

**STATEMENT ON THE VALUE AND
PURPOSE OF THE
OCCUPATIONAL THERAPY
ASSISTANT
IN THE PRACTICE OF
OCCUPATIONAL THERAPY**

**as developed by the Pennsylvania Occupational Therapy
Association (POTA)**

2025 Edition



This document was written by a task force of professionals from the Pennsylvania Occupational Therapy Association (POTA). Please note that the statements included are not the official policies of POTA and are not legal advice. This document is provided for informational purposes only and is based on the state regulations and national guidelines at the current time of development. This document is intended to be updated as practice guidelines, accreditation standards, and licensure laws evolve.

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Purpose of the Document

The purpose of this document is to provide occupational therapy assistants (OTAs), their employers, and those who collaborate with them intra- and inter-professionally with information related to the education and role of the OTA, OTA competency and autonomy, OTA professional growth/role capacity, OTA licensure in PA, and advocacy.

Education and the Role of the OTA

OTAs are educated at the college and university level to obtain either an associate or bachelor's degree. OTA educational programs are accredited by the Accreditation Council for Occupational Therapy Education (ACOTE®). Each degree level has specific accreditation standards that must be addressed. The bachelor level OTA education further develops the OTA's competence and engagement in research and enriching the practice of occupational therapy. Both degree levels are rigorously developed to uphold the standards of both the academic institution as well as those of ACOTE®. As stated in the American Occupational Therapy Association (AOTA) document, *Value of the Occupational Therapy Assistant Education to the Profession* (2019):

Many students within occupational therapy assistant educational programs bring a variety of life experiences and commitment to their local communities that enrich the teaching–learning process and community engagement. These factors are combined with an education based on rigorous accreditation standards that develop:

- Knowledge in the domain and process of occupational therapy;
- Competencies in the application of culturally relevant, client-centered, evidence-based, and occupation-based interventions; and

- Skills in the areas of written and verbal communication, leadership and management, scholarship, advocacy, and professional values, ethics, and responsibilities (p. 2).

A vital component of OTA education is the completion of both Level I and Level II fieldwork experiences. In Level I fieldwork, the OTA student is required to interact with clients who are experiencing the occupational deficits being taught in the didactic coursework, providing a rich application of knowledge and increasing the depth of discussion for strengthened learning. Intervention planning begins at this foundational level under the supervision of the fieldwork educator, the didactic course instructor, and the academic fieldwork coordinator who together provide guidance and feedback for the OTA student to strengthen their skills, in preparation for entry level practice.

The OTA education experience culminates with 16 weeks of full-time Level II fieldwork that “must include an in-depth experience in delivering occupational therapy to clients, focusing on the application of purposeful and meaningful occupation” (ACOTE®, 2023, C Standards). Upon completion of Level II fieldwork, the academic program and fieldwork educators are indicating that the student has become a competent, entry-level generalist OTA.

Upon graduation from an accredited program, OTAs are fully prepared generalist practitioners eligible to sit for the national certification exam administered through the National Board for Certification in Occupational Therapy (NBCOT).

A licensed occupational therapy assistant (OTA) is an active and vital contributor to every step within the occupational therapy process, including the evaluation, intervention planning and provision as well as transition and discharge processes, under the supervision of a licensed occupational therapist (OT).

Evaluation

Although it is the OT’s responsibility to oversee all aspects of evaluation and interpretation of results into a treatment plan, the official document of the American Occupational Therapy Association, “Standards of Practice for Occupational Therapy” (2021) states:

An occupational therapy assistant contributes to the screening, evaluation, and reevaluation process by administering delegated assessments of occupational performance and by reporting assessment results to the occupational therapist in accordance with federal and state laws, other regulatory and payer requirements, and AOTA official documents (p. 4).

The OTA’s education is rigorous in its requirements for each student to demonstrate understanding and use of a variety of industry standard assessments, both standardized and non-standardized, demonstrating preparedness for entry-level practice as an OTA generalist. This academic requirement is outlined in standard B.3.3 of the 2023 ACOTE® Standards.

Intervention Planning and Provision

Having demonstrated competency in areas of activity analysis, use of theoretical frameworks, and application of available evidence, the OTA is an excellent resource for individualized client-centered intervention planning. OTA education provides exposure and education regarding diagnoses that the OTA will encounter when treating clients across the lifespan.

In a collaborative supervisory relationship with the OT, the OTA can implement a creative plan consisting of a variety of occupation-based activities to provide the “just right challenge” for clients. The OTA designs and implements interventions considering the contexts for an individual to participate in education and training, remediation for occupational deficits, modifications to the occupation and/or environment and develop self-advocacy and self-efficacy skills.

The OTA is skilled in assessing client progress in relation to the established plan. The OTA determines areas of success and need for the client. As needs persist, the OTA contributes to the problem-solving process through analyzing the individual and their context to identify strategies essential to client success toward goal attainment.

Throughout this intervention process the OT and OTA work within a supervision structure defined by the state practice act and employer requirements to promote communication and collaboration, to ensure the client’s needs are planned and prepared for with the goal of successful transition from OT services.

Transition and Discharge Process

Having established and developed the therapeutic relationship with the client, caregivers, and an understanding of their context, the OTA is able to provide critical insight to the OT regarding discharge needs, recommendations, and planning. The contributory role of the OTA in the discharge planning process can include (but is not limited to) assessment of client’s current functional abilities, pre-discharge assessment of the client’s environment, education and training for caregivers, collaboration and consultation with other professionals, and recommendations on assistive devices and modifications.

According to the AOTA “Standards of Practice for Occupational Therapy” (2021): “An occupational therapy assistant contributes to the transition or discontinuation plan by providing information and documentation to the occupational therapist related to the client’s progress toward goals, needs, performance, and appropriate follow-up resources” (p. 5-6).

Additionally, the document states that it is the role of all OT practitioners, including OTAs, to facilitate: “the transition or discontinuation process in collaboration with the client, family members, significant others, other

professionals (e.g., medical, educational, social services), and community resources, when appropriate” (AOTA, 2021, p.6).

OTA Competency and Autonomy in Practice

As the AOTA official document *The Value of the OTA Education to the Profession* (2019) states:

Occupational therapy assistants are equipped to promote the value and role of occupational therapy services with people across the life course in rehabilitation, habilitation, prevention, wellness, chronic disease management, and other critical areas while providing skilled occupational therapy services to improve client outcomes at lower costs (AOTA,2014a). In this way, occupational therapy assistant education produces highly skilled practitioners who, in partnership with occupational therapists, help to achieve the triple aim of health care reform to improve the individual experience of care, improve the health of populations, and reduce the cost of care (AOTA, 2014b, p.1).

As indicated in the newly adopted ACOTE® 2023 accreditation standards (ACOTE®, 2023), 18 of 51 (35%) of the B standards are identical across all educational levels from OTA through OTD (OT doctorate degree). These standards address topics such as: communication, activity analysis, grading and adapting processes and environments, and leadership. The equivalency among the remaining standards demonstrates the ability of the OTA to contribute directly to the implementation of OT services in collaboration with the OT. The OTA is adequately prepared in all aspects of OT practice to work autonomously given service competency and required supervision. The current licensure of OTAs in PA allows for general supervision with minimal impact on the OT’s daily schedule.

In addition to licensure in PA, OTAs earn an initial certification status from NBCOT upon passing the national examination. This certification ensures safety and validation of competency of OTAs for consumers of OT services.

OTA Supervision and Licensure in PA

Supervision of the OTA offers an opportunity for collaboration and intra-professional practice while increasing access to care for clients. OTA supervisory structure is distinct from other professions. Upon orientation and demonstration of service competency, an OTA can operate under general supervision. According to the Pennsylvania OT Code (Commonwealth of PA, 2024, Chapter 42), supervision includes intra-professional communication regarding the client evaluation, discussion of the goals and program plan and periodic reevaluation and modification or termination of the program plan. Additionally, supervision includes case management, information exchange, instruction and assistance, and periodic observation of the OTA. Supervision also includes preparing and discussing with the OTA an annual performance report.

As stated in the Pennsylvania OT Code, supervisory contact occurs with the occupational therapy assistant for at least 10% of the time worked by the assistant in direct patient care. 'Supervisory contact' means face-to-face individual contact, telephone communication, contact through written reports or group conferences among a supervisor and two or more supervisees. Face-to-face individual contact shall occur onsite at least once a month and shall include observation of the assistant performing occupational therapy (Commonwealth of PA, 2024, Chapter 42). This frequency of supervision is a required minimum and may increase depending on the unique circumstances of the practice setting and client factors.

OTAs licensed in Pennsylvania are required to attest to continued competency each licensure renewal cycle. This follows the same requirement established for OTs. OTAs may be employed in roles and capacities that do not require traditional supervision as defined above. OTAs employed in roles as a manager or director do not require OT supervision for their managerial duties and responsibilities. If they provide clinical services in addition to their managerial tasks, then the OTA would collaborate with the OT to obtain legal supervision for the hours of OT intervention services provided.

OTAs employed in nontraditional roles (not providing direct OT services) including but not limited to activities director, care manager, sales and marketing, consultant, etc. do not require OT supervision for their services. If their employment is a mixed role between nontraditional and traditional services, the OTA would collaborate with the OT to obtain legal supervision for the hours of OT intervention provided.

OTA Professional Growth and Role Capacity

OTAs are valued members of their intra- and inter-professional practice environments. The OTA profession and demand for practitioners continues to grow. According to the US Bureau of Labor Statistics (2024), the employment outlook is positive for the next decade with a projected growth rate of 21% through 2033. As practitioners, OTAs have the capacity to expand their professional credentials and fulfill many roles. These roles can be considered nontraditional and be implemented outside the expected realm of OT service.

These can include (but are not limited to):

- Director of Rehab/Manager
- Specialty Certification (Driver's Rehab, Lymphedema, Assistive Technology, Home Modifications, etc.)
- Consultant
- Case Manager
- Entrepreneur/Business Owner
- Activities Director
- Residential Program Manager
- Behavioral Health Professional

- Home Care Coordinator
- Faculty in OT academic programs
- Fieldwork Educator - Level I and II OTA students and Level I OT students
- OTD Capstone Site Supervisor
- Technology Specialist

Advocacy

The use of this document can be instrumental in providing support to practitioners, students, and employers in:

- Clarifying OTA/OT role delineation
- Encouraging OTA/OT collaboration beyond supervision
- Understanding supervision requirements for OTA
- Expanding the OTA role in evaluation
- Understanding the potential for revenue growth
- Balancing time demands of the OTA in providing quality client-centered care
- Recognizing and justifying the need for increased OTA positions (traditional and nontraditional)
- Utilizing the OTA in new program development or expanding current services provided

Definitions

Occupational Therapy (OT) - “the therapeutic use of everyday life occupations with persons, groups, or populations (i.e., the client) for the purpose of enhancing or enabling participation.” (AOTA, 2020c, p.1)

Certified Occupational Therapy Assistant (COTA/L) - The PA Practice Act identifies a professional licensed to assist in the practice of Occupational Therapy under this Act and who shall work under the appropriate supervision of and in partnership with an Occupational Therapist. (Commonwealth of Pennsylvania, 2025). Certification (C) is maintained through NBCOT, and licensure (L) is maintained by the state.

Occupational Therapist (OTR/L)- identifies a professional licensed to practice Occupational Therapy. According to the PA Practice Act “The Occupational Therapist is responsible for and directs the evaluation process, develops the intervention plan, and provides occupational therapy services.” (Commonwealth of Pennsylvania, 2025). Registration (R) is maintained through NBCOT, and licensure (L) is maintained by the state.

Occupational Therapy Practitioner (OTP) - this is an inclusive term that refers to both occupational therapists and occupational therapy assistants. (AOTA, 2020c, p. 1)

Occupations - “refer to the everyday activities that people do as individuals, in families, and with communities to occupy time and bring meaning and purpose to life. Occupations include things people need to want to and are expected to do” (WFOT, 2012a, para. 2).

Accreditation Council for Occupational Therapy Education® (ACOTE®) - is an accrediting agency that ensures the quality of occupational therapy education in the United States, its territories and the United Kingdom.

American Occupational Therapy Association (AOTA) - The American Occupational Therapy Association is an organization that “represents more than 244,500 occupational therapists, occupational therapy assistants, and occupational therapy students in the United States and beyond, to advance occupational therapy practice, education, and research” (AOTA, 2025).

National Board for Certification in Occupational Therapy (NBCOT) - “strives to serve the public interest in its diversity by advancing just, equitable, and inclusive client care and professional practice through evidence-based certification practices and the validation of knowledge essential for effective and safe practice in occupational therapy” (NBCOT, 2025). NBCOT administers the national certification exam for COTAs and registration exam for OTRs.

Pennsylvania Occupational Therapy Association (POTA) -

“POTA is a member driven organization that promotes excellence within occupational therapy by advocating for the profession, facilitating quality professional development, and preserving the scope of practice” (POTA, n.d.).

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