>(No related Standard)</td>
</tr>
<tr>
<td>B.8.0. SCHOLARSHIP</td>
<td>Promotion of scholarly endeavors will serve to describe and interpret the scope of the profession, 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</td>
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<tr>
<td>B.8.1.</td>
<td>Articulate the importance of how scholarly activities contribute to the development of a body of knowledge relevant to the profession of occupational therapy.</td>
<td>Articulate the importance of how scholarly activities contribute to the development of a body of knowledge relevant to the profession of occupational therapy.</td>
<td>Articulate the importance of how scholarly activities and literature contribute to the development of the profession.</td>
</tr>
<tr>
<td>B.8.2.</td>
<td>Effectively locate, understand, critique, and evaluate information, including the quality of evidence.</td>
<td>Effectively locate, understand, critique, and evaluate information, including the quality of evidence.</td>
<td>Effectively locate and understand information, including the quality of the source of information.</td>
</tr>
<tr>
<td>B.8.3.</td>
<td>Use scholarly literature to make evidence-based decisions.</td>
<td>Use scholarly literature to make evidence-based decisions.</td>
<td>Use professional literature to make evidence-based practice decisions in collaboration with the occupational therapist.</td>
</tr>
<tr>
<td>B.8.4.</td>
<td>Select, apply, and interpret basic descriptive, correlational, and inferential quantitative statistics and code, analyze, and synthesize qualitative data.</td>
<td>Understand and use basic descriptive, correlational, and inferential quantitative statistics and code, analyze, and synthesize qualitative data.</td>
<td>(No related Standard)</td>
</tr>
<tr>
<td>B.8.5.</td>
<td>Understand and critique the validity of research studies, including their design (both quantitative and qualitative) and methodology.</td>
<td>Understand and critique the validity of research studies, including their design (both quantitative and qualitative) and methodology.</td>
<td>(No related Standard)</td>
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<tr>
<td><strong>B.8.6.</strong></td>
<td>Design a scholarly proposal that includes the research question, relevant literature, sample, design, measurement, and data analysis.</td>
<td>Demonstrate the skills necessary to design a scholarly proposal that includes the research question, relevant literature, sample, design, measurement, and data analysis.</td>
<td><em>(No related Standard)</em></td>
</tr>
<tr>
<td><strong>B.8.7.</strong></td>
<td>Implement a scholarly study that evaluates professional practice, service delivery, and/or professional issues (e.g., Scholarship of Integration, Scholarship of Application, Scholarship of Teaching and Learning).</td>
<td>Participate in scholarly activities that evaluate professional practice, service delivery, and/or professional issues (e.g., Scholarship of Integration, Scholarship of Application, Scholarship of Teaching and Learning).</td>
<td>Identify how scholarly activities can be used to evaluate professional practice, service delivery, and/or professional issues (e.g., Scholarship of Integration, Scholarship of Application, Scholarship of Teaching and Learning).</td>
</tr>
<tr>
<td><strong>B.8.8.</strong></td>
<td>Write scholarly reports appropriate for presentation or for publication in a peer-reviewed journal. Examples of scholarly reports would include position papers, white papers, and persuasive discussion papers.</td>
<td>Demonstrate skills necessary to write a scholarly report in a format for presentation or publication.</td>
<td>Demonstrate the skills to read and understand a scholarly report.</td>
</tr>
<tr>
<td><strong>B.8.9.</strong></td>
<td>Demonstrate an understanding of the process of locating and securing grants and how grants can serve as a fiscal resource for scholarly activities.</td>
<td>Demonstrate an understanding of the process of locating and securing grants and how grants can serve as a fiscal resource for scholarly activities.</td>
<td><em>(No related Standard)</em></td>
</tr>
<tr>
<td><strong>B.8.10.</strong></td>
<td>Complete a culminating project that relates theory to practice and demonstrates synthesis of advanced knowledge in a practice area.</td>
<td></td>
<td><em>(No related Standard)</em></td>
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</table>

**STANDARD C.2.0 REQUIRES THAT “THE STUDENT MUST SUCCESSFULLY COMPLETE ALL COURSEWORK AND LEVEL II FIELDWORK AND PASS A COMPETENCY REQUIREMENT PRIOR TO THE COMMENCEMENT OF THE DOCTORAL EXPERIENTIAL COMPONENT.” HOWEVER, THE OTD CULMINATING PROJECT AND EXPERIENTIAL COMPONENT MAY OCCUR AT THE SAME TIME.**
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<tr>
<td>B.9.0. PROFESSIONAL ETHICS, VALUES, AND RESPONSIBILITIES</td>
<td>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</td>
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<tr>
<td>B.9.1.</td>
<td>Demonstrate knowledge and understanding of the American Occupational Therapy Association (AOTA) Occupational Therapy Code of Ethics and Ethics Standards and AOTA Standards of Practice and use them as a guide for ethical decision making in professional interactions, client interventions, and employment settings.</td>
<td>Demonstrate knowledge and understanding of the American Occupational Therapy Association (AOTA) Occupational Therapy Code of Ethics and Ethics Standards and AOTA Standards of Practice and use them as a guide for ethical decision making in professional interactions, client interventions, and employment settings.</td>
<td>Demonstrate knowledge and understanding of the American Occupational Therapy Association (AOTA) Occupational Therapy Code of Ethics and Ethics Standards and AOTA Standards of Practice and use them as a guide for ethical decision making in professional interactions, client interventions, and employment settings.</td>
</tr>
<tr>
<td>B.9.2.</td>
<td>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.</td>
<td>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.</td>
<td>Explain and give examples of 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.</td>
</tr>
<tr>
<td>B.9.3.</td>
<td>Promote occupational therapy by educating other professionals, service providers, consumers, third-party payers, regulatory bodies, and the public.</td>
<td>Promote occupational therapy by educating other professionals, service providers, consumers, third-party payers, regulatory bodies, and the public.</td>
<td>Promote occupational therapy by educating other professionals, service providers, consumers, third-party payers, regulatory bodies, and the public.</td>
</tr>
<tr>
<td>B.9.4.</td>
<td>Identify and develop strategies for ongoing professional development to ensure that practice is consistent with current and accepted standards.</td>
<td>Discuss strategies for ongoing professional development to ensure that practice is consistent with current and accepted standards.</td>
<td>Discuss strategies for ongoing professional development to ensure that practice is consistent with current and accepted standards.</td>
</tr>
<tr>
<td>B.9.5.</td>
<td>Discuss professional responsibilities related to liability issues under current models of service provision.</td>
<td>Discuss professional responsibilities related to liability issues under current models of service provision.</td>
<td>Identify professional responsibilities related to liability issues under current models of service provision.</td>
</tr>
<tr>
<td>B.9.6.</td>
<td>Discuss and evaluate personal and professional abilities and competencies as they relate to job responsibilities.</td>
<td>Discuss and evaluate personal and professional abilities and competencies as they relate to job responsibilities.</td>
<td>Identify personal and professional abilities and competencies as they relate to job responsibilities.</td>
</tr>
<tr>
<td>B.9.7.</td>
<td>Discuss and justify the varied roles of the occupational therapist as a practitioner, educator, researcher, policy developer, program developer, advocate, administrator, consultant, and entrepreneur.</td>
<td>Discuss and justify the varied roles of the occupational therapist as a practitioner, educator, researcher, consultant, and entrepreneur.</td>
<td>Identify and appreciate the varied roles of the occupational therapy assistant as a practitioner, educator, and research assistant.</td>
</tr>
<tr>
<td>B.9.8.</td>
<td>Explain and justify the importance of supervisory roles, responsibilities, and collaborative professional relationships between the occupational therapist and the occupational therapy assistant.</td>
<td>Explain and justify the importance of supervisory roles, responsibilities, and collaborative professional relationships between the occupational therapist and the occupational therapy assistant.</td>
<td>Identify and explain the need for supervisory roles, responsibilities, and collaborative professional relationships between the occupational therapist and the occupational therapy assistant.</td>
</tr>
<tr>
<td>B.9.9.</td>
<td>Describe and discuss professional responsibilities and issues when providing service on a contractual basis.</td>
<td>Describe and discuss professional responsibilities and issues when providing service on a contractual basis.</td>
<td>Identify professional responsibilities and issues when providing service on a contractual basis.</td>
</tr>
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<tr>
<td>B.9.10.</td>
<td>Demonstrate strategies for analyzing issues and making decisions to resolve personal and organizational ethical conflicts.</td>
<td>Demonstrate strategies for analyzing issues and making decisions to resolve personal and organizational ethical conflicts.</td>
<td>Identify strategies for analyzing issues and making decisions to resolve personal and organizational ethical conflicts.</td>
</tr>
<tr>
<td>B.9.11.</td>
<td>Demonstrate a variety of informal and formal strategies for resolving ethics disputes in varying practice areas.</td>
<td>Explain the variety of informal and formal systems for resolving ethics disputes that have jurisdiction over occupational therapy practice.</td>
<td>Identify the variety of informal and formal systems for resolving ethics disputes that have jurisdiction over occupational therapy practice.</td>
</tr>
<tr>
<td>B.9.12.</td>
<td>Describe and implement strategies to assist the consumer in gaining access to occupational therapy and other health and social services.</td>
<td>Describe and discuss strategies to assist the consumer in gaining access to occupational therapy services.</td>
<td>Identify strategies to assist the consumer in gaining access to occupational therapy services.</td>
</tr>
<tr>
<td>B.9.13.</td>
<td>Demonstrate advocacy by participating in and exploring leadership positions in organizations or agencies promoting the profession (e.g., AOTA, state occupational therapy associations, World Federation of Occupational Therapists, advocacy organizations), consumer access and services, and the welfare of the community.</td>
<td>Demonstrate professional advocacy by participating in organizations or agencies promoting the profession (e.g., AOTA, state occupational therapy associations, advocacy organizations).</td>
<td>Demonstrate professional advocacy by participating in organizations or agencies promoting the profession (e.g., AOTA, state occupational therapy associations, advocacy organizations).</td>
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</table>

SECTION C: FIELDWORK EDUCATION AND DOCTORAL EXPERIENTIAL COMPONENT

C.1.0: 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 of a qualified occupational therapy practitioner serving as a role model. The academic fieldwork coordinator is responsible for the program’s compliance with fieldwork education requirements. The academic fieldwork coordinator will

| C.1.1.         | Ensure that the fieldwork program reflects the sequence and scope of content in the curriculum design in collaboration with faculty so that fieldwork experiences strengthen the ties between didactic and fieldwork education. | Ensure that the fieldwork program reflects the sequence and scope of content in the curriculum design in collaboration with faculty so that fieldwork experiences strengthen the ties between didactic and fieldwork education. | Ensure that the fieldwork program reflects the sequence and scope of content in the curriculum design in collaboration with faculty so that fieldwork experiences strengthen the ties between didactic and fieldwork education. |
| C.1.2.         | Document the criteria and process for selecting fieldwork sites, to include maintaining memoranda of understanding, complying with all site requirements, maintaining site objectives and site data, and communicating this information to students. | Document the criteria and process for selecting fieldwork sites, to include maintaining memoranda of understanding, complying with all site requirements, maintaining site objectives and site data, and communicating this information to students. | Document the criteria and process for selecting fieldwork sites, to include maintaining memoranda of understanding, complying with all site requirements, maintaining site objectives and site data, and communicating this information to students. |

THE PROGRAM MUST HAVE EVIDENCE OF THE TIMELY IMPLEMENTATION OF THE DOCUMENTED CRITERIA AND PROCESS.

| C.1.3.         | Demonstrate that academic and fieldwork educators collaborate in establishing fieldwork objectives and communicate with the student and fieldwork educator about progress and performance during fieldwork. | Demonstrate that academic and fieldwork educators collaborate in establishing fieldwork objectives and communicate with the student and fieldwork educator about progress and performance during fieldwork. | Demonstrate that academic and fieldwork educators collaborate in establishing fieldwork objectives and communicate with the student and fieldwork educator about progress and performance during fieldwork. |

ACADEMIC AND FIELDWORK EDUCATORS ARE EXPECTED TO COLLABORATE IN ESTABLISHING FIELDWORK OBJECTIVES PRIOR TO THE FIELDWORK EXPERIENCE. THEY ARE ALSO EXPECTED TO COMMUNICATE WITH THE STUDENT ABOUT PROGRESS AND PERFORMANCE THROUGHOUT THE FIELDWORK PERIOD.
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<tr>
<td>C.1.4.</td>
<td>Ensure that the ratio of fieldwork educators to students enables proper supervision and the ability to provide frequent assessment of student progress in achieving stated fieldwork objectives.</td>
<td>Ensure that the ratio of fieldwork educators to students enables proper supervision and the ability to provide frequent assessment of student progress in achieving stated fieldwork objectives.</td>
<td>Ensure that the ratio of fieldwork educators to students enables proper supervision and the ability to provide frequent assessment of student progress in achieving stated fieldwork objectives.</td>
</tr>
<tr>
<td>C.1.5.</td>
<td>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 as required by Standard A.4.14.</td>
<td>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 as required by Standard A.4.14.</td>
<td>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 as required by Standard A.4.14.</td>
</tr>
<tr>
<td>C.1.6.</td>
<td>The program must have evidence of valid memoranda of understanding in effect and signed by both parties at the time the student is completing the Level I or Level II fieldwork experience. (Electronic memoranda of understanding and signatures are acceptable.) Responsibilities of the sponsoring institution(s) and each fieldwork site must be clearly documented in the memorandum of understanding.</td>
<td>The program must have evidence of valid memoranda of understanding in effect and signed by both parties at the time the student is completing the Level I or Level II fieldwork experience. (Electronic memoranda of understanding and signatures are acceptable.) Responsibilities of the sponsoring institution(s) and each fieldwork site must be clearly documented in the memorandum of understanding.</td>
<td>The program must have evidence of valid memoranda of understanding in effect and signed by both parties at the time the student is completing the Level I or Level II fieldwork experience. (Electronic memoranda of understanding and signatures are acceptable.) Responsibilities of the sponsoring institution(s) and each fieldwork site must be clearly documented in the memorandum of understanding.</td>
</tr>
<tr>
<td>C.1.7.</td>
<td>Ensure that at least one fieldwork experience (either Level I or Level II) has as its focus psychological and social factors that influence engagement in occupation.</td>
<td>Ensure that at least one fieldwork experience (either Level I or Level II) has as its focus psychological and social factors that influence engagement in occupation.</td>
<td>Ensure that at least one fieldwork experience (either Level I or Level II) has as its focus psychological and social factors that influence engagement in occupation.</td>
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<td>IF STANDARD C.1.7 IS MET THROUGH A LEVEL I FIELDWORK EXPERIENCE, THE EXPERIENCE MUST BE COMPARABLE IN DURATION AND ASSESSMENT METHODS TO OTHER LEVEL I FIELDWORK EXPERIENCES OFFERED BY THE PROGRAM. FOR EXAMPLE, A 2-HOUR FIELDTRIP IS NOT EQUIVALENT TO A 3-DAY EXPERIENCE. THE EXPERIENCE MUST BE CONSISTENT WITH THE CURRICULUM DESIGN.</td>
<td>TO MEET THIS STANDARD, STUDENTS MUST PARTICIPATE IN A FIELDWORK ROTATION THAT IS CREATED EXPLICITLY/SPECIFICALLY FOR THE PURPOSE OF MEETING OBJECTIVES ADDRESSING PSYCHOLOGICAL AND SOCIAL FACTORS. COLLABORATION WITH THE FIELDWORK EDUCATOR MUST INDICATE THAT THE SETTING IS AWARE OF AND SUPPORTIVE OF THIS FOCUS. AN ASSIGNMENT OR OBJECTIVE ALONE IS NOT SUFFICIENT FOR COMPLIANCE.</td>
<td>THE STANDARDS DO NOT STATE THAT THE PSYCHOLOGICAL AND SOCIAL FACTORS COMPONENT OF FIELDWORK HAS TO BE A PART OF A COURSE. LEVEL I FIELDWORK MAY BE A SEPARATE ENTITY AND NOT ATTACHED TO A COURSE. THE PROGRAM SHOULD HAVE APPROPRIATE AND SPECIFIC OBJECTIVES TO MEET THE INTENT OF STANDARD C.1.7.</td>
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PROGRAMS MUST HAVE AMPLE LEVEL I AND LEVEL II FIELDWORK PLACEMENTS FOR ALL STUDENTS IN A VARIETY OF SETTINGS CONSISTENT WITH THE CURRICULUM DESIGN.
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<td><strong>C.1.8.</strong></td>
<td>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.</td>
<td>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.</td>
<td>Ensure that qualified personnel supervise Level I fieldwork. Examples may include, but are not limited to, currently licensed or otherwise regulated occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, nurses, and physical therapists.</td>
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<td><strong>C.1.9.</strong></td>
<td>Ensure that qualified personnel supervise Level I fieldwork. Examples may include, but are not limited to, currently licensed or otherwise regulated occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, nurses, and physical therapists.</td>
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<td><strong>C.1.10.</strong></td>
<td>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.</td>
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<td><strong>C.1.11.</strong></td>
<td>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.</td>
<td>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.</td>
<td>Ensure that the fieldwork experience is designed to promote clinical reasoning appropriate to the occupational therapy assistant role, to transmit the values and beliefs that enable ethical practice, and to develop professionalism and competence in career responsibilities.</td>
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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...
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<tr>
<td>C.1.12.</td>
<td>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.</td>
<td>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.</td>
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<td>C.1.13.</td>
<td>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 an FTE at that site.</td>
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<td>Require a minimum of 16 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 an FTE at that site.</td>
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<tr>
<td>C.1.14.</td>
<td>Ensure that the student is supervised by a currently licensed or otherwise regulated occupational therapist who has a minimum of 1 year full-time (or its equivalent) of practice experience subsequent to initial certification and who is adequately prepared to serve as a fieldwork educator. The supervising therapist may be engaged by the fieldwork site or by the educational program.</td>
<td>Ensure that the student is supervised by a currently licensed or otherwise regulated occupational therapist who has a minimum of 1 year full-time (or its equivalent) of practice experience subsequent to initial certification and who is adequately prepared to serve as a fieldwork educator. The supervising therapist may be engaged by the fieldwork site or by the educational program.</td>
<td>Ensure that the student is supervised by a currently licensed or otherwise regulated occupational therapist or occupational therapy assistant (under the supervision of an occupational therapist) who has a minimum of 1 year full-time (or its equivalent) of practice experience subsequent to initial certification and who is adequately prepared to serve as a fieldwork educator. The supervising therapist may be engaged by the fieldwork site or by the educational program.</td>
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**VERIFICATION THAT THE FIELDWORK SUPERVISOR MEETS ALL REQUIREMENTS OF STANDARD C.1.14 MUST OCCUR PRIOR TO THE ARRIVAL OF THE STUDENT AT THE FIELDWORK EXPERIENCE.**

<p>| C.1.15. | 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). | 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). | 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). |
| C.1.16. | 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 appropriate for the setting, the severity of the client’s condition, and the ability of the student. | 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 appropriate for the setting, the severity of the client’s condition, and the ability of the student. | 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 appropriate for the setting, the severity of the client’s condition, and the ability of the student. |
| C.1.17. | Ensure that supervision provided in a setting where no occupational therapy services exist includes a documented plan for provision of occupational therapy services. | Ensure that supervision provided in a setting where no occupational therapy services exist includes a documented plan for provision of occupational therapy services. | Ensure that supervision provided in a setting where no occupational therapy services exist includes a documented plan for provision of occupational therapy services. |</p>
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<td>therapy services and supervision by a currently licensed otherwise regulated occupational therapist with at least 3 years’ full-time or its equivalent of professional experience. Supervision must include a minimum of 8 hours of direct supervision each week of the fieldwork experience. 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.</td>
<td>therapy services and supervision by a currently licensed otherwise regulated occupational therapist with at least 3 years’ full-time or its equivalent of professional experience. Supervision must include a minimum of 8 hours of direct supervision each week of the fieldwork experience. 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.</td>
<td>therapy assistant services and supervision by a currently licensed or otherwise regulated occupational therapist or occupational therapy assistant (under the direction of an occupational therapist) with at least 3 years’ full-time or its equivalent of professional experience. Supervision must include a minimum of 8 hours of direct supervision each week of the fieldwork experience. 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.</td>
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<td>C.1.18. Document mechanisms for requiring formal evaluation of student performance on Level II fieldwork (e.g., the AOTA Fieldwork Performance Evaluation for the Occupational Therapy Student or equivalent).</td>
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<td>C.1.19. 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.</td>
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**C.2.0. DOCTORAL EXPERIENTIAL COMPONENT**

The goal of the doctoral experiential component is to develop occupational therapists with advanced skills (those that are beyond a generalist level). The doctoral experiential component shall be an integral part of the program’s curriculum design and shall include an in-depth experience in one or more of the following: clinical practice skills, research skills, administration, leadership, program and policy development, advocacy, education, or theory development.

The student must successfully complete all coursework and Level II fieldwork and pass a competency requirement prior to the commencement of the doctoral experiential component. The specific content and format of the competency requirement is determined by the program. Examples include a written comprehensive exam, oral exam, NBCOT certification exam readiness tool, and the NBCOT practice exams.
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<td>C.2.1.</td>
<td>Ensure that the doctoral experiential component is designed and administered by faculty and provided in setting(s) consistent with the program's curriculum design, including individualized specific objectives and plans for supervision.</td>
<td>(No related Standard)</td>
<td>(No related Standard)</td>
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<td>C.2.2.</td>
<td>Ensure that there is a memorandum of understanding that, at a minimum, includes individualized specific objectives, plans for supervision or mentoring, and responsibilities of all parties.</td>
<td>(No related Standard)</td>
<td>(No related Standard)</td>
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<td>C.2.3.</td>
<td>Require that the length of this doctoral experiential component be a minimum of 16 weeks (640 hours). This may be completed on a part-time basis and must be consistent with the individualized specific objectives and culminating project. No more than 20% of the 640 hours can be completed outside of the mentored practice setting(s). Prior fieldwork or work experience may not be substituted for this experiential component.</td>
<td>(No related Standard)</td>
<td>(No related Standard)</td>
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<td>ACOTE VOTED IN AUGUST 2018 TO ALLOW OTD PROGRAMS TO HAVE A 14-WEEK CAPSTONE EXPERIENCE (2018 STANDARD D.1.3) VERSUS A 16-WEEK CAPSTONE EXPERIENCE (2011 STANDARD C.2.3).</td>
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<td>C.2.4.</td>
<td>Ensure that the student is mentored by an individual with expertise consistent with the student’s area of focus. The mentor does not have to be an occupational therapist.</td>
<td>(No related Standard)</td>
<td>(No related Standard)</td>
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<td>C.2.5.</td>
<td>Document a formal evaluation mechanism for objective assessment of the student’s performance during and at the completion of the doctoral experiential component.</td>
<td>(No related Standard)</td>
<td>(No related Standard)</td>
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MENTORING IS DEFINED AS A RELATIONSHIP BETWEEN TWO PEOPLE IN WHICH ONE PERSON (THE MENTOR) IS DEDICATED TO THE PERSONAL AND PROFESSIONAL GROWTH OF THE OTHER (THE MENTEE). A MENTOR HAS MORE EXPERIENCE AND KNOWLEDGE THAN THE MENTEE. THE PROGRAM MUST HAVE A SYSTEM TO ENSURE THAT MENTOR HAS DEMONSTRATED EXPERTISE IN ONE OR MORE OF THE FOLLOWING AREAS IDENTIFIED AS THE STUDENT'S FOCUSED AREA OF STUDY: CLINICAL PRACTICE SKILLS, RESEARCH SKILLS, ADMINISTRATION, LEADERSHIP, PROGRAM AND POLICY DEVELOPMENT, ADVOCACY, EDUCATION, OR THEORY DEVELOPMENT.
GLOSSARY
Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist,
Masters-Degree-Level Educational Program for the Occupational Therapist, and
Associate-Degree-Level Educational Program for the Occupational Therapy Assistant

Definitions given below are for the purposes of these documents.

ABILITY TO BENEFIT: A phrase that refers to a student who does not have a high school diploma or its recognized equivalent, but is eligible to receive funds under the Title IV Higher Education Act programs after taking an independently administered examination and achieving a score, specified by the Secretary of the U.S. Department of Education (USDE), indicating that the student has the ability to benefit from the education being offered.

ACADEMIC CALENDAR: The official institutional document that lists registration dates, semester/quarter stop and start dates, holidays, graduation dates, and other pertinent events. Generally, the academic year is divided into two major semesters, each approximately 14 to 16 weeks long. A smaller number of institutions have quarters rather than semesters. Quarters are approximately 10 weeks long; there are three major quarters and the summer session.

ACTIVITY: A term that describes a class of human actions that are goal directed (AOTA, 2008b).

ADVANCED: The stage of being beyond the elementary or introductory.

AFFILIATE: An entity that formally cooperates with a sponsoring institution in implementing the occupational therapy educational program.

AREAS OF OCCUPATION: Activities in which people engage: activities of daily living, instrumental activities of daily living, rest and sleep, education, work, play, leisure, and social participation.

ASSIST: To aid, help, or hold an auxiliary position.

BODY FUNCTIONS: The physiological functions of body systems (including psychological functions).

BODY STRUCTURES: Anatomical parts of the body such as organs, limbs, and their components.

CARE COORDINATION: The process that links clients with appropriate services and resources.

CASE MANAGEMENT: A system to ensure that individuals receive appropriate health care services.

CLIENT: The term used to name the entity that receives occupational therapy services. Clients may include (1) individuals and other persons relevant to the client’s life including family, caregivers, teachers, employers, and others who may also help or be served indirectly; (2) organizations, such as businesses, industries, or agencies; and (3) populations within a community (AOTA, 2008b).

CLIENT-CENTERED SERVICE DELIVERY: An orientation that honors the desires and priorities of clients in designing and implementing interventions.

CLIENT FACTORS: Factors that reside within the client and that may affect performance in areas of occupation. Client factors include body functions and body structures.

CLINICAL REASONING: Complex multifaceted cognitive process used by practitioners to plan, direct, perform, and reflect on intervention.

COLLABORATE: To work together with a mutual sharing of thoughts and ideas.

COMPETENT: To have the requisite abilities/qualities and capacity to function in a professional environment.

CONSORTIUM: Two or more higher education institutions having a formal agreement to share resources for the operation of an educational program.

CONSUMER: The direct and/or indirect recipient of educational and/or practitioner services offered.
CONTEXT/CONTEXTUAL FACTORS AND ENVIRONMENT:

CONTEXT: The variety of interrelated conditions within and surrounding the client that influence performance. Contexts include cultural, personal, temporal, and virtual aspects.

ENVIRONMENT: The external physical and social environment that surrounds the client and in which the client’s daily life occupations occur.

CONTEXT OF SERVICE DELIVERY: The knowledge and understanding of the various contexts in which occupational therapy services are provided.

COOPERATIVE PROGRAM: Two administrative entities having a cooperative agreement to offer a single program. At least one of the entities must hold degree-granting authority as required by the ACOTE Standards.

CRITERION-REFERENCED: Tests that compare the performance of an individual to that of another group, known as the norm group.

CULMINATING PROJECT: A project that is completed by a doctoral student that demonstrates the student’s ability to relate theory to practice and to synthesize advanced knowledge in a practice area.

CURRICULUM DESIGN: An overarching set of assumptions that explains how the curriculum is planned, implemented, and evaluated. Typically, a curriculum design includes educational goals and curriculum threads and provides a clear rationale for the selection of content, the determination of scope of content, and the sequence of the content. A curriculum design is expected to be consistent with the mission and philosophy of the sponsoring institution and the program.

CURRICULUM THREADS: Curriculum threads, or themes, are identified by the program as areas of study and development that follow a path through the curriculum and represent the unique qualities of the program, as demonstrated by the program’s graduates. Curriculum threads are typically based on the profession’s and program’s vision, mission, and philosophy (e.g., occupational needs of society, critical thinking/professional reasoning, diversity/globalization . (AOTA, 2008a).

DIAGNOSIS: The process of analyzing the cause or nature of a condition, situation, or problem. Diagnosis as stated in Standard B.4.0. refers to the occupational therapist’s ability to analyze a problem associated with occupational performance and participation.

DISTANCE EDUCATION: Education that uses one or more of the technologies listed below to deliver instruction to students who are separated from the instructor and to support regular and substantive interaction between the students and the instructor, either synchronously or asynchronously. The technologies may include
- The Internet;
- One-way and two-way transmissions through open broadcast, closed circuit, cable, microwave, broadband lines, fiber optics, satellite, or wireless communications devices;
- Audio conferencing; or
- Video cassettes, DVDs, and CD-ROMs, if the cassettes, DVDs, or CD-ROMs are used in a course.

DISTANCE EDUCATION DELIVERY MODEL: There is one curriculum with some (or all) of the students receiving the didactic portion of the program taught via distance education from the primary campus. The didactic portion of the program is delivered to all students (irrespective of whether it is delivered in class or by distance education) by the same instructors. Students may receive the experiential and lab components at either the primary campus or at other locations.

DRIVER REHABILITATION: Specialized evaluation and training to develop mastery of specific skills and techniques to effectively drive a motor vehicle independently and in accordance with state department of motor vehicles regulations.

ENTRY-LEVEL OCCUPATIONAL THERAPIST: The outcome of the occupational therapy educational and certification process; an individual prepared to begin generalist practice as an occupational therapist with less than 1 year of experience.

ENTRY-LEVEL OCCUPATIONAL THERAPY ASSISTANT: The outcome of the occupational therapy educational and certification process; an individual prepared to begin generalist practice as an occupational therapy assistant with less than 1 year of experience.

FACULTY:

FACULTY, CORE: Persons who are resident faculty, including the program director and academic fieldwork coordinator, appointed to and employed primarily in the occupational therapy educational program.
FACULTY, FULL TIME: Core faculty members who hold an appointment that are full-time, as defined by the institution, and whose job responsibilities include teaching and/or contributing to the delivery of the designed curriculum regardless of the position title (e.g., full-time instructional staff, academic fieldwork coordinator, and clinical instructors would be considered faculty).

FACULTY, PART TIME: Core faculty members who hold an appointment that is considered by that institution to constitute less than full-time service and whose job responsibilities include teaching and/or contributing to the delivery of the designed curriculum regardless of the position title.

FACULTY, ADJUNCT: Persons who are responsible for teaching at least 50% of a course and are part-time, nonsalaried, non-tenure-track faculty members who are paid for each class they teach.

FIELDWORK COORDINATOR: Faculty member who is responsible for the development, implementation, management, and evaluation of fieldwork education.

FRAME OF REFERENCE: A set of interrelated, internally consistent concepts, definitions, postulates, and principles that provide a systematic description of a practitioner’s interaction with clients. A frame of reference is intended to link theory to practice.

FULL-TIME EQUIVALENT (FTE): An equivalent position for a full-time faculty member (as defined by the institution). A full-time equivalent can be made up of no more than 3 individuals.

GRADUATION RATE: The total number of students who graduated from a program within 150% of the published length of the program, divided by the number of students on the roster who started in the program.

HABITS: “Automatic behavior that is integrated into more complex patterns that enable people to function on a day-to-day basis” (Neidstadt & Crepeau, 1998).

HEALTH LITERACY: Degree to which individuals have the capacity to obtain, process, and understand basic health information and services needed to make appropriate health decisions (National Network of Libraries of Medicine, 2011).

INTERPROFESSIONAL COLLABORATIVE PRACTICE: “Multiple health workers from different professional backgrounds working together with patients, families, careers, and communities to deliver the highest quality of care” (World Health Organization, 2010).

MEMORANDUM OF UNDERSTANDING (MOU): A document outlining the terms and details of an agreement between parties, including each parties’ requirements and responsibilities. A memorandum of understanding may be signed by any individual who is authorized by the institution to sign fieldwork memoranda of understanding on behalf of the institution.

MENTORING: A relationship between two people in which one person (the mentor) is dedicated to the personal and professional growth of the other (the mentee). A mentor has more experience and knowledge than the mentee.

MISSION: A statement that explains the unique nature of a program or institution and how it helps fulfill or advance the goals of the sponsoring institution, including religious missions.

MODALITIES: Application of a therapeutic agent, usually a physical agent modality.

DEEP THERMAL MODALITIES: Modalities such as therapeutic ultrasound and phonophoresis.

ELECTROTHERAPEUTIC MODALITIES: Modalities such as biofeedback, neuromuscular electrical stimulation, functional electrical stimulation, transcutaneous electrical nerve stimulation, electrical stimulations for tissue repair, high-voltage galvanic stimulation, and iontophoresis.

MECHANICAL MODALITIES: Modalities such as vasopneumatic devices and continuous passive motion.

SUPERFICIAL THERMAL MODALITIES: Modalities such as hydrotherapy, whirlpool, cryotherapy, fluidotherapy, hot packs, paraffin, water, and infrared.

MODEL OF PRACTICE: The set of theories and philosophies that defines the views, beliefs, assumptions, values, and domain of concern of a particular profession or discipline. Models of practice delimit the boundaries of a profession.
OCCUPATION: “Activities . . . of everyday life, named, organized and given value and meaning by individuals and a culture. Occupation is everything that people do to occupy themselves, including looking after themselves . . . enjoying life . . . and contributing to the social and economic fabric of their communities” (Law, Polatajko, Baptiste, & Townsend, 1997).

OCCUPATIONAL PROFILE: An analysis of a client’s occupational history, routines, interests, values, and needs to engage in occupations and occupational roles.

OCCUPATIONAL THERAPY: The art and science of applying occupation as a means to effect positive, measurable change in the health status and functional outcomes of a client by a qualified occupational therapist and/or occupational therapy assistant (as appropriate).

OCCUPATIONAL THERAPY PRACTITIONER: An individual who is initially credentialed as an occupational therapist or an occupational therapy assistant.

PARTICIPATION: Active engagement in occupations.

PERFORMANCE PATTERNS: Patterns of behavior related to daily life activities that are habitual or routine. Performance patterns include habits, routines, rituals, and roles.

PERFORMANCE SKILLS: Features of what one does, not what one has, related to observable elements of action that have implicit functional purposes. Performance skills include motor and praxis, sensory/perceptual, emotional regulation, cognitive, and communication and social skills.

PHILOSOPHY: The underlying belief and value structure for a program that is consistent with the sponsoring institution and which permeates the curriculum and the teaching learning process.

POPULATION-BASED INTERVENTIONS: Interventions focused on promoting the overall health status of the community by preventing disease, injury, disability, and premature death. A population-based health intervention can include assessment of the community’s needs, health promotion and public education, disease and disability prevention, monitoring of services, and media interventions. Most interventions are tailored to reach a subset of a population, although some may be targeted toward the population at large. Populations and subsets may be defined by geograpgy, culture, race and ethnicity, socioeconomic status, age, or other characteristics. Many of these characteristics relate to the health of the described population (Keller, Schaffer, Lia-Hoagberg, & Strohschein, 2002).

PREPARATORY METHODS: Intervention techniques focused on client factors to help a client’s function in specific activities.

PROGRAM DIRECTOR (associate-degree-level occupational therapy assistant): An initially certified occupational therapist or occupational therapy assistant who is licensed or credentialed according to regulations in the state or jurisdiction in which the program is located. The program director must hold a minimum of a master’s degree.

PROGRAM DIRECTOR (master’s-degree-level occupational therapist): 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 program director must hold a doctoral degree.

PROGRAM DIRECTOR (doctoral-degree-level occupational therapist): 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 program director must hold a doctoral degree.

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.

PURPOSEFUL ACTIVITY: “An activity used in treatment that is goal directed and that the [client] sees as meaningful or purposeful” (Low, 2002).

RECOGNIZED REGIONAL OR NATIONAL ACCREDITING AUTHORITY: Regional and national accrediting agencies recognized by the USDE to accredit postsecondary educational programs/institutions. The purpose of recognition is to ensure that the accrediting agencies are reliable authorities for evaluating quality education or training programs in the institutions they accredit.

Regional accrediting bodies recognized by USDE:
- Accrediting Commission for Community and Junior Colleges, Western Association of Schools and Colleges (ACCJC/WASC)
- Accrediting Commission for Senior Colleges and Universities, Western Association of Schools and Colleges (ACSCU/WASC)
- Commission on Colleges, Southern Association of Colleges and Schools (SACS)

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• Commission on Institutions of Higher Education, New England Association of Schools and Colleges (CIHE/NEASC)
• Higher Learning Commission, North Central Association of Colleges and Schools (HLC)
• Middle States Commission on Higher Education, Middle States Association of Colleges and Schools (MSCHE)
• Northwest Commission on Colleges and Universities (NWCCU)

National accrediting bodies recognized by USDE:
• Accrediting Bureau of Health Education Schools (ABHES)
• Accrediting Commission of Career Schools and Colleges (ACCSC)
• Accrediting Council for Continuing Education and Training (ACCET)
• Accrediting Council for Independent Colleges and Schools (ACICS)
• Council on Occupational Education (COE)
• Distance Education Accrediting Commission (DEAC)
• New York State Board of Regents

REFLECTIVE PRACTICE: Thoughtful consideration of one’s experiences and knowledge when applying such knowledge to practice. Reflective practice includes being coached by professionals.

RELEASE TIME: Period when a person is freed from regular duties, especially teaching, to allow time for other tasks or activities.

RETENTION RATE: A measure of the rate at which students persist in their educational program, calculated as the percentage of students on the roster, after the add period, from the beginning of the previous academic year who are again enrolled at, or graduated prior to, the beginning of the subsequent academic year.

SCHOLARSHIP: “A systematic investigation . . . designed to develop or to contribute to generalizable knowledge” (45 CFR § 46). Scholarship is made public, subject to review, and part of the discipline or professional knowledge base (Glassick, Huber, & Maeroff, 1997). It allows others to build on it and further advance the field (AOTA, 2009).

SCHOLARSHIP OF DISCOVERY: Engagement in activity that leads to the development of “knowledge for its own sake.” The Scholarship of Discovery encompasses original research that contributes to expanding the knowledge base of a discipline (Boyer, 1990).

SCHOLARSHIP OF INTEGRATION: Investigations making creative connections both within and across disciplines to integrate, synthesize, interpret, and create new perspectives and theories (Boyer, 1990).

SCHOLARSHIP OF APPLICATION: Practitioners apply the knowledge generated by Scholarship of Discovery or Integration to address real problems at all levels of society (Boyer, 1990). In occupational therapy, an example would be the application of theoretical knowledge to practice interventions or to teaching in the classroom.

SCHOLARSHIP OF TEACHING AND LEARNING: “Involves the systematic study of teaching and/or learning and the public sharing and review of such work through presentations, publications, and performances” (McKinney, 2007, p. 10).

SENIOR COLLEGE: A college that holds degree-granting authority that includes baccalaureate-degree-level education.

SKILL: The ability to use one’s knowledge effectively and readily in execution or performance.

SPONSORING INSTITUTION: The identified legal entity that assumes total responsibility for meeting the minimal standards for ACOTE accreditation.

STRATEGIC PLAN: A comprehensive 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’s 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, and
• Evidence of periodic updating of action steps and long-term goals as they are met or as circumstances change.

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SUPERVISE: To direct and inspect the performance of workers or work.

SUPERVISION, DIRECT: Two-way communication that occurs in real time and offers both audio and visual capabilities to ensure opportunities for timely feedback.

SUPERVISOR: One who ensures that tasks assigned to others are performed correctly and efficiently.

THEORY: A set of interrelated concepts used to describe, explain, or predict phenomena.

TELEHEALTH: The application of evaluative, consultative, preventative, and therapeutic services delivered through telecommunication and information technologies. Occupational therapy services provided by means of a telehealth service delivery model can be synchronous, that is, delivered through interactive technologies in real time, or asynchronous, using store-and-forward technologies. Occupational therapy practitioners can use telehealth as a mechanism to provide services at a location that is physically distant from the client, thereby allowing for services to occur where the client lives, works, and plays, if that is needed or desired (AOTA, 2010).

TRANSFER OF CREDIT: A term used in higher education to award a student credit for courses earned in another institution prior to admission to the occupational therapy or occupational therapy assistant program.

References


III. ACCREDITATION PROCESS FOR NEW PROGRAMS
III. A. OVERVIEW OF THE INITIAL ACCREDITATION PROCESS

DEVELOPING A NEW PROGRAM

Information and guidance regarding the accreditation process and accreditation standards are available from the staff of the AOTA Accreditation Department. Any questions regarding the accreditation standards or policies and procedures described in the Accreditation Council for Occupational Therapy Education (ACOTE®) Accreditation Manual should be referred to that office. Formal contact with the AOTA Accreditation Department would occur when the institution is ready to apply for accreditation for the new program (prior to the admission of the first class of students). Note that ACOTE will accept and review a maximum of 6 Candidacy Applications from new programs during a given cycle. The assignment of due dates for Candidacy Applications will be based on the receipt of submitted signed documentation that the program director has been hired, is full-time, and is on-site at least 1 year prior to the submission of the Candidacy Application. Information on available slots is available on ACOTE’s Web page at http://www.aota.org/en/Education-Careers/Accreditation/Policies.aspx under “III. Accreditation Process for New Programs”.

Cooperative and Consortium Programs

Sponsoring institutions may apply for initial accreditation for a new occupational therapy or occupational therapy assistant program as a single higher education institution, as two administrative entities having a cooperative agreement (at least one of which must hold degree-granting authority), or a consortium comprised of two or more higher education institutions having a formal agreement to share resources for the operation of an educational program.

For programs to be offered by more than one institution, the Letter of Intent must include information regarding the institutional accreditation status, the role of each institution in the cooperative or consortium arrangement, how the administration of the program will be managed, how the program will operate, and which institution(s) will grant the degree.

Sponsoring institutions wishing to offer an occupational therapy or occupational therapy assistant program at more than one of the institution’s locations/campuses must apply for accreditation using ACOTE Policy IV.B.2. Additional Locations.

ACCREDITATION PROCESS FOR NEW PROGRAMS

To ensure commitment to the development of quality programs and to review the potential viability of an applicant occupational therapy educational program prior to the admission of the first class of students, all new programs seeking accreditation by ACOTE are required to apply for Candidacy Status as the first step in the three-step accreditation process for new programs.

The following are the three steps of the accreditation process for new programs. All reports and documentation must be submitted in English.

• **STEP 1: APPLICATION REVIEW**

  For new programs, the process begins with the submission of a Letter of Intent, and completion and submission of the Eligibility Data. Once eligibility is confirmed, the program may submit a Candidacy Application according to the approved timeline. The program director must be hired, full-time, and on-site one year prior to submission of the Candidacy Application. The Academic Fieldwork Coordinator must be hired, full-time, and on-site 6 months prior to submission of the Candidacy Application. The Candidacy Application must be electronically signed by the occupational therapy program director, the dean or administrator overseeing the proposed program, and the chief executive officer of the sponsoring institution. Upon review of that
Application, ACOTE grants, defers action on, or denies Candidacy Status. Although the designation “Candidacy Status” is not a guarantee of accreditation, it does indicate that the resource allocation and plan for development of the proposed program appears to demonstrate the ability to meet the applicable ACOTE Accreditation Standards if fully implemented as planned. Candidacy Status must be granted before students may be admitted or notified of admission to the program and is required in order for the program to proceed to Step 2.

**STEP 2: PREACCREDITATION REVIEW**

If Candidacy Status is granted, the program may admit its first class of students and proceed to the second step of the process, the preaccreditation review. In this step, the program assesses its compliance with the ACOTE Standards and submits an initial Report of Self-Study. Upon review of this report, ACOTE grants, defers action on, or denies Preaccreditation Status. The granting of Preaccreditation Status indicates that on the basis of the paper review of the submitted materials, ACOTE has determined that the program is likely to meet the applicable ACOTE Standards if fully implemented in accordance with its plans. The granting of Preaccreditation Status is not a guarantee of accreditation status.

**STEP 3: THE INITIAL ON-SITE EVALUATION**

The third step of the process is an initial on-site evaluation conducted by a two-member team. The team prepares a Report of On-Site Evaluation, upon which ACOTE bases its decision to either grant or withhold accreditation.

### OVERVIEW OF TIMELINE DEADLINES AND PROGRAM STARTING DATES

Because graduation from an accredited educational program is a requirement of eligibility for certification by the National Board for Certification in Occupational Therapy and for licensure in most states, every effort is made to assure that the three-step accreditation process is complete prior to the graduation of the first class of students. The following information provides a general framework for the accreditation process for new occupational therapy educational programs in institutions that follow a September through May academic pattern. It is expected that the proposed curriculum will be approved by the appropriate state and institutional bodies before the application review is conducted by ACOTE.

Details regarding each step are provided below. Since the dates listed below may not apply universally, an individual schedule is prepared by AOTA Accreditation Department staff for each program entering the accreditation process.

The deadlines for receipt of the Letter of Intent and Candidacy Application are determined by the planned student enrollment date. Official action by ACOTE is taken at its spring, summer, and fall meetings (generally in April, August, and December). ACOTE will accept and review a maximum of 6 Candidacy Applications from new programs during a given cycle. Only institutions with occupational therapy/occupational therapy assistant program directors hired, full time, and on-site at least 1 year prior to submission of a Candidacy Application will be assigned to a Candidacy Application submission slot. The assignment of due dates for Candidacy Applications will be based on the receipt of submitted signed documentation that the program director has been hired full-time and is on-site at least 1 year prior to the submission of the Candidacy Application.

Programs must also submit signed documentation that the Academic Fieldwork Coordinator has been hired full-time and is on-site 6 months prior to Candidacy Application. Programs that are unable to meet this requirement will be taken out of the queue and programs will have to reapply once they meet all the required criteria. After the 6-program cap is reached, programs will be placed on a waiting list and may be subject to the next available review cycle. The planned student admission must be delayed accordingly.

It is suggested that the program director be hired well in advance of the deadline to increase the chances of entering the desired review cycle and to allow adequate time to prepare the Candidacy Application.

It is the responsibility of the program seeking Candidacy Status to ensure that the Application is properly signed, the balance of the Candidacy Application Fee is paid, and received by AOTA no later than 5:00 p.m.
on the due date, as there are no exceptions for late receipt of the Candidacy Application and Candidacy Application Fee. All dates refer to business days. Therefore, if a deadline falls on a weekend or national holiday, the next full work day becomes the effective due date for receipt of materials.

<table>
<thead>
<tr>
<th>Letter of Intent and Deposit Due NO LATER THAN 5:00 P.M. EASTERN ON:</th>
<th>November 1 (prior to fall start)</th>
<th>March 1 (prior to winter start)</th>
<th>July 1 (prior to spring/summer start)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed Candidacy Application and Application Fee Due NO LATER THAN 5:00 P.M. EASTERN ON:</td>
<td>December 15</td>
<td>April 15</td>
<td>August 15</td>
</tr>
<tr>
<td>Application Review and ACOTE Action on Candidacy Status (ACOTE meeting)</td>
<td>April</td>
<td>August</td>
<td>December</td>
</tr>
</tbody>
</table>

IF CANDIDACY STATUS IS AWARDED, THE SCHEDULE WOULD CONTINUE APPROXIMATELY AS FOLLOWS. NOTE THAT THIS SCHEDULE IS ADJUSTED AS NEEDED TO ACCOMMODATE THE LENGTH OF EACH PROGRAM:

<table>
<thead>
<tr>
<th>Students May be Notified of Acceptance Into the Program</th>
<th>April/May</th>
<th>August</th>
<th>December</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Class May be Enrolled Full (August/September)</td>
<td>Winter (December/January)</td>
<td>Spring/Summer (May/June)</td>
<td></td>
</tr>
<tr>
<td>Initial Report of Self-Study Due</td>
<td>March 1</td>
<td>July 1</td>
<td>November 1</td>
</tr>
<tr>
<td>Preaccreditation Review (ACOTE Meeting)</td>
<td>August</td>
<td>December</td>
<td>April</td>
</tr>
<tr>
<td>On-Site Evaluation Late Winter/Early Spring</td>
<td>Late Spring/Early Summer</td>
<td>Fall</td>
<td></td>
</tr>
<tr>
<td>Accreditation Action (ACOTE Meeting)</td>
<td>April</td>
<td>August</td>
<td>December</td>
</tr>
</tbody>
</table>

SAMPLE TIMELINE FOR FALL CLASS ENROLLMENT

The following example is a minimal timeline in anticipation of a fall class enrollment.

- **ON OR BEFORE NOVEMBER 1**
  A Letter of Intent, Letter of Intent Data Form, and the program director’s curriculum vitae (if hired) must be attached to an email addressed to accred@aota.org. Upon receipt, accreditation staff will follow up regarding payment options for the $500 deposit. The deadline for receipt of this letter and deposit is 5:00 p.m. Eastern on November 1 for an anticipated fall class start. Programs are strongly encouraged to submit the Letter of Intent before the deadline to allow adequate time to complete preparation of the Candidacy Application due December 15. This letter must be signed by the chief executive officer of the sponsoring institution(s). The Letter of Intent: (1) declares the intention of the institution(s) to develop and seek accreditation for the occupational therapy or occupational therapy assistant program; (2) requests entry into the first step of the accreditation process for new programs; (3) provides information regarding the type and timelines of the proposed program; (4) states that the institution(s) agree not to admit students until Candidacy Status has been obtained; and (5) if offered by more than one institution (e.g., cooperative or consortium program), includes information regarding the institutional accreditation status, the role of each institution in the cooperative or consortium arrangement, how the
administration of the program will be managed, how the program will operate, and which institution(s) will grant the degree. (See “Step One: The Application Review” for specific requirements for the Letter of Intent).

Note that the program must allow sufficient time in its timeline for development to permit submission of the initial Report of Self-Study to occur after students have completed some coursework in the occupational therapy or occupational therapy assistant curriculum component.

### BY DECEMBER 15

The Candidacy Application and check for the balance of the Application Fee must be received no later than 5:00 p.m. on December 15. The Application must be signed by the occupational therapy program director, the dean or administrator overseeing the proposed program, and the chief executive officer of the sponsoring institution.

Note: A program director meeting ACOTE requirements must be hired full-time by the institution and on-site at least 1 year prior to submission of the Candidacy application. An Academic Fieldwork Coordinator meeting ACOTE requirements must be hired full-time and on-site 6 months prior to submission of the Candidacy Application. Both the program director and the academic fieldwork coordinator must be present throughout the time the program is engaged in the initial accreditation process, including the start of the first class of students, the preaccreditation review, and the initial on-site evaluation. If the program does not have a qualified program director or academic fieldwork coordinator during the initial accreditation process for new programs, the progression of the program to the next step in the accreditation process will be delayed until the requirement of having a qualified program director and academic fieldwork coordinator hired full-time and on-site can be met. Specifically, students may not begin occupational therapy coursework in a program having Candidacy Status unless there is a qualified occupational therapy program director and academic fieldwork coordinator on staff. If students have already begun the occupational therapy coursework after Candidacy Status has been granted, but prior to a decision on Preaccreditation Status, the program’s Preaccreditation Status decision will be delayed until a qualified program director and academic fieldwork coordinator are hired and on staff.

The Candidacy Application is made available to AOTA Accreditation Department staff and the designated reviewers. The reviewers assess all materials submitted and present recommendations to ACOTE for consideration at its next scheduled meeting.

### APRIL

At the ACOTE meeting, a subcommittee examines the findings of the application review team and prepares a motion regarding action on Candidacy Status and a Report of Candidacy Review. After discussion, ACOTE takes action to grant, defer action on, or deny Candidacy Status.

A statement of the action taken by ACOTE is forwarded to the chief executive officer of the sponsoring institution, the dean or administrator to whom the program director reports, and the program director. A Report of Candidacy Review that details the concerns of ACOTE is reflected in the letter. If Candidacy Status has been granted, AOTA Accreditation Department staff confirm the timeline for the preaccreditation review process, including a submission date for the initial Report of Self-Study. If action on a Candidacy Status is deferred, the program receives, along with the notification of deferral, a list of concerns identified by ACOTE in reaching their decision and a due date for submission of supplementary information that addresses the concerns.

NOTE: Should the director of a program holding Candidacy Status or Preaccreditation Status leave after the program has admitted students, but has not completed the initial on-site evaluation, the program must submit a request to proceed to the initial on-site visit. In considering the program’s request, ACOTE reviewers will determine if the program has demonstrated that it (1) has implemented steps to ensure that adequate qualified faculty have been hired to deliver the program as approved (either permanent or on an interim basis) and; (2) has made an immediate, ongoing, and reasonable good faith effort to hire a qualified program director.

### MARCH

The program director submits the initial Report of Self-Study for review by the assigned reviewers. The preaccreditation review team reviews all materials submitted and presents recommendations to ACOTE for consideration at its next scheduled meeting.
• **AUGUST**  
At the ACOTE meeting, a subcommittee examines the findings of the preaccreditation review team and prepares a motion regarding action on Preaccreditation Status and a Report of Preaccreditation Review. ACOTE then takes action to grant, defer action on, or deny Preaccreditation Status.

Following ACOTE action, a letter is emailed to the chief executive officer of the sponsoring institution, with a copy to the dean and program director, indicating action taken on the Preaccreditation Status. A Report of Preaccreditation Review that details the concerns of ACOTE is reflected in the letter. If Preaccreditation Status is granted, AOTA Accreditation Department staff arrange with the program director an appropriate date for the required on-site evaluation. If Preaccreditation Status is deferred, the program receives, along with the notification of deferral, a list of concerns identified by ACOTE in reaching their decision and a due date for submission of supplementary information that addresses the concerns. If Preaccreditation Status is denied, no further action is taken by ACOTE unless the appropriate institutional official and the program director send a Letter of Intent to proceed with the accreditation process within 30 days of receipt of notification of denial. (If Preaccreditation Status is deferred or denied, the procedures outlined in ACOTE Policy III.A.2, Step Two: Preaccreditation Review are followed).

• **NOVEMBER/DECEMBER/JANUARY**  
In preparation for the on-site evaluation, the program director supplies an update of any information previously provided for preaccreditation review. (Details regarding additional materials needed to supplement the initial Report of Self-Study are included in the Report of Preaccreditation Review). The program director will be requested to submit updated materials for review by the evaluation team at least 2 months prior to the date of the on-site evaluation.

• **JANUARY/FEBRUARY/MARCH**  
Two qualified evaluators conduct the 2½-day on-site evaluation. A summary report of the visit is made by the evaluators at the final on-site conference, and institution officials are given access to the Evaluators’ Report of On-Site Evaluation at that time. To expedite preparation of the report for ACOTE review and action, the program director is requested to submit any corrections or comments to the AOTA Accreditation Department within 1 week after the on-site evaluation. (Additional response time is available if needed).

• **APRIL**  
At its meeting, ACOTE reviews the Report of On-Site Evaluation, makes any amendments, and votes on an accreditation status for the program. If accreditation is granted and areas of noncompliance are cited in the official Report of the Accreditation Council for Occupational Therapy Education, a due date for the required Plan of Correction is established. The program will receive the letter of notification regarding the action of ACOTE within 4 weeks after the meeting.

### INITIAL ACCREDITATION FEES

Fees will be charged for each step of the three-step accreditation process. The Application Fee for review of the Candidacy Application is due as follows:

- A non-refundable deposit of $500 must be paid immediately after submission of the Letter of Intent. This deposit is applied toward the application fee.
- The balance of the application fee must be submitted prior to the due date for the Candidacy Application. The preaccreditation review fee is due at the time the initial Report of Self-Study is submitted, and the initial on-site evaluation fee is due upon receipt of the invoice after the initial on-site evaluation. An annual fee will not be billed until the first full academic year that the program has accreditation status. Information regarding current fees is located in the ACOTE Policy V.A. Fees, and appears on the ACOTE website (www.acoteonline.org).
WITHDRAWAL OF REQUEST FOR INITIAL ACCREDITATION

An institution may withdraw its request for initial accreditation of an occupational therapy educational program at any time prior to final action by ACOTE. The request for withdrawal should be in writing and signed by the program director or dean overseeing the program and the chief executive officer of the sponsoring institution and submitted to ACOTE c/o the AOTA Accreditation Department. If the program wishes to reapply for initial accreditation, applicable fees will be assessed.

INSTITUTIONAL REQUEST FOR A CHANGE IN THE INITIAL ACCREDITATION SCHEDULE

If the institution requires a revision of the schedule developed by the AOTA Accreditation Department based on the Letter of Intent, it is the responsibility of the institution to notify the AOTA Accreditation Department in writing of the request to change the schedule. Written notification is required (including the proposed new start date and graduation date for the first class of students). If there are no available slots in the desired submission cycle, the program will be placed on a waiting list for that cycle. A new schedule will be generated.

The previously submitted $500 application fee deposit will be applied toward the application fee as long as the balance of the application fee is scheduled to be paid within the next fiscal year. For example, a $500 application fee deposit paid in December 2019 (FY 2019/2020) may be applied toward an application fee due on April 15, 2021 (FY 2020/2021). Otherwise, a new $500 application fee deposit must be submitted with the request for a revision to the initial accreditation schedule.
III. A. 1. STEP ONE: THE APPLICATION REVIEW

LETTER OF INTENT

To initiate the accreditation process, a Letter of Intent, Letter of Intent Data Form, program director’s curriculum vitae (if hired), and check payable to AOTA for a non-refundable deposit of $500 (applied toward the application fee) must be submitted to ACOTE, c/o the AOTA Accreditation Department (accred@aota.org), prior to admission of the first class of students.

ACOTE will accept and review a maximum of 6 Candidacy Applications from new programs during a given cycle. The assignment of due dates for Candidacy Applications will be based on the receipt date of the Letter of Intent. (After the 6-program cap is reached, programs will be subject to the next available review cycle and planned student admission must be delayed accordingly. (See Remaining Slots for New Program Applications.)

It is suggested that Letter of Intent be submitted well in advance of the planned start date to increase the chances of entering the desired review cycle and to allow adequate time to prepare the Candidacy Application.

The Letter of Intent must be signed by the chief executive officer of the sponsoring institution(s). The Letter of Intent must:

- Declare the intention of the institution(s) to develop and seek accreditation for the occupational therapy or occupational therapy assistant program and the degree level for which accreditation is sought.

- Request entry into the first step of the accreditation process for new programs (the Application Review).

- State that the institution(s) agree not to admit students into the occupational therapy or occupational therapy assistant program until Candidacy Status has been obtained from the Accreditation Council for Occupational Therapy Education (ACOTE®).

- If offered by more than one institution (e.g., cooperative or consortium program), include information regarding the institutional accreditation status, the role of each institution in the cooperative or consortium arrangement, how the administration of the program will be managed, how the program will operate, and which institution(s) will grant the degree.

The Letter of Intent, Letter of Intent Data Form, and the program director’s curriculum vitae (if hired) must be attached to an email addressed to accred@aota.org. Upon receipt, accreditation staff will follow up regarding payment options for the $500 deposit.

In an effort to keep state occupational therapy associations informed of new applicant educational programs in their state, ACOTE notifies the appropriate state association president that a Letter of Intent has been submitted.

Please note that the initial accreditation process takes approximately 1 to 2 years to complete and the first class schedule may need to be adjusted to allow completion of the initial accreditation process prior to graduation.

Beginning with Candidacy Applications due in August 2020, ACOTE is requiring that a qualified program director must be hired full time and on-site 1 year prior to the submission of the Candidacy Application. A qualified academic fieldwork coordinator must be hired full-time and on-site 6 months prior to the submission of the Candidacy Application. At least 1 year prior to the submission date for the Candidacy Application, the program must notify the Accreditation Department (accred@aota.org) that a qualified program director has been hired full-time in order to proceed with the initial accreditation process. Otherwise, the Candidacy
Application submission slot will be made available to the first program on the waiting list or to the next Applicant program with a hired qualified program director.

Should the director of an Applicant program resign after receiving a slot for submission of a Candidacy Application, the institution must notify the Accreditation Department (accred@ota.org) that another qualified program director has been hired full-time in order to proceed with the initial accreditation process. Notification must be received within 30 days of the prior program director’s resignation or the Candidacy Application submission slot will be made available to the first program on the waiting list or to the next Applicant program with a hired qualified program director. If the institution elects to proceed with the initial accreditation process and submits notification that a program director has been hired full time and is on-site, the institution will be advised of the timeline for submission of the Candidacy Application.

**CANDIDACY APPLICATION**

Upon receipt of the Letter of Intent, data form, program director’s curriculum vitae, and deposit, AOTA Accreditation Department staff will conduct a preliminary review of the program director’s credentials, and, if acceptable, provide the program with instructions for completing the Eligibility Application in ACOTE Online (https://acote.ota.org). Once that is submitted, staff will provide the Candidacy Application and a preliminary timeline for the accreditation process.

*The Candidacy Application must be electronically signed by the occupational therapy program director, the dean or administrator overseeing the proposed program, and the chief executive officer of the sponsoring institution.* Candidacy Applications or fees received after the deadline may result in both the materials and payment being returned to the program. The program may resubmit on the next available Candidacy Application due date.

**REQUIREMENTS FOR CANDIDACY STATUS**

The program must provide all the requested information and meet the requirements of the Candidacy Application. In addition, the occupational therapy educational program must:

1. Be a new program that has been granted authorization through the governance processes of the parent institution to offer the credential for which Candidacy Status is sought.

2. Agree, as stated in the Letter of Intent, not to admit students to the occupational therapy or occupational therapy assistant program until Candidacy Status has been obtained.

3. Agree to inform students who apply to or plan to enroll in the program that it is not yet accredited and convey the implications of nonaccreditation for program graduates. (The institution may advertise its occupational therapy or occupational therapy assistant program as an Applicant program, but it must be made very clear that there is no guarantee that the program will receive Candidacy Status or be allowed to admit students). (See [ACOTE Policy VI.E. Sample Statements Regarding Accreditation Status and Use of the ACOTE Logo](https://acote.ota.org)).

*The program must describe the specific mechanisms it will use to ensure that prospective students and other relevant parties are fully and accurately informed of the program’s accreditation status and its effect on graduates’ eligibility for the National Board for Certification in Occupational Therapy certification examination and state licensure.*

4. Ensure that the balance of the application fee and the Candidacy Application are received on or before the due date. The program will not be reviewed for Candidacy Status if payment is not received by the AOTA Accreditation Department by close of business (5:00 p.m. Eastern Time) on the due date.

5. Have a full-time program director hired on-site 1 year prior to submission of the Candidacy Application as well as a full-time academic fieldwork coordinator hired and on-site 6 months prior to submission of the Candidacy Application. This must be maintained throughout candidacy and the initial accreditation process for new programs. The program must agree to delay the program’s progression to the next step in the development process until program can meet the accreditation requirement of having a full-time program director hired on-site 1 year prior to submission of the Candidacy Application as well as a full-time academic
fieldwork coordinator hired and on-site 6 months prior to submission of the Candidacy Application. Specifically, students may not begin occupational therapy coursework in a program having Candidacy Status unless there is a qualified full-time occupational therapy program director and academic fieldwork coordinator on-site.

If the program director does not have the required years of experience in a full-time academic appointment with teaching responsibilities at the time the Candidacy Application is submitted, the institution must detail plans (e.g., additional time in a full-time academic appointment with teaching responsibilities, plan for mentoring, co-teaching, additional coursework, etc.) to ensure that the program director meets the requirements prior to starting the first class of students in occupational therapy coursework.

6. Provide evidence of signed letters of intent for two Level II fieldwork placements for each student in a variety of settings consistent with the curriculum design. (The signed letters of intent are to be uploaded with the Candidacy Application for all anticipated students who will be admitted into the program during the first year. For example, if a program anticipates accepting 3 cohorts of 20 students (60 students) during the first year, the program must upload the letters of intent for 120 student placements in the Candidacy Application.)

**FEES**

An application fee must be submitted by the due date for the Candidacy Application. Information regarding current fees is located in ACOTE Policy V.A. Fees and appears in the ACOTE Accreditation section of AOTA’s Web site (www.acoteonline.org). The Candidacy Application and balance of the application fee must be received by AOTA by the close of business (5:00 p.m. Eastern Time) on the due date (or next business day if the due date falls on a weekend or holiday).

**APPLICATION REVIEW**

Upon receipt, the Candidacy Application will be reviewed by a review team. The program director may be requested to provide additional written information to the review team to clarify or enhance submitted materials. The reviewers will submit a report at the next ACOTE meeting to recommend that ACOTE grant, defer action on, or deny Candidacy Status.

**Candidacy Status Granted**

If the Candidacy Application documents that the program meets the requirements for Candidacy Status and indicates the program’s potential to achieve compliance with the Standards, the action will be to grant Candidacy Status. As soon as the institutional officials receive notification from ACOTE that the program has been granted Candidacy Status, they may admit students into the program according to the approved timeline and move on to the second step, which is the preaccreditation review. AOTA will officially list the program as having Candidacy Status.

Programs that are granted Candidacy Status may request an earlier start date for their first class of students as long as the scheduled graduation date will occur AFTER initial accreditation action by ACOTE. Requests for an earlier start date should be addressed to the Director, AOTA Accreditation Department and sent to accredit@aota.org.

Once Candidacy Status has been granted, requests to expand or significantly change the program (e.g., admit an additional student cohort, increase the number of students to be accepted each year by 25% or more from the number indicated in the program’s Candidacy Application, offer the program at an additional location by distance education, add a weekend, evening, or part-time track, etc.) require advance approval from ACOTE. The request for a significant change must include all information designated under “Significant Program Changes or Additions” in ACOTE Policy V.B.1. Additions or Changes.

**Candidacy Status Denied**

The program will be denied Candidacy Status if 1) the program does not meet the requirements for Candidacy Status, or 2) the Application does not indicate the program’s potential to achieve compliance with the Standards. If Candidacy Status is denied, the program will not be able to admit students and will not be eligible to proceed to the preaccreditation review step. The program may reapply for Candidacy Status by submitting a new Letter of Intent and starting the initial accreditation process again. The deadline for receipt of the Letter of Intent is determined by the new planned student enrollment date. Applicable fees would be assessed. Clearly delineated procedures for
programs wishing to appeal an action of Denial of Candidacy Status are described in ACOTE Policy IV.D. Appeals Process.

Action on Candidacy Status Deferred
The program’s application will be deferred if the information received from the applicant is incomplete and/or insufficient for evaluation. Supplementary information is requested for consideration at a subsequent ACOTE meeting. The program receives, along with the notification of deferral, a list of concerns identified by ACOTE in reaching their decision and a due date for submission of supplementary information that addresses the concerns. The supplementary information is reviewed at the next meeting of ACOTE, at which time a decision will be made to either grant or deny the Candidacy Status. A program may have action on the Candidacy Application deferred a maximum of two times.

TERM OF CANDIDACY STATUS

A program receiving Candidacy Status must admit students to the program within 2 years of the enrollment date indicated in the Letter of Intent or reapply for Candidacy Status. Candidacy Status cannot be renewed or extended; however, programs may reapply for Candidacy Status. Applicable fees would be assessed. A change in the timeline for initial accreditation must be requested in writing to the AOTA Accreditation Department.
III. A. 2.  STEP TWO: PREACCREDITATION REVIEW

PREACCREDITATION REVIEW

The preaccreditation review is a process used by the Accreditation Council for Occupational Therapy Education (ACOTE®) as a mechanism for providing feedback to a developing program prior to the initial on-site evaluation. A program must have obtained Candidacy Status (formerly Developing Program Status) prior to proceeding with the preaccreditation review. The granting of Preaccreditation Status indicates that, on the basis of examination of the initial Report of Self-Study and supplementary information available to the reviewers, ACOTE has determined that the program is likely to meet the ACOTE Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, a Master’s-Degree-Level Educational Program for the Occupational Therapist, or an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant if fully implemented in accordance with its plans. This is intended to provide an indication that program planning appears to be proceeding in a direction that will lead toward ACOTE accreditation. The program must allow time in its timeline for submission of the initial Report of Self-Study after the first class of students has completed some coursework in the occupational therapy or occupational therapy assistant curriculum component.

FEES

A preaccreditation review fee (payable to AOTA) must be received by the AOTA Accreditation Department prior to ACOTE scheduled action on the preaccreditation review of the program or the preaccreditation review will be cancelled. Information regarding current fees is located in ACOTE Accreditation Manual Section V.A. and appears in the ACOTE Accreditation section of AOTA's Web site (www.acoteonline.org).

THE PREACCREDITATION REVIEW

The reviewers assigned to the preaccreditation review team review the materials submitted by the program director. The program director may be requested to provide additional information to the review team to clarify or enhance submitted materials. After conducting a complete review of all submitted materials, each reviewer submits a comprehensive evaluation to the review team coordinator. A Composite Report of Preaccreditation Review is prepared by the review team coordinator for presentation to ACOTE.

ACOTE ACTION ON PREACCREDITATION REVIEW

At its next scheduled meeting, ACOTE takes one of the following actions:

- **PREACCREDITATION STATUS GRANTED**
  The proposed program would appear to meet the Standards if fully implemented in accordance with the plans of the sponsoring institution. An on-site evaluation will be conducted before the first class completes the academic curriculum.

- **PREACCREDITATION STATUS DENIED**
  One or more of the Standards are not met and there does not appear to be evidence of the ability to comply within the immediate future.
• **PREACCREDITATION STATUS DEFERRED**

Information received from the program is incomplete and/or insufficient for evaluation. Supplementary information is requested for consideration at a subsequent ACOTE meeting.

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**PROCEDURES FOLLOWING ACTION ON PREACCREDITATION REVIEW**

Following action by ACOTE relative to the granting of Preaccreditation Status, the results of the review are sent to the chief executive officer, dean or administrator to whom the program director reports, and program director. Included in this notification is a copy of the Report of Preaccreditation Review, which lists the strengths of the program and details the concerns of ACOTE.

**A. If PREACCREDITATION STATUS has been GRANTED:**

1. AOTA Accreditation Department staff contacts the program director to schedule an on-site evaluation prior to graduation of the first class. This on-site evaluation must occur while students are still on campus. A reasonable effort is made in scheduling to allow for ACOTE action on the Report of On-Site Evaluation prior to the actual graduation date.

2. Procedures for on-site evaluation are followed according to those outlined in [ACOTE Accreditation Manual Section III.A.3](#).

3. In preparation for the initial on-site evaluation, the program director may submit an update of the previously submitted initial Report of Self-Study or may submit an entirely new report. In preparing updated/new self-study materials, the program should be guided by the Report of Preaccreditation Review, as provided with the Preaccreditation Status notification.

**B. If PREACCREDITATION STATUS has been DENIED:**

1. No further action is taken by ACOTE unless the appropriate institutional official and the program director send a Letter of Intent to proceed with the accreditation process within 30 days of receipt of notification of denial.

2. At the end of the 30 days, if no request has been received from the program, the program is removed from Candidacy Status and the accreditation process for that program is considered terminated.

3. The sponsoring institution is responsible for informing the students in the occupational therapy or occupational therapy assistant program that there is no assurance that the program will be accredited prior to their graduation. Because failure to receive accreditation would affect the students' eligibility to sit for the National Board for Certification in Occupational Therapy certification examination, it is imperative that students be notified by the institution of the options for protecting certification eligibility (e.g., transfer to an accredited program).

4. The institution retains the option of proceeding with the initial on-site evaluation by notifying the AOTA Accreditation Department in writing of the intent to proceed. Should the institution choose to do so, the dates of the on-site evaluation are established as described in A.1. above. A complete updated initial Report of Self-Study must be submitted.

5. Procedures for on-site evaluation are followed according to those outlined in [ACOTE Accreditation Manual Section III.A.3](#).

6. The application review and preaccreditation review processes may be repeated. The program may submit a Letter of Intent to reenter the accreditation process from the beginning. A second application fee and preaccreditation review fee are charged. A due date for submission of new self-study materials would then be established by ACOTE. In preparing new self-study materials, the program should be guided by the Report of Preaccreditation Review, as provided with the letter of notification.

**NOTE:** There is no guarantee that the accreditation process can be repeated in time to complete accreditation action prior to the graduation of the first class of students.
C. **If ACTION has been DEFERRED ON PREACREDITATION STATUS:**

1. The program receives, along with the notification of deferral, a list of concerns identified by ACOTE in reaching their decision and a due date for submission of supplementary information that addresses the concerns.

2. The supplementary information is reviewed at the next meeting of ACOTE, at which time a decision will be made to either grant or deny Preaccreditation Status. A program may have action on Preaccreditation Status deferred only once.

3. The sponsoring institution is responsible for informing the students in the occupational therapy program that there is no assurance that the program will be accredited prior to their graduation. Because failure to receive accreditation would affect the students' eligibility to sit for the National Board for Certification in Occupational Therapy certification examination, it is imperative that students be notified by the institution of the options for protecting certification eligibility (e.g., transfer to an accredited program).

4. If the program does not respond by the due date for submission of supplementary materials (see #1 above) or if the Preaccreditation Status is denied following the second review, the program is removed from Candidacy Status and the accreditation process for that program is considered terminated.
III. A. 3.  STEP THREE: THE INITIAL ON-SITE EVALUATION

THE INITIAL ON-SITE EVALUATION

In preparation for the initial on-site evaluation, the program director may be requested to submit current information to update the initial Report of Self-Study previously submitted, including any additional materials requested in the Report of Preaccreditation Review. This material is submitted at least 2 months prior to the on-site. The members of the preaccreditation review team are generally assigned to serve as either an on-site evaluator or paper reviewer for the on-site visit.

At least two evaluators (members of ACOTE or Roster of Accreditation Evaluators) conduct the 2½-day on-site evaluation. In emergency situations when a suitable replacement evaluator cannot be located, a qualified AOTA occupational therapy staff member may serve as one of the team members with the advance permission of the program director. A summary report of the visit is made by the evaluators at the final on-site conference and institution officials are given access to the Evaluators’ Report of On-Site Evaluation at that time. To expedite preparation of the report for ACOTE review and action, the program director is requested to submit a copy of the report with any corrections or comments to the AOTA Accreditation Department within one week after the on-site evaluation. (Additional response time is available if needed.) A written response to the on-site visit may also be submitted if there are special considerations or circumstances the program director wishes to be brought to the attention of ACOTE. Additional material or documents will not be considered by ACOTE, however. ACOTE will only consider action on the program based on those materials the on-site team had the opportunity to review and discuss during the on-site visit.

ACCREDITATION ACTION

Following Accreditation Council for Occupational Therapy Education (ACOTE®) review of the Evaluators’ Report of On-Site Evaluation and any comments submitted by the program director, action is taken to grant a status of either Accreditation or Accreditation Withheld. (Descriptions of each accreditation status are provided in ACOTE Policy IV.C. Classification of Accreditation Categories) Notification of final action by ACOTE and the link to the Report of ACOTE are e-mailed to the chief executive officer, dean, and program director. The ACOTE Certificate of Accreditation (if awarded) is mailed directly to the program director. Letters containing notification of Accreditation Withheld are sent electronically, read receipt requested. Procedures for request for appeal of an ACOTE decision to withhold accreditation are found in ACOTE Policy IV.D. Appeals Process.

If ACOTE determines that further information related to the program’s compliance with the Standards is required to enable a fair decision to be made regarding the accreditation of the program, it may defer action until the information is received. ACOTE may request materials by mail or schedule a second on-site evaluation or fact-finding visit. The cost of the visit shall be borne by ACOTE.

If areas of noncompliance are identified in the Report of ACOTE, the program will be required to submit a Plan of Correction. Subsequent Progress Reports will be required until all areas of noncompliance are corrected. (See ACOTE Policy IV.E.1 and IV.E.2.)

Following action to award initial accreditation, the next on-site evaluation is scheduled 5 or 7 academic years following the initial on-site evaluation, as determined by ACOTE. Five years will be the standard number of years for initial accreditation. Seven years will be the maximum number of years for initial accreditation of a program with no areas of noncompliance.
ACOTE may extend the accreditation term awarded from 5 to 7 years for programs cited with no more than two areas of noncompliance. This decision will be based on ACOTE’s review of the Plan of Correction or Progress Report submitted by the program and a determination that the program has fully resolved all cited areas of noncompliance within 1 year of ACOTE’s accreditation action on the program’s Report of On-Site Evaluation. ACOTE will also consider any pre-existing areas of noncompliance as well as program changes that have occurred subsequent to the on-site evaluation that affect or are likely to affect the program’s full compliance with the Standards, including student learning outcomes. ACOTE may decline to extend the accreditation term of a multi-site program if one or more of the program locations was accredited for a shorter term than the primary location.
ACCREDITATION PROCESS FOR NEW PROGRAMS

III. B. INTERNATIONAL PROGRAMS

ACCREDITATION PROCESS FOR INTERNATIONAL PROGRAMS

The Accreditation Council for Occupational Therapy Education (ACOTE®) accepts applications from occupational therapy and occupational therapy assistant programs located outside the United States. Such programs are invited to submit Letters of Intent to seek ACOTE accreditation, which if granted, would allow its graduates to sit for the National Board for Certification in Occupational Therapy (NBCOT) certification examination upon meeting NBCOT’s application requirements. A maximum of four international programs will be reviewed by ACOTE per calendar year. The acceptance of applications for review will be based on the receipt date of the Letter of Intent.

Within 60 days of the Letter of Intent being received by ACOTE, the senior staff representative will notify, in writing, the appropriate government and non-governmental accreditation or quality assurance entities in the country where the program is located of the program’s intent to apply for ACOTE accreditation. The correspondence will include an overview and purposes of ACOTE accreditation and a timeline for accreditation actions. The entities will receive copies of statements of all actions taken by ACOTE regarding the program.

The steps of the accreditation process for international programs are:

- **APPLICATION REVIEW**
  
  International programs will follow the three-step initial accreditation process, which begins with submission of the Candidacy Application through ACOTE Online (https://acote.aota.org). (See ACOTE Policy III.A, Overview of the Process.) Upon review of that Application, ACOTE either grants, defers action on, or denies Candidacy Status. Although the designation “Candidacy Status” is not a guarantee of accreditation, it does indicate that the resource allocation and plan for development of the proposed program appear to demonstrate the ability to meet the Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, the Accreditation Standards for a Master’s-Degree-Level Educational Program for the Occupational Therapist, or the Accreditation Standards for an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant if fully implemented as planned. (See ACOTE Policy III.A.1. Step One: The Application Review for further detail.)

- **PREACREDITATION REVIEW**
  
  The program director (head of the department) should prepare an initial Report of Self-Study using the Self-Study tab of ACOTE Online as directed by AOTA. The report must be prepared and submitted on or before the established deadline.

  At its next scheduled meeting, ACOTE takes action to grant, defer action on, or deny Preaccreditation Status. Granting of Preaccreditation Status indicates that on the basis of the paper review of the submitted materials, ACOTE has determined that the program is likely to meet the Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, the Accreditation Standards for a Master’s-Degree-Level Educational Program for the Occupational Therapist, or the Accreditation Standards for an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant if fully implemented in accordance with its plans. (See ACOTE Policy III.A.2, Step Two: Preaccreditation Review for further detail.)

- **THE INITIAL ON-SITE EVALUATION**
  
  The initial on-site evaluation (usually 2 to 2½ days in length) is conducted by a team of at least two evaluators. Based on review of the Evaluators’ Report of On-Site Evaluation, ACOTE will either grant a status of
Accreditation or Accreditation Withheld at its next scheduled meeting. (See ACOTE Policy III.A.3. Step Three: The Initial On-Site Evaluation for further details.)

INITIAL ACCREDITATION TIMELINE

The timeline for submission of the Candidacy Application, Initial Report of Self-Study, and subsequent on-site evaluation will be established in collaboration with each program.

- **ON OR BEFORE ESTABLISHED DUE DATE**

  The Candidacy Application and check for the balance of the Application Fee must be received on or before the established due date. All documentation must be submitted in English. The Application must be electronically signed by the occupational therapy program director, the dean or administrator overseeing the proposed program, and the chief executive officer of the sponsoring institution.

- **PRIOR TO THE ACOTE MEETING**

  The Candidacy Application is made available to AOTA Accreditation Department staff and the designated reviewers. The reviewers assess all materials submitted and present recommendations to ACOTE for consideration at its next scheduled meeting.

- **AT THE ACOTE MEETING**

  At the ACOTE meeting, a subcommittee examines the findings of the application review team and prepares a motion regarding action on Candidacy Status and a Report of Application Review. After discussion, ACOTE takes action to grant, defer action on, or deny Candidacy Status.

  A statement of the action taken by ACOTE is forwarded to the chief executive officer of the sponsoring institution, the dean or administrator to whom the program director reports, and the program director. A Report of Application Review that lists the strengths of the program and details the concerns of ACOTE accompanies the letter. If Candidacy Status has been granted, AOTA Accreditation Department staff confirm the timeline for the preaccreditation review process, including a submission date for the initial Report of Self-Study. If action on a Candidacy Status is deferred, the program receives, along with the notification of deferral, a list of concerns identified by ACOTE in reaching their decision and a due date for submission of supplementary information that addresses the concerns.

- **ON OR BEFORE ESTABLISHED DUE DATE**

  The program director submits the initial Report of Self-Study on or before the established due date. All documentation must be submitted in English. The preaccreditation review team reviews all materials submitted and presents recommendations to ACOTE for consideration at its next scheduled meeting.

- **PRIOR TO THE ACOTE MEETING**

  The reviewers assigned to the preaccreditation review team will assess the materials submitted by the program. The program director may be requested to provide additional written information to the review team to clarify or enhance submitted materials. After conducting a complete review of all submitted materials, each reviewer submits a comprehensive evaluation to the review team coordinator. A Composite Report of the Preaccreditation Review Team is prepared by the review team coordinator for presentation to ACOTE.

- **AT THE ACOTE MEETING**

  At the ACOTE meeting, a subcommittee of ACOTE examines the findings of the preaccreditation review team and prepares a motion to grant, defer action on, or deny Preaccreditation Status.

  Following ACOTE action, a letter is forwarded to the chief executive officer of the sponsoring institution, with a copy to the administrator overseeing the program (if applicable) and program director, indicating action taken
on Preaccreditation Status. A Report of Preaccreditation Review that lists the strengths of the program and details the areas of concern accompanies the letter.

If Preaccreditation Status is granted, AOTA Accreditation Department staff arranges with the program director an appropriate date for the required on-site evaluation. If action on Preaccreditation Status is deferred, the program receives, along with the notification of deferral, a list of concerns identified by ACOTE in reaching its decision and a due date for submission of supplementary information that addresses the concerns. If action on Preaccreditation Status is denied, no further action is taken by ACOTE unless the appropriate institutional official and the program director send a Letter of Intent to proceed with the accreditation process within 30 days of receipt of notification of denial. (If Preaccreditation Status is deferred or denied, the procedures outlined in ACOTE Policy III.A.2, Step Two: Preaccreditation Review are followed.)

- **TWO MONTHS PRIOR TO THE ON-SITE EVALUATION**
  
  In preparation for the on-site evaluation, the program director supplies an update of any information previously provided for the preaccreditation review. (Details regarding additional materials needed to supplement the initial Report of Self-Study are included in the Preaccreditation Report.) The program director will be requested to submit updated materials to the AOTA Accreditation Department at least 2 months prior to the date of the on-site evaluation.

- **ON-SITE EVALUATION**
  
  At least two evaluators conduct the on-site evaluation. A summary report of the visit is made by the evaluators at the final on-site conference and institution officials are given a copy of the Evaluators' Report of On-Site Evaluation at that time. To expedite preparation of the report for ACOTE review and action, the program director is requested to submit a copy of the report with any corrections or comments to the AOTA Accreditation Department within 1 week after the on-site evaluation. (Additional response time is available if needed.) A written response to the on-site visit may also be submitted if there are special considerations or circumstances the program director wishes to be brought to the attention of ACOTE. Additional material or documents will not be considered by ACOTE, however. ACOTE will only consider action on the program based on those materials the on-site team had the opportunity to review and discuss during the on-site visit.

- **NEXT SCHEDULED ACOTE MEETING**
  
  At its meeting, ACOTE reviews the Report of On-Site Evaluation and any comments submitted by the program director, makes amendments if necessary, and votes to either grant or withhold accreditation. If accreditation is granted and areas of noncompliance are cited in the final Report of ACOTE, a due date for the required Plan of Correction is established. The program will receive the letter of notification regarding the action of ACOTE within 4 weeks after the meeting.

  Programs may appeal an ACOTE decision to withhold accreditation. (See ACOTE Policy IV.D. Appeals Process.)

**INTERNATIONAL ACCREDITATION FEES**

Fees for the initial accreditation of international programs will be charged as indicated in ACOTE Policy V.A. Fees.

**WITHDRAWAL OF REQUEST FOR INITIAL ACCREDITATION**

An institution may withdraw its request for initial accreditation of an occupational therapy educational program at any time prior to final action by ACOTE. The request for withdrawal should be in writing and signed by the program director overseeing the program and the chief executive officer of the sponsoring institution and submitted to the ACOTE Chairperson. If the program wishes to reapply for initial accreditation, applicable fees will be assessed.
IV. CONTINUING ACCREDITATION
IV. A. 1. THE REPORT OF SELF-STUDY

THE REPORT OF SELF-STUDY FOR CONTINUING ACCREDITATION

The Report of Self-Study documents the self-study process and findings and provides the basis for the on-site evaluation visit. Specific instructions and forms for the preparation of the report are provided in the Guide to the Report of Self-Study, available from the AOTA Accreditation Department.

All Reports of Self-Study are to be submitted electronically through the ACOTE Online portal (https://acote.aota.org). Program directors will receive an e-mail notification from the AOTA Accreditation Department as soon as the self-study module is available. The Report of Self-Study must be completed, electronically signed by the program director, administrator to whom the program director reports (dean), and CEO, then submitted by the CEO at least 3 months prior to the date of the on-site evaluation. Upon submission, access to the Report of Self-Study will be provided to the two on-site evaluators, paper reviewer, ACOTE reader, auditor (if assigned), and AOTA Accreditation Department staff.
IV. A. 2. THE ON-SITE EVALUATION

COMPOSITION OF EVALUATION TEAM

A single location on-site evaluation is conducted by a team of 2 individuals who are members of the Roster of Accreditation Evaluators (RAE). In emergency situations when a suitable replacement evaluator cannot be located, a qualified and trained AOTA accreditation staff member may serve as one of the team members with the advance permission of the program director. For occupational therapy programs, both evaluators are typically occupational therapists. For occupational therapy assistant programs, one or both evaluators may be an occupational therapy assistant. One team member is an academic educator; the other team member is a practitioner. When an on-site evaluation includes additional locations, a 2-person team is assigned to the primary location and at least 1 individual is assigned to each additional location.

Prior to the selection of the team, the program director is provided with a list of potential evaluators. This is a list of individuals representing academic education and occupational therapy practice who have been trained as accreditation evaluators. The program director is instructed to strike names of individuals who are perceived to have a conflict of interest with the program.

The on-site evaluators are selected from those remaining on the list by the ACOTE Executive Committee in collaboration with the AOTA Accreditation staff. A sincere effort is made to “match” team members to the program and institution being evaluated. Factors affecting the selection include the type of expertise needed (e.g. distance education experience), the type of institution that houses the program, the need to avoid conflict of interest, and geographic proximity. The team’s responsibility is to study the information provided concerning the educational program and the requirements for accreditation, and to carry out an objective and impartial assessment of the quality of the occupational therapy program seeking accreditation.

One of the representatives is designated as the team chairperson and serves as the official spokesperson of the team during the evaluation process, assuming primary responsibility for checking the final arrangements before the on-site evaluation; reviewing the suggested schedule and recommending changes, if appropriate; and overseeing whatever follow-up activities are indicated. For on-site evaluations to programs with multiple locations, there will be one team chairperson assigned for the on-site visit encompassing all sites.

ON-SITE EVALUATION SCHEDULE

On-site evaluations are usually scheduled for 2½ days, with visitors generally arriving the evening before the visit begins and departing in the early afternoon on the third day. Monday to Wednesday is the preferred time frame, as it allows the visitors to take advantage of the less expensive (Saturday night stay over) airfares with only one additional night’s stay.

For weekend programs or programs located on more than one campus, adjustments to the schedule are made in collaboration with the program director. Any other request to alter the length of the on-site evaluation must be submitted in writing to the ACOTE at least 9 months prior to the scheduled visit.

The program director prepares a tentative schedule for the on-site evaluation, using the sample schedule (following this section) and adjusting it to most appropriately represent the program.

The schedule should include interviews with the following individuals:

- The program director, for the purpose of mutual orientation and discussion of administrative responsibilities.
• The program director and occupational therapy faculty as a group for discussion of mission, philosophy, strategic plan, curriculum design, program evaluation, and organization of the program.

• Occupational therapy faculty members to discuss their administrative, advisory, and teaching responsibilities as related to the occupational therapy program, the objectives and content of courses, the means of evaluating student performance, and relevant plans and activities of the faculty for the future. For these interviews, the faculty may be grouped as appropriate for discussion of the curriculum content areas.

• Key faculty from other disciplines to discuss their administrative, advisory, and teaching responsibilities as related to the occupational therapy program, the objectives and content of the courses, the means of evaluating student performance, and relevant plans and activities of the faculty for the future. For these interviews, the faculty may be grouped as appropriate for discussion of the curriculum content areas.

• The academic fieldwork coordinator to determine the selection process for fieldwork placements, the extent of collaboration with fieldwork educators, and how students are monitored and advised during fieldwork.

• A representative sample of fieldwork educators from nearby facilities to give the team members an opportunity to learn firsthand the role of the fieldwork educators in the students’ educational experiences and to discuss their role in student educational experiences as well as their observations of student performance.

• Employers of program graduates to determine whether the graduates were adequately prepared for entry-level practice.

• The college/university president and/or designated administrative officer to discuss the mission of the institution and compatibility with the program’s mission.

• The administrator to whom the program director is directly responsible (e.g., dean of the school of allied health) for orientation of the team members to the university and school or college.

• Representatives from each class in the program to discuss their views of the program and courses. Each group should be scheduled separately if possible.

• Recent graduates and students in fieldwork experience settings to discuss their views of the program, courses, fieldwork experiences, and preparation for entry-level practice. Each group should be scheduled separately if possible.

The program director should arrange an effective and efficient schedule with faculty interviews arranged so that each instructor is interviewed and each Standard is addressed. Previous experience demonstrates that it is helpful in some instances for the team to have individual interviews with key instructors, and in other instances, for them to meet in groups (e.g., when several teach together). The structure of these sessions depends on faculty size and grouping for teaching. ACOTE recognizes that each program uniquely integrates the requirements of the Standards into its curriculum design and that the design should affect the schedule.

When the schedule is complete, it should indicate the name, highest degree, and title for each interviewee; the name and catalog number of the course(s) taught; and the Standard(s) being covered.

In scheduling the interviews with fieldwork educators, the program director should keep in mind that it is not necessary to have all fieldwork educators from affiliating centers present at the interview. A representative sample of local fieldwork educators is suggested. If possible, at least one fieldwork educator from each major area of practice is desirable. In addition, the fieldwork educators should represent facilities that provide both Level I and Level II fieldwork experiences.

When planning and scheduling the meeting between the on-site team and fieldwork educators and employers of program graduates, the program director should plan for approximately 1 hour of discussion. Timing should be so that it is least disruptive to the work schedules of the participants. It is usually not advisable to schedule meetings in conjunction with meals; however, a lunchtime meal may be an alternative for fieldwork educators and employers who have to travel great distances (i.e., schedule meetings for lunch and a block of time immediately following the meal).
In situations where time and distance preclude in-person interviews, the program director should consider options such as telephone interviews, conference calls to several locations where fieldwork supervisors and employers can gather easily, and teleconferences.

Students, fieldwork educators, and employers may not be knowledgeable about the accreditation process. The program director should inform them of the purpose of the visit and the interviews and the types of questions that the team might ask. Typical questions may include the following:

**To the Students:**
- How are the institutional services? Counseling? Financial aid? Health services?
- Are faculty members available on a regular basis outside of the classroom? Is there privacy for advising?
- How are the library resources and availability of materials and equipment?
- How have the liberal art courses been? Availability? Has the content prepared you for occupational therapy courses?
- How do you like the sequence of courses? Does it make sense?
- How do you like the evaluation process for the program? What do you do? Any changes that you have helped to facilitate?

**To the Fieldwork Educators and Employers:**
- How are fieldwork placements made? What is the selection process?
- How do you ensure a cross section of client and facility experiences?
- How do you ensure that fieldwork educators are familiar with the program’s objectives for fieldwork experiences?
- Describe your due process system for a student failing a Level I or Level II fieldwork experience.
- Do you feel program graduates were adequately prepared for entry-level practice?

In addition to the interviews, 1 hour and 45 minutes should be set aside on the first day for review of student records; evaluations of student performance (including examinations); fieldwork data; and published documents providing a description of the program, selection and retention information, rights and appeal mechanisms, institutional safety policies, and so on. Time should also be allotted for a tour of laboratories and the library. A short period should be left free for the team to review materials at the end of each day, and no meetings or activities of any nature should be scheduled for the evenings.

On the morning of the third day, the schedule should also allow time for the team to meet with the program director to review their findings and complete the report.

The tentative on-site schedule should be uploaded to the ACOTE Online (https://acote.aota.org/login) Self-Study Home tab at least one month prior to the on-site evaluation. Should there be suggestions for change of the tentative schedule, the team chairperson will submit them to the program director for consideration.

The program director should finalize the schedule with the on-site evaluation team chairperson prior to confirming appointments because the team chairperson may wish to make adjustments to the schedule. After the team chairperson has been contacted and the schedule is confirmed, a final copy should be uploaded to the ACOTE Online (https://acote.aota.org/login) Self-Study Home tab prior to the on-site evaluation.
SAMPLE SCHEDULE

Please note: This schedule is only a sample to facilitate planning for the on-site visit. Program directors, in consultation with the on-site team chairperson, may modify the schedule as institutional, faculty, and on-site team member needs dictate. Please see notes at the end of the schedule for other details.

FIRST DAY

8:00 - 8:30 a.m. Team with program director.

8:30 - 10:00 a.m. Team with program director and faculty: Overview of mission, philosophy, strategic plan, curriculum design, and program evaluation system of the occupational therapy/therapy assistant program.

10:00 - 10:15 a.m. Break.

10:15 - 12:00 noon Team reviews student records* and evaluations of student performance, including classroom assignments, examinations, fieldwork data, graduate and employer survey data, and certification examination results. Program director should have available student outcome data, program materials, meeting minutes, curricular files, selection and retention information, rights and appeals mechanisms, institutional safety policies, and so on. *(Team may divide for this session).

*To comply with HIPAA regulations, please ensure that no identifiable patient health information is included in student files.

12:00 - 1:00 p.m. Team alone for lunch.

1:00 - 2:45 p.m. Team meets with individual faculty/groups of faculty in the order courses occur in the curriculum. The team should experience the content and sequence as would the students in the program.

2:45 - 3:00 p.m. Break.

3:00 - 3:45 p.m. Team meets with the academic fieldwork coordinator.

3:45 - 4:45 p.m. Team meets with recent graduates and/or Level II fieldwork students. *(A breakout room may be required if team decides to divide).*

4:45 - 5:45 p.m. Team meets with Level I and II fieldwork educators and employers of program graduates (6-10 of each). Academic fieldwork coordinators are not expected to be present.

*(Consider options for scheduling interviews with fieldwork educators and employers, especially in situations where time and distance preclude in-person interviews. Such options may include telephone interviews, conference calls to several locations where fieldwork supervisors and employers can gather easily, and teleconferences.)*

5:45 - 6:00 p.m. Team wraps up the day with program director.

SECOND DAY

8:30 - 9:00 a.m. Team with program director

9:00 - 9:30 a.m. Team with college/university president and/or designated administrative official, e.g., vice president for academic affairs, dean of medical school. *(Be sure to allow for travel time in the schedule if office is located at a distance).*

9:30 - 10:00 a.m. Team meets with administrator to whom the program director is directly responsible
(e.g., dean of the school of allied health).

10:00 - 10:15 a.m.  Break.

10:15 - 11:00 a.m.  Team meets with students—concurrent groups with 6-10 representatives from each level.

11:00 - 12:00 noon  Team tours college, teaching/learning areas, laboratories, faculty offices, library/resource center, and other areas as necessary (i.e., admissions office, learning center, etc.)

12:00 - 1:00 p.m.  Team alone in working lunch.

1:00 - 3:30 p.m.  Individual faculty conferences as requested by team chairperson and further record review as necessary.

3:30 - 4:30 p.m.  Team prepares ROSE report.

4:30 - 5:00 p.m.  Team meets with program director.

THIRD DAY

8:00 - 9:00 a.m.  Team finalizes the Report of On-Site Evaluation (ROSE) and meets with the program director to review it. Wrap-up conference with program director.

9:00 - 10:00 a.m.  Team discusses program enhancement ideas with the program director and faculty as needed.

10:00 - 10:30 a.m.  Team presents final report to the president (or designated representative), dean, program director, and faculty. Students and others interested may attend at the invitation of the program director. The report will be presented electronically, so it is helpful if an LCD projector and screen is available for the exit conference.

ADDITIONAL NOTES TO CONSIDER:

- The optimum number of individuals available for interview by the on-site team for each meeting is 10 or more. Please note that if the number falls below 6, there is potential that the on-site may need to be rescheduled.

- It is helpful to have a laptop computer and printer available to the team for all days of the on-site visit.

- Please prepare a tentative list of individuals (in a Word document) who will be interviewed as a part of the schedule. Full names, credentials, and titles are helpful since these names will be included on the Evaluators’ Report of On-Site Evaluation. Although changes may occur, having a tentative list facilitates the process for the team. The list of fieldwork educators should include the facility in which they work. It would also expedite the preparation of the final report if this list was made electronically available to the on-site team chairperson on the morning of the first day of the site visit.

- To assure reasonable representation of participants from key constituent groups, consider alternatives to the above schedule if necessary. Consult with the team chairperson regarding scheduling alternatives.

ARRANGEMENTS FOR THE ON-SITE TEAM

Travel

The program director is asked to furnish local transportation information to the team (i.e., best method of reaching the institution, specific routes for those driving, recommendations regarding renting a car, taking a taxi, using public transportation, etc.). Team members will make their own travel arrangements and notify the program director of their plans and schedules.
Accommodations

The program director is asked to make room reservations for the on-site team at least 3 months prior to the on-site at a convenient, moderately priced hotel or motel. Because the team generally works in the room during the evenings, it is helpful if the team chairperson’s room has a table or desk or the hotel has an alternate work area. Program directors will be notified by AOTA Accreditation staff of the evaluators’ preference for single or double rooms.

Reservations should be made for a minimum of three (3) nights, commencing the day before the on-site evaluation is scheduled to begin. The on-site team may request an additional night depending on travel arrangements. When selecting a hotel for the on-site team, program directors are asked to select one that is moderately priced, but safe, clean, and comfortable.

Confirmation of reservations with the name, address, and telephone number of the hotel or motel should be sent to each team member and a copy to AOTA Accreditation staff. AOTA and on-site evaluators are responsible for all of the team’s expenses (i.e., travel, hotel, and meals). Reimbursement of any expenses incurred by the team is handled directly through AOTA. The host school does not pay for any of the team’s expenses as those costs are incorporated into the annual accreditation fee.

Telephone Contacts

Team members and AOTA Accreditation staff should be sent the office and home telephone numbers of the program director, or another number for weekends and evenings, in the case of an emergency prior to the on-site visit.

In addition, the program director is asked to furnish team members and AOTA Accreditation staff with telephone numbers at which the team members may be reached in case of emergency during the visit.

Meeting Room

It is extremely helpful to have a secure room assigned to the team. Arrangements should be made for all interviews and conferences to be held there, with the exception of those with the president and/or dean. In this way, time is not lost in moving about. This room should be equipped with adequate lighting, a large table, chairs, a telephone, and light refreshments. If telephone interviews are scheduled as part of the on-site evaluation, please ensure that there is a speakerphone available and that any codes, passwords, or special dial features are made known to the team.

Preparation of the Report of On-Site Evaluation

The Report of On-Site Evaluation (ROSE) is prepared while the on-site is taking place. The on-site team often prefers to have a laptop and printer available for their personal use while conducting the on-site to prepare the ROSE. It is requested that the program director communicate with the chairperson of the on-site team prior to the visit to determine the need for computer and/or printer availability.

THE ON-SITE EVALUATION

The well-planned on-site evaluation visit usually proceeds smoothly. The team generally meets with the program director briefly at the beginning and end of each day for a brief report on their progress, needs, concerns, and so on. The team chairperson keeps the program director apprised of any additional information that the team determines it needs or any changes desired in the schedule (e.g., to pursue a particular area of concern).

The Interviews

The evaluators will conduct interviews throughout the on-site visit and will use their observations on the following points to contribute to their final decisions relative to compliance with the Standards:

1. The degree of support from the administration for the occupational therapy program.
2. The degree of support from the institutional teaching faculty for the occupational therapy program.
3. The level of responsibility afforded the program director.
• for faculty selection, development, and retention;
• for budget development and control; and
• for program development, general effectiveness, and evaluation.

4. The program director’s and faculty’s understanding and ability to articulate the
   • program’s mission (goals, strategic plan), and
   • institution’s mission (goals, strategic plan).

5. The faculty’s understanding and ability to articulate the program’s
   • philosophy,
   • strategic plan,
   • curriculum design,
   • course objectives, and
   • integration of fieldwork into the curriculum.

6. The faculty’s understanding and ability to articulate program evaluation emphasizing student outcomes.

7. The students’ ability to express their perception of their roles as therapists or assistants and their values and attitudes toward the profession.

8. Appropriate opportunities for fieldwork experience during and following the didactic program.

9. Future plans for the occupational therapy program:
   • systematic and periodic program evaluation,
   • continuing professional development, and
   • support from the administration.

THE EXIT CONFERENCE

On the third morning, prior to exit (final) conference, the team meets in executive session to review its findings and draft the Evaluators’ Report of On-Site Evaluation. Following this, generally 10:00-11:00 a.m., a summation conference is held with the chief executive officer of the institution (or designated representative) and the program director. At this time, the on-site team presents its findings. Other administrative officers, faculty, fieldwork educators, employers, and students may be present at the invitation of the program director or designee.

The team’s exit report is based on the Evaluators’ Report of On-Site Evaluation and includes

• major strengths of the program,
• suggestions for enriching or broadening the program, and
• areas of noncompliance with the Standards.

Subsequent procedures leading to final action on the program are described. It should be noted that the Evaluators’ Report of On-Site Evaluation is subject to modification by ACOTE.

Following the exit conference, an electronic copy of the Evaluators’ Report of On-Site Evaluation (ROSE) is left with the program director with a request that any factual errors in the report be indicated. A written response to the on-site visit may be submitted if there are special considerations or circumstances the program director wishes to be brought to the attention of ACOTE. Additional material or documents will not be considered by ACOTE, however. ACOTE will only consider action on the program based on those materials the on-site team had the opportunity to review and discuss during the on-site visit. To expedite preparation of the report for ACOTE review and action, the program director is requested to submit any corrections or comments regarding the report to the AOTA Accreditation Department within 1 week after the on-site evaluation. (Additional response time is available if needed). This information is shared with ACOTE prior to action. If no corrections are to be made, the AOTA Accreditation staff should be notified of this fact so that the review process may proceed.
PROCEDURES FOR EMERGENCIES DURING ON-SITE EVALUATIONS

In the event that an emergency situation arises during the on-site evaluation or an on-site evaluator is for any reason unable to complete his or her team responsibility, the team chairperson will meet with the program director and appropriate administrators to determine if the on-site evaluation should continue or be terminated and rescheduled.

- If the evaluation team chairperson determines that the evaluation process could satisfactorily continue and be completed and institutional personnel agree, the on-site evaluation will be continued.

- If the evaluation team chairperson determines that the evaluation process has been too seriously affected to continue and institutional personnel agree, the on-site evaluation will be terminated and rescheduled.

If circumstances call for additional consultation before reaching a final decision, the team chairperson will contact the ACOTE Chairperson, Vice Chairperson, and/or senior AOTA Accreditation staff. Such circumstances should be documented in the Report of On-Site Evaluation (ROSE).

PROGRAM SITE VISIT QUESTIONNAIRE

Following the on-site evaluation visit, the program director, dean, and chief executive officer are asked to complete a Web-based Program Site Visit Questionnaire (PSQ) regarding the accreditation process (available on the “Accreditation Surveys, Forms, and Templates” section of the ACOTE Web page [www.acoteonline.org]). This questionnaire is the primary mechanism for ongoing monitoring of the perceptions of the academic community regarding the ACOTE accreditation process and its value to the program and the institution. Information from these questionnaires is compiled and used in modifying accreditation procedures. A candid response is therefore appreciated. The completed questionnaires are not seen by ACOTE prior to its taking final action on the program.

ACOTE ACCREDITATION ACTION

Unless deferred, accreditation action on the Report of On-Site Evaluation is taken by the ACOTE at the next scheduled meeting following the visit. Within 4 weeks of the ACOTE meeting, the chief executive officer, dean, and program director are sent an electronic copy of the action letter which includes notification of the accreditation status accorded to the program, a Certificate of Accreditation (if awarded), and the final Report of the Accreditation Council for Occupational Therapy Education. It should be noted that the Report of the Accreditation Council for Occupational Therapy Education may differ from the Evaluators’ Report of On-Site Evaluation presented at the conclusion of the visit. For example, the ACOTE may act to change one or more “Suggestions” to “Areas of Noncompliance” or vice versa based on its analysis of the findings. If areas of noncompliance were identified in the final report, the program will be required by ACOTE to submit a Plan of Correction by a specified date, usually 2½ months after the ACOTE meeting. (See ACOTE Policy IV.E.1. Plans of Correction.)
CONTINUING ACCREDITATION

IV. A. 3. ACCREDITATION ACTIONS

ACCREDITATION ACTION AND TERM OF ACCREDITATION

Following Accreditation Council for Occupational Therapy Education (ACOTE®) review of the Evaluators’ Report of On-Site Evaluation and any comments submitted by the program director, action is taken to grant Accreditation, Probationary Accreditation, or Accreditation Withdrawn. (Descriptions of these accreditation statuses are provided in the ACOTE Policy IV.C. Classification of Accreditation Categories.)

At the time of ACOTE action, ACOTE awards an accreditation period based on the following criteria:

- 5-year review cycles are given to programs that are reaccredited, but raise significant concerns as determined by ACOTE;
- 7-year review cycles are the standard number of years for reaccreditation; and
- 10-year review cycles are granted to those programs that have no areas of noncompliance and have demonstrated exceptional educational quality.

Programs cited with no more than two areas of noncompliance that are given a 7-year accreditation term may be granted an extension to a 10-year term by ACOTE. This decision will be based on ACOTE’s review of the Plan of Correction or Progress Report submitted by the program and a determination that the program has fully resolved all cited areas of noncompliance within 1 year of ACOTE’s accreditation action on the program’s Report of On-Site Evaluation. ACOTE will also consider any pre-existing areas of noncompliance as well as program changes that have occurred subsequent to the on-site evaluation that affect or are likely to affect the program’s full compliance with the Standards, including student learning outcomes. ACOTE may decline to extend the accreditation term of a multi-site program if one or more of the program locations was accredited for a shorter term than the primary location.

Notification of final action by ACOTE and the link to the Report of ACOTE are e-mailed to the chief executive officer, dean, and program director. The ACOTE Certificate of Accreditation (if awarded) is mailed directly to the program director. Letters containing notification of a status of Probationary Accreditation, Accreditation Withheld, or Accreditation Withdrawn are sent electronically, read receipt requested. Procedures for request for appeal of adverse ACOTE actions are found in ACOTE Policy IV.D. Appeals Process.

OPTION FOR DEFERRAL

If ACOTE determines that further information related to the program’s compliance with the Standards is required to enable a fair decision to be made regarding the accreditation of the program, it may defer action until the information is received. ACOTE may request materials by mail or schedule a second on-site evaluation or fact-finding visit. ACOTE may grant an extension of the period for correction of areas of noncompliance to allow a fact-finding visit or on-site evaluation to be conducted prior to taking action. The cost of the visit shall be borne by ACOTE.

SUBSEQUENT REPORTS

If areas of noncompliance are identified in the Report of ACOTE, a Plan of Correction and subsequent progress reports are required. (See ACOTE Policy IV.E.1. Plans of Correction). Areas of noncompliance must be corrected within the period of time specified by the U. S. Department of Education (USDE) criteria:
- 12 months if the program is less than 1 year in length;
- 18 months if the program is at least 1 year in length, but less than 2 years in length; or
- 2 years if the program is at least 2 years in length.

OPPORTUNITY FOR WITHDRAWAL OF APPLICATION

The sponsoring institution has the option to withdraw its request for continuing accreditation at any time prior to ACOTE final action. Programs selecting this option relinquish the opportunity to appeal that is provided to programs receiving a status of Accreditation Withdrawn--Involuntary.
Administrative requirements for maintaining accreditation are detailed in Standard A.1.5. of the Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, Accreditation Standards for a Master’s-Degree-Level Educational Program for the Occupational Therapist, and Accreditation Standards for an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant.

All reports and documentation must be submitted in English.

In summary, to maintain accreditation, the sponsoring institution or program must do the following.

- Inform the Accreditation Council for Occupational Therapy Education (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., Annual Report, Interim 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.

*Thirty days is the maximum amount of time for programs to notify ACOTE of a change in program director. However, it is ACOTE’s expectation that institutions will notify the AOTA Accreditation Department immediately of a vacancy in the program director position and provide information regarding the appointment of an interim, acting, or permanent program director. The information to be submitted is detailed in ACOTE Policy IV.E.4, Program Director Changes.

ACOTE may require additional reports or schedule a fact-finding visit if indicated by information provided in reports, as a result of a formal complaint (see ACOTE Policy V.B. Procedure for Complaints), or a potential violation of ACOTE’s Doctrine of Integrity Policy (see ACOTE Policy VII. Doctrine of Integrity.) A fact-finding visit may also be scheduled if ACOTE is unable to determine a program’s compliance with one or more Standards through written documentation and finds it necessary to obtain information via on-site data gathering.

The cost of the fact-finding team’s travel and per diem will be divided equally between ACOTE and the educational program.
CONTINUING ACCREDITATION

IV.A. OVERVIEW OF THE PROCESS

CONTINUING ACCREDITATION

Once awarded, accreditation continues until a reevaluation results in its reaffirmation or until it is withdrawn at the request of the institution or by the Accreditation Council for Occupational Therapy Education (ACOTE®) for cause. (See ACOTE Policy IV.A.3. Accreditation Actions.) Established occupational therapy educational programs are reevaluated on a 5-, 7-, or 10-year cycle. The program director is notified 1 year in advance of the on-site year and is provided with the necessary information and links to complete the Report of Self-Study. The specific dates for the visit are established in collaboration with the program director after the selection of the visiting team.

At the time of ACOTE action on the Report of On-Site Evaluation, ACOTE awards an accreditation period based on the following criteria:

- 5-year review cycles are given to programs that are reaccredited, but raise significant concerns as determined by ACOTE.
- 7-year review cycles are the standard number of years for reaccreditation.
- 10-year review cycles are granted to those programs that have no areas of noncompliance and have demonstrated exceptional educational quality.

Programs cited with no more than two areas of noncompliance that are given a 7-year accreditation term may be granted an extension to a 10-year term by ACOTE. This decision will be based on ACOTE’s review of the Plan of Correction or Progress Report submitted by the program and a determination that the program has fully resolved the cited areas of noncompliance. ACOTE will also consider any pre-existing areas of noncompliance or program changes that have occurred subsequent to the on-site evaluation that affect or are likely to affect the program’s full compliance with the Standards. This extension option is only available within 1 year of ACOTE’s accreditation action on the program’s Report of On-Site Evaluation.

THE SELF-STUDY PROCESS

At the heart of the continuing accreditation process is the self-study. The U.S. Department of Education (USDE) mandates inclusion of self-study as a requirement for accreditation. Self-study in this context refers to a formal process during which an educational program critically examines its structure and substance, judges the program’s overall effectiveness relative to its mission and success with respect to student achievement, identifies specific strengths and weaknesses, and indicates a plan for necessary modifications and improvements. The process should flow naturally out of the ongoing program evaluation. It should include a consideration of external factors influencing educational directions as well as an assessment of the extent to which the program is in compliance with established accreditation standards.

ACOTE does not specify details regarding how the self-study process is to be conducted. However, it does have the following expectations:

- The self-study process precedes the preparation of the report. Although the requirements of the final report should be considered in the plan for the study, the initial focus should be on the evaluative process, not on the document.
The self-study process should be comprehensive, examining in sufficient detail all aspects of the program so that eventual assessment of compliance with the Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, Accreditation Standards for a Master’s-Degree-Level Educational Program for the Occupational Therapist, or Accreditation Standards for an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant can be accomplished. Regardless of the delivery model of the educational program (i.e., consortium, distance education, etc.), compliance with the Standards must be documented.

The self-study process begins with a well-thought-out plan that includes

- objectives,
- identification of resources,
- individuals to be involved and delegation of responsibilities,
- timeline, and
- reporting mechanisms.

The plan should address how existing information from ongoing evaluation will be included.

The self-study process is evaluative rather than descriptive. It should include comments, suggestions, and recommendations on program change, particularly the resolution of current problems or weaknesses that are cited in the Report of Self-Study, and should offer predictions or plans for future change.

The self-study process involves the entire faculty of the program. Although it is recognized that a small committee or a single individual is generally assigned responsibility for overseeing the process and the preparation of the report, it is expected that the process include input from all faculty and from administration, students, graduates, and fieldwork educators.

Further guidelines are provided in the Guide to the Report of Self-Study, available from the AOTA Accreditation Department. All reports and documentation must be submitted in English.

It is the self-study process from which many of the benefits of accreditation for the program derive. The report should be perceived not as the end or goal, but as the means of communicating the results of the self-study to ACOTE.
DESCRIPTION OF THE PROCESS

IV. B. 1. ADDITIONS OR CHANGES

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<tr>
<th>MINOR AND SIGNIFICANT PROGRAM CHANGES</th>
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<tr>
<td>When an institution having an entry-level occupational therapy or occupational therapy assistant educational program makes a decision to change the program, the following review procedures apply:</td>
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- **Minor Program Changes or Additions**
  Minor program changes or additions must be submitted through ACOTE Online ([https://acote.aota.org](https://acote.aota.org)) using the “Substantive Change” tab. This information will be forwarded to the ACOTE reviewers assigned to the program and the program will be notified if any additional information is required. There is no separate accreditation action necessary for such changes. Minor program changes include the following:
  - admission requirements and selection criteria
  - reduction in frequency of student admissions (e.g., not admitting students for one admission cycle or reducing admissions from once a year to every other year)
  - elimination of an approved track
  - changes in how the program is offered (e.g., move from a combined baccalaureate/master’s-degree-level program to a professional entry-level master’s program).
  - changes to the curriculum delivery model or content for less than one third of courses (e.g., change from in-classroom to distance education delivery model)
  - curricular adjustments
  - changes between quarter/semester systems
  - move to new facilities within the current administrative unit on the same campus (include information on how the change of location affects compliance with the Standards, such as the impact on classrooms, laboratory, storage, offices, and space for private advising of students)
  - physical resources
  - changes to the institution’s name or the table of organization
  - transfer of program sponsorship/ownership with the program remaining within the current facility with no change in resources or delivery model (notification must be submitted within 30 days of the change and include details of the change, the impact on the program, and the regional/national accreditation status of the new sponsoring institution. NOTE: If the new sponsoring institution plans to relocate the program to a different institution within the next 5 years, it must apply for separate accreditation through the initial accreditation process described in ACOTE Manual Policy III.A. Overview of the Process.

Minor changes will be processed and reviewed by the assigned ACOTE reviewers at six points during the year. Minor changes do not require approval prior to implementation by the program. The following deadlines should be used for submitting a Minor Program Change:

- January 10th
- March 10th
- May 10th
- July 10th
- September 10th
- November 10th

Note that changes to program officials (CEO, Dean, Academic Fieldwork Coordinator, or Student Occupational Therapy Association Advisor) should be reported by using the designated Program Data Forms available in the Accreditation Surveys, Forms, and Templates section of the ACOTE webpage and not as a minor change.

Program director changes should be reported as directed by ACOTE Policy IV.E.4. Program Director Changes.
Significant Program Changes or Additions

Significant program changes or additions require ACOTE review and approval prior to the admission of students into the new/changed program. The following are considered to be significant program changes or additions:
- addition of a student cohort
- addition of a weekend or evening cohort
- addition of an extended or part-time cohort
- addition of a distance learning cohort*
- a planned headcount increase of 25% or more since the last on-site visit
- increase in frequency of student admissions
- changes to the curriculum delivery model or content for more than one third of courses (e.g., change from in-classroom to distance education delivery model)
- addition or change of participating colleges in an accredited consortium
- move to new facilities within the current administrative unit, but at a different campus (include information on how the change of location affects compliance with the Standards, such as the impact on classrooms, laboratory, storage, offices, and space for private advising of students)

Programs must submit a request for approval of a significant change through ACOTE Online (https://acote.aota.org) using the “Substantive Change” tab. The request must include the following information:
- the proposed addition or change;
- the requirements for institutional/state approval of the addition or change and the status of that approval;
- the month/year the proposed addition or change would occur; and
- the accommodations to support the addition/change, including implications for 1) faculty, mentors, or other support staff composition, 2) resources, 3) budget, 4) curriculum design, 5) admission information and criteria, 6) course sequence, 7) course content, and 8) fieldwork.

*If the proposal includes the addition of a distance learning or online cohort, the program must also address, in depth, Standard A.2.19 which states:

If the program offers distance education, it must include
- a process through which the program establishes that the student who registers in a distance education course or program is the same student who participates in and completes the program and receives academic credit;
- technology and resources that are adequate to support a distance-learning environment; and
- a process to ensure that faculty are adequately trained and skilled to use distance education methodologies.

The program must also describe how the proposed change reflects the philosophy of learning (Standard A.6.5) the mission of the institution (Standard A.6.6), and the curriculum design (Standard A.6.7). In addition, any other Standards that are impacted by this change must be addressed, including but not limited to:

| A.2.24. | Equipment and Supplies |
| A.2.25. | Evaluative and Treatment Methodologies |
| A.2.27. | Instructional Aids and Technology |
| A.3.6. | Evaluation Content and Methods |
| A.3.7. | Evaluation on a Regular Basis |
| A.3.8. | Student Support Services |
| A.4.1. | Accurate Program Publications |

The following deadlines should be used for submitting a Significant Program Change to ACOTE:
- February 20th (for review at the April ACOTE meeting)
- June 20th (for review at the August ACOTE meeting)
- October 20th (for review at the December ACOTE meeting)

Upon review of the submitted information by ACOTE, the program will be notified whether the accreditation status of the existing program will accrue to the addition or change or if additional information is required. The accreditation status of the existing program will not accrue to the additional/changed program until ACOTE
accreditation review procedures are successfully completed. When considering significant change requests, ACOTE will consider any outstanding areas of noncompliance. ACOTE may also elect to conduct an abbreviated on-site evaluation to assess the significant change prior to final approval.

### DETERMINATION OF A MINOR CHANGE OR SIGNIFICANT CHANGE

If it is not clear whether the change is classified as a minor change or a significant change, the program must submit a letter to the ACOTE Chairperson, c/o the AOTA Accreditation Department, that requests clarification. The letter must be signed by the program director and the administrator to whom the program director reports and may be sent electronically to accred@aota.org. The letter must include information about the proposed addition or change, the requirements for institutional/state approval of the addition or change, and the status of that approval. That information will be reviewed by the ACOTE Executive Committee and a determination of the applicable policy will be made and communicated to the program.

### ADDITIONS/CHANGES REQUIRING SEPARATE ACCREDITATION ACTION

In any of the following situations, programs must apply for separate accreditation through the initial accreditation process described in ACOTE Manual Policy III.A. Overview of the Process:

1. An institution with an accredited occupational therapy master’s or doctoral program seeks to add a new occupational therapy assistant program.
2. An institution with an accredited occupational therapy master’s program seeks to add a new occupational therapy doctoral program.
3. An institution with an accredited occupational therapy assistant program seeks to add a new occupational therapy master’s or doctoral program.

### NEW ADDITIONAL LOCATIONS

Accredited occupational therapy and occupational therapy assistant programs that are planning to seek accreditation for an additional location must follow the initial accreditation process described in ACOTE Manual Policy IV.B.2, Additional Locations.
ADDITIONAL LOCATIONS

Programs that are planning an additional location (e.g., satellite location) must follow a separate accreditation procedure for the new location. ACOTE review and acceptance of the Candidacy Application for an Additional Location is required prior to the admission of students into the additional location. The accreditation status of the existing program does not accrue to the additional location until the procedures for accreditation of an additional location are successfully completed.

Programs are limited to 4 additional locations under the accreditation status of a primary location. This policy was implemented to ensure the quality of the education provided at each accredited location under the direction and leadership of one program director. Programs seeking accreditation for more than 4 additional locations must identify a new primary location and apply as a new applicant program through the 3-step initial accreditation process.

DEFINITIONS

Additional Location:
1. A facility that is geographically separated from the primary location that offers a significant portion of the didactic and experiential component of the educational program by faculty at the primary location.
2. The degree is granted by the institution housing the ACOTE-accredited program (the primary location).
3. The additional location must demonstrate the same institutional sponsorship and governance as the accredited program.
4. Students from the additional location must graduate with a degree awarded from the accredited program’s sponsoring institution.
5. The additional location has the same programmatic mission, vision, philosophy, curriculum design, strategic plan, and course objectives as the accredited primary location.
6. The program director must be responsible for management and administration of the additional site as required by the ACOTE Standards, including planning, evaluation, budgeting, selection of faculty and staff, maintenance of accreditation, and commitment to strategies for professional development.
7. There is a site coordinator on-site at the additional location who meets the requirements of the ACOTE Standards.
8. Faculty, resources, and operational policies (e.g. admissions, budget, etc.) are shared.
9. The faculty at the additional location must be considered to be faculty of the accredited program.
10. The faculty at the additional location must report to the program director.
11. The additional location is within the limit of four locations per accredited primary location.

Programs that are self-contained with separate faculty, admissions, facilities, etc. that teach an identical curriculum are considered to be separate programs. As such, the institution must apply for independent accreditation for the program per the accreditation process for new programs. (See ACOTE Policy III.A. Overview of the Initial Accreditation Process).

All proposed new additional locations must meet the following criteria:
1. Additional locations may only be established at ACOTE-accredited programs holding no areas of noncompliance. Applicant or candidate programs are not eligible to submit a Candidacy Application for an Additional Location.
2. Additional locations may only be established at ACOTE-accredited programs demonstrating successful student learning outcomes (e.g., Level II fieldwork pass rate, NBCOT certification exam pass rate, job placement rate, employer satisfaction, etc.).
3. The program must provide evidence of all necessary approvals to offer the new location from the institution, the educational licensing and/or governing board(s) of the state(s) in which the program is to be offered, and the institutional accrediting body. In cases where no approval is needed, statements to that effect from the relevant body are required.

4. The site coordinator must be hired and physically located at the additional location prior to the start of coursework by the first class of students who have been accepted into the occupational therapy or occupational therapy assistant program.

### ACCREDITATION PROCESS FOR NEW ADDITIONAL LOCATIONS

Due to the wide variations possible for additional location models, a multi-step approval and application process will be utilized as outlined below.

### STEP 1: INITIAL PROPOSAL FOR AN ADDITIONAL LOCATION

Accredited programs seeking accreditation for an additional location must upload an initial proposal to ACOTE through ACOTE Online (https://acote.aota.org) using the “Substantive Change” tab, at least 12 months prior to the time the first group of students are projected to enter the program. (NOTE: It is imperative that the evaluation process be completed prior to the graduation of the first class of students).

The initial proposal must be signed by the chief executive officer and by the occupational therapy or occupational therapy assistant program director and include the following information:

1. A brief description of the proposed additional location, the planned arrangement, and the anticipated effect(s) on each program/institution.

2. Timeline information including the month and year occupational therapy or occupational therapy assistant students are projected to enter the program at the new location, the month and year the first class is projected to begin Level II fieldwork, the month and year the first class is projected to begin the doctoral capstone experience (OTD only), and the month and year the first class is projected to graduate. An Additional Location Data Form must also be completed and submitted.

3. Documentation that the program will meet the following requirements:
   a. The primary location that is applying for accreditation of a new location is an ACOTE-accredited program holding no areas of noncompliance. (Applicant or candidate programs are not eligible to submit a Candidacy Application for an Additional Location).
   b. The primary location demonstrates successful student learning outcomes (e.g., Level II fieldwork pass rate, NBCOT certification exam pass rate, job placement rate, employer satisfaction, etc.).
   c. The new location demonstrates the same institutional sponsorship and governance as the accredited program.
   d. Evidence is provided that the primary location has obtained of all necessary approvals to offer the new location.
   e. Students from the additional location will graduate with a degree awarded from the accredited program’s sponsoring institution.
   f. The program director of the primary location will be responsible for the administration and operation of all locations offered by the accredited program.
   g. The site coordinator will be hired and physically located at the additional location prior to the start of coursework by the first class of students who have been accepted into the occupational therapy or occupational therapy assistant program.
   h. The faculty at the additional location will be considered to be faculty of the primary location.
   i. The faculty at the additional location will report to the program director of the primary location.
   j. The additional location will have the same programmatic mission, vision, philosophy, curriculum design, strategic plan, and course objectives as the primary location.

Upon receipt of the initial proposal, the two assigned ACOTE reviewers (usually the same reviewers assigned to the existing program) will complete an online review of the proposal and decide whether:
1) the initial proposal meets the criteria for establishment of an additional location and approve the program to submit a Candidacy Application for an Additional Location, or
2) the initial proposal does not meet the criteria for establishment of an additional location.

If the initial proposal meets the criteria, the institution will be provided with a due date for the Candidacy Application for an Additional Location. If the initial proposal does not meet the criteria, the institution will be informed of the available options.

**STEP 2: CANDIDACY APPLICATION FOR AN ADDITIONAL LOCATION**

The Candidacy Application for an Additional Location and the instructions regarding required documentation will be provided by Accreditation staff.

The application is provided as a guide to indicate areas in which information is required; however, each Standard should be reviewed to determine whether there are any changes from the currently accredited program. An explanation of the changes and the resulting impact on the program should be included in the application.

The program director will be notified by Accreditation staff of the process for submitting a Candidacy Application through ACOTE Online (https://acote.aota.org) and for payment of the new additional location application fee (per location) that must be submitted at the time the Candidacy Application is due. (See ACOTE Policy V.A. Fees)

Upon receipt of the application, the two assigned ACOTE reviewers (usually the same reviewers assigned to the existing program) complete a paper review of the application and report their findings to ACOTE at its next scheduled meeting. At that meeting, ACOTE may take any one of the following actions:

- **Grant Candidacy Status** to the additional location and proceed with either a full-scale on-site evaluation or a modified on-site evaluation (e.g., decrease the time involved or the number of on-site team members). The program may proceed with plans to admit students into the program at the additional location according to the approved timeline. Although the designation “Candidacy Status” is not a guarantee of accreditation, it does indicate that the resource allocation and plans for development of the proposed program appear to demonstrate the ability to meet the applicable ACOTE Accreditation Standards if fully implemented as planned. Candidacy Status must be granted before students may be admitted or notified of admission to the program.

- **Defer action on the application** and request that additional information be submitted for consideration at a subsequent ACOTE meeting. The program receives, along with the notification of deferral, a list of concerns identified by ACOTE in reaching their decision and a due date for submission of supplementary information that addresses the concerns. The supplementary information is reviewed at the next meeting of ACOTE, at which time a decision regarding Candidacy Status will be made. A program may have action on the Candidacy Application for an Additional Location deferred a maximum of two times. The tentative on-site evaluation of the additional location may need to be postponed or cancelled.

- **Deny Candidacy Status** to the additional location. If Candidacy Program Status is denied, the program will not be able to admit students into the additional location and will not be eligible to proceed with accreditation process. The program may reapply for Candidacy Status for the additional location by submitting a new Letter of Intent and starting the initial accreditation process again. Note: ACOTE will consider an expedited review schedule for a program location that was denied Candidacy Status that submits a new Letter of Intent. Accreditation staff will develop a schedule based on the application.

**STEP 3: REPORT OF SELF-STUDY AND ON-SITE EVALUATION OF AN ADDITIONAL LOCATION**

If ACOTE grants Candidacy Status and determines that an on-site evaluation is required, Accreditation staff will establish the date of the visit to the additional location based on the projected graduation date of the first class. ACOTE may decide to waive the on-site evaluation of the new location if it meets all of the following criteria:
- The application materials provide adequate information upon which to assess the additional location’s compliance with the applicable ACOTE Accreditation Standards.
- The main program/campus has no outstanding areas of noncompliance.
- The date of the next regularly scheduled on-site evaluation is near enough to encompass evaluation of the additional location.

In preparation for the initial on-site evaluation, the program director will be requested to submit a complete Report of Self-Study for the primary location that addresses information specific to each additional location. The report must be submitted at least 3 months prior to the on-site.

Two evaluators (members of the Roster of Accreditation Evaluators) conduct the on-site evaluation of the additional location(s). A summary report of the visit is made by the evaluators at the final on-site conference and institution officials are provided online access to the Evaluators’ Report of On-Site Evaluation. To expedite preparation of the report for ACOTE review and action, the program director is requested to submit any corrections or comments to the within one week after the on-site evaluation. (Additional response time is available if needed.) A written response to the on-site visit may also be submitted if there are special considerations or circumstances the program director wishes to be brought to the attention of ACOTE. Additional material or documents will not be considered by ACOTE, however. ACOTE will only consider action on the program based on those materials the on-site team had the opportunity to review and discuss during the on-site visit.

### ACCREDITATION ACTION

Following Accreditation Council for Occupational Therapy Education (ACOTE®) review of the Evaluators’ Report of On-Site Evaluation and any comments submitted by the program director, action is taken to grant a status of either Accreditation or Accreditation Withheld. (Descriptions of each accreditation status are provided in ACOTE Policy IV.C. Classification of Accreditation Categories) Notification of final action by ACOTE and the link to the Report of ACOTE are e-mailed to the chief executive officer, dean, and the program director. The ACOTE Certificate of Accreditation (if awarded) is mailed directly to the program director. Letters containing notification of Accreditation Withheld are sent electronically, read receipt requested. Procedures for request for appeal of an ACOTE decision to withhold accreditation are found in ACOTE Policy IV.D. Appeals Process.

If ACOTE determines that further information related to the program’s compliance with the Standards is required to enable a fair decision to be made regarding the accreditation of the program, it may defer action until the information is received. ACOTE may request additional materials or schedule a second on-site evaluation or fact-finding visit. The cost of the visit shall be borne by ACOTE.

If areas of noncompliance are identified in the Report of ACOTE, the program will be required to submit a Plan of Correction. Subsequent Progress Reports will be required until all areas of noncompliance are corrected. (See ACOTE Policy IV.E.1. Plans of Correction and ACOTE Policy IV.E.2. Progress Reports.)

Following action to award initial accreditation, the next on-site evaluation is scheduled to coincide with the next visit of the primary location.

### ACCREDITATION FEES FOR AN ADDITIONAL LOCATION

A Candidacy Application for an Additional Location must be accompanied by the new additional location application fee. (See ACOTE Policy V.A. Fees) If an on-site evaluation is required, an initial on-site fee will also be charged.

An annual additional location fee becomes effective with the first full academic year for which the program has accreditation status. The fee will be included with the annual accreditation fee invoice of the main campus program.
DESCRIPTION OF THE PROCESS

IV. B. 3. ACCREDITED ADDITIONAL LOCATIONS TRANSITIONING TO INDEPENDENT ACCREDITATION

ACCREDITATION PROCESS FOR ACCREDITED ADDITIONAL LOCATIONS TRANSITIONING TO INDEPENDENT ACCREDITATION

Accredited additional locations of occupational therapy or occupational therapy assistant programs that are seeking to transition to independent accreditation must follow an abbreviated accreditation process that will require submission of a Report of Self-Study and an on-site evaluation.

STEP 1: LETTER OF INTENT

Accredited additional locations seeking independent accreditation must submit a Letter of Intent that declares the intention of the institution(s) to seek independent accreditation for the additional location. The Letter of Intent must be signed by 1) the chief executive officer of the sponsoring institution(s) and 2) the occupational therapy or occupational therapy assistant program director AND/OR dean overseeing the proposed program. A completed Letter of Intent Data Form for Additional Locations must accompany the Letter of Intent.

STEP 2: REPORT OF SELF-STUDY

Upon receipt of the Letter of Intent, the program will be provided with instructions for submission of an online Report of Self-Study that addresses compliance with all of the current ACOTE Accreditation Standards. The program will be provided with a target date for submission of the Report of Self-Study and timeframe for the on-site evaluation. The actual submission date for the Report of Self-Study will be 3 months prior to the date of the on-site evaluation, but no earlier than the target date. That actual submission date will be provided to the program director as soon as the dates for the on-site evaluation are finalized.

STEP 3: ON-SITE EVALUATION (INDEPENDENT ACCREDITATION VISIT)

The process for the independent accreditation visit of the additional location will follow the steps outlined in ACOTE Policy III.A.3. The Initial On-Site Evaluation. Since the accredited program location has been paying Annual Accreditation Fees that are designed to cover the cost of the on-site visit, no on-site fee will be charged.

STEP 4: ACOTE ACCREDITATION ACTION

Programs transitioning from an additional location to an independent program may be granted 5-, 7-, or 10-year cycles.

At the time of ACOTE action, ACOTE awards an accreditation period based on the following criteria:

- 5-year review cycles are given to programs that are reaccredited, but raise significant concerns as determined by ACOTE.
- 7-year review cycles are the standard number of years for reaccreditation.
- 10-year review cycles are granted to those programs that have no areas of noncompliance and have demonstrated exceptional educational quality.
Programs cited with no more than two areas of noncompliance that are given a 7-year accreditation term may be granted an extension to a 10-year term by ACOTE. This decision will be based on ACOTE’s review of the Plan of Correction or Progress Report submitted by the program and a determination that the program has fully resolved the cited areas of noncompliance. ACOTE will also consider any pre-existing areas of noncompliance or program changes that have occurred subsequent to the on-site evaluation that affect or are likely to affect the program’s full compliance with the Standards. This extension option is only available within 1 year of ACOTE’s accreditation action on the program’s Report of On-Site Evaluation.
# DESCRIPTION OF THE PROCESS

## IV. B. 4. TRANSITIONING EDUCATION LEVELS

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<th>ACCREDITED PROGRAMS TRANSITIONING TO A HIGHER DEGREE LEVEL:</th>
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<td>- OT MASTER'S TO AN OT DOCTORAL DEGREE LEVEL</td>
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<td>- OTA ASSOCIATE TO AN OTA BACcalaureate DEGREE LEVEL</td>
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Accreditation status is awarded based on compliance with degree-specific accreditation Standards. As a result, the accreditation status of the accredited master’s-degree-level occupational therapy program or associate-degree-level occupational therapy assistant program cannot automatically accrue to the proposed doctoral-degree-level program or proposed baccalaureate-degree-level program. Accredited master’s-degree-level occupational therapy programs and associate-degree-level occupational therapy assistant programs transitioning to an entry-level doctoral program or entry-level baccalaureate level program must follow a separate accreditation procedure for the new degree-level program. ACOTE review and acceptance of the Candidacy Application is required prior to the admission of students into the curriculum. The accreditation status of the existing program does not accrue to the new degree-level program until the procedures for accreditation of the new program are successfully completed.

### LETTER OF INTENT

An occupational therapy program or occupational therapy assistant program seeking accreditation for a new entry-level degree program should first seek approval to offer the doctoral or baccalaureate degree from the institution, the educational licensing and/or governing board(s) of the state(s) in which the program is to be offered, and the institutional accrediting body. The program does not need to have degree-granting authority at the time of the Letter of Intent, but must have that authority at the time the Candidacy Application is submitted. To begin the accreditation process, the program should submit the following documentation:

A Letter of Intent that is signed by 1) the chief executive officer of the sponsoring institution(s) and 2) the occupational therapy or occupational therapy assistant program director of the proposed program.

The Letter of Intent must:

- Declare the intention of the institution(s) to develop and seek accreditation for the occupational therapy or occupational therapy assistant program.
- Request entry into the first step of the accreditation process for new programs (the Candidacy Review).
- State that the institution(s) agree not to admit students into the program until Candidacy Status has been obtained from the Accreditation Council for Occupational Therapy Education (ACOTE®). Provide evidence of all necessary approvals to offer the required degree from the institution, the educational licensing and/or governing board(s) of the state(s) in which the program is to be offered, and the institutional accrediting body. In cases where no approval is needed, a statement to that effect from the relevant body is required. If these approvals have not yet been received, the program should provide a timeline indicating when the approvals will be received.
- If offered by more than one institution (e.g., cooperative or consortium program), include information regarding the institutional accreditation status, the role of each institution in the cooperative or consortium arrangement, how the administration of the program will be managed, how the program will operate, and which institution(s) will grant the degree.
- Indicate:
  1. The month and year the first class is projected to enter the new program (must be after Candidacy Status is awarded).
  2. The month and year the first class is projected to begin Level II fieldwork.
  3. The month and year the first class is projected to begin the doctoral-level experiential component (for doctoral programs only).
  4. The month and year the first class is projected to graduate.
  5. The year the first graduates are projected to sit for the National Board for Certification in Occupational Therapy (NBCOT) certification examination.
The program must also document in the Letter of Intent that it meets the following criteria:
1. The master’s or associate degree program must be fully accredited by ACOTE and may not be on Probationary Accreditation. If the program is carrying areas of noncompliance, those areas must be corrected prior to submission of the Letter of Intent.
2. The program director must possess all of the experience and credentials required for a doctoral or baccalaureate-degree-level educational program.

Programs should submit a scanned copy of the Letter of Intent, completed Letter of Intent Data Form, the program director’s CV, and evidence of all necessary approvals to offer the baccalaureate or doctoral degree to acccred@aota.org.

NOTE: No fees are required and there is no cap on submission of Candidacy Applications for currently accredited master’s-degree-level programs transitioning to the doctoral degree level or currently accredited associate-degree-level programs transitioning to the baccalaureate degree level.

STEP 1: THE APPLICATION REVIEW

Upon receipt of the Letter of Intent, Letter of Intent Data Form, and accompanying documentation, the Accreditation Department staff will provide the program with instructions for completing the Eligibility Application in ACOTE Online (https://acote.aota.org). Once that is submitted, staff will provide the Candidacy Application and a preliminary timeline for the accreditation process. The deadline for submission of the Candidacy Application is determined by the planned student enrollment date as follows:

Candidacy Application must be received NO LATER THAN 5:00 PM EASTERN TIME on:
December 15 (prior to fall start)
April 15 (prior to winter start)
August 15 (prior to spring/summer start)

The Candidacy Application must be signed by the occupational therapy or occupational therapy assistant program director, the dean or administrator overseeing the proposed program, and the chief executive officer of the sponsoring institution. Application materials received after the deadline will result in the materials being returned to the program. The program may resubmit on the next available Application due date.

Upon receipt, the Candidacy Application will be reviewed by a review team. The program director may be requested to provide additional written information to the review team to clarify or enhance submitted materials. The reviewers will submit a report at the next ACOTE meeting to recommend that ACOTE grant, defer action on, or deny Candidacy Status.

If the Application documents that the program meets the requirements for Candidacy Status and indicates the program’s potential to achieve compliance with the Standards, the action will be to grant Candidacy Status. As soon as the institutional officials receive notification from ACOTE that the program has been granted Candidacy Status, they may admit students into the new program according to the approved timeline and move on to the second step, which is the preaccreditation review. AOTA will officially list the doctoral or baccalaureate program as having Candidacy Status.

If the information received from the applicant is incomplete and/or insufficient for evaluation, the program’s application will be deferred. Supplementary information is requested for consideration at a subsequent ACOTE meeting.

The program will be denied Candidacy Status if 1) the program does not meet the requirements for Candidacy Status, or 2) the Application does not indicate the program’s potential to achieve compliance with the Standards. If Candidacy Status is denied, the program will not be able to admit students and will not be eligible to proceed to the preaccreditation review step. The program may reapply for Candidacy Status by submitting a new Letter of Intent and starting the initial accreditation process again.

STEP 2: THE PREACCRREDITATION REVIEW

Programs that have been granted Candidacy Status may proceed into Step 2 of the Initial Accreditation process, the Preaccreditation Review. The program will be required to submit a Report of Self-Study that addresses compliance with all of the ACOTE Accreditation Standards for a Doctoral-Degree-Level Educational Program for the
Assigned reviewers will conduct a comprehensive assessment of the program’s compliance with the applicable ACOTE Accreditation Standards and will make a recommendation to ACOTE regarding the status of the program. There are a number possible scenarios based on the review:

1. If ACOTE determines that the proposed program appears to be in substantial compliance with the ACOTE Accreditation Standards, ACOTE may:
   a. Grant a status of preaccreditation and proceed with an initial on-site evaluation, or
   b. Grant a status of accreditation without conducting an initial on-site evaluation. Factors that ACOTE will consider when making this decision include the history of the program, the date of the last on-site evaluation, the date of the next scheduled on-site evaluation, and the ACOTE Standards that were in effect when the program had its last on-site evaluation.

2. If ACOTE determines that the proposed program does NOT appear to be in substantial compliance with the ACOTE Accreditation Standards, the program will be denied preaccreditation status (see ACOTE Manual Policy III.A.2, Step 2: Preaccreditation Review).

**STEP 3: THE INITIAL ON-SITE EVALUATION**

If ACOTE determines that an initial on-site evaluation must be conducted prior to making an accreditation decision, the process will follow the steps outlined in ACOTE Manual Policy III.A.3, The Initial On-Site Evaluation. Since the accredited program has been paying Annual Accreditation Fees that are designed to cover the cost of the on-site visit, no initial on-site fee will be charged.

**STATUS OF THE PROGRAM AND TRANSITION RULE**

During the transition period, the accreditation status of the program must be maintained until at least the time that the new program is granted accreditation and the last student has graduated from the current program. During this period, there will be special transition rules implemented related to the review of the program.

**NOTE:** There are requirements that must be met to remain compliant with recognition agencies (e.g., U.S. Department of Education and the Council for Higher Education Accreditation). For example, federal regulations require that ACOTE conduct an on-site evaluation at regularly scheduled intervals in order for a program to maintain accreditation.

If a program has submitted a Letter of Intent with a proposed timeline to seek accreditation for a doctoral-degree-level program for the occupational therapist or baccalaureate–degree-level for the occupational therapy assistant, the program’s existing accredited master’s-degree-level or associate-degree-level program must comply with the following reporting requirements:

1. Annual Reports:
   a) Must be submitted until the master’s or associate-degree-level program has withdrawn from accreditation.

2. Interim Reports:
   a) An abbreviated interim report will address:
      i) Any current areas of noncompliance, and

3. Reaccreditation and Self-Study Review:
   a) An abbreviated report of self-study and on-site evaluation will be required:
      i) The report of self-study review will address:
         (1) Any current areas of noncompliance, and
      ii) Abbreviated one day on-site visit to include:
         (1) Interviews with faculty, students, administrators, and recent graduates.
         (2) Consultation session on the proposed doctoral-degree-level or baccalaureate-degree-level curriculum.
IV. C. CLASSIFICATION OF ACCREDITATION CATEGORIES

PREACCREDITATION CATEGORIES

Applicant Program
To initiate the accreditation process for a new occupational therapy or occupational therapy assistant program, a Letter of Intent and check payable to AOTA for a non-refundable deposit of $500 must be submitted to the Director, Accreditation Department, AOTA, prior to admission of the first class of students. Once an acceptable Letter of Intent and deposit are received, the program is classified as an Applicant Program and will be required to submit a Candidacy Application.

Candidate Program
If ACOTE determines that the Candidacy Application documents that the program meets the requirements for Candidacy Status and indicates the program’s potential to achieve compliance with the Standards, the action will be to grant Candidacy Status. As soon as the institutional officials receive written notification from ACOTE that the program has been granted Candidacy Status, students may be admitted into the program according to the approved timeline. The program may then move on to the second step, the preaccreditation review. AOTA will officially list the program as having Candidacy Status. An initial on-site evaluation will be conducted before an accreditation decision is made. (See ACOTE Policy III.A.1. Step One: The Application Review).

ACCREDITATION CATEGORIES

The following accreditation categories are used by the Accreditation Council for Occupational Therapy Education (ACOTE®), based on evaluation of the extent to which an educational program complies with the ACOTE Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, a Master’s-Degree-Level Educational Program for the Occupational Therapist, or an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant.

A list of accredited programs is available on AOTA’s Web site (www.aota.org) and in the archival issue of the American Journal of Occupational Therapy. In addition, all final accreditation actions will be posted on the Accreditation section of AOTA’s Web site (www.acoteonline.org) and published in OT Practice, the official bimonthly publication of AOTA.

The sponsoring institution of a program may withdraw the Application for Accreditation at any time prior to final action by ACOTE.

ACCREDITATION

Initial accreditation is granted to a program by action of ACOTE prior to the graduation of the first class. Continuing accreditation is granted to a fully operational program by action of ACOTE. A self-study and an on-site evaluation are integral parts of both the evaluation for initial accreditation and continuing accreditation. The accreditation review process confirms that the program is in substantial compliance with the ACOTE Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, a Master’s-Degree-Level Educational Program for the Occupational Therapist, or an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant.

A program in substantial compliance with the Standards may be in noncompliance in one or more specific Standards that are believed to be readily correctable. Based on the action of ACOTE, the sponsoring institution is provided with a clear statement of each area of noncompliance. On or before the specified due date, the institution must submit to ACOTE a plan for correcting the indicated area(s) of noncompliance. This plan must include a
schedule for correcting areas of noncompliance within a specified period of time that may not exceed the United States Department of Education (USDE) criteria:

- 12 months if the program is less than 1 year in length;
- 18 months if the program is at least 1 year in length, but less than 2 years in length; or
- 2 years if the program is at least 2 years in length.

ACOTE will assess the adequacy of the plan to return the program to full compliance with the Standards and will require Progress Reports documenting how each area of noncompliance has been or is being resolved. If ACOTE determines that the program has not returned to compliance with the Standards within the specified period of time (depending on program length), it will change the program’s status to Accreditation Withdrawn—Involuntary unless the period for achieving compliance is extended for good cause. The notification of accreditation letter will inform the institution of the status awarded to the educational program.

In making a determination to grant an extension of the period for achieving compliance for good cause, ACOTE will review the rationale for the request and assess whether the program has met the following criteria:

1. The program has submitted an appropriate plan for achieving compliance within a reasonable time frame.
2. The program has provided a detailed timeline for completion of the plan.
3. The program has provided evidence that the plan has been implemented according to the established timeline.
4. The program has provided reasonable assurance that the program will achieve compliance as stated in the plan.

ACOTE may also grant an extension of the period for achieving compliance to allow a fact-finding visit or on-site evaluation to be conducted prior to taking action to withdraw accreditation. Extensions of the period of time for achieving compliance are usually limited to a maximum of 2 additional years.

**PROBATIONARY ACCREDITATION**

A program’s status may be changed to Probationary Accreditation for any of the following reasons:

1. The areas of noncompliance are so serious that the capability of the program to provide acceptable educational experiences for the students is threatened. (If the cited areas of noncompliance are not in dispute, ACOTE may recommend Probationary Accreditation without conducting an on-site evaluation. However, most awards of Probationary Accreditation in this category are based on evidence obtained during an on-site evaluation or fact-finding visit.)
2. The program has failed to document significant progress toward compliance with one or more cited areas of noncompliance.
3. The program is in jeopardy of having its accreditation status withdrawn due to the mandated time limit for carrying areas of noncompliance.
4. The program fails to comply with administrative requirements. (See Administrative Requirements Policy.)

Programs cited with area(s) of noncompliance are notified in writing that all area(s) must be corrected within a specified period of time that may not exceed the United States Department of Education (USDE) criteria:

- 12 months if the program is less than 1 year in length;
- 18 months if the program is at least 1 year in length, but less than 2 years in length; or
- 2 years if the program is at least 2 years in length.

Programs are required to report on progress toward correcting cited areas of noncompliance at approximate 4-month intervals throughout the year. Programs are reminded of the time limit for correcting cited areas at regular intervals, depending upon the program’s specific time limit for correction. If the area(s) of noncompliance are not corrected approximately 8 months prior to the end of the time limit, the institution is notified that the program is at risk of being placed on Probationary Accreditation if the cited area(s) are not corrected in the next Progress Report. At the same time, the program is notified of the procedure for requesting an extension for good cause.

If the area(s) of noncompliance are not corrected in the next Progress Report (reviewed by ACOTE approximately 4 months prior to the end of the time limit), and the program has NOT been granted an extension for good cause, the program status may be changed to Probationary Accreditation.
Probationary Accreditation is an accreditation category. During a period of Probationary Accreditation, programs are recognized and listed as being accredited. Probationary Accreditation is usually limited to 1 year. However, extensions may be granted by ACOTE for good cause. Programs receiving ACOTE’s notification of a change of status to Probationary Accreditation must notify currently enrolled students and those seeking admission that the program has been placed on probation.

The appropriate official is provided with a clear statement of each area of noncompliance contributing to the placement of the program on Probationary Accreditation. This official is also notified of the due date for the required Plan of Correction. ACOTE will assess the adequacy of the plan to return the program to substantial compliance with the Standards within the specified period of time and will require Progress Reports documenting how each area of noncompliance has been or is being resolved. Probationary status may be removed when the program has demonstrated that it is in substantial compliance with the Standards:

— Because the areas of noncompliance are resolved, or
— Because the program has documented significant progress toward compliance with the cited areas of noncompliance within the allowed time period.

Failure to come into substantial compliance with the Standards within the allowed time period will result in a change of status to Accreditation Withdrawn.

**ADMINISTRATIVE REQUIREMENTS POLICY**

The sponsoring institution and the accredited program must comply with the following administrative requirements for maintaining accreditation as required by ACOTE Standard A.1.5. The sponsoring institution or program must

1. Inform ACOTE of the transfer of program sponsorship or change of the institution’s name within 30 days of the transfer or change.
2. 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.
3. 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.
4. Inform ACOTE within 30 days of the resignation of the program director or appointment of a new or interim program director.
5. Pay accreditation fees within 90 days of the invoice date.
6. Submit a Report of Self-Study and other required reports (e.g., Annual Report, Interim Report, Plan of Correction, Progress Report) within the period of time designated by ACOTE. All reports must be complete and contain all requested information.
7. Agree to a site visit date before the end of the period for which accreditation was previously awarded.
8. Demonstrate honesty and integrity in all interactions with ACOTE.
9. Comply with the current requirements of all ACOTE policies.

When an accredited program has failed to satisfy the requirements identified above, the program may be cited with an area of noncompliance pertaining to Standard A.1.5 and placed on Probationary Accreditation at the next ACOTE meeting.

Continued failure to meet the administrative requirements for maintaining accreditation may result in a recommendation for involuntary withdrawal of accreditation.
**INACTIVE STATUS**

Inactive status is a special status applied only to programs that are not currently enrolling new students and do not plan to enroll new students in the future. Programs that continue to enroll students, even when the frequency of admissions is reduced (e.g., from once a year to every other year), do not need to request that the program be placed on inactive status.

The status “inactive” does not replace any other current accreditation status. The designation follows the regular accreditation status (e.g., Accreditation—Inactive or Probationary Accreditation—Inactive). Students graduating from a program with Accreditation—Inactive or Probationary Accreditation—Inactive status are considered graduates of an accredited program. A program may remain on inactive status for a maximum of 3 years dependent upon the accreditation term remaining. During that time, programs with a status of Accreditation—Inactive or Probationary Accreditation—Inactive remain responsible for submission of Annual and Inactive Status Reports to the Accreditation Council for Occupational Therapy Education (ACOTE®) and must pay the annual accreditation fee. A program may request Inactive Status only once within the assigned accreditation term (e.g., 5, 7, or 10 years). (See ACOTE Policy VI.D. Inactive Status).

**NON-ACCREDITATION CATEGORIES**

The following non-accreditation categories are used by the Accreditation Council for Occupational Therapy Education (ACOTE®) when a program is not in substantial compliance with the ACOTE Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, a Master’s-Degree-Level Educational Program for the Occupational Therapist, or an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant.

**ACCREDITATION WITHHELD**

A program seeking initial accreditation may have accreditation withheld if the accreditation review process confirms that the program is not in substantial compliance with the Standards that are vital to the educational program. The program is expected to assist any students who have not yet completed their degrees to find reasonable opportunities to complete their education.

The appropriate official is provided with a clear statement of each area of noncompliance and is informed that a new application for accreditation may be made whenever the program is believed to be in substantial compliance with the Standards. A Letter of Intent must be filed and the initial accreditation process repeated. Initial fees are reassessed.

**Opportunity for Withdrawal of Application**

The institution sponsoring a program may withdraw the Application for Initial Accreditation at any time prior to final action by ACOTE. Programs selecting this option relinquish the opportunity to appeal that is provided programs receiving a status of Accreditation Withheld.

**Opportunity for Appeal**

The letter from ACOTE notifying the appropriate official that the program has had accreditation withheld for failure to be in substantial compliance with the Standards indicates that the institution may appeal the decision. (See ACOTE Policy IV.D. Appeals Process).
1. **ACCREDITATION WITHDRAWN—VOLUNTARY**  
   (At the request of the sponsoring institution.)

   The appropriate official of a program may at any time inform ACOTE in writing that the program is or will be discontinued by a given date or wishes to have accreditation withdrawn. If there are any remaining students in the program, this notification must include a teach-out plan that ensures equitable treatment of the remaining students. The plan must specify:
   - the number of students remaining in the program and their status in the program;
   - a provision for notification to the students of any additional costs;
   - resources, including faculty, for ensuring a quality education for the remaining students in the program; and
   - how the planned closure will be disclosed to students in the program as well as to prospective applicants.

   The official is informed that the sponsoring institution must apply for accreditation as a new applicant should it wish to resume sponsorship of an accredited program.

2. **ACCREDITATION WITHDRAWN—INVOLUNTARY**  
   (For failure to be in substantial compliance with the Standards or with administrative requirements.)

   Accreditation may be involuntarily withdrawn from a program with Probationary Accreditation if the accreditation review process confirms that the program has not come into substantial compliance with the Standards within the period of time mandated by USDE.

   Accreditation may also be involuntarily withdrawn if the program has not complied with the administrative requirements for maintaining accreditation within a reasonable period of time, usually no longer than 1 year.

   The appropriate official is provided with a clear statement of each area of noncompliance and is informed that the sponsoring institution may apply for accreditation as a new applicant whenever the program is believed to be in compliance with the Standards and with the administrative requirements for maintaining accreditation.

   The program is expected to assist any students who have not yet completed their degrees to find reasonable opportunities to complete their education.

   **Opportunity for Withdrawal of Application**

   The institution sponsoring a program may withdraw the Application for Continuing Accreditation at any time prior to ACOTE action. Programs selecting this option relinquish the opportunity to appeal that is provided programs receiving a status of Accreditation Withdrawn—Involuntary.

   **Opportunity for Appeal**

   The letter from ACOTE notifying the appropriate officials that the program has received Accreditation Withdrawn—Involuntary status indicates that the institution may appeal the decision. (See **ACOTE Policy IV.D. Appeals Process**).

**MOVING FROM ONE ACCREDITATION CATEGORY TO ANOTHER**

**FROM INITIAL OR CONTINUING ACCREDITATION**

If the accreditation review process confirms that a program is in substantial compliance with the Standards and with administrative requirements, the program is awarded continuing accreditation. If the program is not in compliance with the Standards and requirements, ACOTE may grant Probationary Accreditation or Accreditation Withdrawn.

In unusual circumstances, such as evidence of critical areas of noncompliance that appear to be irremediable within a reasonable length of time, or a documented threat to the welfare of current and potential students, ACOTE may withdraw accreditation without first providing a period of probation.
Programs from which accreditation is involuntarily withdrawn without a probationary period are ensured due process, as described in ACOTE Policy IV.D. Appeals Process.

**FROM PROBATIONARY ACCREDITATION**

If the accreditation review process confirms that a program has corrected the identified areas of noncompliance leading to probation within a reasonable period of time and is in substantial compliance with the Standards and with administrative requirements, the program is awarded continuing accreditation. If the identified areas of noncompliance are not corrected within a reasonable period of time (usually no more than 1 year), ACOTE may grant an extension of Probationary Accreditation or change the program’s status to Accreditation Withdrawn.

**PUBLIC DISCLOSURE OF PROBATIONARY ACCREDITATION OR FINAL ADVERSE ACTIONS**

Final decisions to place a program on Probationary Accreditation, withhold accreditation, or withdraw accreditation will be publicly disclosed via a summary of ACOTE actions on the AOTA Web site, in an *OT Practice* article, and in response to written or verbal inquiries. This summary will include the following information:

1. The award of accreditation or reaccreditation of a program.
2. Final decisions to withhold or withdraw accreditation of a program and any findings made in connection with the action taken, together with the official comments of the affected institution.
3. Any other adverse action taken with respect to a program or placement of a program on Probationary Accreditation.

(See ACOTE Policy VI.B. Policy on Confidentiality and Disclosure).
DESCRIPTION OF THE PROCESS

IV. D. APPEALS PROCESS

OPPORTUNITY TO APPEAL

A. Opportunity to Appeal Adverse Accreditation Decisions

The procedure specified in these rules of practice and procedure is the exclusive remedy for an institution that seeks to appeal an adverse accreditation decision by the Accreditation Council for Occupational Therapy Education (ACOTE®).

1. Only the following adverse accreditation decisions made by ACOTE are subject to appeal:
   a. Denial of Candidacy Status;
   b. Denial of a request for reactivation;
   c. Decision to withdraw accreditation;
   d. Decision to withhold accreditation;

2. Decisions to place an institution on Probationary Accreditation are final and not subject to appeal.

3. ACOTE will not entertain petitions for reinstatement or petitions for reconsideration.

4. An appeal properly and timely filed pursuant to these rules automatically stays the decision to deny Candidacy Status, deny a request for reactivation, withhold accreditation, or withdraw accreditation until the final disposition of the appeal.

GROUNDS FOR APPEAL

B. Grounds for Appeal, Standard of Review, and Record on Appeal

1. An institution subject to an adverse accreditation decision taken by ACOTE may appeal that decision if it has reason to believe that the decision was arbitrary, capricious, in substantial disregard of the criteria or procedures of ACOTE, or that the decision was not supported by substantial evidence in the record upon which ACOTE relied in making the decision.

2. The institution has the burden of proof on appeal.

3. During an appeal, and with the exception of certain financial information (see section C.4), the Appeal Panel will only consider the record (evidence, documents, and other information) that was before ACOTE when it took the adverse accreditation action.

4. The record on appeal shall include, as applicable, the institution’s appeal document and supporting materials, reports of on-site evaluation teams, decision letters and other correspondence between ACOTE and the institution, and the institution’s responses to ACOTE inquiries and actions. Accordingly, the appealing institution may not present to the Appeal Panel any data, information, documents, or other evidence that was not part of the record when ACOTE made the decision from which an appeal was taken. The Appeal Panel shall disregard any such material and not utilize it in deciding the appeal.
5. The Director of AOTA’s Accreditation Department shall transmit a complete copy of the record on appeal to the Chairman of the Appeal Hearing Panel as soon as the possible after the panel is selected.

### APPEAL PROCEDURES

**C. Appeal Procedures**

1. **Notice of Intent to Appeal.** An institution shall commence an appeal by submitting to ACOTE a Notice of Intent to Appeal within 10 days after receiving written notice from ACOTE of the adverse accreditation decision.

2. **Grounds for Appeal.** Within 30 days after receipt of notice of ACOTE’s adverse accreditation decision, the institution must submit a written statement to ACOTE electronically (preferred), which specifies the institution’s arguments in support of its contention that the decision was arbitrary, capricious, in disregard of ACOTE’s accreditation criteria or procedures, or is not supported by substantial evidence in the record on which ACOTE predicated its decision. If submitted by mail, six copies of a written statement of the Grounds for Appeal must be provided.

3. **Materials Submitted with Grounds for Appeal.** An institution may not submit any documents, data, evidence, or other materials with its Grounds for Appeal unless such materials were in the record before ACOTE at the time it rendered its adverse accreditation decision.

4. **Exception for Financial Information.** In the event that the adverse accreditation decision included a finding(s) that the institution failed to comply with ACOTE standards concerning financial soundness, an institution may submit new financial information with its Grounds for Appeal under the following conditions: (a) the financial information is relevant and significant; (b) the information was unavailable to the institution and/or ACOTE prior to the adverse decision; (c) the financial data would materially impact the findings of ACOTE with respect to the financial viability of the institution; (d) the institution may provide new financial information only once; and (e) any subsequent final decision by ACOTE taking into account the new financial information does not present the institution with the basis for another appeal.

5. **Personal Appearance and Representation by Legal Counsel.** The institution has the right to a hearing before the Appeal Panel and may select a qualified individual(s) to represent the institution at the hearing. The institution also has the right to be represented by legal counsel at the hearing if it so chooses. Within 10 days of the scheduled hearing date, the institution shall provide ACOTE with the names, titles, and contact information for all representatives who will be participating in the appeal hearing on the institution’s behalf. The institution shall also furnish the names and contact information for any legal counsel who will be representing the institution during the appeal proceedings and hearing.

6. **Transcript of Hearing.** The institution has the right to a written transcript of the appeal hearing and may exercise this right by notice to ACOTE at the time of filing of the Grounds for Appeal. ACOTE will provide the transcription services, but the institution will be responsible for the cost services. An institution may not videotape the appeal hearing.

7. **Timing of Appeal Hearing.** The appeal hearing will be conducted within 60 days of receipt of the institution’s Notice of Intent to Appeal. ACOTE may extend this time for good cause. After consultation with the chief executive officer of the appealing institution, the date, time, and place for the appeal hearing shall be set by Chairperson of ACOTE. ACOTE shall give written notification to the institution of the date, time, and location of the appeal hearing no later than 10 business days prior to the hearing date.

8. **Hearing Format.** The following process shall be observed during the appeal hearing:
   
   a. The Chairperson of the Appeal Panel shall make an opening statement identifying the participants in the hearing, briefly describing the issues on appeal, the standard of review to be
used by the Appeal Panel in deciding the appeal, and summarizing the procedures to be followed during the hearing.

b. Following the Chairperson’s opening statement, a representative of the AOTA Accreditation Department will make a brief statement describing ACOTE’s accreditation decision and the grounds for that decision.

c. The appealing institution will be afforded 30-40 minutes to present arguments as to why its appeal of ACOTE’s adverse accreditation decision should be granted. The presentation may be made by one or more representatives of the institution and/or by the institution’s legal counsel. The institution’s presentation shall be limited to issues relevant to the adverse decision of ACOTE.

d. After the institution has concluded its presentation, members of the Appeal Panel may question the representatives of the institution about its appeal or any of the issues raised by the institution during the hearing.

e. Following the question and answer period, the Chairperson of the Appeal Panel shall permit the institution to make a brief concluding statement.

f. The appeal hearing shall be concluded and the record closed after the institution makes its concluding statement.

**APPEAL PANEL**

D. Appeal Panel

1. **Appeals Board Roster.** ACOTE shall select fifteen or more individuals to participate in an Appeals Board Roster from which individuals will be selected to serve on an Appeal Panel to hear appeals from institutions subject to an adverse accreditation decision. The Chairperson of ACOTE shall nominate individuals for the Appeals Board Roster and the members shall be confirmed by ACOTE. Individuals in the Appeals Board Roster must have experience with educational accreditation, have a working knowledge of the ACOTE Accreditation Standards, and be familiar with the administration and functional components of the specific type of institution sponsoring the educational program under appeal (e.g. community college, university). The Appeals Board Roster shall also include public members from industry, government, education, or individuals with accreditation experience from other accreditation agencies. No current member or staff member of ACOTE or the Board of Directors of the American Occupational Therapy Association (AOTA) may serve on the Appeals Board Roster. Members of the Appeals Board Roster shall be subject to applicable ACOTE policies, procedures, and ethics and conflicts requirements. ACOTE may remove an individual from the Appeals Board Roster for failure to comply with any of these requirements.

2. **Appeal Hearing Panel.** In the event of a timely and duly filed appeal from an institution, the Chairperson of ACOTE shall select three individuals from the Appeals Board Roster to serve on an Appeal Hearing Panel to consider the appeal. The Appeal Hearing Panel will consist of one public member, one OT or OTA educator, and one OT or OTA practitioner. The Chairperson of ACOTE shall designate one of the members of the Appeal Hearing Panel to serve as the chairperson.

3. **No Prior Involvement with Institution or Decision.** No individual from the Appeals Board Roster may be selected to serve on an Appeal Hearing Panel if he or she has had any prior involvement with the appealing institution or had any involvement with ACOTE’s accreditation review which gave rise to the decision which the institution is appealing.

4. **Notice to Institution of Appeal Hearing Panel Members.** No later than 15 days prior to the scheduled appeal hearing date, ACOTE shall advise the appealing institution of the names and affiliations of the three individuals selected to serve on the Appeal Hearing Panel.
5. **Objections to Appeal Hearing Panel Members.** If the institution has good cause to believe that any member(s) of the Appeal Hearing Panel should not hear the institution’s appeal, it must promptly notify the Chairperson of ACOTE in writing that it objects to the panelist(s) and state with specificity the grounds for the objection. The Chairperson of ACOTE will consider the objections and decide whether to replace the member(s) of the Appeal Hearing Panel with another individual(s) from the Appeals Board Roster. The decision of the ACOTE Chairperson with respect to the members of the Appeal Hearing Panel is not an appealable decision.

### SCOPE OF AUTHORITY

**E. Scope of Authority of the Appeal Hearing Panel**

1. **Authority of the Appeal Hearing Panel.** The Appeal Hearing Panel may affirm, amend, reverse, or remand the adverse accreditation decision made by ACOTE. The action must be approved by a majority of the members of the Appeal Hearing Panel.

2. **Affirm.** If the decision of the Appeal Hearing Panel is to affirm (uphold) ACOTE’s accreditation decision, ACOTE’s decision becomes final as of the date of the Appeal Hearing Panel’s decision without further action by ACOTE.

3. **Remand.** If the decision of the Appeal Hearing Panel is to remand ACOTE’s accreditation decision back to ACOTE for further consideration, the Appeal Hearing Panel must identify the specific issues which the Panel has determined that ACOTE must address. ACOTE’s subsequent accreditation decision must be consistent with the Appeal Hearing Panel’s findings and decision. If upon remand, ACOTE renders an adverse accreditation decision which is predicated on grounds that were not considered by the Appeal Hearing Panel, the institution may appeal that action based only on the new grounds identified by ACOTE in its decision.

4. **Amend.** If the Appeal Hearing Panel amends ACOTE’s accreditation decision, ACOTE shall implement the decision in a manner that is consistent with the Appeal Hearing Panel’s ruling.

5. **Reverse.** If the Appeal Hearing Panel reverses ACOTE’s accreditation decision, ACOTE shall carry out the decision in a manner consistent with the Appeal Hearing Panel’s decision.

6. **No Further Appeal.** Except as otherwise specified, the decision of the Appeal Hearing Panel to affirm, remand, amend, or reverse ACOTE’s accreditation decision is not appealable.

### APPEAL HEARING PANEL DECISION

**F. Appeal Hearing Panel Decision**

1. **Standard of Review.** In considering what action to take on the institution’s appeal, the Appeal Hearing Panel shall utilize the standard of review set out in section B.1 of these rules. The Appeal Hearing Panel will determine whether each area of noncompliance or area of concern cited in ACOTE’s accreditation decision and challenged by the appealing institution is supported by substantial evidence in the record. If raised on appeal by the institution, the Appeal Hearing Panel shall also consider whether ACOTE’s accreditation decision contravened any applicable procedures, policies, practices, or standards.

2. **Written Decision.** After the hearing, the Appeal Hearing Panel shall prepare a written decision which details its decision in detail, specifies the reasons for its decision, and describes with particularity the action which it is taking—viz. to affirm, remand, amend, or reverse ACOTE’s accreditation decision.

3. **Transmittal of Decision.** Within 30 days of the conclusion of the appeal hearing, the Chairperson of the Appeal Hearing Panel shall transmit the written decision of the panel to the Chairperson of ACOTE.

4. **ACOTE Action.** As promptly as possible after receipt of the Appeal Hearing Panel’s written decision, ACOTE shall take action consistent with the appeal decision. Pursuant to section E.2 of these rules, if the
decision is to affirm the accreditation decision, no further action by ACOTE is required to make the decision effective.

5. **Notice of Decision.** Upon the decision of the Appeal Hearing Panel to affirm ACOTE’s accreditation decision, or upon further action by ACOTE to carry out the Appeal Hearing panel’s decision to remand, amend, or reverse the accreditation decision, the Director of the AOTA Accreditation Department shall notify the appealing institution in writing of the final ACOTE decision. At the same time that the appealing institution is notified, the U.S. Department of Education, applicable state regulatory authorities, and the appropriate institutional accrediting agency will be notified of final ACOTE decisions to deny Candidacy Status, deny a request for reactivation, withhold accreditation, or withdraw accreditation. The public will be notified of final ACOTE decisions through AOTA’s website within 24 hours of confirmation that the institution has received notification of ACOTE’s final decision.

### APPEAL EXPENSES

**G. Appeal Expenses**

1. **Expenses of Appealing Institution.** An appealing institution is fully responsible for all of its expenses in prosecuting its appeal.

2. **Expenses of the Appeal Hearing Panel.** The appealing institution shall also be exclusively responsible for all of the reasonable costs associated with the appeal hearing including the hearing room, transcription services, travel, meals, and lodging for members of the panel.

### NOTICES, CALCULATION OF DAYS, EXTENSIONS OF TIME

**H. Notices, Calculation of Days, Extensions of Time**

1. **Notices.** All notices and other correspondence referred to in these rules shall be send by certified mail, return receipt requested.

2. **Days.** All days referred to in these rules mean business days unless the period of time is 30 days or more in which case days refers to calendar days.

3. **Extensions of Time.** For good cause shown, the Chairperson of ACOTE may extend any time period provided for in these rules.
IV. E. 1. PLANS OF CORRECTION

PLAN OF CORRECTION REQUIREMENTS

Whenever areas of noncompliance are identified as a result of an on-site evaluation, fact-finding visit, or other form of program review, a Plan of Correction is required. An electronic version of the Plan of Correction format is available on the Accreditation Surveys, Forms, and Templates section of the AOTA Web site.

For each area of noncompliance, the report must include a description of the plan for bringing the program into compliance with each Standard cited, a projected timeline, and a description of the documentation to be submitted to demonstrate compliance. If progress has been made toward correcting the area of noncompliance, a summary of the progress may also be included.

Because one of the U.S. Department of Education (USDE) recognition criteria mandates that ACOTE withdraw accreditation from a program if all areas of noncompliance are not corrected within the specified period of time (unless the period for achieving compliance is extended for good cause), it is strongly recommended that the program develop a Plan of Correction with a timeline for correction that does not exceed:

- 8 months if the program is less than 1 year in length;
- 14 months if the program is at least 1 year in length, but less than 2 years in length; or
- 20 months if the program is at least 2 years in length.

The Plan of Correction must be submitted as requested by ACOTE. All materials must be submitted in English or translated to English.

ACOTE ACTION ON PLANS OF CORRECTION

The reviewers assigned to the program will assess the Plan of Correction and present a motion to ACOTE for consideration and vote at its next scheduled meeting. If ACOTE determines that execution of the Plan of Correction is likely to bring the program into compliance with the cited Standard(s) in a timely manner, the report is accepted and a due date is established for a Progress Report. If ACOTE determines that the Plan has inadequately addressed the area(s) of noncompliance or that execution of the Plan is not likely to bring the program into compliance with the cited area(s) of noncompliance in a timely manner, the report is not accepted and a due date is established for a revised Plan of Correction. The Report of ACOTE Action notifying the program director that the Plan of Correction has not been accepted will specify the reasons why the Plan was considered inadequate.

If the Plan of Correction is determined by ACOTE to correct all cited areas of noncompliance, it may be accepted with no further report. Accreditation terms for programs that were cited with no more than two areas of noncompliance may be extended if the areas are corrected within 1 year of ACOTE’s action on the Report of On-Site Evaluation. For initial programs, terms may be extended from 5 to 7 years; for reaccredited programs, terms may be extended from 5 to 7 or from 7 to 10 years. This decision will be based on ACOTE’s review of the Plan of Correction or Progress Report submitted by the program and a determination that the program has fully resolved the cited areas of noncompliance. ACOTE will also consider any pre-existing areas of noncompliance as well as program changes that have occurred subsequent to the on-site evaluation that affect or are likely to affect the program’s full compliance with the Standards, including student learning outcomes. ACOTE may decline to extend the accreditation term of a multi-site program if one or more of the program locations was accredited for a shorter term than the primary location.
ADDITIONAL REPORTS

IV. E. 2. PROGRESS REPORTS

PROGRESS REPORT REQUIREMENTS

Following acceptance of a Plan of Correction, periodic Progress Reports are required until all areas of noncompliance are corrected. An electronic version of the Progress Report format is available on the Accreditation Surveys, Forms, and Templates section of the AOTA Web site.

For each area of noncompliance, the report should indicate whether the program director believes that the cited area has been corrected. The report should also provide a summary of the progress made toward correcting the cited area(s), the documentation that is being submitted, and additional action to be taken (if any) with a timeline for completion. If no progress has been made toward correcting the area(s) of noncompliance, a statement to that effect should be included.

The Progress Report must be submitted as requested by ACOTE. All materials must be submitted in English or translated to English.

ACOTE ACTION ON PROGRESS REPORTS

The reviewers assigned to the program will assess the Progress Report and determine whether any or all areas of noncompliance have been fully corrected. At the next scheduled ACOTE meeting, the reviewers will present a motion to ACOTE for consideration and vote.

If the Progress Report is determined by ACOTE to correct all cited areas of noncompliance, it may be accepted with no further report. Accreditation terms for programs that were cited with no more than 2 areas of noncompliance may be extended if the areas are corrected within 1 year of ACOTE’s action on the Report of On-Site Evaluation. For initial programs, terms may be extended from 5 to 7 years; for reaccredited programs, terms may be extended from 5 to 7 or from 7 to 10 years. This decision will be based on ACOTE’s review of the Plan of Correction or Progress Report submitted by the program and a determination that the program has fully resolved the cited areas of noncompliance. ACOTE will also consider any pre-existing areas of noncompliance as well as program changes that have occurred subsequent to the on-site evaluation that affect or are likely to affect the program’s full compliance with the Standards, including student learning outcomes. ACOTE may decline to extend the accreditation term of a multi-site program if one or more of the program locations was accredited for a shorter term than the primary location.

If areas of noncompliance remain, a due date for an additional report will be established. If a change in status is indicated, the program will be notified of the action.

EXTENSIONS FOR GOOD CAUSE

Any program carrying an area of noncompliance will be notified in writing of ACOTE’s policy on timelines for correction of areas of noncompliance and ACOTE’s criteria for granting an extension for good cause. Programs will receive notification of the need to submit a letter requesting an extension for good cause if necessary. The timing of the notification is dependent upon the remaining time the program has to correct the cited areas.
In making a determination to grant a request for extension of the period for achieving compliance, ACOTE will review the rationale for the request and assess whether the program has met the following criteria:

1) The program has submitted an appropriate plan for achieving compliance within a reasonable time frame.
2) The program has provided a detailed timeline for completion of the plan.
3) The program has provided evidence that the plan has been implemented according to the established timeline.
4) The program has provided reasonable assurance that the program will achieve compliance as stated in the plan.

Extensions of the period of time for achieving compliance are usually limited to a maximum of 2 additional years.

**TIME LIMIT FOR CARRYING AREAS OF NONCOMPLIANCE**

Any program that is in jeopardy of having its accreditation withdrawn due to the mandated time limit for carrying areas of noncompliance that has not requested and been granted an extension for good cause may be placed on Probationary Accreditation. This action will be scheduled at the ACOTE meeting preceding the end of the mandated time limit for carrying areas of noncompliance. Depending upon ACOTE’s scheduled meeting dates, this generally occurs as follows:

- 8 months if the program is less than 1 year in length;
- 16 months if the program is at least 1 year in length, but less than 2 years in length; or
- 20 months if the program is at least 2 years in length.

If ACOTE determines that the program has not returned to compliance with the Standards within the specified period of time (depending on program length), it will change the program’s status to Accreditation Withdrawn—Involuntary. Unless the period for achieving compliance has been extended for good cause, the United States Department of Education (USDE) mandated time for correction is:

- 12 months if the program is less than 1 year in length;
- 18 months if the program is at least 1 year in length, but less than 2 years in length; or
- 2 years if the program is at least 2 years in length.
IV. E. 3. INTERIM REPORTS TO ACOTE

INTERIM REPORT REQUIREMENTS

Each active program that is accredited by the Accreditation Council for Occupational Therapy Education (ACOTE®) is required to submit an Interim Report to document continuing compliance with the ACOTE Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, a Master’s-Degree-Level Educational Program for the Occupational Therapist, or an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant. Programs on Inactive Status are not required to complete an Interim Report, but must complete Inactive Status Reports as required by ACOTE. All materials must be submitted in English or translated to English.

An accredited occupational therapy program that has submitted an acceptable Letter of Intent to transition to an entry-level doctoral-degree-level program will be required to submit an abbreviated Interim Report for the occupational therapy master’s program on the regularly scheduled due date. The abbreviated Interim Report will require the program to address any current areas of noncompliance and Standards A.5.1 (Strategic Plan), A.5.2 (Faculty Professional Development Plans), A.5.3 (Program Evaluation), A.5.4 (Annual Evaluation Report), A.5.5 (Use of Evaluation Data), and A.5.6 (Certification Exam Pass Rate).

The current Interim Report submission requirements follow:

- For programs granted a 10-year accreditation term, an Interim Report would be due at the completion of year 4 and the Report of Self-Study would be prepared in year 9. The on-site visit would occur in year 10.
- For programs granted a 7-year accreditation term, an Interim Report would be due at the completion of year 3 and the Report of Self-Study would be prepared in year 6. The on-site visit would occur in year 7.
- For programs granted a 5-year accreditation term, an interim report would be due at the completion of year 2 and the Report of Self-Study would be prepared in year 4. The on-site visit would occur in year 5.

*Note: The period between reports will not exceed 5 years for any program.

The purpose of the Interim Report is to facilitate ongoing monitoring of programs in the interval between on-site evaluations. Questions are designed to elicit self-evaluation of continuing compliance with each Standard. For maximum benefit to the program, the report should be discussed by the entire program faculty and should be incorporated into, or flow directly from, a program’s ongoing evaluation.

Online forms for completion of the Interim Report to ACOTE are made available early in the fall and are due by the following spring. Completed Interim Reports must be electronically signed by both the program director and administrator to whom the program director reports.

ACOTE ACTION ON INTERIM REPORTS

Interim Reports are reviewed by the ACOTE at its summer meeting. Actions that may be taken by the ACOTE include:

- Acceptance of the report with no further action required.
- Acceptance of the report with no further action required; however, an item or items will be monitored on future reports.
- Deferral of action on the report with a request for clarification of one or more items. Following receipt of the requested information, the ACOTE will act upon the report a second time. It is the
program’s responsibility to supply all requested information. If it is not provided subsequent to this request, ACOTE may cite an area of noncompliance.

- Acceptance of the report with a request for a Plan of Correction regarding one or more areas of noncompliance with the Standards.
IV. E. 4.  PROGRAM DIRECTOR CHANGES

NOTIFICATION OF PROGRAM DIRECTOR CHANGE

A requirement for maintaining accreditation is that prompt notification be sent to the AOTA Accreditation Department if the program director of an accredited occupational therapy or occupational therapy assistant program changes. (Programs must inform ACOTE within 30 days of the resignation of the program director or appointment of a new or interim program director.) If the position is vacant, written notification should include the plan for filling the position and the name, credentials, and contact information of the individual who will serve as the primary point of contact for the program.

Upon the appointment of an acting or permanent program director or individual who is primarily responsible for handling the duties of the program director, the following documentation must be submitted to ACOTE through ACOTE Online (https://acote.aota.org) using the Substantive Change (SUBS. CHANGE) tab.

1. A letter of appointment, including the effective date of appointment of the new program director or the individual who is primarily responsible for handling the duties of the program director.


3. The curriculum vitae of the new program director or the individual who is primarily responsible for covering the duties of the program director. The curriculum vitae should detail occupational therapy experience, and should give particular attention to experience and qualifications in clinical practice, administration, and teaching.

4. A summary of experience and qualifications that is pertinent to the ACOTE Accreditation Standards. See the “Summary of Program Director Credentials” form in the “Accreditation Surveys, Forms, and Templates” section of the ACOTE Web site (www.acoteonline.org).

ACOTE REVIEW OF PROGRAM DIRECTOR CREDENTIALS

The assigned Accreditation Council for Occupational Therapy Education (ACOTE®) reviewers will assess the information and determine compliance with the relevant ACOTE Standards as follows:

Doctoral-Degree-Level Educational Program for the Occupational Therapist

A.2.1. The program must identify an individual as the program 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 document that the program director has sufficient release time to ensure that the needs of the program are being met.

A.2.2. The program director must be an initially certified occupational therapist who is licensed or otherwise regulated according to regulations in the state(s) or jurisdiction(s) in which the program is located. The program director must hold a doctoral degree awarded by an institution that is accredited by a regional accrediting body recognized by the U.S. Department of Education (USDE). The doctoral degree is not limited to a doctorate in occupational therapy.

A.2.3. The program director must have a minimum of 8 years of documented experience in the field of occupational therapy. This experience must include:

- Clinical practice as an occupational therapist;
- Administrative experience including, but not limited to, program planning and implementation, personnel management, evaluation, and budgeting;
- Scholarship (e.g., scholarship of application, scholarship of teaching and learning); and
- At least 3 years of experience in a full-time academic appointment with teaching responsibilities at the postbaccalaureate level.

**Master’s-Degree-Level Educational Program for the Occupational Therapist**

**A.2.1.** The program must identify an individual as the program 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 document that the program director has sufficient release time to ensure that the needs of the program are being met.

**A.2.2.** The program director must be an initially certified occupational therapist who is licensed or otherwise regulated according to regulations in the state(s) or jurisdiction(s) in which the program is located. The program director must hold a doctoral degree awarded by an institution that is accredited by a regional accrediting body recognized by the U.S. Department of Education (USDE). The doctoral degree is not limited to a doctorate in occupational therapy.

**A.2.3.** The program director must have a minimum of 8 years of documented experience in the field of occupational therapy. This experience must include
- Clinical practice as an occupational therapist;
- Administrative experience including, but not limited to, program planning and implementation, personnel management, evaluation, and budgeting;
- Scholarship (e.g., scholarship of application, scholarship of teaching and learning); and
- At least 3 years of experience in a full-time academic appointment with teaching responsibilities at the postsecondary level.

**Associate-Degree-Level Educational Program for the Occupational Therapy Assistant**

**A.2.1.** The program must identify an individual as the program 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 document that the program director has sufficient release time to ensure that the needs of the program are being met.

**A.2.2.** The program director must be an initially certified occupational therapist or occupational therapy assistant who is licensed or otherwise regulated according to regulations in the state(s) or jurisdiction(s) in which the program is located. The program director must hold a minimum of a master’s degree awarded by an institution that is accredited by a regional or national accrediting body recognized by the U.S. Department of Education (USDE). The master’s degree is not limited to a master’s degree in occupational therapy.

**A.2.3.** The program director must have a minimum of 5 years of documented experience in the field of occupational therapy. This experience must include
- Clinical practice as an occupational therapist or occupational therapy assistant;
- Administrative experience including, but not limited to, program planning and implementation, personnel management, evaluation, and budgeting;
- Understanding of and experience with occupational therapy assistants; and
- At least 1 year of experience in a full-time academic appointment with teaching responsibilities at the postsecondary level.

If review of credentials for a director of an established occupational therapy educational program reveals compliance with the Standards, no further action is taken. If the credentials indicate noncompliance and ACOTE agrees, an area of noncompliance will be cited and the program will be required to submit a Plan of Correction to ACOTE.
IV. E. 5.  ANNUAL REPORTS TO ACOTE

ANNUAL REPORT REQUIREMENTS

Each program that is accredited by the Accreditation Council for Occupational Therapy Education (ACOTE®) is required to submit an Annual Report to provide data on key indicators and quality outcomes of the programs including, but not limited to:

- General program information
- Applicants and student enrollment
- Faculty resources
- Program Operations
- Outcomes
- Access to Information

ACOTE receives an annual report on certification exam pass rates of all programs directly from the National Board for Certification in Occupational Therapy (NBCOT).

ACOTE ACTION ON ANNUAL REPORTS

Annual Reports are reviewed by ACOTE at its spring meeting. Actions that may be taken by the ACOTE include:

- Acceptance of the report with no further action required.
- Acceptance of the report with no further action required; however, an item or items will be monitored on future reports.
- Deferral of action on the report with a request for clarification of one or more items. Following receipt of the requested information, the ACOTE will act upon the report a second time. **It is the program’s responsibility to supply all requested information. If it is not provided subsequent to this request, ACOTE may cite an area of noncompliance.**
- Acceptance of the report with a request for a Plan of Correction regarding one or more areas of noncompliance with the Standards.
V. ADMINISTRATIVE PROCEDURES
ADMINISTRATIVE PROCEDURES

V. A. FEES

ACCREDITATION FEES

The Accreditation Council for Occupational Therapy Education (ACOTE®) is committed to administering a quality accreditation program in a cost-effective and efficient manner. Accreditation fees paid by the educational programs help to support costs attributed to the entire accreditation process. ACOTE uses a fixed fee formula that includes the cost of the on-site visit in the annual fee; therefore, educational programs are not charged a fee for reaccreditation on-site evaluations.

ACCREDITATION FEE SCHEDULE (NOTE: All fees are subject to change.)

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<td>Annual Accreditation Fee (per location)</td>
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<td>Annual Inactive Fee</td>
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<td>Application Fee (includes $500 deposit)</td>
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<tr>
<td>Preaccreditation Review Fee (US)</td>
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<tr>
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<tr>
<td>New Location Application Fee</td>
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<td>$4,565</td>
<td>$4,750</td>
<td>$4,940</td>
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<tr>
<td>New Location On-Site Fee</td>
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<td>$4,565</td>
<td>$4,750</td>
<td>$4,940</td>
<td>$5,140</td>
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FEE INFORMATION

Institutions with Multiple Levels: Institutions housing more than one accredited program level (i.e., OT doctoral, OT master’s, OTA) must pay the application, preaccreditation, initial on-site, and annual fees applicable to each program.

Annual Accreditation Fees are billed in advance of the coming academic year. Invoices are mailed in July and payment is due no later than October 15th. If early notification is required to facilitate processing of a purchase order for payment, the AOTA Accreditation Department should be notified. Annual fees are due each year, including the year in which an on-site evaluation is scheduled. For new programs, the annual fee becomes effective with the first full academic year for which the program has accreditation status.
**Application Fees** are based on the due date of the Candidacy Application. $500 of this fee must be submitted with the Letter of Intent as a non-refundable deposit. Accredited OT master’s-degree level programs transitioning to the OT doctoral-degree level or OTA associate-degree level programs transitioning to the OTA baccalaureate-degree level are exempt from the application fee.

**Preaccreditation Review Fees** should be submitted at the time the initial Report of Self-Study is due. Accredited OT master’s-degree level programs transitioning to the OT doctoral-degree level or OTA associate-degree level programs transitioning to the OTA baccalaureate-degree level are exempt from the preaccreditation review fee.

**Initial On-Site Fees** will be billed by Accreditation staff after the on-site evaluation is completed. Accredited OT master’s-degree level programs transitioning to the OT doctoral-degree level or OTA associate-degree level programs transitioning to the OTA baccalaureate-degree level are exempt from the initial on-site fee.

**Inactive Fees:** Inactive fees for all inactive programs must be paid until a program applies for and receives voluntary withdrawal of accreditation.

**Transitioning Programs and Inactive Fees:** Programs must pay the annual reaccreditation fee for each accredited program. Once a program transitions to a higher degree level, the newly accredited program will be charged the annual reaccreditation fee. Annual Inactive Fees will be charged for programs transitioning from the OT master’s-degree level to the OT doctoral-degree level or for programs transitioning from the OTA associate-degree level to the OTA baccalaureate-degree level until the transitional program applies for and receives voluntary withdrawal of accreditation.

### FEE PAYMENTS

All $500 application fee deposits and payments sent by overnight mail should be made payable to AOTA and mailed to:

AOTA Accreditation Department  
4720 Montgomery Lane, Suite 200  
Bethesda, MD 20814-3449

All other fees can be paid by check or credit card as follows:

Checks should be made payable to AOTA and mailed to:

AOTA Accreditation Department  
c/o Eagle Bank Lockbox  
PO Box 347171  
Pittsburgh, PA 15251-4171

Credit card or electronic transfer payments should be directed to AOTA at 301-652-6611 x1928. To expedite payment, please have ready the order number found on the fee invoice.
V. B. PROCEDURE FOR COMPLAINTS

POLICY FOR COMPLAINTS AGAINST EDUCATIONAL PROGRAMS

The Accreditation Council for Occupational Therapy Education (ACOTE®) follows established procedures when complaints are received by ACOTE indicating that accredited programs or programs seeking accreditation may not be in compliance with the Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, Accreditation Standards for a Master’s-Degree-Level Educational Program for the Occupational Therapist, or Accreditation Standards for an Educational Program for the Occupational Therapy Assistant, or may not be following established accreditation policies or procedures. Actions taken by other accrediting agencies do not preclude ACOTE from investigating a complaint against the same institution or program.

ACOTE will not intervene on behalf of individuals or act as a court of appeal for faculty members or students in matters of admission, appointment, promotion, or dismissal. A copy of the Standards may be obtained through the ACOTE Web site (www.acoteonline.org) or by contacting Accreditation Department staff at the American Occupational Therapy Association (AOTA).

PROCEDURES FOR COMPLAINTS AGAINST EDUCATIONAL PROGRAMS

1. To receive formal consideration, all complaints against a program subject to ACOTE accreditation must be submitted electronically to the ACOTE Chairperson, c/o the AOTA Accreditation Department. The complaint must be submitted as an attachment to an e-mail addressed to accred@aota.org and must include a signed complaint form, “Complaint Against a Program Subject to ACOTE Accreditation”. A complaint against an educational program must:
   a. describe the nature of the complaint and the related accreditation Standards or accreditation policies or procedures that the complainant believes are not being met by the program, including any evidence or documents that might substantiate the complaint;
   b. document that the complainant has made reasonable efforts to resolve the complaint, or alternatively that such efforts would be unavailing; and
   c. be signed by the complainant: (The confidentiality of the complaining party is protected by AOTA Accreditation staff unless release of identity has been authorized, or disclosure is required by legal action.)
   d. redact the names of any individuals who are not directly related to the complaint (e.g., student names associated with discussion boards, email addresses of peers) prior to submission of the complaint. (The complaint should only include the names of the complaining party and those who provoked the complaint.)

2. Complaints that do not meet all of the above requirements will be returned to the complainant with an explanation. Complaints meeting the above requirements are transmitted by AOTA Accreditation staff to the ACOTE Chairperson for consideration. The identity of the complainant is concealed.

3. The ACOTE Chairperson will determine whether, in fact, the complaint relates to the manner in which the program complies with the Standards or follows established accreditation policies or procedures.
   a. If the complaint does not relate to the Standards or to established policies or procedures, the person initiating the complaint will be notified accordingly by the ACOTE Chairperson.
   b. If the complaint is judged to relate to program compliance with the Standards or to accreditation policies or procedures, the following procedures will be followed:
(1) AOTA Accreditation staff will acknowledge receipt of the complaint and share with the filing party a description of the process and policies that pertain to handling such complaints.

(2) AOTA Accreditation staff will notify the program director and the chief executive officer of the sponsoring institution of the substance of the complaint and will request the institution/program to provide a preliminary investigation and report on the findings within 30 days of the sponsoring institution’s receipt of the letter of notice. The identity of the complaining party is not revealed unless release of identity has been authorized by the complainant or disclosure is required by legal action.

(3) At the request of the ACOTE Chairperson, AOTA Accreditation staff may request further information or material relative to the complaint from the complaining party, the institution, or other relevant sources.

4. On receipt of the responses referred to in 3.b.(2) and (3) above, or at its next scheduled meeting, the ACOTE reviewers for the program in question will consider the complaint and all relevant information obtained in the course of investigation and formulate an appropriate action to present to ACOTE at its next scheduled meeting according to the following guidelines:

a. If the complaint is determined to be unsubstantiated or unrelated to the Standards or established accreditation policies or procedures, the complaining party, officials of the program in question, and the appropriate official of the sponsoring institution will be so notified.

b. If the investigation reveals that the program may not be or may not have been in compliance with the Standards or may not be or may not have been following the established accreditation policies or procedures, one of two options will be taken.

(1) The program may be requested to submit a report and documentation that the substantiated complaint has been corrected. Should ACOTE be satisfied with this response, the program, its sponsoring institution, and the party filing the complaint will be notified of ACOTE’s satisfaction with the resolution of the matter and notice that the program’s accreditation status remains unaffected by the complaint.

(2) Should ACOTE judge the program or sponsoring institution’s response to the complaint inadequate and lacking in evidence of the program’s continuing compliance with the Standards or adherence to accreditation policies or procedures, ACOTE may request that the program submit additional information or may arrange for a fact-finding visit to the program. The cost of the visit will be divided equally between ACOTE and the educational program.

(a) If ACOTE, on the basis of the evidence before it, determines that the program is in compliance with the Standards and is adhering to accreditation policies and procedures, the program, its sponsoring institution, and the complaining party will be notified of this assessment and the fact that the program’s current accreditation status remains unaffected by the complaint.

(b) If ACOTE, on the basis of the evidence before it, determines that the complaint is valid and that the program is not in compliance with one or more Standards, areas of noncompliance will be cited and a Plan of Correction will be required.

If ACOTE, on the basis of the evidence before it, determines that the program is not in substantial compliance with the Standards, areas of noncompliance will be cited, a Plan of Correction will be required, and the program’s accreditation status will be changed to Probationary Accreditation.

The program, its sponsoring institution, the complaining party, and the U.S. Department of Education will be advised of ACOTE’s action to change accreditation status to Probationary Accreditation. Final decisions to place a program on probationary accreditation will be publicly disclosed via a posting on the ACOTE Web site within 24 hours of confirmation that the program has
received notification of ACOTE’s decision to place the program on Probationary Accreditation.

5. The AOTA Accreditation Department maintains a file of all complaints received by ACOTE. All complaints against an educational program that are judged by the ACOTE Chairperson or designee to relate to program compliance with the Standards or to accreditation policies or procedures since the last on-site evaluation will be made available for review by the on-site team scheduled to visit that program.

### POLICY FOR COMPLAINTS AGAINST ACOTE

ACOTE is dedicated to providing a sustained quality of program evaluation and review. Established procedures are followed when complaints are received alleging that ACOTE has not complied with established accreditation practices, including noncompliance with its own policies and procedures, exceeding its scope as defined by the Standards, the behavior of its on-site evaluation team members, or noncompliance with the recognition criteria of the U.S. Department of Education (USDE) or the recognition standards of the Council for Higher Education Accreditation (CHEA).

ACOTE will not consider complaints that include matters pertaining to an adverse accreditation action or citing of areas of noncompliance. If program representatives wish to appeal an adverse action, they should refer to ACOTE Policy IV.D. Appeals Process.

No institution or person who, in good faith, makes a complaint against ACOTE, its members, agents, or its staff will be subject to harassment, retaliation, or adverse accreditation decisions by virtue of having lodged the complaint.

### PROCEDURES FOR COMPLAINTS AGAINST ACOTE

1. A complaint against ACOTE may be filed by completing the printable complaint form, “Complaint Against ACOTE”. Completed forms must be submitted as an attachment to an e-mail addressed to accred@aota.org.

   The complaint against ACOTE must:
   a. describe the nature of the complaint in detail;
   b. list the established accreditation practices that the complainant believes are not being met by ACOTE or ACOTE accreditation evaluators; and
   c. be signed by the complainant.

2. Within one week of the receipt of the complaint, the Accreditation Department staff will acknowledge receipt of the complaint and attach a copy of the procedure for handling complaints against ACOTE. The complaint will be copied to the ACOTE Chairperson.

3. The ACOTE Chairperson will appoint a 3-person complaint panel consisting of former ACOTE members currently serving on the Roster of Accreditation Evaluators (RAE). One of the panelists will be appointed as chairperson of the complaint panel by the ACOTE Chairperson. The ACOTE Chairperson will request that the complaint panel investigate the complaint and report its findings to the complainant and ACOTE within 30 days.

4. The complaint panel will review complaints that relate to ACOTE’s compliance with established accreditation practices and take the following action:
   a. The complaint panel chairperson may request further information or material relative to the complaint from the complaining party.
   b. The complaint panel will consider the complaint and all relevant information obtained in the course of investigation and formulate an appropriate action according to the following guidelines:
      1. If the complaint is determined to be unsubstantiated or unrelated to ACOTE compliance with established accreditation policies or procedures, the complainant and ACOTE Chairperson will be so notified in writing.
(2) If the investigation reveals that ACOTE may not be or may not have followed established accreditation policies or procedures, ACOTE will be so notified in writing by the complaint panel chairperson. ACOTE, at its next meeting, must review its noncompliant practices and policies and either make necessary modifications to comply with its established accreditation policies or procedures, or revise/develop policies or procedures appropriate to reflect accepted accreditation practice.

(3) The complaint panel and the complainant will be notified in writing of ACOTE’s final resolution of the complaint.

5. The AOTA Accreditation Department maintains a file of all complaints filed against ACOTE.
V. C. POLICY AND PROCEDURE FOR DELAY OF ON-SITE EVALUATION

PROCEDURE FOR REQUESTING RESCHEDULING OF AN ON-SITE EVALUATION WITHIN THE SAME ACADEMIC YEAR

A program director may request that an on-site evaluation be rescheduled within the same academic year. Such requests with accompanying rationale should be sent to AOTA Accreditation staff and do not require ACOTE approval and vote. Because rescheduling an on-site evaluation involves a significant amount of logistics, such requests should be made as far in advance of the on-site as possible.

PROCEDURE FOR REQUESTING A DELAY OF ON-SITE EVALUATION TO A SUBSEQUENT ACADEMIC YEAR

A program director may request that an on-site evaluation be delayed to a subsequent academic year. Such requests require ACOTE approval and vote. The procedure for requesting a delay of on-site follows:

1. Requests for delay must be submitted in writing to ACOTE, c/o the AOTA Accreditation Department, at least 6 months prior to the scheduled on-site evaluation.

2. The request must include the program’s rationale for requesting a delay and the length of delay requested (e.g., 1 or 2 years). Unless there are extenuating circumstances, requests for delays that would result in an accreditation term of longer than 10 years will not be considered.

3. Until a decision is made, the program must proceed with preparations as though the on-site were occurring as originally scheduled.

ACOTE’S CONSIDERATION OF A REQUEST FOR DELAY OF ON-SITE EVALUATION

1. Upon receipt, the program’s request for a delay of on-site evaluation is forwarded by AOTA Accreditation staff to the ACOTE reviewers assigned to the program. The reviewers complete a review of program’s history with consideration given to the factors listed below.

   - Request for participation in a joint or coordinated survey
   - Changes in program level since the last on-site evaluation (e.g., transition from a master’s-degree level to a doctoral-degree level)
   - Number of years since the last on-site evaluation
   - Impact on current students
   - Frequency and history of asking for delays
   - Status at the last on-site evaluation

2. The reviewers’ motion to either approve or deny the request for a delay of on-site evaluation is presented for a vote by ACOTE at its next scheduled meeting.

3. A letter indicating the final decision of ACOTE regarding the request for delay will be sent to the CEO, dean, and program director. If the delay is granted, a new ACOTE Certificate of Accreditation reflecting the extension of accreditation will be included with the program director’s copy of the letter. Subsequent administrative adjustments will be coordinated by AOTA accreditation staff.
A requirement for maintaining accreditation is to submit all required reports by the due date specified by the Accreditation Council for Occupational Therapy Education (ACOTE®). All reports must be submitted according to the instructions provided. Timely submission of accreditation reports is critical to provide adequate review time prior to ACOTE action. ACOTE has established the following procedures regarding the failure to submit accreditation reports by the specified due date:

1. A due date is established for each accreditation report and provided to the program in writing.

2. When an accreditation report is not received by the specified due date, warning notification is sent to the program director (with a copy to the dean), stating that the report must be received within one week (7 days) of the due date or the program may be cited with an area of noncompliance pertaining to Standard A.1.5 and placed on Probationary Accreditation at the next scheduled ACOTE meeting. (See ACOTE Manual Section IV.C.)

3. If the late report is a Report of Self-Study:
   
   a. The paper reviewer and on-site team will be contacted by Accreditation Department staff and a determination will be made regarding a postponement of the on-site evaluation.
   
   b. Should the on-site evaluation be postponed, the program will be billed for any financial penalties incurred by cancellation of airline tickets, hotel rooms, or other related costs.

4. If a report is received by the Accreditation Department before the end of the 7-day grace period, receipt of the report is acknowledged by the Accreditation Department and the report is reviewed by the ACOTE at the next scheduled meeting.

5. If a report is not received by 5:00 p.m. on day 7 of the grace period, the program will be placed on the agenda of the next scheduled ACOTE meeting for action to cite an area of noncompliance pertaining to Standard A.1.5 and place the program on Probationary Accreditation.

Once a delinquent report is received, it is acknowledged by the Accreditation Department, and will be scheduled for review at ACOTE’s next meeting. The action to cite an area of noncompliance pertaining to Standard A.1.5 and place the program on Probationary Accreditation will be removed from the ACOTE agenda.
V. E. STANDARDS REVISION PROCESS

ACOTE EDUCATIONAL STANDARDS REVIEW COMMITTEE

Within 5 years after new accreditation standards are adopted, the Accreditation Council for Occupational Therapy Education (ACOTE®) will appoint members to serve on the ACOTE Educational Standards Review Committee according to that Committee’s Standard Operating Procedure. This Committee will conduct a complete evaluation and revision of the Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, Accreditation Standards for a Master’s-Degree-Level Educational Program for the Occupational Therapist, and Accreditation Standards for an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant.

STANDARDS REVIEW AND REVISION TIMELINE

The following is a suggested review and revision timeline. The actual timeline to be followed may be expanded as needed.

Year One:

1. First meeting of the ACOTE Educational Standards Review Committee:
   - Develop a timeline and methodology for the Standards revision process.
   - Review recommendations for change made by ACOTE.
   - Review other comments and feedback received from stakeholders.
   - Review Standards for compliance with current United States Department of Education (USDE) and Council for Higher Education Accreditation (CHEA) criteria for recognition.

2. Publish an article on the AOTA Web site, in relevant publications (e.g., OT Practice and OT Advance) announcing the revision of the Standards and describing the process and schedule for Standards review/revision. Disseminate a call for comment (with timeline indicated for comment) to all communities of interest and outline the procedure for those wishing to provide input to the ACOTE Educational Standards Review Committee.

   Communities of interest include all the bodies within the AOTA organizational structure; related bodies or organizations (the American Occupational Therapy Foundation, the American Occupational Therapy Political Action Committee, the National Board for Certification in Occupational Therapy); OT and OTA educational program representatives (CEOs, deans, program directors, fieldwork coordinators, and student advisors); occupational therapy fieldwork educators; practitioners; consumers; employers; regulators (licensure boards, state higher education commissions); recognition bodies (U.S. Department of Education, Council for Higher Education Accreditation); accreditors (Association of Specialized and Professional Accreditors, regional, national, and specialized accreditors); students; and the public at large.

3. Second meeting of the ACOTE Educational Standards Review Committee:
   - Review the data collected from all evaluation instruments.
   - Review any correspondence, e-mails, or telephone calls received by ACOTE regarding the Standards.
   - Identify Standards determined to have greatest concerns.
   - Prepare draft Standards for ACOTE review and discussion.
4. **ACOTE meeting**
   - Review and discuss the draft Standards.
   - Provide feedback to the ACOTE Educational Standards Review Committee.

**Year Two:**

5. Third meeting of the ACOTE Educational Standards Review Committee:
   - Revise the draft Standards based on input from ACOTE.
   - Develop an online survey for comment and feedback on the draft Standards.

6. Publish a draft of the revised Standards on the AOTA Web site and disseminate with a survey instrument to invite feedback from all communities of interest.

7. Hold a Standards Open Hearing that is open to the public and send ACOTE representatives to a variety of meetings (e.g., OT and OTA Program Directors’ Council meetings, regional fieldwork council meetings, Faculty Forum, Education Special Interest Section, etc.) to present identified Standards issues and request input on the Standards revision.

8. Fourth meeting of the ACOTE Educational Standards Review Committee:
   - Review feedback regarding the draft revised Standards.
   - Revise the draft Standards based on input.

9. **ACOTE meeting**
   - Review and discuss the draft Standards.

10. Fifth meeting of the ACOTE Educational Standards Review Committee:
    - Finalize the draft Standards based on ACOTE input.
    - Develop an online survey for comment and feedback on the draft Standards.

11. Post a draft of the revised Standards on the AOTA Web site and invite comment.

12. Sixth meeting of the ACOTE Educational Standards Review Committee:
    - Review feedback regarding the draft revised Standards.
    - Revise draft Standards (if necessary) based on input.

13. **ACOTE meeting:**
    - **Approval of New Standards:** ACOTE will vote on approval of the new Standards and establish a transition timeline (usually a minimum of 18 months). Typically, an implementation date of July 31st is set so that each academic year of on-site evaluations (August-July) is conducted using the same set of Standards.
    - **Implementation for Programs Undergoing Initial Accreditation:** During the transition period, programs undergoing initial accreditation that have initial on-site evaluations scheduled after the implementation date will be required to prepare both the Candidacy Application (if not already submitted) and the initial Report of Self-Study for Preaccreditation Review under the new Standards. If the initial on-site evaluation is scheduled prior to the implementation date of the new Standards, both the Candidacy Application and initial Report of Self-Study for Preaccreditation Review must be prepared using the current Standards.
    - **Implementation for Programs Undergoing Reaccreditation:** Programs scheduled for reaccreditation on-site evaluations after the implementation date will be required to prepare the Report of Self-Study under the new Standards. If the reaccreditation on-site evaluation is scheduled prior to the implementation date of the new Standards, the Report of Self-Study must be prepared using the current Standards.

14. Post the new Standards on the AOTA Web site and send an e-mail announcement to all communities of interest regarding the new Standards.
Year Three

15. Provide ACOTE workshops to program directors and all accreditation evaluators on implementing the new Standards.

16. Begin assessing compliance with the new Standards as part of the regular on-site and interim report review process.

**ONGOING REVIEW**

Once the new Standards have been adopted, the ongoing review of the Standards becomes the responsibility of the ACOTE Standards and Ethics Committee, a standing committee of ACOTE. This Committee is responsible for review of the feedback obtained through the Standards Evaluation Forms and other evaluation instruments to determine:

1. The need for an immediate change to the Standards. If ACOTE determines, at any point during its systematic program of review, that it needs to make changes to the Standards, ACOTE will initiate action within 12 months to make the changes and will complete that action within a reasonable period of time. Before finalizing any changes to the Standards, ACOTE will provide advance public notice of proposed new or revised Standards. ACOTE will provide adequate opportunity for broad comment from the academic community and the public prior to adoption of proposed changes to ACOTE Standards.

2. Continued compliance with USDE and CHEA recognition criteria. ACOTE will notify the Secretary of USDE in writing of any changes in its policies, procedures, or accreditation standards which might alter ACOTE’s scope of recognition or its compliance with the USDE requirements for notification to the Secretary.

3. The need for an ACOTE interpretation of a Standard or Standards. Such interpretations will be included in ACOTE’s Standards Interpretive Guide to be maintained on the AOTA Web site. Any changes to the Standards Interpretive Guide will be immediate unless otherwise indicated by an implementation date. In determining the implementation date, ACOTE will take the following guidelines into consideration:
   (a) If the interpretation is to the benefit of the programs, it will be implemented immediately.
   (b) If the interpretation potentially requires changes by the program in order to be in compliance, then an implementation date will be determined by ACOTE that provides all programs a reasonable time period with which to come into compliance.

4. The need for a change to any of ACOTE’s policies, procedures, or forms.
ADMINISTRATIVE PROCEDURES

V. F. POLICY ON RECORDS RETENTION

USDE REQUIREMENTS

§602.15(b) The agency maintains complete and accurate records of --

(1) Its last full accreditation or preaccreditation review of each institution or program including on-site evaluation team reports, the institution’s or program’s responses to on-site reports, periodic review reports, any reports of special reviews conducted by the agency between regular reviews, and a copy of the institution’s or program’s most recent self-study; and

(2) All decisions made throughout an institution's or program's affiliation with the agency regarding the accreditation and preaccreditation of any institution or program and substantive changes, including all correspondence that is significantly related to those decisions.

ACOTE POLICY

The Accreditation Department keeps two full accreditation or preaccreditation reviews of each program readily available on-site at AOTA headquarters. This includes the following:

1. Reports of the Accreditation Council (RACs)
2. Program Director’s response to the Report of On-Site Evaluation (ROSE)
3. Plans of Correction
4. Progress Reports
5. Biennial/Interim Reports
6. Fact-finding or special reports
7. Most recent self-study report

Formal correspondence and reviewers’ reaction forms (1Ms, 2Ms, 3Ms, 4Ms, 5Ms) associated with the above reports are also maintained in the files, as are the original Letter of Intent and accompanying response and any program director credentials and correspondence.

Any information earlier than the last two accreditation cycles is removed and shredded. This includes the following:

1. Plans of Correction, reviewers' reaction forms (3Ms), and corresponding action letters.
2. Progress Reports, reviewers' reaction forms (3Ms), and corresponding action letters.
3. General correspondence regarding arrangements for on-site evaluation, e.g., letters to the program director regarding the on-site evaluation, on-site schedules, travel arrangements, original/handwritten ROSEs, etc.
4. Invoices.

NOTE: The following materials are retained longer than two cycles:

1. Reports of the Accreditation Council (RACs)
2. Any fact-finding or special reports
3. Appeals reports and correspondence
4. Annual/Biennial/Interim Reports
5. Record of ACOTE decisions on programs not granted accreditation or developing program status
6. Corresponding action letters to numbers 1-5

All information is included chronologically in the program file with most recent information first.
VI. GUIDELINES AND POLICY STATEMENTS
GUIDELINES AND POLICY STATEMENTS

VI. A. GUIDELINES FOR COMMUNICATION WITH EDUCATIONAL PROGRAM AND INSTITUTIONAL REPRESENTATIVES

WRITTEN COMMUNICATION

In order to prevent problems related to misunderstanding and/or misinformation, it is the policy of the Accreditation Council for Occupational Therapy Education (ACOTE®) that all communications regarding ACOTE actions related to the accreditation status shall be presented through official written correspondence. Such correspondence is sent electronically from the Accreditation Department or through ACOTE Online and is addressed and copied as follows:

- For all ACOTE action that involves or may involve areas of noncompliance with the Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, Accreditation Standards for a Master’s-Degree-Level Educational Program for the Occupational Therapist, or Accreditation Standards for an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant, correspondence is forwarded to the CEO, dean, and program director, and copied to reviewers.

- For ACOTE actions that do not directly affect accreditation status, letters are generally addressed to the program director and may be copied to the CEO, dean, and reviewers.

Additional written communication related to procedures and scheduling of the accreditation process is sent directly to the program director from Accreditation Department staff.

VERBAL COMMUNICATION

To facilitate the accreditation process, regular communication with the staff of the Accreditation Department is encouraged. Questions related to the self-study process, interpretation of the accreditation standards, preparation of required reports, arrangements for the on-site evaluation, or other procedural issues may be directed at any time to the staff. In addition, questions regarding clarification of an action or a request from ACOTE may be directed to the Director of the Accreditation Department. The director will contact the reviewers and subsequently provide a response to the program representative.

Although AOTA Accreditation Department staff and ACOTE will clarify statements in regard to areas of noncompliance or acceptability of reports, it is not their role to provide consultation regarding program development. Questions related to program development or requests for detailed guidance regarding approaches to addressing areas of noncompliance may be directed to the AOTA Education Department, AOTA Commission on Education, or to independent consultants.

Direct communication between members of ACOTE and members of educational program faculty and staff prior to an on-site evaluation visit is appropriate when it is related to specific arrangements for travel or housing for the visit or discussion of the on-site schedule. It shall not be appropriate for there to be direct communication between reviewers and the program director or faculty in those instances where the communication relates to the substance or appropriateness of a decision of ACOTE. Communication at that time should occur with the Accreditation Department staff who, in turn, will relay concerns to ACOTE.

Telephone conversations are documented by the Accreditation Department staff and copies sent to program reviewers as appropriate.
GUIDELINES AND POLICY STATEMENTS

VI. B. POLICY ON CONFIDENTIALITY AND DISCLOSURE

In keeping with its responsibility to the public, the American Occupational Therapy Association (AOTA) Accreditation Council for Occupational Therapy Education (ACOTE®) has clearly delineated policies regarding confidentiality and disclosure.

**STATEMENT ON CONFIDENTIALITY**

ACOTE maintains the confidentiality of information collected during the accreditation process. Materials such as Reports of Self-Study, Plans of Correction, Progress Reports, Annual Reports, and Interim Reports to ACOTE are considered confidential and are accessible only to AOTA Accreditation Department staff and members of the evaluating bodies of ACOTE. Written permission must be secured from the authorities of the educational institution prior to release of this information to any other individual or group, except when this released information does not disclose the identity of the educational institution or is required to meet recognition criteria of the U.S. Department of Education (USDE) or Council for Higher Education Accreditation (CHEA).

During discussions related to review and evaluation of specific programs, strict safeguards of confidentiality are maintained. These meetings are closed and the minutes are kept confidential. Meetings may be open during discussion of general accreditation procedures. During open meetings, participants avoid references to specific programs by name or through elaborate descriptions.

To ensure that accurate and current information regarding student outcomes is readily available to the public, AOTA Accreditation Department staff may release a program’s 3-year aggregate national certification examination pass rate data that is obtained directly from the National Board for Certification in Occupational Therapy (NBCOT). Statistical summaries that do not specifically reveal information about individual programs may also be disclosed. ACOTE shall not be responsible for attempts to use general information disclosed by ACOTE to identify specific programs.

In an effort to keep state occupational therapy associations informed of new applicant educational programs in their state, ACOTE forwards a copy of all Letters of Intent and Letter of Intent Data Forms to the appropriate state association president.

Upon written request to the AOTA Accreditation Department (4720 Montgomery Lane, Suite 200, Bethesda, Maryland 20814-3449), ACOTE will provide a brief summary of the most recent on-site visit report (Report of ACOTE) regarding any ACOTE-accredited program.

**STATEMENT ON DISCLOSURE**

Information regarding ACOTE: The scope, policies, procedures, and decisions of ACOTE are described in official documents and are available to the public through the ACOTE Web site ([www.acoteonline.org](http://www.acoteonline.org)). Relevant policies and procedures are disseminated to educational programs on a regular basis.

Information relevant to decisions on accreditation status: Lists of all ACOTE-accredited, developing, and applicant occupational therapy and occupational therapy assistant educational programs are available to the public through the ACOTE Web site ([www.acoteonline.org](http://www.acoteonline.org)). Each program listing includes complete contact information for the program, the level(s) of the program accredited, and the academic year of the next scheduled on-site evaluation. A list of accredited and developing programs is also published annually in the *American Journal of Occupational Therapy*. 
The definitions of the specific categories of accreditation are presented in the introduction to the listing as follows:

**ACCREDITATION:**
The program is in substantial compliance with the Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, Accreditation Standards for a Master’s-Degree-Level Educational Program for the Occupational Therapist, or Accreditation Standards for an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant.

**PROBATIONARY ACCREDITATION:**
At the occasion of its most recent review, the program was not in substantial compliance with the administrative requirements or one or more of the Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, Accreditation Standards for a Master’s-Degree-Level Educational Program for the Occupational Therapist, or Accreditation Standards for an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant.

The listing published in the *American Journal of Occupational Therapy* does not specify which of the accreditation categories applies to each individual program. Those programs on probation are included in the listing without differentiation from the other accredited programs, since Probationary Accreditation is an accreditation status. Probationary Accreditation status and the findings made in connection with the action taken, together with the official comments of the affected institution are, however, disclosed on the ACOTE Web site, where those listings can be kept current.

If inquiries, written or verbal, are received regarding the accreditation status of a program, the inquirer is told:

1. whether the program is accredited,
2. the specific accreditation category,
3. the definition of the applicable accreditation category, and
4. the next review date.

If the status is Probationary Accreditation, the inquirer is also provided with the information that appears on the ACOTE Web site and referred to the program for further, current information regarding the reason(s) for the probation and the program’s progress in addressing the reason(s).

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**NOTIFICATION TO THE USDE, STATE REGULATORY AUTHORITIES, INSTITUTIONAL ACCREDITING AGENCIES, AND THE PUBLIC**

Within 30 days after a decision is made, the Secretary of the United States Department of Education (USDE), appropriate state regulatory authority, appropriate institutional accrediting agency, and the public are provided written notice of the following types of ACOTE decisions:

1. A decision to grant Candidacy Status to an applicant program.
2. A decision to grant, defer action on, or deny Preaccreditation Status to a developing program.
3. A decision to award initial accreditation or reaccreditation to a program.
4. A decision to change a program’s status to Accreditation—Inactive at the request of the institution.
5. A decision to change a program’s status to Accreditation Withdrawn—Voluntary at the request of the institution.
Notification of all final ACOTE accreditation actions is sent to the USDE within 30 days after a decision is made. The public is notified of all final actions via a posting on ACOTE’s Web site and an article in OT Practice, the official bimonthly publication of AOTA.

The Secretary of the USDE, the appropriate state regulatory authority, and the appropriate institutional accrediting agency will be notified of the following types of decisions at the same time as the program, and no later than 30 days after a decision is made.

1. A decision by ACOTE to place a program on probation.
2. A decision by ACOTE to deny Candidacy Status, withhold accreditation, or withdraw accreditation of a program.

No later than 60 days after a final decision by ACOTE to deny Candidacy Status, deny Preaccreditation Status, withhold accreditation, or withdraw accreditation, the USDE, appropriate state regulatory authority, and the public, are provided a brief statement summarizing the reasons for the action and the official comments, if any, that the affected institution or program may wish to make regarding that decision, or evidence that the affected institution has been offered the opportunity to provide official comments.

ACOTE also will provide the following information to the USDE:

1. A copy of the AOTA Annual Report.
2. An updated copy of the list of accredited and developing occupational therapy and occupational therapy assistant programs after each ACOTE meeting at which program actions are taken.
3. If requested by the Secretary of the USDE, a summary of ACOTE’s major accrediting activities during the previous year (an annual data summary).

**PUBLIC DISCLOSURE OF PROBATIONARY ACCREDITATION OR FINAL ADVERSE ACTIONS**

Final decisions to place a program on Probationary Accreditation, deny Candidacy Status, deny Preaccreditation Status, withhold accreditation, or withdraw accreditation will be publicly disclosed via a posting on the AOTA Web site within 24 hours of:

1. Confirmation that the program has received notification of ACOTE’s decision to place the program on Probationary Accreditation or deny Preaccreditation Status;
2. Confirmation that the program has received notification of ACOTE’s final decision to deny Candidacy Status, withhold accreditation, or withdraw accreditation (subsequent to an appeal); or
3. The conclusion of the allowable period for appeal of ACOTE’s decision to deny Candidacy Status, withhold accreditation, or withdraw accreditation (in the absence of an appeal).

Final decisions to place a program on Probationary Accreditation, deny Candidacy Status, deny Preaccreditation Status, withhold accreditation, or withdraw accreditation will also be disclosed in an OT Practice article and in response to written or verbal inquiries.

**OPPORTUNITY FOR THIRD-PARTY COMMENT**

Notice of the dates when a program is scheduled for an initial accreditation or reaccreditation on-site evaluation will be posted on ACOTE’s Web site and published in OT Practice, the official bimonthly publication of AOTA, to provide an opportunity for written third-party comment concerning the program’s qualifications for accreditation. (See ACOTE Policy VI.H. Policy on Third-Party Comment.)
PROGRAM FAILURE TO MEET TITLE IV, HEA REQUIREMENTS OR ENGAGEMENT IN FRAUDULENT ACTIVITY

ACOTE will notify the Secretary of the USDE in writing of the name of any program accredited by ACOTE that ACOTE has reason to believe is failing to meet its Title IV, HEA program responsibilities or is engaged in fraud or abuse. The written notification shall document the reason for the agency’s concern. The notification to USDE shall be copied to the educational program.

If the Secretary requests, ACOTE will provide information that may bear upon an accredited or preaccredited institution’s compliance with its Title IV, HEA program responsibilities, including the eligibility of the institution or program to participate in Title IV, HEA programs.

PUBLIC NOTICE OF CHANGE IN ACOTE ACCREDITATION STANDARDS

If ACOTE determines, at any point during its systematic program of review, that it needs to make changes to the Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, Accreditation Standards for a Master’s-Degree-Level Educational Program for the Occupational Therapist, or Accreditation Standards for an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant, ACOTE will initiate action within 12 months to make the changes and will complete that action within a reasonable period of time. Before finalizing any changes to the Standards, ACOTE will provide advance public notice of proposed new or revised Standards. ACOTE will provide adequate opportunity for broad comment from the academic community and the public prior to adoption of proposed changes to ACOTE Standards.

- An article detailing the proposed changes in the Standards and requesting comment on the proposal prior to its adoption will be posted on the AOTA Web site and published in OT Practice, the official bimonthly publication of AOTA.

- ACOTE will directly notify all educational programs in its accreditation system of proposed changes in the Standards and will request written comment on the proposal prior to adoption.

ACOTE will notify the Secretary of the USDE in writing of any changes in its policies, procedures, or accreditation standards that might alter ACOTE’s scope of recognition or its compliance with the USDE requirements for notification to the Secretary.
VI. C. STATEMENT OF ETHICAL RESPONSIBILITIES AND CONFLICT OF INTEREST GUIDELINES

In carrying out their charge to protect the interest of the public through accreditation of educational programs in occupational therapy, members of the Accreditation Council for Occupational Therapy Education (ACOTE®), Appeals Board Roster, and the Roster of Accreditation Evaluators (RAE) must demonstrate that evaluations are conducted and decisions rendered under conditions that assure an impartial and objective judgment.

Therefore, the following guidelines are to be applied as indicated to paid AOTA accreditation staff, ACOTE members, Appeals Board Roster, and RAE members in making decisions regarding potential conflicts of interest.

STATEMENT OF ETHICAL RESPONSIBILITIES

ACOTE members:

1. may not serve as a paid or unpaid consultant to an institution subject to ACOTE accreditation on matters related to accreditation unless such consultations are performed under the auspices of ACOTE or other official body or committee of AOTA.

ACOTE, Appeals Board Roster, and RAE members:

1. shall abide by AOTA’s Code of Ethics;
2. shall act in ways to preserve the confidentiality of the personnel, students, programs, and institutions that are evaluated;
3. shall expeditiously handle all matters pertaining to accreditation;
4. shall not advertise or publicly promote or permit others to act in a similar manner with respect to their membership on ACOTE or the RAE for any purpose unrelated to official business of ACOTE, RAE, or AOTA with the exception of such responsibilities as are appropriate for inclusion in curriculum vitae, professional publications, and manuscripts;
5. shall not provide any service, whether paid or unpaid, to any institution or program in litigation with ACOTE or having an appeal of an ACOTE action under active consideration;
6. shall not disclose to any person, institution, or program any information related to ACOTE actions that is not publicly available.

CONFLICT OF INTEREST RESULTING FROM MEMBERSHIP IN OTHER BODIES

Accreditation evaluators (RAE) and members of accreditation bodies with decision-making authority (ACOTE and Appeals Board Roster) must not hold concurrent voting positions on any AOTA policy or decision-making body for occupational therapy. Therefore, membership (as a voting member) in the following bodies presents a conflict of interest:

1. AOTA Representative Assembly
2. AOTA Board of Directors
3. AOTA Ethics Commission
In addition, members of accreditation bodies with decision-making authority (ACOTE and Appeals Board Roster) must not hold concurrent voting positions on the following bodies:

1. AOTA Commission on Education
2. National Board for Certification in Occupational Therapy (as a Board member, staff, or individual involved in writing certification examination questions).

CONFLICT OF INTEREST WITH INDIVIDUAL EDUCATIONAL PROGRAMS

Responsibility for identifying a conflict of interest with any given educational program lies with the individual staff member, public member, or evaluator. ACOTE has the final authority to determine when a conflict of interest exists. In making a decision regarding conflict of interest, a staff member, public member, or evaluator must consider the possibility of perceived conflict of interest as well as actual conflicts of interest as defined as follows:

1. A close personal, professional, educational, or financial interest, or other special relationship (including those of a negative nature), in any institution in question.
2. An employee or consultant to an entity, other than the institution under review or other consideration, that provides all or a significant portion of the institution’s funding (e.g., a state department of education or a federal or private agency providing significant grants or research funding).
3. A current or former student or graduate, or parent of a current or former student or graduate of the institution in question.
4. A current or former candidate for a paid position within the past 5 years with the entity in question.
5. A position, whether paid or voluntary, current or within the past 5 years, to or for the institution in question. This includes positions as a consultant, advisor, or faculty member (including clinical or adjunct).
6. A residence and/or place of employment in the same state or in close proximity to the institution in question. Close proximity is determined by geographic, educational, and economic spheres (communities of interest) of influence rather than strict political boundaries.
7. A position, whether paid or voluntary, current or within the past 5 years, in an institution that is generally viewed by peers and occupational therapy students as a major competitor to the institution in question. This includes positions as a consultant, advisor, or faculty member (including clinical or adjunct).
8. An ACOTE Appeals Hearing Panelist for the institution in question.

ABSENTING ONESELF FROM ACOTE DELIBERATIONS

Members of ACOTE, with the exception of paid staff, shall absent themselves from ACOTE’s deliberation on the institution in question if conditions 1, 5, or 6 above are applicable. If any of these conditions apply, or if a member has any doubt or discomfort as to their applicability, the member must physically leave the room during any formal or informal discussion of the institution in question. When there is a conflict as per these guidelines, the member must immediately rise, request recognition from the ACOTE Chairperson, and ask to be absent from the discussion. For conference call meetings, the individual should declare the conflict, receive acknowledgment from the Chairperson, and hang up the telephone. When discussion of the program in question is completed, a staff member will e-mail or call that individual and instruct him or her to rejoin the conference call. The minutes of the official proceedings of ACOTE will reflect the absence, and the absented member will be permitted back into the room or permitted to rejoin the conference call only after the discussion ends.
WITHDRAWING ONESELF FROM PARTICIPATION IN ACOTE DISCUSSION

Members of ACOTE and paid staff must withdraw from any formal or informal discussion of any institution when the potential exists for another party to reasonably perceive that they have a conflict of interest. Withdrawal means that the individual conveys no information, either verbal or nonverbal, that could be construed as influencing the course of the discussion or action.

Circumstances requiring ACOTE members or staff to withdraw from participation include, but are not limited to, conditions 2, 3, 4, 7, and 8 above. If any of these conditions apply, or if an ACOTE member or paid staff member has any doubt or discomfort as to their applicability, the individual must rise, request recognition from the ACOTE Chairperson, state the nature of the conflict, and ask to withdraw from the discussion, either formal or informal. The individual withdrawing from the discussion may remain in the room away from the table so that all perception is removed that the individual is engaged in the discussion, either verbally or nonverbally. The individual may speak only when responding to a direct inquiry from the Chairperson. For conference call meetings, the individual must request recognition from the Chairperson, state the nature of the conflict, and ask to withdraw from the discussion, either formal or informal. The individual withdrawing from the discussion may remain on the conference call, but must remain silent during discussion of the program unless responding to a direct inquiry from the Chairperson. The minutes of the official proceedings of ACOTE will reflect the individual’s withdrawn status. The individual will be permitted to move back to the table or rejoin the conference call when discussion ends on the institution in question.

ABSTAINING FROM A VOTE DURING ACOTE MEETINGS

Abstaining (or abstention) is a parliamentary term that means that a voting member chooses not to cast a vote. An abstention in no way implies or indicates that a conflict of interest exists. Abstentions are to be used only when a voting member of the ACOTE cannot make an informed decision based on the information presented/discussed/debated. The minutes of the official proceedings of ACOTE will record all abstentions as a part of the vote count on all action items.

When a motion has been discussed to the satisfaction of ACOTE, and the question has been called, the Chairperson will ask for either a hand or voice vote from those in favor of the motion, those against the motion, and those abstaining from the vote.

DISCLOSURE

Disclosure of Program Conflicts

Upon notification of appointment to ACOTE, Appeals Board Roster, or the RAE, the appointed member shall submit to AOTA accreditation staff a listing of all educational programs with which a conflict exists as determined by criteria 1 through 8 above. AOTA accreditation staff shall maintain a record of this conflict of interest listing.

During tenure as a member, a member shall advise as above, in writing, of the commencement of any new affiliation with a program that creates an additional conflict.

Disclosure of Program Conflicts Related to Consultation

At any time during an individual’s tenure on the Appeals Board Roster or the RAE, if the individual accepts or performs a service that creates a conflict of interest, the individual shall notify the institution for which the services are to be provided that a conflict of interest exists. The notification shall consist of the following statement:

“My services to [SCHOOL] are strictly independent in nature and cannot be construed in any way by any party to be related to ACOTE or the accreditation process. Further, I hereby declare myself in conflict of interest with any ACOTE accreditation activities related to [SCHOOL].”

In addition, members of the Appeals Board Roster or RAE must notify ACOTE, c/o the AOTA Accreditation Department, of any consulting activity. This written notification must include the following information:
1. The program at which consultation is being provided and subsequent declaration of a conflict of interest with that program.

2. The nature of the consultation (e.g., consultant, advisory board, council).

3. The frequency and duration of the consultation.

4. Whether financial remuneration is being provided for the consultation.

5. Whether the appropriate persons at the institution(s) were provided with the ACOTE disclaimer statement.

For a period of 2 years following the conclusion of their service to ACOTE, Appeals Board Roster, or the RAE, any former ACOTE, Appeals Board Roster, or RAE members who agree to serve as a consultant to an institution or program must send a letter addressed to the program director or other appropriate program representative stating that the advice given is personal advice and does not represent the opinion of ACOTE. A copy of this letter shall be forwarded to ACOTE, c/o the AOTA Accreditation Department.

**GENERAL**

1. An ACOTE or RAE member who served as a reviewer of a program that was denied Candidacy Status may not be reassigned as a reviewer of that program should the program reapply for Candidacy Status.

2. An evaluator is not prohibited from serving as an on-site evaluator at an institution evaluated previously, although such a selection is not encouraged.
Inactive status is a special status applied only to programs that are not currently enrolling new students and do not plan to enroll new students in the future. Programs that continue to enroll students, even when the frequency of admissions is reduced (e.g., from once a year to every other year), do not need to request that the program be placed on inactive status.

The status “inactive” does not replace any other current accreditation status. The designation follows the regular accreditation status (e.g., Accreditation—Inactive or Probationary Accreditation—Inactive). Students graduating from a program with Accreditation—Inactive or Probationary Accreditation—Inactive status are considered graduates of an accredited program. A program may remain on inactive status for a maximum of 3 years dependent upon the accreditation term remaining. During that time, programs with a status of Accreditation—Inactive or Probationary Accreditation—Inactive remain responsible for submission of Annual and Inactive Status Reports to the Accreditation Council for Occupational Therapy Education (ACOTE®) and must pay the annual accreditation fee. A program may request Inactive Status only once within the assigned accreditation term (e.g., 5, 7, or 10 years).

Written requests to change the program’s status to inactive must be signed by the CEO of the institution and the program director. Requests should be addressed to ACOTE, c/o the AOTA Accreditation Department, and include the information listed under “Procedures for Requesting Inactive Status”. Decisions to place a program on inactive status become effective on the date the decision becomes final. Once a program is placed on inactive status, no new students may be admitted into the program until an Application for Reactivation/Candidacy Application is submitted and ACOTE grants a status of Accreditation or Accreditation—Reactivating. A program may request reactivation at any time during the 3-year period of inactive status by following the process outlined under “Procedure for Requesting Reactivation.”

If the program chooses not to reactivate, the program may request voluntary withdrawal of accreditation. If a request is not received prior to the end of 3 years or prior to the expiration of the accreditation term (whichever is sooner), the status of an accredited program will be changed from Accreditation—Inactive or Probationary Accreditation—Inactive to Involuntary Withdrawal of Accreditation.

Written requests to change the program’s status to inactive must be signed by the CEO of the institution and the program director and sent to ACOTE, c/o the AOTA Accreditation Department. Requests must include information regarding:

- How the institution plans to continue the program while on inactive status (e.g., teach out current students, increase recruitment efforts, etc.)
- Anticipated plans for the program at the end of the 3-year period (e.g., whether the program plans to close or reactivate).
- If the program plans to close, a teach-out plan that ensures equitable treatment of the remaining students. The plan must specify:
  - the number of students remaining in the program and their status in the program;
  - a teach-out agreement that ensures that all current students complete all aspects of the program within 3 years;
  - a provision for notification to the students of any additional costs;
  - resources, including faculty, for ensuring a quality education for the remaining students in the program; and
  - how the inactive status will be disclosed to students in the program as well as to prospective applicants.
The request for inactive status will be forwarded to the ACOTE reviewers assigned to the program. If the request for inactive status includes a request for delay of an on-site evaluation visit, the request will be considered in accordance with ACOTE’s “Policy and Procedure for Delay of On-Site Evaluation”. A letter indicating the final decision will be sent to the CEO, dean, and program director. If inactive status is granted, it will become effective on the date the decision became final, as stated in the letter. Programs will be required to provide updated inactive status reports as requested by ACOTE.

**Reporting Requirements While on Inactive Status**

Programs with a status of Accreditation—Inactive or Probationary Accreditation—Inactive remain responsible for submission of the Annual Report and regular Inactive Status Reports as requested by ACOTE.

At a minimum, Inactive Status reports must include information on the number of students remaining in the program, their status in the program, and resources (including faculty), for ensuring a quality education for those remaining students. At ACOTE’s discretion, Inactive programs that are carrying areas of noncompliance may also be required to report on any progress made toward correcting the cited areas.

**Procedure for Requesting Reactivation**

A request to reactivate accreditation must be submitted in writing 12 months prior to the planned enrollment of students.

The letter of intent to request reactivation must be signed by (1) the chief executive officer of the sponsoring institution and (2) the occupational therapy program director AND/OR dean overseeing the proposed program. (Although signature of the occupational therapy program director is not required on the letter of intent, it is strongly recommended that the program director be hired in sufficient time to be instrumental in preparing the Application for Reactivation/Candidacy Application.) The request must:

- declare the intention of the institution to reactivate the occupational therapy or occupational therapy assistant educational program, and

- state that the institution agrees not to admit students into the occupational therapy or occupational therapy assistant program until ACOTE grants a status of Accreditation or Accreditation—Reactivating.

- Indicate:
  - the level of the program (i.e., associate degree, professional master’s degree, or doctorate);
  - the month and year the first class is projected to enter the program;
  - the month and year the first class is projected to begin Level II fieldwork and for doctoral programs, the experiential component;
  - the month and year the first class is projected to graduate; and
  - the year the first graduates are projected to sit for the National Board for Certification in Occupational Therapy (NBCOT) certification examination.

The request for reactivation should be addressed to:

ACOTE  
c/o the AOTA Accreditation Department  
4720 Montgomery Lane, Suite 200  
Bethesda, Maryland  20814-3449
APPLICATION FOR REACTIVATION/CANDIDACY APPLICATION

Upon receipt of the request for reactivation, AOTA Accreditation Department staff will provide access to the Application for Reactivation/Candidacy Application and a preliminary timeline for the reactivation process.

The Application for Reactivation/Candidacy Application must be electronically signed by the occupational therapy program director, the dean overseeing the proposed program, and the chief executive officer of the sponsoring institution.

APPLICATION REVIEW

Upon submission, the Application for Reactivation/Candidacy Application will be reviewed and one of the following decisions will be made at the next ACOTE meeting:

- **GRANT** a status of ACCREDITATION on the basis of the application review, extend the status until action is taken on the next regularly scheduled on-site evaluation, and notify the program that students may be admitted into the program.
- **GRANT** a status of ACCREDITATION—REACTIVATING, notify the program that students may be admitted into the program, and SCHEDULE A FULL ON-SITE of the program.
- **GRANT** a status of ACCREDITATION—REACTIVATING, notify the program that students may be admitted into the program, and SCHEDULE A FOCUSED ON-SITE of the program to assess specific areas identified by ACOTE.
- **DEFER ACTION** on the request for reactivation, request additional information for review at a subsequent ACOTE meeting, and notify the program that students may NOT be admitted into the program until ACOTE grants a status of Accreditation or Accreditation—Reactivating.
- **DENY** a status of ACCREDITATION—REACTIVATING and notify the program that students may NOT be admitted into the program.

If the application documents sufficient compliance with the applicable ACOTE Standards for an Accredited Educational Program, the action will be to GRANT a status of Accreditation or Accreditation—Reactivating. As soon as the institutional officials receive written notification from ACOTE that the program has been granted Accreditation or Accreditation—Reactivating status, they may admit students into the program according to the approved timeline and proceed with plans for the on-site evaluation (if scheduled). AOTA will officially list the program as having a status of Accreditation or Accreditation—Reactivating.

If the application materials are insufficient to allow ACOTE to determine compliance with the applicable ACOTE Standards for an Accredited Educational Program, ACOTE will DEFER ACTION on the request for reactivation and request additional information for review at a subsequent ACOTE meeting. A program may have action on the Application for Reactivation/Candidacy Application deferred a maximum of two times.

The program will be DENIED a status of Accreditation—Reactivating if the program does not document sufficient compliance with the applicable ACOTE Standards for an Accredited Educational Program. If a status of Accreditation—Reactivating is denied, the program will not be able to admit students. Clearly delineated procedures for programs wishing to appeal an action of Denial of Accreditation—Reactivating are described in ACOTE Accreditation Manual Section IV.D. Options for programs denied a status of Accreditation—Reactivation include the following:

- If the program is still within the 3-year period for Inactivation, the program will remain on inactive status and may reapply for Accreditation—Reactivating by submitting a new request for reactivation.
- If the program is beyond the 3-year period for Inactivation, the program’s status will be changed to Accreditation Withdrawn. The program may apply for accreditation through the initial accreditation process described in ACOTE Accreditation Manual Section III.A. Applicable fees would be assessed.

SAMPLE STATEMENTS FOR INACTIVE PROGRAMS

A program placed on a status of Accreditation-Inactive may use the following sample statements when publishing the accreditation status of the program:
The occupational therapy / occupational therapy assistant program has been granted a status of Accreditation-Inactive by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 4720 Montgomery Lane, Suite 200, Bethesda, MD 20814-3449. ACOTE’s telephone number c/o AOTA is (301) 652-AOTA and its Web address is www.acoteonline.org. This status indicates that the program is not currently enrolling new students and does not plan to enroll new students in the future. While the program is on Accreditation-Inactive status, the graduates of the program will be eligible to sit for the national certification examination for the occupational therapy assistant administered by the National Board for Certification in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be a Certified Occupational Therapy Assistant (COTA). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure.

**ACCREDITATION—REACTIVATING**

Programs that have been granted a status of Accreditation—Reactivating must have a qualified occupational therapy program director on staff throughout the reactivation process. Students shall not be admitted to the program unless there is a qualified occupational therapy program director on staff.

**ACCREDITATION FEES**

Should an on-site evaluation be required during the reactivation process, the program will be responsible for all costs related to the accreditation visit (actual expenses for travel and per diem of the on-site team).
GUIDELINES AND POLICY STATEMENTS

VI. E. SAMPLE STATEMENTS REGARDING ACCREDITATION STATUS AND USE OF THE ACOTE LOGO

SAMPLE STATEMENTS FOR APPLICANT PROGRAMS

APPLICANT PROGRAMS:

The following are samples of university/college catalog statements concerning accreditation and credentialing mechanisms for new programs that have submitted an acceptable Letter of Intent to the Accreditation Council for Occupational Therapy Education (ACOTE®) c/o the AOTA Accreditation Program.

DOCTORAL-DEGREE-LEVEL OCCUPATIONAL THERAPY PROGRAM (Applicant Program)

The entry-level occupational therapy doctoral degree program has applied for accreditation by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 4720 Montgomery Lane, Suite 200, Bethesda, MD 20814-3449. ACOTE’s telephone number c/o AOTA is (301) 652-AOTA and its Web address is www.acoteonline.org.

The program must be granted Candidacy Status, have a preaccreditation review, complete an on-site evaluation, and be granted Accreditation Status before its graduates will be eligible to sit for the national certification examination for the occupational therapist administered by the National Board for Certification in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be an Occupational Therapist, Registered (OTR). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure.

NOTE: In addition to the above statements, the program must have a documented and published policy to ensure that students complete all graduation, fieldwork, and experiential component requirements in a timely manner. This must include a statement that all Level II fieldwork and the experiential component of the program must be completed within a time frame established by the program. Sample wording: “Students must complete Level II fieldwork and experiential requirements within 24 months following completion of the didactic portion of the program.”

MASTER’S-DEGREE-LEVEL OCCUPATIONAL THERAPY PROGRAM (Applicant Program)

The entry-level occupational therapy master’s degree program has applied for accreditation by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 4720 Montgomery Lane, Suite 200, Bethesda, MD 20814-3449. ACOTE’s telephone number c/o AOTA is (301) 652-AOTA and its Web address is www.acoteonline.org. The program must be granted Candidacy Status, have a preaccreditation review, complete an on-site evaluation, and be granted Accreditation Status before its graduates will be eligible to sit for the national certification examination for the occupational therapist administered by the National Board for Certification in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be an Occupational Therapist, Registered (OTR). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure.
NOTE: In addition to the above statements, the program must have a documented and published policy to ensure that 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 24 months following completion of the didactic portion of the program.”

OCCUPATIONAL THERAPY ASSISTANT PROGRAM (Applicant)

The occupational therapy assistant program has applied for accreditation by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 4720 Montgomery Lane, Suite 200, Bethesda, MD 20814-3449. ACOTE’s telephone number c/o AOTA is (301) 652-AOTA and its Web address is www.acoteonline.org. The program must be granted Candidacy Status, have a preaccreditation review, complete an on-site evaluation, and be granted Accreditation Status before its graduates will be eligible to sit for the national certification examination for the occupational therapy assistant administered by the National Board for Certification in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be a Certified Occupational Therapy Assistant (COTA). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure.

NOTE: In addition to the above statements, the program must have a documented and published policy to ensure that 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 18 months following completion of the didactic portion of the program.”

SAMPLE STATEMENTS FOR PROGRAMS WITH CANDIDACY STATUS

PROGRAMS WITH CANDIDACY STATUS:
The following are samples of university/college catalog statements concerning accreditation and credentialing mechanisms for new programs that have been granted Candidacy Status by the Accreditation Council for Occupational Therapy Education (ACOTE).

DOCTORAL-DEGREE-LEVEL OCCUPATIONAL THERAPY PROGRAM (Program with Candidacy Status)

The entry-level occupational therapy doctoral degree program has applied for accreditation and has been granted Candidacy Status by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 4720 Montgomery Lane, Suite 200, Bethesda, MD 20814-3449. ACOTE’s telephone number c/o AOTA is (301) 652-AOTA and its Web address is www.acoteonline.org. The program must have a preaccreditation review, complete an on-site evaluation, and be granted Accreditation Status before its graduates will be eligible to sit for the national certification examination for the occupational therapist administered by the National Board for Certification in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be an Occupational Therapist, Registered (OTR). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure.

NOTE: In addition to the above statements, the program must have a documented and published policy to ensure that students complete all graduation, fieldwork, and experiential component requirements in a timely manner. This must include a statement that all Level II fieldwork and the experiential component of the program must be completed within a time frame established by the program. Sample wording: “Students must complete Level II fieldwork and experiential requirements within 24 months following completion of the didactic portion of the program.”
MAJOR’S-DEGREE-LEVEL OCCUPATIONAL THERAPY PROGRAM (Program with Candidacy Status)

The entry-level occupational therapy master’s degree program has applied for accreditation and has been granted Candidacy Status by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 4720 Montgomery Lane, Suite 200, Bethesda, MD 20814-3449. ACOTE’s telephone number c/o AOTA is (301) 652-AOTA and its Web address is www.acoteonline.org. The program must have a preaccreditation review, complete an on-site evaluation, and be granted Accreditation Status before its graduates will be eligible to sit for the national certification examination for the occupational therapist administered by the National Board for Certification in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be an Occupational Therapist, Registered (OTR). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure.

NOTE: In addition to the above statements, the program must have a documented and published policy to ensure that 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 24 months following completion of the didactic portion of the program.”

OCCUPATIONAL THERAPY ASSISTANT PROGRAM (Program with Candidacy Status)

The occupational therapy assistant program has applied for accreditation and has been granted Candidacy Status by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 4720 Montgomery Lane, Suite 200, Bethesda, MD 20814-3449. ACOTE’s telephone number c/o AOTA is (301) 652-AOTA and its Web address is www.acoteonline.org. The program must have a preaccreditation review, complete an on-site evaluation, and be granted Accreditation Status before its graduates will be eligible to sit for the national certification examination for the occupational therapy assistant administered by the National Board for Certification in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be a Certified Occupational Therapy Assistant (COTA). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure.

NOTE: In addition to the above statements, the program must have a documented and published policy to ensure that 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 18 months following completion of the didactic portion of the program.”

SAMPLE STATEMENTS FOR PROGRAMS WITH PREACCREDITATION STATUS

PROGRAMS WITH PREACCREDITATION STATUS:

The following are samples of university/college catalog statements concerning accreditation and credentialing mechanisms for new programs that have been granted Preaccreditation Status by the Accreditation Council for Occupational Therapy Education (ACOTE).

DOCTORAL-DEGREE-LEVEL OCCUPATIONAL THERAPY PROGRAM (Program with Preaccreditation Status)

The entry-level occupational therapy doctoral degree program has applied for accreditation and has been granted Preaccreditation Status by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 4720 Montgomery Lane, Suite 200, Bethesda, MD 20814-3449. ACOTE’s telephone number c/o AOTA is (301) 652-AOTA and its
Web address is www.acoteonline.org. The program must complete an on-site evaluation and be granted Accreditation Status before its graduates will be eligible to sit for the national certification examination for the occupational therapist administered by the National Board for Certification in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be an Occupational Therapist, Registered (OTR). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure.

NOTE: In addition to the above statements, the program must have a documented and published policy to ensure that students complete all graduation, fieldwork, and experiential component requirements in a timely manner. This must include a statement that all Level II fieldwork and the experiential component of the program must be completed within a time frame established by the program. Sample wording: “Students must complete Level II fieldwork and experiential requirements within 24 months following completion of the didactic portion of the program.”

MASTER’S-DEGREE-LEVEL OCCUPATIONAL THERAPY PROGRAM (Program with Preaccreditation Status)

The entry-level occupational therapy master’s degree program has applied for accreditation and has been granted Preaccreditation Status by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 4720 Montgomery Lane, Suite 200, Bethesda, MD 20814-3449. ACOTE’s telephone number c/o AOTA is (301) 652-AOTA and its Web address is www.acoteonline.org. The program must complete an on-site evaluation and be granted Accreditation Status before its graduates will be eligible to sit for the national certification examination for the occupational therapist administered by the National Board for Certification in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be an Occupational Therapist, Registered (OTR). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure.

NOTE: In addition to the above statements, the program must have a documented and published policy to ensure that 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 24 months following completion of the didactic portion of the program.”

OCCUPATIONAL THERAPY ASSISTANT PROGRAM (Program with Preaccreditation Status)

The occupational therapy assistant program has applied for accreditation and has been granted Preaccreditation Status by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 4720 Montgomery Lane, Suite 200, Bethesda, MD 20814-3449. ACOTE’s telephone number c/o AOTA is (301) 652-AOTA and its Web address is www.acoteonline.org. The program must complete an on-site evaluation and be granted Accreditation Status before its graduates will be eligible to sit for the national certification examination for the occupational therapy assistant administered by the National Board for Certification in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be a Certified Occupational Therapy Assistant (COTA). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure.

NOTE: In addition to the above statements, the program must have a documented and published policy to ensure that 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 18 months following completion of the didactic portion of the program.”
ACCREDITED PROGRAMS:

The following are samples of university/college catalog statements concerning accreditation and credentialing mechanisms for programs that are accredited by the Accreditation Council for Occupational Therapy Education (ACOTE):

ACCREDITED DOCTORAL-DEGREE-LEVEL OCCUPATIONAL THERAPY PROGRAM

The entry-level occupational therapy doctoral degree program is accredited by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 4720 Montgomery Lane, Suite 200, Bethesda, MD 20814-3449. ACOTE’s telephone number c/o AOTA is (301) 652-AOTA and its Web address is www.acoteonline.org. 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 in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be an Occupational Therapist, Registered (OTR). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure.

NOTE: In addition to the above statements, the program must have a documented and published policy to ensure that students complete all graduation, fieldwork, and experiential component requirements in a timely manner. This must include a statement that all Level II fieldwork and the experiential component of the program must be completed within a time frame established by the program. Sample wording: “Students must complete Level II fieldwork and experiential requirements within 24 months following completion of the didactic portion of the program.”

ACCREDITED MASTER’S-DEGREE-LEVEL OCCUPATIONAL THERAPY PROGRAM

The entry-level occupational therapy master’s degree program is accredited by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 4720 Montgomery Lane, Suite 200, Bethesda, MD 20814-3449. ACOTE’s telephone number c/o AOTA is (301) 652-AOTA and its Web address is www.acoteonline.org. 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 in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be an Occupational Therapist, Registered (OTR). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure.

(Sample paragraph if transitioning to the OTD and admission is closed to the master’s-level program): In response to the mandate that the entry-level degree requirement for the occupational therapist will move to the doctoral level by July 1, 2027, the occupational therapy program is in the process of transitioning to the doctoral level. New admissions to the master’s degree program are no longer being accepted. Please refer to the following webpage for further information about the occupational therapy doctoral program [list webpage].

NOTE: In addition to the above statements, the program must have a documented and published policy to ensure that 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 24 months following completion of the didactic portion of the program.”

ACCREDITED OCCUPATIONAL THERAPY ASSISTANT PROGRAM

The occupational therapy assistant program is accredited by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 4720 Montgomery Lane, Suite 200, Bethesda, MD 20814-3449. ACOTE’s telephone number c/o AOTA is (301)
652-AOTA and its Web address is www.acoteonline.org. Graduates of the program will be eligible to sit for the national certification examination for the occupational therapy assistant administered by the National Board for Certification in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be a Certified Occupational Therapy Assistant (COTA). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure.

NOTE: In addition to the above statements, the program must have a documented and published policy to ensure that 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 18 months following completion of the didactic portion of the program.”

**GUIDELINES FOR USE OF THE ACOTE LOGO**

ACOTE- accredited programs are invited to use the ACOTE logo when reflecting the program’s ACOTE accreditation status in written or Web-based publications. However, the use of the logo is governed by the following guidelines:

1. The ACOTE logo may only be used by currently accredited occupational therapy and occupational therapy assistant educational programs. The logo may NOT be used by programs that have applied for, but not yet received accreditation, including programs granted Candidacy Status or Preaccreditation Status.

2. When programs or program levels are included in the publication or Web page that are not accredited by ACOTE, the accompanying text must clearly indicate which programs or levels are ACOTE-accredited.

3. Use of the logo is subject to revocation and withdrawal by ACOTE when, in its sole judgment, its continued use would not serve the best interests of ACOTE or the public.
VI. F. PUBLIC CORRECTION OF INCORRECT OR MISLEADING STATEMENTS REGARDING ACCREDITATION STATUS

PUBLIC DISCLOSURE

Any institution or program making a public disclosure of the accreditation status of its occupational therapy or occupational therapy assistant program must accurately disclose the status; the specific academic program covered by that status; and the name, address, and telephone number of the accrediting agency as follows:

Accreditation Council for Occupational Therapy Education (ACOTE®)
American Occupational Therapy Association
4720 Montgomery Lane, Suite 200
Bethesda, MD 20814-3449
301-652-2682

Any institution or program that elects to make a public disclosure of the results of any ACOTE report, including Reports of Application Review, Reports of Preaccreditation Review, and Reports of On-Site Evaluation, must accurately disclose:


• For all ACOTE reports: Complete information regarding ACOTE’s findings (i.e., strengths, suggestions, areas of concern, possible areas of noncompliance, cited areas of noncompliance, and ACOTE’s final accreditation action). Strengths cited in the report may not be published without also publishing any suggestions, areas of concern, possible areas of noncompliance, or cited areas of noncompliance.

PUBLIC CORRECTION

The following are requirements of the Accreditation Standards for a Doctoral-Degree-Level Educational Program for the Occupational Therapist, Accreditation Standards for a Master’s-Degree-Level Educational Program for the Occupational Therapist, and Accreditation Standards for an Associate-Degree-Level Educational Program for the Occupational Therapy Assistant:

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.

Standard A.4.2.: Accurate and current information regarding student and program outcomes must be readily available to the public on the program’s Web page. At a minimum, the following data must be reported for the previous 3 years:

• Total number of program graduates
• Graduation rates.

The program must provide the direct link to the National Board for Certification in Occupational Therapy (NBCOT) program data results on the program’s home page.

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 materials used by the institution: catalog, Web site, and program-related brochures or flyers available to prospective students. A link to www.acoteonline.org must be provided on the program’s home page.

SAMPLE WORDING: “THE OCCUPATIONAL THERAPY/OCCUPATIONAL THERAPY ASSISTANT PROGRAM IS ACCREDITED BY THE ACCREDITATION COUNCIL FOR OCCUPATIONAL THERAPY EDUCATION (ACOTE) OF THE AMERICAN OCCUPATIONAL THERAPY ASSOCIATION (AOTA), LOCATED AT 4720 MONTGOMERY LANE, SUITE 200, BETHESDA, MD 20814-3449. ACOTE’S TELEPHONE NUMBER, C/O AOTA, IS (301) 652-AOTA AND ITS WEB ADDRESS IS WWW.ACOTEONLINE.ORG.”

In the case that a program accredited by ACOTE does not comply with any of the above requirements, ACOTE may cite an area of noncompliance. The program must then demonstrate compliance with Standard A.4.1, A.4.2, and/or A.4.3 to remove the area of noncompliance.

If any occupational therapy or occupational therapy assistant program (ACOTE accredited or not) fails to make public correction of incorrect or misleading information regarding its accreditation status, the contents of reports of site team visitors, reports of application or preaccreditation review, or the accreditation actions taken, the AOTA Accreditation Department will post an article providing correct information to the public on the ACOTE Web site (www.acoteonline.org).
VI. G. REGARD FOR DECISIONS OF STATES AND OTHER ACCREDITING AGENCIES

STATEMENT OF NOTIFICATION OF ACCREDITATION ACTION ON ANY PROGRAM PENDING DECISIONS BY STATES OR OTHER ACCREDITING AGENCIES

The Accreditation Council for Occupational Therapy Education (ACOTE®) will consider the accreditation status of sponsoring institutions prior to making programmatic accreditation decisions to grant initial or continued accreditation or preaccreditation (Candidacy Status) to an occupational therapy (OT) or occupational therapy assistant (OTA) program during a period in which the sponsoring institution is the subject of:

1. a pending or final action brought by a state agency to suspend, revoke, withdraw, or terminate the institution’s legal authority to provide postsecondary education in the state;
2. a decision by a recognized agency to deny accreditation or preaccreditation;
3. a pending or final action brought by a recognized accrediting agency to suspend, revoke, withdraw, or terminate the institution’s accreditation or preaccreditation; or
4. probation or an equivalent status imposed by a recognized agency.

Should initial or continued accreditation or preaccreditation (Candidacy Status) be granted, ACOTE will provide the Secretary of the United States Department of Education, within 30 days of its action, a thorough and reasonable explanation consistent with its accreditation standards, for why the action of the other body does not preclude ACOTE’s action.

STATEMENT OF ACOTE PROCEDURE

If ACOTE learns that the sponsoring institution of an occupational therapy or occupational therapy assistant program that it accredits or preaccredits is the subject of an adverse action by another recognized accrediting agency or has been placed on probation or an equivalent status by another recognized agency, it will promptly review its accreditation or preaccreditation status of the program to determine if it should also take adverse action or place the program on probation.

- Specifically, review will be conducted to determine compliance with the following Standard as applicable to the program:

  OT Doctoral-Degree-Level Standard A.1.1.:
  *The sponsoring institution(s) and affiliates, if any, must be accredited by the recognized regional accrediting authority. For programs in countries other than the United States, ACOTE will determine an alternative and equivalent external review process.*

  OT Master’s-Degree-Level Standard A.1.1.:
  *The sponsoring institution(s) and affiliates, if any, must be accredited by the recognized regional accrediting authority. For programs in countries other than the United States, ACOTE will determine an alternative and equivalent external review process.*

  OTA Associate-Degree-Level Standard A.1.1.:
  *The sponsoring institution(s) and affiliates, if any, must be accredited by a recognized regional or national accrediting authority.*
ACOTE will promptly review the accreditation status of an OT or OTA program if a state agency has suspended, revoked, or terminated the institution’s legal authority to provide postsecondary education.

- Specifically, review will be conducted to determine compliance with the following OT or OTA Standard:

  **OT Doctoral-Degree-Level Standard A.1.2.**
  Sponsoring institution(s) must be authorized under applicable law or other acceptable authority to provide a program of postsecondary education and have appropriate doctoral degree-granting authority.

  **OT Master’s-Degree-Level Standard A.1.2.**
  Sponsoring institution(s) must be authorized under applicable law or other acceptable authority to provide a program of postsecondary education and have appropriate degree-granting authority.

  **OTA Associate-Degree-Level Standard A.1.2.**
  Sponsoring institution(s) must be authorized under applicable law or other acceptable authority to provide a program of postsecondary education and have appropriate degree-granting authority, or the institution must be a program offered within the military services.
VI. H. POLICY ON THIRD-PARTY COMMENT

**POLICY**

The Accreditation Council for Occupational Therapy Education (ACOTE®) may consider written third-party comment concerning an institution’s or program’s qualifications for accreditation (i.e., whether a program appears to be in compliance with the current ACOTE Accreditation Standards or ACOTE accreditation policy).

Notice of the dates of all initial accreditation and reaccreditation visits to occupational therapy and occupational therapy assistant educational programs will be posted on ACOTE’s Web site (www.acoteonline.org) and published in *OT Practice*, the official bimonthly publication of AOTA. This provides interested parties an opportunity to submit written third-party comment concerning a program’s compliance with the ACOTE Accreditation Standards or ACOTE accreditation policy prior to the accreditation team’s on-site evaluation of that program.

**PROCEDURES FOR SUBMITTING THIRD-PARTY COMMENT**

To receive formal consideration, all third-party comment shall be clearly labeled as such, shall be submitted in writing, and shall be forwarded to the following address:

ACOTE  
c/o AOTA Accreditation Department  
4720 Montgomery Lane, Suite 200  
Bethesda, MD 20814-3449

To be eligible for consideration, all third-party comments must be received by the AOTA Accreditation Department 20 days before the program’s scheduled on-site evaluation.

AOTA accreditation staff will acknowledge receipt of the third-party comment and will copy the letter of comment to the relevant program director and on-site evaluation team. The individual making the third-party comment may request in writing to remain anonymous. AOTA staff will redact personal information contained within the document prior to forwarding the comment to the program director and the on-site evaluation team.

Any issues related to the program’s compliance with the ACOTE Accreditation Standards or ACOTE accreditation policy will be reviewed by the accreditation team while on-site.

Individuals with questions regarding third-party comment may call the AOTA Accreditation Department at 301-652-2682 or send an e-mail to accred@aota.org.
VI. I. **DOCTRINE OF INTEGRITY**

**INTEGRITY IS ELEMENTAL**

In all relationships with the Accreditation Council for Occupational Therapy Education (ACOTE®), a program shall demonstrate honesty and integrity. In submitting materials for accreditation or reaccreditation, the program agrees to comply with ACOTE’s requirements, policies, guidelines, decisions, and requests. During the process of accreditation, the program must evidence full and candid disclosure, and shall make readily available all relevant information. The program shall provide ACOTE with unrestricted access to all parts and facets of its operations, and with full and accurate information about the program’s affairs, including reports of any other accrediting, licensing, or auditing agencies, as requested. Programs are responsible for ensuring the integrity of the data and information submitted. Presenting false information, either through intent or through failure to exercise care and diligence in verifying the information, is considered a breach of this policy. This would include the misrepresentation of credentials, degrees obtained, or work/volunteer experience by either the program director or faculty members.

**POLICY ON BREACHES OF INTEGRITY**

The program’s failure to disclose information honestly and completely by presenting false information, by the intentional omission of relevant information, or by a distortion of information for the purpose of deliberate misrepresentation, will be considered to be a breach of integrity, in and of itself. Furthermore, because a program can only exist and operate through its representatives, it is crucial for each program to be aware that it will be held responsible for the actions of its representatives. Verification of any instances of breaches of integrity may adversely affect the program’s accreditation status with ACOTE. Depending on the seriousness of the infraction, sanctions may result in a letter of censure and/or warning, probationary status, or withdrawal of accreditation.

**INVESTIGATION OF POTENTIAL BREACHES OF INTEGRITY**

If ACOTE has reason to believe that a program or a representative of the program may have violated the Doctrine of Integrity, an investigation may be instituted. ACOTE may conduct the investigation by scheduling a fact-finding visit to the program, by requesting that the program or institution submit a report to ACOTE that addresses the stated concerns, or in such other manner as ACOTE may deem reasonable and appropriate. Upon completion of that investigation, a report will be provided to the program and the program will be afforded an opportunity to respond to any alleged infractions prior to ACOTE action.

**ACOTE ACTION**

If, after notice and opportunity to respond, ACOTE concludes that the program is willfully practicing misrepresentation, has presented false information to ACOTE or to any other concerned parties, or fails to provide and disclose completely all relevant information and materials requested, ACOTE may issue a letter of censure and/or warning, place the program on probation, or withdraw accreditation, depending upon the seriousness of the infraction. If ACOTE finds that there is a misrepresentation of credentials, degrees obtained, or work/volunteer experience by either the program director or a faculty member, the program will be notified by letter and will be asked to correct the misrepresentation immediately. If appropriate, the individual may also be reported to the AOTA Ethics Commission.

An institution may appeal an adverse decision by ACOTE to withdraw accreditation by submitting in writing its objections, together with supporting data and a request for reevaluation. An appeal filed in accord with the ACOTE Appeals Process (ACOTE Policy IV.D. Appeals Process) automatically delays the decision to withdraw accreditation until its final disposition. ACOTE awards of Probationary Accreditation are final and not subject to appeal.
GUIDELINES AND POLICY STATEMENTS

VI. J. POLICY ON EMERGENCIES AND DISASTERS

DISASTER POLICY

The Accreditation Council for Occupational Therapy Education (ACOTE®) recognizes that there are times of local, regional, or national emergency or disaster that may delay or in other ways compromise communications between occupational therapy educational programs, the AOTA Accreditation Department, and ACOTE members. It may also disrupt operation of programs and classes. For the purpose of this policy/procedure, such an emergency or disaster must impact, or be perceived as potentially impacting, operations and/or communications for at least a 1-month period.

REQUESTS FOR SPECIAL CONSIDERATION

In order to avoid unintentional injury to students, programs, or other stakeholders during times of emergency or disaster, the following policy will be followed.

1. The program director or administrator is requested to contact the Accreditation Department as soon as physically possible after the emergency/disaster to inform accreditation staff of any expected short- or long-term impact on the program and its ability to remain in compliance with the Standards. If there is no communication within 2 weeks, Accreditation Department staff will attempt to contact the program director and administrators of the impacted program by electronic means, telephone, and mail.

2. Once communication is established, the program director or administrator will be asked to consider a request for special consideration by ACOTE under the emergency/disaster policy.

3. Requests for special consideration must include the following information:
   • The nature of the impact on the program and students.
   • The tentative plan and timeline for resumption of classes and other services by the educational program.
   • Contact information for the program director and administrator.
   • Status of the students during the interim period, if any.
   • Length of time for special consideration. (Requests may be granted for a period of time up to 6 months.)

4. Upon receipt of the request, Accreditation Department staff will forward the request to the ACOTE reviewers assigned to the program.

5. Action to grant or deny emergency/disaster special consideration will occur within 2 weeks of receipt of required information and a written request from the program director or administrator based on the verbal and written information supplied by the program director or administrator.

   If the two reviewers are unable to agree upon action, or length of the term, or believe that the entire council should be involved, a conference call or other rapid method of information sharing and decision making will be requested.

   During the period of special consideration, submission by the program of any requested information (e.g., Plan of Correction, Progress Report, Annual Report, Interim Report, or Report of Self-Study) or other action by the program may be delayed without negative consequences. If an on-site evaluation is scheduled during the granted period, it will be rescheduled.

6. One extension of the special consideration term may be granted for good cause, for up to 3 months with written information from the program director or administrator explaining the rationale for an extension. The maximum period a program may be granted special consideration under this policy is 9 months (6 months initially, followed by a 3-month extension).
7. Information will be placed on the ACOTE Web site (www.acoteonline.org) indicating the period for which the program was granted special consideration status as a result of the emergency or disaster.

8. At the end of the special consideration period, the program director or administrator will be informed of the timeline for submission of any previously requested reports.

### RESPONSIBILITIES OF THE PROGRAM

1. If special consideration is granted by ACOTE reviewers, the program director or administrator must provide monthly written updates of progress toward resumption of classes and other services by the educational program.

2. During the granted period of special circumstances, the program director or administrator may request in writing, one extension of up to 3 months should it become evident that the program will not resume operations within the initially granted time period.

3. Should it be evident that the program will not be able to resume classes and other services by the end of the total period of special circumstances, the program director and administrator must request in writing that the program be placed on Inactive Status. (Refer to Section VI.D. Inactive Status policy in the ACOTE Accreditation Manual.)

### RESPONSIBILITIES OF ACOTE

1. If Accreditation staff are unable to make contact with a program representative within 3 weeks of the emergency/disaster, the program’s status will be changed to Accreditation—Inactive. Prospective students and others inquiring about the program will be informed that the program is not currently accepting new students. Subsequent actions will be guided by ACOTE’s policy on Inactive Status.
QUALITY EDUCATIONAL STANDARDS: A PROFESSIONAL IMPERATIVE

A profession is distinguished by a variety of factors. Among these are a set of recognized educational standards for professional preparation; a credentialing mechanism for certifying its members; and a degree of autonomy in making decisions which guide its future.

ACOTE, the body selected to ensure the quality of occupational therapy education:

- has established educational standards that are recognized by the US Department of Education (USDE) and the Council for Higher Education Accreditation (CHEA).
- has developed a collaborative relationship with the National Board for Certification in Occupational Therapy (NBCOT) to allow graduates of ACOTE accredited programs to become credentialed for practice.
- continues to develop as a decision-making body, accountable to members of the profession and numerous communities of interest.

Through in-depth self-study and analysis and ongoing dialogue with multiple communities of interest, ACOTE has determined that revisions to the standards must be guided by the following imperatives that ensure the quality of the educational programs it accredits. When applying these imperatives, ACOTE must respect and acknowledge the program and host institution’s mission and right to autonomy in fulfilling that mission.

The standards must:

1. Require an educational experience with breadth and depth in the liberal arts and science, which includes a focus on globalism and multiculturalism.

2. Respond to the rapidly changing and dynamic nature of contemporary health and human services delivery systems.

3. Require an educational experience that prepares a competent generalist who can practice in a variety of delivery systems and service models where occupational therapy currently exists and where it is emerging as a service.

4. Address the role of occupational therapy in interprofessional collaborative practice and clearly articulate the unique nature of occupational therapy, its professional foundations, intervention approaches and rationales, and expected outcomes using occupation as a therapeutic medium.

5. Prepare practitioners who are effective consumers of the latest research, evidence, and knowledge bases that undergird practice and who contribute to the growth and dissemination of research, evidence, and knowledge.

6. Ensure the integration of fieldwork education into the educational program so that it is implemented and evaluated as a key component of the overall curriculum design.