

AOTA FELLOWSHIP PROGRAM CRITERIA AND INTERPRETIVE GUIDELINES

Title	Criterion	Interpretive Guidelines
SECTION A: PROGRAM ELIGIBILITY		
A.1 Sponsoring Organization	<p>The fellowship program must be sponsored by an appropriately accredited or licensed organization.</p> <p>If the fellowship program is sponsored by more than one organization, a Memorandum of Agreement (MOA) or comparable document delineating the roles and responsibilities of each organization is required.</p>	Key Term: Sponsoring Organization
A.2 AOTA Membership	The fellowship program must be associated with an active AOTA membership, either through an Organizational Associate membership held by the sponsoring organization or through an individual membership held by the Fellowship Coordinator.	Key Terms: AOTA Membership, Individual, Organizational Associate
A.3 Focused Area of Practice	The fellowship program must focus on a recognized area of occupational therapy practice in which the sponsoring organization can provide significant engagement through didactic and clinical education with occupational therapy staff with appropriate expertise, and through the regular delivery of relevant patient or client services.	Key Terms: Focused Area of Practice, Sponsoring Organization
SECTION B: RESOURCES AND SUSTAINABILITY		
B.1 Program Finances	The sponsoring organization must demonstrate that sufficient funding and organizational support are available to implement and maintain the objectives of the program, to fulfill the program's obligation to fellows, and to obtain and maintain AOTA Fellowship Program approval status.	Key Term: Sponsoring Organization
B.2 Fellowship Coordinator	The sponsoring organization must hire or appoint a qualified staff member as the Fellowship Coordinator. The Fellowship	The sponsoring organization may determine the official title of the individual holding the Fellowship Coordinator position.

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	<p>Coordinator is responsible for the management and administration of the program, including the program curriculum, selection of staff and fellows, program evaluation, and maintenance of AOTA approval.</p> <p>The Fellowship Coordinator must:</p> <ul style="list-style-type: none"> • be an initially certified occupational therapist, • be licensed or otherwise regulated according to the state(s) or jurisdiction(s) in which the fellowship is offered, • have at least 3 years of documented experience in the field of occupational therapy, and • have expertise in the program’s focused area of practice. 	<p>If a Fellowship Coordinator will also be a primary mentor, the Coordinator must also meet the requirements for the mentor role (see B.3. Mentors).</p> <p>The Fellowship Coordinator job description must include general OT and fellowship program responsibilities.</p> <p>If the Fellowship Coordinator responsibilities are shared between two employees of the sponsoring organization, one co-coordinator must be designated as the principal, fully meet the AOTA requirements for the position, and be the primary contact for AOTA. The second co-coordinator may or may not fully meet the AOTA requirements for the position.</p> <p>Key Terms: Program Evaluation, Focused Area of Practice</p>
B.3 Mentors	<p>The sponsoring organization must appoint staff with appropriate expertise to provide one-on-one mentorship to fellows throughout the fellowship or during specific rotations.</p>	<p>The expertise of a primary mentor may be substantiated through combinations of (a) years of practice, (b) certifications or on-going competency in the focused area of practice, (c) leadership/research roles, and (d) professional engagement.</p> <p>A fellowship program may have a combination of occupational therapists and non-occupational therapists as mentors.</p> <p>Key Term: Primary Mentor</p>
B.4 Sufficient Staff	<p>The sponsoring organization must ensure that the staff responsible for developing and delivering the program are sufficient in number and have the necessary expertise in the focused area of practice to successfully deliver the fellowship program as developed and on schedule. The organization must document that each staff member has sufficient release time to ensure that the needs of the fellowship program are met.</p>	<p>Key Terms: Sponsoring Organization, Release Time</p>
B.5 Learning Environment and Resources	<p>The sponsoring organization must provide learning facilities, resource and reference materials, and instructional aids and equipment that are consistent with current evidence-based interventions in the program’s focused area of practice, the program goals, the curriculum, and the identified learning supports.</p>	<p>Key Terms: Focused Area of Practice, Goal</p>

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SECTION C. FELLOWS		
C.1 Program Publications	<p>The fellowship program must provide and publish consistent and accurate program information that is accessible to potential applicants. This must include, but is not limited to:</p> <ul style="list-style-type: none"> • program description that indicates the focused area of practice; • program goals; • program contact details; • program start and end dates; • program eligibility requirements; • application requirements, fees, and deadlines; • selection process • additional fees payable by an accepted fellow, if applicable; and • form of compensation (e.g., salary or stipend, etc.). 	<p>At least one source of program information should contain all of the required information, such as the program webpage(s). Other program publications may be less comprehensive.</p> <p>Screenshots of unpublished webpage(s) may be submitted in lieu of an address to the published webpage(s). Webpages must be published prior to the site visit.</p> <p>The program is not required to disclose the specific amount of compensation or range of compensation in materials published for the public.</p> <p>Key Term: Focused Area of Practice</p>
C.2 Fellow Eligibility and Application Requirements	<p>The fellowship program must have eligibility and application requirements that are reflective of the demands of the program and aligned with the selection process and criteria.</p> <p>The eligibility requirements must include that the applicant be:</p> <ul style="list-style-type: none"> • a graduate of an occupational therapy educational program accredited by the Accreditation Council for Occupational Therapy Education (ACOTE), and • licensed, or be eligible for licensure, in the state(s) or jurisdiction(s) in which the program is offered. 	<p>The program may opt to accept applications from graduates of an occupational therapy educational program approved by the World Federation of Occupational Therapists (WFOT).</p>
C.3 Non-Discrimination Policy	<p>The fellowship program must have and abide by a non-discrimination policy. The policy should be the same as or consistent with the non-discrimination policy of the sponsoring organization, and readily available to prospective and accepted fellows.</p>	<p>Key Term: Sponsoring Organization</p>
C.4 Performance Expectations	<p>The fellowship program must have established performance expectations and corrective action and termination policies. The performance expectations and program policies must be provided to fellows prior to the start of a fellowship.</p>	

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C.5 Fellow Compensation	The fellowship program must provide detailed compensation and benefits information to applicants offered a fellowship position.	
C.6 Malpractice Insurance	The fellowship program must provide each fellow with comprehensive malpractice insurance that is the same or comparable to the malpractice insurance provided to occupational therapists employed by the sponsoring organization.	Key Term: Sponsoring Organization
SECTION D. CURRICULUM & EVALUATION		
D.1 Program Hours	The fellowship program must be a minimum of 1,400 hours in duration and delivered over 12 months. The required minimum number of program hours are to include didactic and clinical education, mentored service delivery (≥350 hours), and non-mentored service delivery.	Programs may submit a written request to deliver the fellowship program over fewer than or more than 12 months, or to deliver the program on a part-time schedule across 24 months. The request will be subject to approval by the Fellowship Program Review Committee.
D.2 Mission Statement	The fellowship program must have a mission statement that is consistent with the mission of its sponsoring organization, and reflects the current philosophy of occupational therapy and the purpose of the fellowship program.	Key Term: Mission
D.3 Program Goals	The fellowship program must establish program goals that encapsulate its educational and professional purposes and reflect its intent to provide advanced practice training in a focused area of occupational therapy practice.	The program goals should inform the development of the educational modules. Each program goal may correspond in part or in whole to one or more modules. Key Terms: Goal, Focused Area of Practice
D.4 Adult Learning	The fellowship program must consider the needs of adult learners and appropriate educational theories in the construction and delivery of its curriculum, specifically with regards to: <ul style="list-style-type: none"> • instructional strategies, • provision of learning resources, and • educational and environmental supports, including when remediation may be necessary. 	Key Term: Instructional Strategy
D.5 AOTA Fellowship Program Learning Objectives	The fellowship program must integrate the <i>AOTA Fellowship Program Learning Objectives</i> (FPLO) into the curriculum and assess the meeting of each FPLO by fellows.	See Fellowship Program Learning Objectives Chart Assessment information must include the method of assessment (tool, project, activity, etc.), the criteria for passing the

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		<p>assessment(s), and when or how often the assessment(s) will be administered.</p> <p>If a broad assessment tool is identified, the specific components of the tool that apply to the Objectives must be identified as well as criteria for meeting those specific components.</p> <p>Key Terms: Assessment Criteria, Assessment Method, Fellowship Program Learning Objectives, Objective</p>
D.6 Curriculum	<p>The fellowship program must deliver educational modules that provide didactic and clinical activities and experiences to facilitate the attainment of the program goals.</p> <p>There must be a written plan that includes the following for each module of the curriculum:</p> <ul style="list-style-type: none"> • A brief description of the module; • Rationale for the module’s inclusion in the program and placement in the program timeline; • Content, scope, and schedule of delivery of the module that aligns with the caseload and mentoring activities; • Instructional strategies, materials and resources that are consistent with the module content, learning objectives, and current evidence-based occupational therapy practices; • Module-specific objectives that are: <ul style="list-style-type: none"> ○ congruent with the module content and instructional strategies; ○ clear, concise, and observable and/or measurable; • Assessment method(s) and criteria appropriately aligned to the learning objectives; and • Related clinical caseload assignments. 	<p>See Fellowship Program Module Plan Template</p> <p>Each module may align completely or partially with a program goal(s).</p> <p>Assessment information must include the method of assessment (tool, project, activity, etc.), the criteria for passing the assessment(s), and when or how often the assessment(s) will be administered.</p> <p>If the program is using content developed by a third-party provider, comparable documentation on the content may be substituted for the module plan template. The documentation must include all the information required through the Module Plan Template, and all the required details must be consistently presented and easily locatable.</p> <p>Full course content is not required.</p> <p>Key Terms: Assessment Criteria, Assessment Method, Goal, Instructional Strategy, Module, Objective, Schedule of Delivery</p>
D.7 Mentorship	<p>The fellowship program must ensure and accurately document that at least 350 program hours (or 25% of the required minimum 1,400 total program hours) are dedicated to one-on-one mentored practice delivery of occupational therapy services in the focused area of practice.</p>	<p>See AOTA Mentored Practice Tracker</p> <p>Mentored practice hours may fall under the following categories: service delivery, caseload management, and professional development.</p>

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	<p>The program must document the following for each mentoring session:</p> <ul style="list-style-type: none"> • date • duration • mentored practice category • session focus • name of mentor providing the session. 	<p>Programs may use the <i>AOA Mentored Practice Tracker</i> or develop their own form to document the required information. The <i>AOA Mentored Practice Tracker</i> may be modified to document additional information.</p> <p>The amount of time and method for providing mentorship should be adjusted to account for individual learning needs and practice environments (e.g., complexity of caseload).</p> <p>Face-to-face communication may be met through telehealth technology where appropriate to the learning needs and environment. However, telehealth technologies cannot be the sole method of providing face to face communication.</p> <p>Key Terms: Focused Area of Practice, Mentored Practice, Session Focus, Telehealth</p>
D.8 Clinical Caseload	<p>The fellowship program must ensure and accurately document that the majority of the fellow’s assigned caseload is consistent with the:</p> <ul style="list-style-type: none"> • program’s focused area of practice, • curriculum content and progression, and • plans for mentorship. 	<p>Key Terms: Focused Area of Practice, Mentored Practice</p>
D.9 Program Evaluation	<p>The fellowship program must routinely secure and document sufficient qualitative and quantitative information to allow for an analysis of the effectiveness of the program. The information must be routinely analyzed and used to inform program improvement. The fellowship program’s evaluation plan must incorporate an assessment of the:</p> <ul style="list-style-type: none"> • program goals, • module-specific learning objectives, • fellow’s achievement of the <i>AOA Fellowship Program Learning Objectives</i>, • exit evaluations by fellows, • post-fellowship evaluations by fellows, and • coordinator and mentor evaluations of program strengths and areas for development. 	<p>A program evaluation plan must specify (1) what information or data will be collected, (2) the frequency at which the information will be collected and analyzed, (3) the criteria for analysis, and (4) how the analysis will be used to maintain or improve the quality of the program. Additional information may be included at the discretion of the program.</p> <p>Post-fellowship evaluations should include, if applicable, questions on the pursuit and attainment of a relevant certification.</p> <p>NOTE: An analysis of the program evaluation data and any resulting changes to the program will be requested in the program’s interim report.</p> <p>Key Terms: Fellowship Program Learning Objectives, Goal, Objective, Program Evaluation</p>

GLOSSARY:

Definitions given below are for the purposes of this document and other AOTA Fellowship Program documents only.

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

AOTA Membership (See <https://www.aota.org/AboutAOTA/Membership/Types-and-Fees.aspx>.)

Individual: Includes all membership types for an individual initially certified to practice as an Occupational Therapist or licensed or regulated by a U.S. state, commonwealth, district, or territory to practice as an occupational therapist.

Organizational Associate: Membership open to health organizations and institutions, and to nonprofit facilities, libraries and educational programs.

Assessment

Administration: A statement on when and how often within the fellowship schedule a specific assessment is given.

Criterion: A descriptive statement that explicitly express how achievement of the learning objectives are to be demonstrated.

Method: A specific tool, instrument or strategy for collecting information on the extent to which an individual demonstrates achievement of the learning objectives.

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

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

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

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

Interprofessional Collaborative Practice: “Multiple health workers from different professional backgrounds provide comprehensive services by working with patients, families, carers, and communities to deliver the highest quality of care” (WHO, 2010).

Intraprofessional Collaborative Practice: The relationship between occupational therapists and occupational therapy assistants that is based on mutual respect, effective communication, and professionalism to promote the highest quality of care in service delivery (Dillon, 2001).

Mentored Practice: An experience-based learning structure through which a less experienced or less knowledgeable therapist (mentee) is guided by a more experienced or more knowledgeable therapist (mentor). It entails informal and formal communication and feedback, usually face-to-face and over a sustained period of time.

Interactions that may be counted toward the minimum number of mentored practice hours include, but are not limited to:

Service Delivery – Fellow, mentor *and* patient/client present

- Observation by the fellow of patient/client assessment and intervention when the mentor is the primary provider
- Observation and feedback by the mentor of patient/client assessment and intervention when the fellow is the primary provider
- Side-by-side patient/client assessment and intervention

Caseload Management – Patient/client *may* be present

- Review of shared patient/client experience to facilitate advanced patient/client management and decision-making
- Evaluation of fellow’s patients/clients with constructive critique of the care provided

- Review of assessment and intervention treatment plans when the fellow is the primary provider (with or without client present)
- Establishing and reviewing intervention outcomes

Professional Development – Patient/client *not* present

- Development of an individual professional development plan
- Establishing and implementing strategies to develop competencies in: (1) Inter- and Intraprofessional collaborative practice; (2) advocacy; (3) leadership; (4) research, etc. that relate directly to an individual professional development plan.

(No didactic portion of the program may be considered as professional development.)

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

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

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

Occupation-Based Intervention: A type of occupational therapy intervention—a client-centered intervention in which the occupational therapy practitioner and client collaboratively select and design activities that have specific relevance or meaning to the client and support the client’s interests, needs, health, and participation in daily life.

Primary Mentor: A mentor who is responsible for providing the majority of mentorship hours throughout the entire fellowship or during one or more complete rotations.

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.

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

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

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

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

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, 2013b).

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