

OCCUPATIONAL THERAPIST ASSISTANT & PHYSIOTHERAPIST ASSISTANT EDUCATION ACCREDITATION PROGRAM

UPDATE: NOVEMBER 2013

The Occupational Therapist Assistant and Physiotherapist Assistant Education Accreditation Program (OTA & PTA EAP) operates in collaboration with the Canadian Association of Occupational Therapists (CAOT) and Physiotherapy Education Accreditation Canada (PEAC) as the accrediting agency for occupational therapist assistant and physiotherapist assistant education programs in Canada.

The OTA & PTA EAP has been busy over the past six months. Here are some highlights:

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Affiliated Programs:

- As of November 30, 2013, the OTA & PTA EAP holds a list of 30 affiliated programs. Six have accreditation status (BC-3, ON-3), and the remaining 24 have candidacy status. The 30 programs include two French programs, and eleven located in private colleges. They are spread throughout Canada (BC-4, AB-4, ON-19, NS-2, NL-1).

Accreditation Standards:

- The first two education programs to use the 2012 Accreditation Standards are undergoing their onsite accreditation visits in November 2013.
- Feedback continues to be gathered regarding the accreditation standards to inform future changes.
- Discussion is ongoing regarding criterion 3.4.2 (which currently reads: *Clinical/fieldwork education includes no less than 30% of the total time in each discipline*). There is concern that such a criterion creates a risk that some students may graduate having completed 70% of their fieldwork hours in only one setting (either OTA or PTA), and therefore a graduate from a combined OTA/PTA program may not be equally prepared to work as either an OTA or a PTA. It is recognized in most education programs, students spend 30% of their fieldwork hours in OTA settings, 30% in PTA settings and the remainder in combined OTA/PTA settings, where they are supervised by either OT or PT, and often perform tasks which could be allocated to either OTA hours or PTA hours. The challenge is in better defining the combined OTA/PTA fieldwork tasks and allocation. A pilot project will be conducted in 2014/2015 in order to address this challenge. See a description of the project [on page 5](#).

Montreal Education Session follow up:

- The education session in Montreal back in May 2013 was a great success, judging by the feedback we received in the evaluations submitted. Thank you to everyone for being there and for such engaged participation. We certainly learned a lot together!
- One component of the session involved brainstorming around how to increase fieldwork placement opportunities for OTA and PTA placements. Participants provided lots of great suggestions, all of which were discussed at our most recent Joint Accreditation Committee meeting in October. We'd like to share with you the steps we intend to take in response to your suggestions. They are outlined in [Appendix 1](#).

Current Priority issue:

- With the success and rapid growth of the OTA & PTA EAP come challenges with resource management, primarily human resources. Four Peer Review Team (PRT) members must be recruited for every accreditation review that takes place. Right now we average 4 reviews a year – requiring 16 PRT members. By 2016 we will need 32 PRT members each year, and more if the program continues to grow at this pace. Recruitment of PRT members is an ongoing challenge, especially the recruitment of the two members per team who are OTA/PTA educators. More later in this update about the strategies currently in place to tackle this issue (See [Appendix 2](#)).



To All Educators in OTA/PTA Programs (private and public institutions)

Please review the eligibility criteria for becoming a Peer Review Team member (GUIDE-05) (<http://www.otapta.ca/english/get-involved/become-a-peer-review-team-member.php>) and submit your name for consideration to join the pool of Peer Review Team members. While the accreditation process is intense, the benefits to you personally and professionally, as well as the benefit to your education program when you share your experience with them cannot be understated!

We need eligible Peer Reviewers in order to continue to successfully run this accreditation program.

Please contact Kathy Davidson, Program Manager for more information.

Policy Revision:

- As the accreditation program evolves so must our policies. Here is a summary of the new or revised policies now in place. All are available on the [website](#):

Document Name and/or Number	New or Revised	Rationale
ACC-09 Disclosure	Revised	Review of this policy to more fully describe consequences should education programs not adhere to rules of publication was required.

Document Name and/or Number	New or Revised	Rationale
ACC-10 Failure of Payment of Fees	New	It was recognized that this document was necessary early in 2013 as approximately 25% of education programs are late in paying fees (invoiced in January of each year), some not paying until September. There was no clear consequence to late payment. This policy provides these consequences.
GUIDE-03 Fee Schedule	Revised	In June 2013, Policy ACC-08 Distributed Education was approved and implemented. However, an accompanying fee structure for programs eligible for accreditation status as a distributed education site had not yet been discussed or approved. The fee schedule now includes the current fee for Distributed Education sites.
ACC-11 Administrative Probation	New	As part of the development/revision of ACC-10, and ACC-09 it was recognized that an administrative categorization, that of Administrative Probation, would be helpful to provide a consequence to programs who do not meet administrative deadlines. This policy describes Administrative Probation.
TOR-01 Peer Review Teams	Revised	There are great challenges in recruiting PRT members at the rate needed, especially members representing OTA/PTA educators. A number of strategies were discussed to address this challenge and these strategies required revision to the Terms of Reference for PRTs. This document includes those revisions. (The strategies are described in Appendix 2).
GUIDE-05 Eligibility to Become a PRT Member	New	It was agreed that in order to promote the role of a PRT member and to assist in recruitment, a document should be created to provide information to potential PRT members.
FORM-03 PRT Application Form	Revised	The PRT application form has also been revised to reflect changes in the TOR-01.
Requirements to maintain Candidacy/ Accreditation status	Revised	<p>In the past the following was necessary to maintain Candidacy/Accreditation status:</p> <ul style="list-style-type: none"> • submission of Progress Reports as required in the Accreditation Review and Status Report - AR & SR, (accredited programs) • submission of an Annual Accreditation Report (online survey), • payment of an annual fee, and • reporting of any substantive change in an education program which may affect compliance <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><u>New requirements</u>, in addition to the above, are:</p> <ul style="list-style-type: none"> • nomination of one educator meeting the PRT member eligibility criteria to join the pool of PRT members, • publication of accreditation status, and • use of approved text to publicly disclose candidacy status (if choosing to publish candidacy status). </div>



Policies/Guidelines in development:

Document Name and/or Number	New or Revised	Rationale
GUIDE-06 – Supervision of OTA/PTA Students during fieldwork	New	A lack of clarity regarding who can supervise an OTA/PTA student (OT? PT? OTA? PTA?) when on a fieldwork placement appears to exist. A guideline is in development to more clearly describe from regulatory, educational and accreditation perspectives where the responsibility lies for supervision and evaluation of a student, and to outline the conditions necessary for each supervision situation. Anticipated date: March 2014.
GUIDE-07 – Quality and Substantial Equivalency of Distance Education	New	Prior to review of the first education program with a distance education component, it is important to develop a guideline document for both the JAC and for PRT members to outline what evidence is necessary to ensure quality and substantial equivalency of the distance education being offered. Anticipated date: Spring 2014
GUIDE-08 – Role-Emerging Fieldwork Placements	New	Role-emerging fieldwork placements are those which are atypical, and may or may not involve gaining experience with patients. Examples of such placements include community education partnerships or pilot projects. A list of considerations that must be addressed when a role-emerging fieldwork placement is to be included in the fieldwork hours for accreditation purposes will be developed. This list will help guide both programs and Peer Review Teams when providing/evaluating evidence provided in the Self Study Report. Anticipated date: Fall 2014

2014/2015 Pilot Projects:

1. There has been some hesitation expressed regarding the inclusion of educators from private institutions on Peer Review Teams for public institutions and vice-versa. Private and public institutions are, in many ways, in competition with each other, and have different educational models and institutional structures. Despite strict conflict of interest and confidentiality policies, providing the opportunity for PRT members from the opposite institutional model full access to the detailed material contained in a Self Study Report has been viewed as unsettling. However, there are likely lessons to be learned from each model, and each model has strengths to be explored.

For this reason a pilot project will be undertaken, with established evaluative criteria, whereby a one private educator will be included on the team for each of three public institution accreditation reviews to explore whether there is resistance in practice to having “cross” reviewing. Programs will continue to have the opportunity to request that a member be removed from the PRT when they receive the PRT member list for approval. Requests must be substantiated.

Stay tuned for more details regarding the results of this pilot.

2. As described in “Accreditation Standards” above and in Appendix 1 below, more clearly defining the combined OTA/PTA fieldwork tasks and allocation to either OTA or PTA fieldwork hours is necessary in order to inform future revision of criterion 3.4.2.

A pilot project will be undertaken to collect data from students and their preceptors during fieldwork experiences in OTA/PTA education programs. The platform for data collection is software application called T-Res (<http://www.t-res.net>). The project will track and document individual student clinical experiences; the objectives will be to explore whether OTA and PTA activities in combined placements can be differentiated, and to identify activities that can be recorded as either OTA or PTA experiences.

As a result of the project, a template for T-Res will have been developed for OTA/PTA education programs. In the future, programs who are interested in using T-Res for their own purposes will be able to purchase, modify the template, and use the platform for the needs of their specific education system and students.

All English programs affiliated with the OTA & PTA EAP (accredited or with candidacy status) will be eligible to participate in the pilot. Of those expressing interest, 5 programs will be chosen based on purposive sampling criteria established for the project. Representation will be required from public and private institutions, and a statistically established number of students and diversity of clinical contexts will be necessary. Recruitment of participants will begin early in the new year – stay tuned for updates.

A Steering Committee will also be established to guide this project; recruitment of these representatives will also begin in January. **Any interested individuals are welcome to contact Kathy Davidson at kathy.davidson@otapta.ca for more information.**

Updated Handbooks

The Program Handbook and the Peer Review Team Handbook will be updated between January and March 2014 to reflect the new policies and processes outlined above. Please be sure to review the updated versions once they are published – a notice will be sent by email once they are available

Revised OTA & PTA EAP Website

The accreditation program has grown so fast, and information to be shared has grown equally fast. This required a revision to the website in order to improve navigation and to make information more accessible to both programs and the public. The new website will be launched by the end of 2014. As a result, some links that programs currently use may no longer work but every effort will be made to update links as quickly as possible throughout the OTA & PTA EAP documentation. We apologize for any challenge this might cause but we hope the end result meets your needs more effectively.

**OCCUPATIONAL THERAPIST ASSISTANT & PHYSIOTHERAPIST ASSISTANT
EDUCATION ACCREDITATION PROGRAM
APPENDIX 1**

October 30, 2013

Education Session: May 23, 2013
Discussion at JAC meeting Oct 17&18, 2013

In the small group discussion, a number of strategies to increase the number of fieldwork placements for both OTA and PTA were generated. These strategies were reviewed and discussed at the Joint Accreditation Committee Meeting October 17 & 18, 2013, and the results of that discussion are summarized below.

Strategy generated	JAC Discussion	Action (if any)
1 Limit the number of new OTA/PTA education programs	This is seen as an advocacy role which likely is more the responsibility of COPEC, CAOT and CPA than of the OTA & PTA EAP.	<p>Create a one-page description of the issue for CAOT and CPA – potentially they can advocate at the provincial/national level for consideration to this issue when new programs are approved.</p> <p>OTA & PTA EAP to require as part of employer/new graduates surveys a question that determines whether graduates are employed and where. This will also be included in the annual accreditation report survey.</p>
2 Use non-supervised settings (eg Move E.Z.)	This falls under the umbrella of “role-emerging” fieldwork placements. Many examples of such placements were provided during the JAC discussion. Some would be considered acceptable to count towards OTA/PTA fieldwork hours but some would not.	The OTA & PTA EAP will develop a list of considerations that must be addressed when a role-emerging fieldwork placement is to be included in the fieldwork hours for accreditation purposes. This list will help guide both programs and Peer Review Teams when providing/evaluating evidence provided in the Self Study Report.

Strategy generated	JAC Discussion	Action (if any)
3 Sub-clinical patients (eg family, friends etc.)	While “patients” such as these are great practice for students, they are not seen by the OTA & PTA EAP as contributing to fieldwork hours for the purposes of accreditation.	
4 Education programs hire OTs or PTs to supervise students when on placement in facilities.	The OTA & PTA EAP supports this strategy should education programs want to use it.	
5 Explore using faculty members as student preceptors/supervisors. It was reported that this will not work in some provinces as it is not permitted.	The OTA & PTA EAP supports this strategy.	This model is used by nursing programs in many if not all provinces. It would be worthwhile for programs who believe that this is not permitted in their province to communicate with the nursing programs in their institution to see how they have addressed the issue in the affiliation agreements for placements.
6 Encourage OTA/PTA graduates to take students, and to convince/encourage their supervising OT or PT to participate	The OTA & PTA EAP supports this strategy.	
7 Financial incentives (in ON preceptors who take OT or PT students receive an honorarium, but not those who take OTA or PTA students)	The OTA & PTA EAP supports this provincial initiative but it is beyond the program’s scope to follow up on it.	
8 Partnership in student-led PT/OT clinics	The OTA & PTA EAP supports this strategy	The OTA & PTA EAP will suggest/advocate to the accrediting agencies for OT and PT programs that PT and OT Accreditation Standards include delegation to OTAs/PTAs in student clinics.

Strategy generated	JAC Discussion	Action (if any)
9 Opportunities for projects while on placement (eg create a placement where a community project+patient care are combined, explore pilot projects and partnerships)	The OTA & PTA EAP supports this strategy and would consider this learning with regards to community service learning as an example of “role-emerging” fieldwork (see #2 above). What is organized by the program should meet the yet-to-be-developed list of considerations when creating placements.	
10 CCAC OTs (or the private agencies contracted by CCAC) in Ontario do not take OT students – advocate to change this.	This is beyond the scope of the OTA & PTA EAP.	However, the OTA & PTA EAP can seek success stories from other provinces accepting OTA students in homecare-type contexts to use to advocate for placements when the opportunity arises.
11 Ensure that placement dates are staggered between programs (and university OT/PT programs) in adjacent catchment areas to avoid competition for placements.	The OTA & PTA EAP supports this strategy. This is done already in many provinces with more than one OTA/PTA education program.	The other strategy would be to coordinate with OT and PT programs to advocate for PT+PTA placements or OT+OTA placements to take place simultaneously, and allow the OT or PT student to gain experience supervising the OTA or PTA student.
12 Education regarding the use of and role of OTA/PTAs to clinical practice leaders and managers. Encourage new OT and PT graduates to be supervisors for OTA/PTA students as preparation for supervision of OT and PT students	The OTA & PTA EAP supports this strategy, and would also encourage newer OT and PT graduates to be responsible for supervising OTA/PTA new graduates.	
13 Seek out more service areas (eg. Mental Health).	The OTA & PTA EAP supports this strategy. An example was given of an orthopaedic clinic placement in a mental health facility designated as PTA fieldwork hours. It was agreed that such a placement whereby a student must use OTA skills to communicate with patients with mental	The OTA & PTA EAP will develop case examples of such placements which may not at this time be included by programs as combined OTA/PTA placements. The list of considerations will be important to guide the requirements needed to re-designate such placements.

Strategy generated	JAC Discussion	Action (if any)
	health disorders while at the same time helping to address PT issues, could, with the correct supervision be considered as both OTA and PTA fieldwork hours	
14 Explore 2:1 placements	The OTA & PTA EAP supports this strategy. Group supervision models can include many variations. An example was given where five students were spread over three sites of an institution and were supervised by one OT. With adequate supervision, this is possible.	
15 Encourage facilities to put student supervision as an expectation of being an employee – how can we encourage this? <u>Caution:</u> “forcing”/mandating OTs/PTs to take students might change the quality of placements in the future.	The OTA & PTA EAP supports this strategy but...	suggests that facilities perhaps should be encouraged to take a set number of students per year, rather than insisting that all therapists take students. This way those preceptors who enjoy the experience can take more than one and OTs/PTs who do not enjoy it or who are poor preceptors would not be forced to participate.
16 Dedicate more time to preceptor education and support	The OTA & PTA EAP supports this strategy, and relationships between preceptors/facilities and the education program are explored during the accreditation process.	

OCCUPATIONAL THERAPIST ASSISTANT & PHYSIOTHERAPIST ASSISTANT EDUCATION ACCREDITATION PROGRAM APPENDIX 2

Peer Review Team Member Recruitment Summary of Issues and Strategies JAC Meeting Oct 17 & 18, 2013

As per the Terms of Reference TOR-01 Peer Review Teams, review teams consist of the following members:

- one occupational therapist representing the Canadian Association of Occupational Therapists (CAOT);
- one occupational therapist OTA educator;
- one physiotherapist representing Physiotherapy Education Accreditation Canada (PEAC) and;
- one physiotherapist PTA educator.

At the rate of four reviews per year (scheduled currently), 16 PRT members must be recruited annually. In 2016, eight reviews are anticipated, requiring 32 PRT members. It is extremely challenging to recruit OTA/PTA educators to Peer Review Teams, and this will be a critical need in the coming years.

The strategies discussed and agreed upon at the JAC meeting on October 17 & 18, 2013 are described below:

1. Retired PTs and OTs are no longer eligible to use the title "OT" or "PT" if they cannot register with their regulatory colleges. They may have time available and interest in participating in accreditation reviews but they do not currently meet the eligibility requirements in the TOR for Peer Review Teams.

Strategy Change the TOR to allow OTs and PTs who are retired but who have been members in good standing of their regulatory colleges within the past 10 years to be eligible as PRT members.

2. PTs and OTs who are sessional or contracted instructors in OTA/PTA education programs may be interested in/skilled at accreditation. Current TOR requires 5 years' experience as an instructor in OTA/PTA education programs.

Strategy Change TOR to allow OTs and PTs who have instructed a minimum of 90 hours per year in an OTA/PTA education program to be eligible as PRT members.

3. The primary recruitment challenge is to find members representing education programs for a variety of reasons (small faculties with little administrative support make it difficult to leave their teaching responsibilities for the onsite visit, accreditation process is new – not yet well known among all faculty and sessional instructors, difficulty accessing emails of all educators – only program coordinators are known to the OTA & PTA EAP).

Strategy new requirement to maintain accreditation/candidacy status: each education program with accreditation/candidacy status must nominate one educator to join the pool of PRT members. This would be someone the program would support in participating in an accreditation review.

4. Public colleges express concern about private college educators (private colleges are in direct competition with public colleges) participating in accreditation review and consequently, despite confidentiality agreements, having access to materials used in the public programs. To date, only public program educators have been part of PRTs. At this point more than 30% of the programs affiliated with the OTA & PTA EAP are in private institutions.

Strategy Consult AAAC and ASPA programs with both public and private institutions to see how they manage the private vs public peer reviewer challenge.

Strategy Conduct a pilot test with established evaluative criteria including one private educator on the team for each of three public institution accreditation reviews to explore whether there is resistance in practice to having “cross” reviewing. Programs will have the opportunity to refuse a private institution educator when they receive the PRT member list to approve.

Additional strategies agreed upon include:

- Development of a small pool of “expert” PRT Chairs, willing to conduct 2-3 reviews per year. This would create consistency between reviews, the opportunity for skilled mentorship of the junior PRT members (especially those from education programs who have little to no experience in accreditation).
- Consider, when less experienced teams are created, seeking a volunteer, or hiring, an experienced mentor who could help the teams from a distance through the report writing, and as a contact during the onsite visit should questions arise. This role is also played by the Program Manager, but given current time constraints on that staff position, this may be a solution for more efficient time management.
- Consider providing the option to education programs to conduct reviews in May/June/July/August when students are either on break or in fieldwork placements. Students off campus could be brought in for the interviews. This may increase availability of PRT members from other programs as their teaching duties may be less onerous at that time of the year when students are away.
- Develop one-pager brief “Profile of a Peer Review Team Accreditor”: Include: benefits (may be considered by their college as meeting continuing professional development requirements; ensuring continuing competency for their regulatory colleges; explain the benefit that an experienced accreditor with an understanding of the accreditation process brings to the program they come from), time requirements and work involved, testimonials of the benefits from those who have participated to date. Frame involvement in accreditation as evidence of commitment to quality, and as evidence of professional contribution.
- Join the Alliance of PT regulators Registrar’s committee teleconference to request that support of accreditation be included in communications to membership, along with application forms/links. Seek a similar forum to access OTs.
- Include question at the end of the survey to PRT members following an accreditation review– would you do this again? How often?