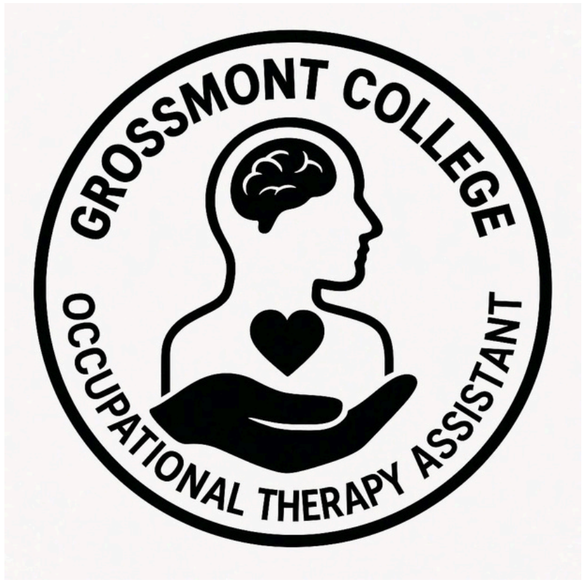
Close Collaboration from a Distance: Comparing Occupational Therapy and Occupational Therapy Assistant Students' Perceptions

Samuel Merritt University



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Introduction

In 2020, our colleague Robyn Wu saw an opportunity to use Zoom learning to build bridges between our MOT, OTD programs and OTA programs.

After contacting Joyce Fries at Grossmont College a case study zoom collaboration was set up between the two programs.

We have been running this program for five years and the following is what we have learned.

We hope that this information inspires you to build bridges of your own.

What does ACOTE say about intraprofessional collaboration?

ACOTE- Changes in 2023 (effective fall 2025)

There were significant changes regarding OT and OTA collaboration in the most recent updated standards

- 2018 version contained only two standards and one definition:
  - B.4.19 - The first context is the consultative process B.4.19. "…in collaboration with inter- and intra-professional colleagues"
  - B.4.24. Effective Intra-professional Collaboration outlined for the Doctoral and Master's levels as "identifying the roles of the OT and OTA in the screening and evaluation process" and "demonstrate and identify skills of supervision and collaboration with OTAs"
    - "Intra-professional" defined in the glossary where collaborative process is defined

2023 ACOTE Standards increased related to “intra-professional”

- B.3.0. screening, evaluation, and interventions planning. The language is more descriptive and inclusive. …“The occupational therapy process is enhanced, and outcomes are improved when intra-professional collaboration takes place.”
- B.3.3 includes language that requires collaboration. “Demonstrate intra-professional collaboration to establish and document an occupational therapy assistants competence regarding screening and assessment tools.”
- B.3.10. Intra-professional collaboration is again included in the plan for discharge
- B.3.21. “Demonstrate effective communication with clients, care partners, communities, and members of the intraprofessional and interprofessional teams
- B.3.22. “Demonstrate awareness of the principles of intraprofessional and interprofessional team dynamics to perform effectively in different team roles….”

- B.4.6. “Demonstrate knowledge of:
  - Care coordination, case management, and transition services in traditional and emerging practice environments.
  - The consultative process with persons, groups, programs, organizations, or communities in collaboration with inter- and intraprofessional colleagues.”

- Glossary term change from intra-professional collaboration to “intra-professional education” .
  - Definition: “Occupational therapist and occupational therapy assistant students participate in collaborative educational experiences to develop the knowledge, skills, and teamwork necessary for current-day practice” (AOTA, 2018).
- Both glossary terms that included “collaborative practice” have been deleted.

- A new AOTA reference is cited: American Occupational Therapy Association. (2018a). Importance of collaborative occupational therapist–occupational therapy assistant intraprofessional education in occupational therapy curricula. American Journal of Occupational Therapy, 72(Suppl. 2), 7212410030p1–7212410030p18. https://doi.org/10.5014/ajot.2018.72S207

Interpretation of the ACOTE Standards

How might you interpret these new, more detailed standards?
https://PollEv.com/free_text_polls/d8zQ9Lb1Yv0Y5gh3sCXbe/respond

Academic Interpretation:

Standards around OT/ OTA collaboration - ACOTE requires educational programs to prepare students for effective OT-OTA collaboration through role clarity, communication, supervision, ethical practice, and shared responsibility for client outcomes.

Understanding Professional Roles

- OT and OTA students must understand the distinct yet complementary roles and responsibilities of occupational therapists and occupational therapy assistants.
- Educational programs must prepare graduates to function effectively within the OT-OTA collaborative relationship.
- Graduates should understand how each practitioner contributes to quality occupational therapy service delivery.

Collaboration throughout the OT Process



Collaborate in screening, service delivery, and intervention implementation.



Participate in shared decision-making to support client-centered care.



Communicate effectively regarding documentation, progress, and outcomes.



Work together to monitor and adjust interventions within established role responsibilities.

Supervision and Service Competency

Demonstrate ethical and legal decision-making related to collaborative practice.

Understand principles of OT-OTA supervision and collaborative service delivery.
Apply service competency standards to ensure safe, effective care.
Recognize appropriate delegation of responsibilities between OTs and OTAs.

Intraprofessional Collaboration

Function as effective members of occupational therapy service delivery teams.

Develop effective communication skills within occupational therapy teams.

Engage in collaborative problem-solving and clinical reasoning.

Foster mutual respect and shared responsibility for client outcomes.

Academic Expectations

- OT program directors must demonstrate an understanding of the role of the occupational therapy assistant (Standard A.2.1).
- OTA program directors must demonstrate understanding of and experience with occupational therapy assistants (Standard A.2.1).
- OTA programs must include a faculty member who is currently practicing as an OTA and involved in curriculum design, strategic planning, teaching, and student advising (Standard A.2.7).
- Programs are expected to model collaborative OT-OTA practice through faculty expertise and curriculum design.
- “ACOTE aims to enhance OT students' understanding of the OTA's role, but challenges remain. With 416 accredited OT programs and only 249 OTA programs, collaboration will be essential, especially in diverse geographical areas.” Using video conferencing may make connecting OT and OTA students less labor and time intensive. (Wu, Embrey, Tom, 2025)

What was our activity goal:

- Design format so student use shared leadership model

What we did prior to class:

- OT students were given a case study to evaluate
- OTA students were given assignment to create powerpoint explanation of OTA role and scope in CA
- All students given an agenda for day to anticipate what to expect

In class: OTA students shared their role/scope and OT students shared background of case.

- Together OT/OTA student small groups were asked to create a treatment plan for the client in small groups. (ratio of 1 OTA: 2 OT)

How did we evaluate if this program was successful?

We wanted to use best practice is to evaluate a new program/teaching strategy.
Determined that student feedback received from an anonymous survey from both OT and OTA students was crucial.

Gathering data

Created a post class mixed methods survey

Likert scaled questions for example:

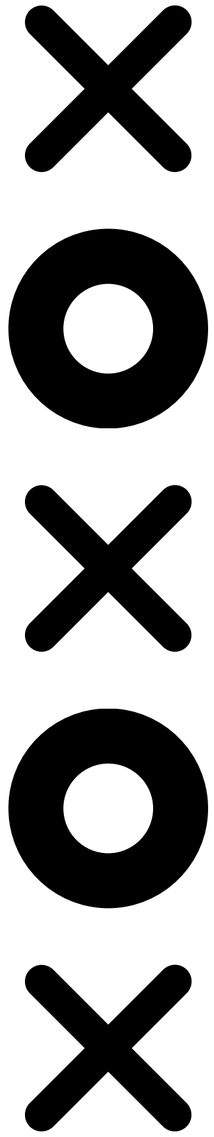
“I gained new knowledge about guidelines and best practices for OT-OTA professional collaboration.”

“Collaborating with my OT-OTA partners on a client case expanded my clinical problem solving skills”

Write in questions, for example:

What was your biggest takeaway from today’s learning activities?

What is one thing you learned about yourself with respect to professional collaboration?



Research

Implemented over multiple years - 2021-2026

6 student cohorts from both institutions

Overall response rate of 93% N=351

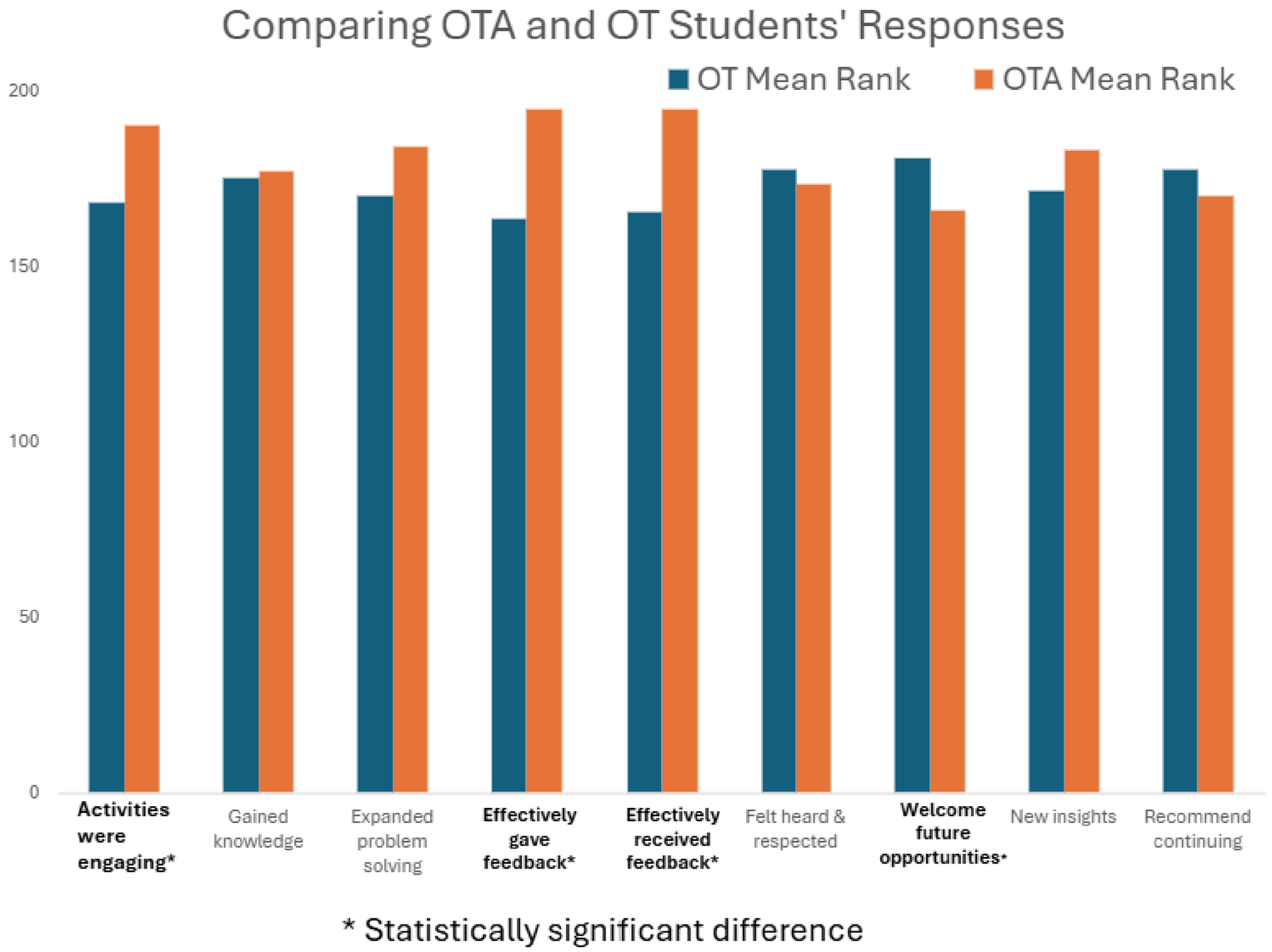
OT students N=229 OTA students N=122

Mixed Method Study

Wu, R., Tom, D., Embrey, D., & Fries, J. M. (2025). Comparing Occupational Therapy Students' and Occupational Therapy Assistant Students' Perceptions of an Intraprofessional Class Session. Journal of Occupational Therapy Education, 9 (4). https://doi.org/10.26681/jote.2025.090414

The above reference is for cohorts from 2021-2023 cohorts, current research results are being presented for 2021-2026 cohorts





Quantitative Results

Table by Robyn Wu, OTD
Samuel Merritt University, Scholarship Symposium and Poster Session: "Close Collaboration from a Distance: Comparing Occupational Therapy and Occupational Therapy Assistant Students' Perceptions of a Joint Class Session between Samuel Merritt University and Grossmont College". 2026. Wu, Tom, Embrey, Fries

Qualitative Themes That Were Similar

Enjoyment and Emotional Safety

Hands-On Introduction to Future Practice

The Importance of Communication and Collaboration

Themes That Emerged Differently

OTAs Are Valuable

Affirming for OTA students

A Revelation for OT students

Powerful experience for students

“Working in collaboration creates multiple ideas and viewpoints that are so useful to the client”

“Consistent communication, specific goals, honest feedback, therapeutic use of self, and a client centered approach are all major factors that play a role in the profession”

“Respect for each other and open communication is important.”

“This experience made me feel more comfortable and informed of our OTA/OT collaborative relationship”

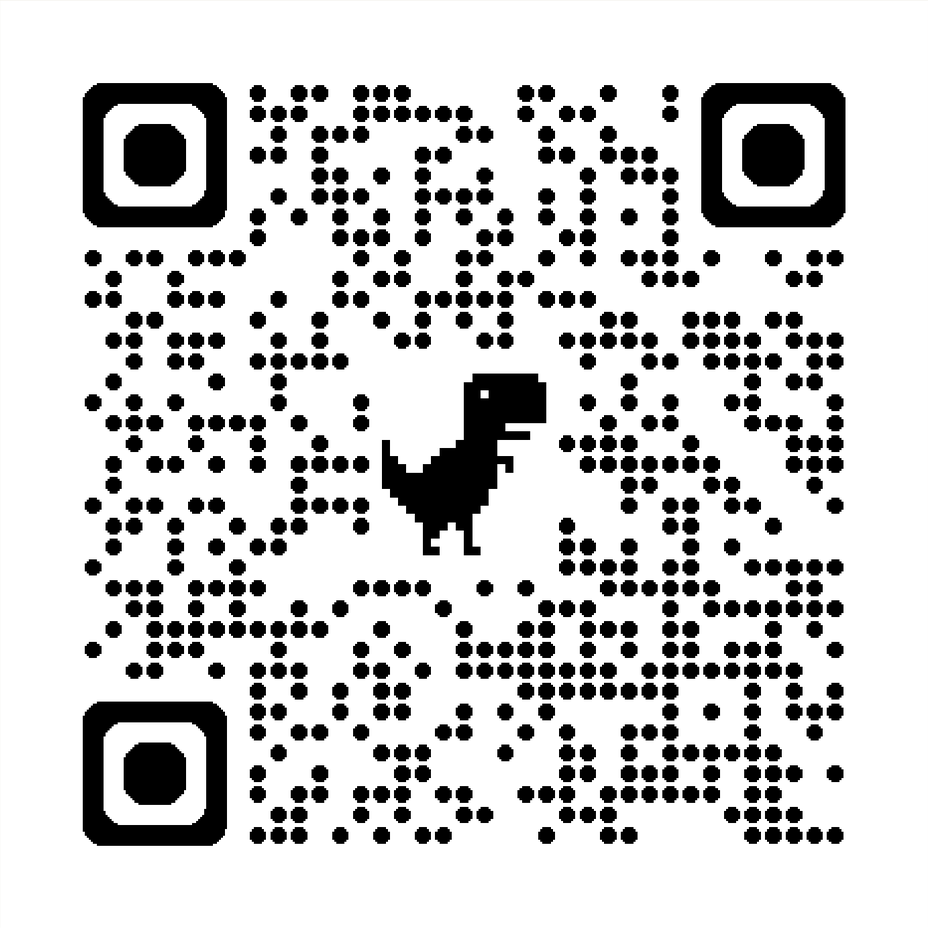
In your role how can you promote OT/OTA collaboration?

Using what you just learned break into small groups to discuss ways to meet the ACOTE standard and ways to help OT and OTA students gain exposure to each other

15-20 minutes break out,

How can we best teach students about the importance of intraprofessional collaboration?

Share what your group discussed



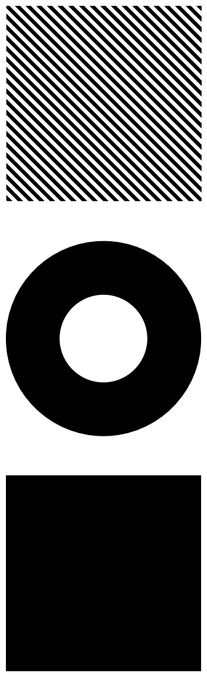


Encourage others to use this model

Outlined how to do this in our article: Wu, R., Tom, D., Embrey, D., & Fries, J. M. (2025). Comparing Occupational Therapy Students' and Occupational Therapy Assistant Students' Perceptions of an Intraprofessional Class Session. Journal of Occupational Therapy Education, 9 (4). https://doi.org/10.26681/jote.2025.090414

Here is the QR code:

Questions and Answers



Thank you

Selected References

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