

Agenda Item 2
Review and Approval of March 3, 2015
Minutes



AD HOC COMMITTEE MEETING MINUTES

Tuesday, March 3, 2015

Committee Members Present

Richard Bookwalter, Board Member & Chair
Sharon Pavlovich, Board Member
Joyce Fries

Board Staff Present

Heather Martin
Jeff Hanson

Public Attendee

Judy Paladino
Yeaphana LaMarr, DCA

1. **Call to order and roll call.**

At 3:13 p.m. contact was established between all teleconference locations.

2. **Discussion and consideration of request from California Fieldwork Council to increase the number of PDUs earned for supervising students completing their Level II Fieldwork.**

Heather Martin opened with a brief overview describing the events and circumstances which brought the committee together. At the Board's November 13, 2014, meeting in San Diego, the Board formed this committee to further discuss and develop regulatory language to increase professional development units for therapists that supervise students completing Level II Fieldwork assignment. This matter was initiated as a result of a written request from the California OT Fieldwork Council (Council) dated August 7, 2014.

Richard Bookwalter, Committee Chair, referenced a chart that he prepared which identified and compared credit that other states allow for supervising OT and OTA fieldwork. A majority of states allow credit for supervising Level II OT/OTA fieldwork. Some even allow credit for supervising Level I fieldwork. The total number of continuing education units required in other states varied, as did maximum limits that other state licensees allow toward their continuing education requirements for supervising OT/OTA fieldwork.

Discussion ensued amongst the committee regarding the appropriateness of allowing professional development credit for this activity when essentially it could be construed as a licensee simply performing their job duties. Joyce Fries and Judy Paladino offered that in most cases therapists do not receive extra compensation from their employer for supervising OT/OTA students. The underlying problem that the California Fieldwork Council is attempting to address is decreasing accessibility to therapists that are willing to supervise OT students and the current trend is not sustainable. By increasing credit for this activity it is hoped that it will become more attractive for therapists to train OT/OTA students. Ultimately students would benefit as

an increase in clinical instructors would provide more training opportunities and promote diversification in various practice settings that occupational therapy practitioners deliver services.

Sharon Pavlovich indicated she saw a benefit in the Council's proposal. The proposal ultimately promotes and translates to better services being provided to California consumers.

Discussion also delved into situations where multiple therapists provided or teamed to provide fieldwork training to an OT or OTA student and what type of documentation Board staff might rely on when conducting continuing education audits.

There was a consensus amongst the committee members to recommend to the Board the following:

- Use the National Board for Certification in Occupational Therapy (NBCOT) standards as a guide to assist in developing language to increase continuing education credit for supervising an OT student.
- Increase the credit for supervising Level II fieldwork pursuant to the California Fieldwork Counsel's request from .5 PDU for 60 hours of supervision to 1 PDU for one week or 40 hours of supervision.
- Allow credit for supervising Level I fieldwork students.
- Apply the cap of 12 PDUs for continuing education activities that fall under California Code of Regulations Section 4161(c) that is pending regulatory approval with the Office of Administrative Law. Thus assuming the pending regulations will be approved, a licensee would only be able to apply 12 PDUs of activities identified in Section 4161(c), which includes and is not limited to supervising OT fieldwork students, toward the overall continuing competency requirement of 24 PDUs.
- Incorporate language that would identify the type(s) of evidence or documentation a licensee would need to provide if they were audited for continuing education compliance when they have supervised an OT/OTA student (e.g. signed fieldwork evaluation forms, letter from the college or university fieldwork coordinator, etc.)

3. Public Comment session for items not on the agenda.

There was no public comment provided pertaining to items not on the agenda.

4. Adjournment.

At 4:18 the meeting adjourned.

Agenda Item 3
Review and Approval of April 22, 2015
Minutes



DRAFT Ad Hoc COMMITTEE MEETING MINUTES

Wednesday, April 22, 2015

Committee Members Present

Richard Bookwalter, Board Member & Chair
Sharon Pavlovich, Board Member
Joyce Fries

Board Staff Present

Jeff Hanson

Public Attendees

Judy Paladino
Arameh Anvarizadeh
Karen Park

1. Call to order and roll call. (H. Martin)

Due to a staff member's error in a communication to the Committee Members earlier in the day, the meeting inadvertently commenced at 2:30 p.m., earlier than the noticed time. At 3:00 Board staff joined the meeting.

2. Discussion and consideration of request from California Fieldwork Council to increase the number of PDUs earned for supervising students completing their Level II Fieldwork. (R. Bookwalter)

Background: At the California Board of Occupational Therapy (Board) meeting on March 6, 2015, Richard Bookwalter and Sharon Pavlovich reported on the Committee's recommendation to:

- *Increase professional development units (PDU) earned for supervising Level II students*
- *Establish credit for supervising Level I students*
- *Apply/maintain a cap of 12 PDU for these activities (consistent a prior regulatory action that is pending final approval with the Office of Administrative Law).*
- *Use the National Board for Certification in Occupational Therapy (NBCOT) standards as a guide.*

After hearing the recommendation the Board asked the Committee to develop a verification form that could be used for continuing competence audit purposes and to further vet issues regarding co-supervision.

Discussion ensued on developing a verification form. NBCOT requires a verification letter or certificate from the school that includes the dates of supervision, the fieldwork

level, and other relevant information. Concern was expressed by some meeting attendees regarding the potential of completing additional and somewhat duplicative documentation for California auditing purposes.

Discussion ensued on situations where a student's Level II fieldwork is supervised by multiple supervisors. There were differences in the way meeting participants interpreted the National Board for Certification in Occupational Therapy's (NBCOT) instruction for applying professional development units in situations where co-supervision occurred.

Committee members agreed that instead of using language that would establish a practitioner would receive 1 PDU for per week of supervision it should be further defined as 1 PDU for 40 hours of supervision.

Richard Bookwalter indicated he would draft an attestation form to present to the Board.

3. Public Comment session for items not on the agenda.

There was no public comment for items not on the agenda.

4. Adjournment.

At 3:50 the meeting adjourned.

DRAFT

**DRAFT ATTESTATION FORM and
EXAMPLES of REGULATORY LANGUAGE**

California Board of Occupational Therapy

PDI Attestation form

DRAFT

Occupational therapy practitioner: _____ OTA OT

Occupational therapy student: _____ OTA OT

Fieldwork Level : Level 1 Level 2

Dates of fieldwork: _____ to _____

Number of weeks as fieldwork supervisor: _____

Average hours/week as fieldwork supervisor: _____

Co-supervisors (if any): _____

Professional Development units requested: _____ (Maximum 12 per 2-year license-renewal period)

Signature of licensee: _____

Date: _____

Signature of Employer or Fieldwork Coordinator:

Licensee's Employer Fieldwork Coordinator

Date: _____

Examples of language used to describe PDU credit for fieldwork supervision

NBCOT language for FW 1

Letter of verification or certificate from school including dates of fieldwork and name of fieldwork student.

NBCOT language for FW 2

Letter of verification or certificate from school that includes the dates of fieldwork. DO NOT submit student evaluation form as verification. Co-supervision is acceptable; record dates and times when acting as primary student supervisor. Supervision of more than one student at a time is acceptable; record dates and times of supervision provided to each student. Apply appropriate PDU number based on time spent supervising.

California (Language effective July 1, 2015):

§ 4.161. Continuing Competency

(c) PDUs may also be obtained through any or a combination of the following:

(4) Supervising the fieldwork of Level II occupational therapist and occupational therapy assistant students. For each 60 hours of supervision, the practitioner will receive .5 PDU with a maximum of twelve (12) PDUs credited per renewal period.

(d) Partial credit will not be given for the professional development activities listed in subsection (c) and a maximum of twelve (12) PDUs may be credited for the activities listed in subsection (c).

Delaware Regulation

3.0 Continuing Education

3.5.7 Fieldwork Supervision: The maximum number of credit hours shall not exceed ten (10) hours. One CE hour may be awarded for each week of participation as the primary clinical fieldwork educator for Level II OT or OTA fieldwork students.

3.5.7.1 Documentation shall include verification provided by the school to the fieldwork educator with the name of student, school, and dates of fieldwork or the signature page of the completed student evaluation form. Evaluation scores and comments should be deleted or blocked out.

Florida Regulation: Admin Code 64B11-5.001

64B11-5.001 Requirements for License Renewal of an Active License; Continuing Education.

(11) Fieldwork Experience – A licensee may earn up to six (6) continuing education hours per biennium for supervision of a Level II Occupational Therapy or Occupational Therapy Assistant fieldwork student at the rate of no more than three (3) hours per student. To be eligible for the credit, the licensee must participate as the primary clinical fieldwork educator for the student. Documentation shall include verification provided by the school to the fieldwork educator with the name of the student, school, and dates of fieldwork or the signature page of the completed student evaluation form. Evaluation scores and comments shall be deleted or blocked out.

Georgia Regulation: Rules and Regs 671-3-.08

671-3-.08 Renewal of License/Penalties/Continuing Education Requirements. Amended

(7) Documentation of continuing education which the Board deems as acceptable proof of completion includes the following:

(c) For Level II Fieldwork Supervision involving serving as the primary clinical fieldwork educator for Level II occupational therapy or occupational therapy assistant fieldwork students:

1. A description of the fieldwork including name and type of facility, name of the fieldwork educator and times spent in direct supervision of the student; and,
2. Verification provided by the school to the fieldwork educator with the name of the student, school and dates of fieldwork or the signature page of the completed student evaluation form with evaluation scores and comments blocked out;

Illinois Regulation: 68 IL Admin Code §1315.145

Section 1315.145 Continuing Education

b) Additional CE activities

3) Fieldwork Supervision

Participation as the primary clinical fieldwork educator for Level I/Level II OT or OTA fieldwork students.

A) A licensee may earn 2 contact hours for each Level I student supervised. A licensee may earn 6 contact hours for each Level II student supervised. A licensee may earn a maximum of 8 contact hours for student supervision per renewal period.

B) Documentation shall include verification provided by the school to the fieldwork educator with the name of student, school, and dates of fieldwork or the signature page of the completed student evaluation form. Evaluation scores and comments should be deleted or blocked out.

Indiana

844 IAC 10-7-4 "Category I continuing competency courses" and "category II continuing competency activities" defined

Sec. 4. (b) As used in this rule, "category II continuing competency activities" includes the following:

(3) Supervision of fieldwork for Level I and Level II students. One (1) contact hour will be awarded for every thirty-two (32) hours of supervision with a maximum of six (6) contact hours.

Kansas

Regulation: KS Admin Reg 100-54-7 to 8

100-54-7. Continuing education; license renewal.

g. Continuing education experiences shall be classified as follows.

6. Class VI: fieldwork supervision of level II students. Five contact hours may be given for supervising a level II student's full-time fieldwork for at least a six-week period or its equivalent. Ten contact hours may be given for supervising field work for at least a 12-week period or its equivalent.

h. Each licensee shall submit documented evidence of attendance at, participation in, or presentation to class I and class II continuing education activities. Each licensee shall submit personal verification for class III activities. Copies of publications shall be submitted for verification of class IV activities. Verification of class VI fieldwork supervision shall be submitted by the licensee's employer.

KENTUCKY Regulation: 201 KY Admin Regs 28:200. Continuing competence.

Section 2. Continuing Competence Requirements. n shall be submitted by the licensee's employer.

(6) Fieldwork supervision.

(a) Credit may be earned by participation as the primary clinical fieldwork educator for an OT or OTA fieldwork student.

(b) A licensee may earn one (1) CCU per forty (40) hours of supervision for each fieldwork student supervised.

(c) Documentation shall include:

1. A written verification from the school to the fieldwork educator with the name of student, school, and dates of fieldwork or the signature page of the completed student evaluation form.

2. Evaluation scores and comments should be deleted or blocked out.

NORTH CAROLINA

21 NCAC 38 .0805 QUALIFIED ACTIVITIES FOR MAINTAINING CONTINUING COMPETENCE

Activities that qualify for maintaining continuing competence are:

(5) Fieldwork Supervision:

(a) Participation as the primary clinical fieldwork educator for Level I or Level II OT or OTA fieldwork students;

(b) A licensee may earn one-half point for each 40 hours of fieldwork, up to a maximum of six points;

(c) Documentation shall include verification provided by the school to the fieldwork educator with the name of student, school, and dates of fieldwork or the signature page of the completed student evaluation form. Evaluation scores and comments shall be deleted or blocked out; and

(d) If fieldwork spans two licensure years, credit shall be given only for the year it is completed.

NORTH DAKOTA

Regulation: ND Admin Code § 55.5-02-01-04

55.5-02-01-04. Continued competency.

6. Continued competency includes:

f. Direct supervision of occupational therapy students performing level II fieldwork in an occupational therapy program accredited by the accreditation council for occupational therapy education. The licensee must be the primary supervisor. The supervision may not be the primary responsibility of the licensee's employment.

The licensee must submit to the board a record of the students supervised and the dates and times of supervision and a certification of the supervision from the occupational therapy

TEXAS 23 Admin Code

CHAPTER 367 CONTINUING EDUCATION

§367.1 Continuing Education

§367.2 Categories of Education

(a) All continuing education must comply with Type 1 or Type 2 as outlined in §367.1 of this title (relating to Continuing Education). Continuing education undertaken by a licensee for renewal shall be acceptable if it falls in one or more of the following categories.

(6) Fieldwork Supervision, 8 hours maximum, Type 2

(A) A licensee may earn 2 contact hours for each Level 1 students supervised. A licensee may earn 6 contact hours for each Level 2 student supervised. A licensee may earn a maximum of 8 contact hours for student supervision per renewal period.

(B) Fieldwork supervision hours may be evenly divided between licensees, not to exceed two fieldwork educators.

(C) Fieldwork education supervision must be completed before the licensee's renewal date.

(D) Documentation shall include verification provided by the school to the fieldwork educator(s) with the name of the student, school, and dates of fieldwork or the signature page of the completed evaluation form. Evaluation scores and comments should be deleted or blocked out.

California (Underlined Language effective July 1, 2015):

§ 4161. Continuing Competency

(c) PDUs may also be obtained through any or a combination of the following:

- (4) Supervising the fieldwork of Level 1 or Level II occupational therapist and occupational therapy assistant students.

For each forty (40) hours of supervision, the practitioner will receive one (1) PDU, with a maximum of twelve (12) PDUs credited per renewal period.

Options:

- (a) The supervision may not be the primary responsibility of the licensee's employment. (Source: N. Carolina, N. Dakota)
(b) If fieldwork spans two licensure periods, credit shall be given only for the year it is completed. (Source: N. Carolina)
(c) Fieldwork supervision hours may be (evenly) divided between licensees (not to exceed two fieldwork educators). (Source: Texas). Total weekly hours claimed by two licensees sharing supervision of a single fieldwork student may not exceed 40 hours per week.

Deleted: 60

Deleted: .5

- (d) Partial credit will not be given for the professional development activities listed in subsection (c) and a maximum of twelve (12) PDUs may be credited for the activities listed in subsection (c).

§ 4162. Completion and Reporting Requirements

(a) The occupational therapy practitioner shall record the following information for each activity on the renewal form:

- (1) the date each course or activity was completed;
(2) the provider, course number, and course title, if applicable;
(3) a description of the course; and
(4) the total number of PDUs.

Verification options:

- (a) Documentation shall include verification provided by the school to the fieldwork educator(s) with the name of student, school, and dates of fieldwork or the signature page of the completed student evaluation form. Evaluation scores and comments should be deleted or blocked out (sources: Florida, Texas)
(b) Verification of fieldwork supervision shall be submitted by the licensee's employer. (source: Kansas)
(c) Verification of fieldwork supervision shall be submitted by the licensee, using a form approved by the Board. This form will include the name of student, school, and dates of fieldwork; number of supervision hours furnished by the licensee; any other persons sharing supervision of the student; and the signature of the member's employer or the student's fieldwork coordinator.

(b) Records showing participation in each professional development activity must be maintained by the occupational therapy practitioner for four (4) years following the renewal period.

(c) A maximum of three (3) PDUs in excess of the required 12 PDUs may be carried over to the next renewal period for those practitioners renewing after one year. A maximum of six (6) PDUs

in excess of the required 24 PDUs may be carried over to the next renewal period for those practitioners renewing after two years.

(d) Any occupational therapy practitioner who is unable to provide records documenting completion of the continuing competency requirements is subject to citation and/or administrative fine or disciplinary action

**EXAMPLES OF VERIFICATION
DOCUMENTATION CURRENTLY BEING
USED BY CALIFORNIA PROGRAMS**

Verification of Fieldwork Supervision

Clinical Fieldwork Supervisor: _____ has provided the following fieldwork supervision:

Fieldwork Level: Level I Level II

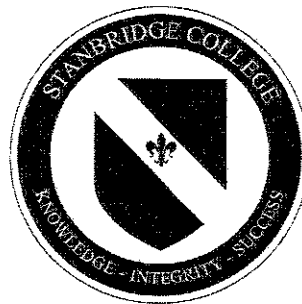
Number of COTA Students Supervised: _____

Number of OTR Students Supervised: _____

Name of Facility

Student Name

Dates of Supervision



Eileen Wang

Signature, Academic Fieldwork Coordinator

Print Name

Date



California State University
Dominguez Hills

•College of Professional Studies • (310) 243-2046 • 1000 Victoria Street • Carson, CA 90747
Department of Occupational Therapy

Verification of Fieldwork Supervision Certificate

This is to certify that :  **OTR/L**

Has provided the following fieldwork supervision:

Fieldwork Level:

 Level I
(NBCOT: 1 PDU/student CBOT: 0 PDU)

 X Level II
(NBCOT: 1 PDU/student/wk CBOT: 2 PDU/240hrs)

Name of Student/s:

Stephanie Li

Dates of Fieldwork:

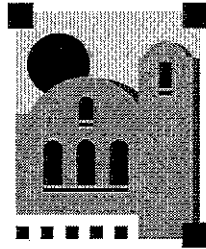
9/17/12 – 12/7/12 Full time for 12 weeks equivalent

At the Facility:

Kindred Transitional Care and Rehab – Lawton
1575 7th Avenue
San Francisco, CA 94112

Signature, Academic Fieldwork Coordinator:

Diane Mayfield, Ed.D., OTR/L



SANTA ANA

COLLEGE

Occupational Therapy Assistant Program
1530 West 17th Street
Santa Ana, CA 92706

This Certifies that:

Fieldwork Educator

provided supervision for:

Student, OTAS

for _____ hours/weeks

during the Level II 8-week, full-time, fieldwork rotation

Spring 2015 Semester

at **Name of Facility**

NBCOT 8 PDU's (1 PDU/student/wk)

BOT .5 PDU's / 60 hours of supervision

Michelle Parolise

Michelle Parolise
Program Coordinator

Deborah Hyman

Deborah Hyman
Academic Fieldwork Coordinator

Grossmont College

Occupational Therapy Assistant Program

Completion Certificate for January through March 2015

This is to certify that

Jane Doe, COTA/L

Has provided 10 weeks of Fieldwork Level II Clinical Instruction

Sincere thanks are extended for your time and dedication to the
Students of the Occupational Therapy Assistant Program



Joyce Fries, MSOTR/L

Academic Fieldwork Coordinator

Grossmont College OTA Program

March 31, 2015



**SAMUEL
MERRITT
UNIVERSITY**

Master of Occupational Therapy Certificate of Appreciation

Jane Doe, OTR/L

In recognition of your outstanding service providing Fieldwork supervision of Level II Occupational Therapy student, George Jones, and your support of the Occupational Therapy Program

Dates of Supervision: September 22 – December 12, 2014 (3 months, approx. 470 hours)

Donna Breger Stanton, OTD, OTR/L, CHT, FAOTA
Academic Fieldwork Coordinator

Dominican University of California

Occupational Therapy Department

Verification of Fieldwork Supervision



Clinical Fieldwork Supervisor: _____

NBCOT Cert. Number: _____

Fieldwork Level: Level I Level II

Name of Facility: _____

Dates of Supervision: _____

X Alison Virzi
Alison Virzi, OTR/L
Academic Fieldwork Coordinator

**DRAFT AMENDMENTS to CALIFORNIA
CODE OF REGULATION SECTION 4161
REFLECTING RECOMMENDATIONS of the
COMMITTEE**

**CALIFORNIA BOARD OF OCCUPATIONAL THERAPY
APPROVED MODIFIED REGULATORY LANGUAGE
Title 16, Division 39, California Code of Regulations**

DRAFT LANGUAGE reflecting the Committee's recommendation to increase PDUs for supervising fieldwork is shown in underline for new text and strikeout for deleted text.

§ 4161. Continuing Competency

(a) Effective January 1, 2006, each licensee renewing a license under Section 2570.10 of the Code shall submit evidence of meeting continuing competency requirements by having completed twenty-four (24) professional development units (PDUs) during the preceding renewal period, or in the case of a license delinquently renewed, within the two years immediately preceding the renewal, acquired through participation in professional development activities.

(1) One (1) hour of participation in a professional development activity qualifies for one PDU;

(2) One (1) academic credit equals 10 PDUs;

(3) One (1) Continuing Education Unit (CEU) equals 10 PDUs.

(b) Topics and subject matter shall be pertinent to the practice of occupational therapy and course material must have a relevance or direct application to a consumer of occupational therapy services. Except as provided in subdivision (c), professional development activities acceptable to the board include programs or activities sponsored by the American Occupational Therapy Association (AOTA) or the Occupational Therapy Association of California; post-professional coursework completed through any approved or accredited educational institution, or otherwise meets all of the following criteria:

(1) The program or activity contributes directly to professional knowledge, skill, and ability; and

(2) The program or activity must be objectively measurable in terms of the hours involved.

(c) PDUs may also be obtained through any or a combination of the following:

(1) Involvement in structured special interest or study groups with a minimum of three (3) participants. Three (3) hours of participation equals one (1) PDU, with a maximum of six (6) PDUs credited per renewal period.

(2) Structured mentoring with an individual skilled in a particular area. For each 20 hours of being mentored, the practitioner will receive three (3) PDUs, with a maximum of six (6) PDUs credited per renewal period.

(3) Structured mentoring of a colleague to improve his/her skills. Twenty (20) hours of mentoring equals three (3) PDUs, with a maximum of six (6) PDUs credited per renewal period.

(4) Supervising the fieldwork of Level II and Level I occupational therapist and occupational therapy assistant students shall be credited as follows: ~~For each 60 hours of supervision, the practitioner will receive 5 PDU, with a maximum of twelve (12) PDUs credited per renewal period.~~

(a) Supervising the fieldwork of a Level II student. For each 40 hours of supervision the practitioner will receive 1 PDU.

(b) Supervising the fieldwork of a Level I student. For each student supervised the practitioner will receive 1 PDU.

(c) A maximum of twelve (12) PDUs of credit for supervising Level II and/or Level I students shall be allowed per renewal period.

(d) [language for verification documentation/form]

(e) [language for co-supervision, allocation of credit]

(5) Publication of an article in a non-peer reviewed publication. Each article equals five (5) PDUs, with a maximum of ten (10) PDUs credited per renewal period.

(6) Publication of an article in a peer-reviewed professional publication. Each article equals 10 PDUs, with a maximum of ten (10) PDUs credited per renewal period .

(7) Publication of chapter(s) in occupational therapy or related professional textbook. Each chapter equals 10 PDUs, with a maximum of ten (10) PDUs credited per renewal period.

(8) Making professional presentations at workshops, seminars and conferences. For each hour presenting, the practitioner will receive two (2) PDUs, with a maximum of six (6) PDUs credited per renewal period.

(9) Attending a meeting of the California Board of Occupational Therapy. Each meeting attended equals two (2) PDUs, with a maximum of six (6) PDUs credited per renewal period.

(10) Attending board outreach activities. Each presentation attended equals two (2) PDUs, with a maximum of four (4) PDUs credited per renewal period.

(d) Partial credit will not be given for the professional development activities listed in subsection (c) and a maximum of twelve (12) PDUs may be credited for the activities listed in subsection (c).

(e) This section shall not apply to the first license renewal following issuance of the initial license.

(f) Of the total number of PDUs required for each renewal period, a minimum of one half of the units must be directly related to the delivery of occupational therapy services, may include: models, theories or frameworks that relate to client/patient care in preventing or minimizing impairment, enabling function within the person/environment or community context. Other activities may include, but are not limited to, occupation based theory assessment/interview techniques, intervention strategies, and community/environment as related to one's practice.

(g) Applicants who have not been actively engaged in the practice of occupational therapy within the past five years completing continuing competency pursuant to section 2570.14(a) of the Code to qualify for licensure shall submit evidence of meeting the continuing competency requirements by having completed, during the two year period immediately preceding the date the application was received, forty (40) PDUs that meet the requirements of subsection (b).

The forty PDUs shall include:

(1) Thirty-seven (37) PDUs directly related to the delivery of occupational therapy services, which may include the scope of practice for occupational therapy practitioners or the occupational therapy practice framework;

(2) Three (3) PDUs related to ethical standards of practice in occupational therapy.

Note: Authority cited: Sections 2570.10 and 2570.20, Business and Professions Code.

Reference: Section 2570.10, Business and Professions Code.

NBCOT PDU ACTIVITIES CHART AND
SAMPLE VERIFICATION OF FIELDWORK
SUPERVISION FORM

NBCOT® Professional Development Units (PDU) Activities Chart

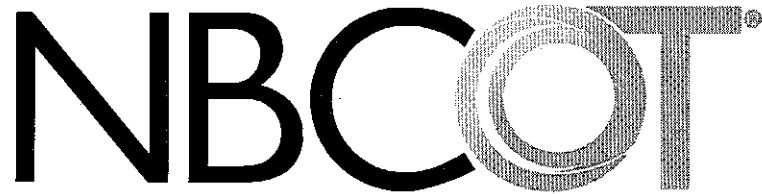
PDU ID#	Professional Development Activity	PDU Value	Max units allowed per 3 year cycle	Verification Documentation
PROFESSIONAL SERVICE				
1	Assessing professional skills using the NBCOT Self-Assessment tool(s) (available online at www.nbcot.org) or similar professional skills assessment tool, (e.g., AOTA or employer-based professional development tool).	1 unit per tool	7 units (for completing a maximum of 7 NBCOT self-assessment tools)	Print off score report from NBCOT online self-assessment; or provide copy of completed tool from other providers
2	Developing a Professional Development Plan based on the results of a professional skills assessment.	1 unit	1 unit	Use results of self-assessment tool(s) (see above) to develop goals relating to competence/skills.
3	Volunteering for an organization, population, or individual that adds to the overall development of one's practice roles.	5 hours = 1 unit	18 units	Verification of hours via letter from organization and a report describing the hours and outcomes of volunteer service. Volunteer Service form is available online at www.nbcot.org .
4	Peer review of a professional manuscript or textbook.	2 hours = 1 unit	18 units	Letter from publishing organization.
5	Mentoring an OT colleague or other professional to improve skills of the protégé, including role as a disciplinary monitor (mentor must be currently certified with NBCOT).	2 hours = 1 unit	18 units	Goals, objectives, and analysis of mentee performance (see NBCOT Mentoring form, at www.nbcot.org).
ATTENDING WORKSHOPS/COURSES/INDEPENDENT LEARNING				
6	Attending employer-provided, workplace continuing education (this may include CPR training). <i>Does not include new staff orientation and/or annual mandatory workplace trainings e.g. annual policy review and corporate compliance.</i> The same workshop may be claimed one-time only for PDU.	1 hour = 1 unit	36 units	A certificate of attendance or letter from sponsor/ employer verifying contact hours or CEU, dates, event title, attendee name and workshop agenda (if available).
7	Attending workshops, seminars, lectures, professional conferences approved by one of the following (same workshop may be claimed one-time only for PDU): 1) Regionally accredited college or university; 2) State regulatory board for licensure renewal; 3) Continuing education providers (e.g., state associations, continuing education companies); 4) Third-party entity.	1 hour = 1 unit	36 units	A certificate of attendance or letter from sponsor/ employer verifying contact hours or CEU, dates, event title, attendee name and workshop agenda (if available)
8	Successfully completing education (e.g., workshops, seminars, lectures, online courses or conferences) with an assessment component at the end of the program (e.g., scored test, project, paper) provided by: <ul style="list-style-type: none"> • AOTA • AOTA approved providers • IACET authorized providers • Regionally accredited colleges or universities 	1 hour = 1.25 units	36 units	Certificate of attendance or letter from education provider (AOTA, AOTA approved providers, IACET authorized providers or regionally accredited college or university) verifying dates, event title, attendee name, agenda, and successful completion of assessment component at the end of the program (e.g., scored test, project, paper).
9	Reading peer-reviewed, role-related professional journal article and/or textbook chapter, and writing a report describing the implications for improving skills in one's specific role (Cannot claim for PDU purposes if textbook is required reading for academic coursework/audited course).	2 articles or 2 chapters = 1 unit	36 units	Annotated bibliography AND a report with analysis of how articles have assisted with improving skills in one's role (see Journal/Text Book Reading form, at www.nbcot.org).
10	Successfully completing academic coursework. Course must relate to practice area.	1 credit hour/ per semester = 10 units	36 units	Official transcript from accredited college/university with registrar's seal. This should be placed in a sealed envelope, with 'RENEWAL' noted on the exterior. Send this envelope with your renewal application. DO NOT SEND TRANSCRIPT SEPARATELY.
11	Independent learning <i>with</i> assessment component (e.g., online courses, CE articles, self-study series, etc.).	1 hour = 1 unit	36 units	Certificate of completion verifying contact hours or CEU.
12	Independent learning <i>without</i> assessment component (e.g., audited coursework, multimedia courses, etc.).	2 hours = 1 unit	18 units	Summary report of learning with notation of hours spent.
13	Receiving mentoring from a currently certified occupational therapy practitioner or other professional in good standing to improve the skills of the protégé.	2 hours = 1 unit	18 units	Goals and objectives established in collaboration with the mentor and self-analysis of performance (see NBCOT Mentoring form, at www.nbcot.org).
14	Participating in professional study group/online study group designed to advance knowledge through active participation.	2 hours = 1 unit	18 units	Group attendance records verifying time spent, study group goals, and analysis of goal attainment and learning (see Study Group Report form, at www.nbcot.org).

continued on reverse

PDU ID#	Professional Development Activity	PDU Value	Max units allowed per 3 year cycle	Verification Documentation
PRESENTING				
15	Primary or co-presenter making a professional presentation at state, national or international workshop, seminar, or conference (one-time presentation per topic; time spent on preparation cannot be included).	1 hour = 2 units	36 units	Copy of presentation OR copy of program listing. Presenter name and times (or length of session) and title of presentation must be indicated on documentation.
16	Primary or co-presenter making a poster presentation for state, national, or international workshop, seminar, or conference (one-time presentation per topic; time spent on preparation cannot be included).	2 units per poster	18 units	Copy of presentation OR program listing. Presenter name and times (or length of session) and title of presentation must be indicated on documentation.
17	Serving as adjunct faculty, teaching practice area-related academic course per semester (must not be one's primary role; one-time per course title; time spent on preparation cannot be included) Note: For a one-time lecture, use PDU ID#18.	1 credit hour = 6 units	36 units	Letter of verification from school that includes dates, lecture/course title, length of session and course/lecture goals and objectives or copy of course syllabi.
18	Primary or co-presenter providing professional in-service training, instruction, or guest lecturer for occupational therapists, occupational therapy assistants, or related professionals (one-time presentation per topic; time spent on preparation cannot be included).	1 hour = 1 unit	18 units	Copy of attendance record and outline of presentation or letter from supervisor on letterhead verifying: presenter's name, date/time/length of presentation.
19	Primary or co-presenter providing presentation for local organization/ association/ group on practice area-related topic; e.g., energy conservation, back care and prevention of injury (one-time presentation per topic; time spent on preparation cannot be included).	1 hour = 1 unit	18 units	Copy of presentation or program listing that includes: presenter's name; date, time, and location of presentation; and contact person for organization.
FIELDWORK SUPERVISION				
20	Level I fieldwork direct supervision (must not be one's primary role).	1 unit per student	18 units	Letter of verification or certificate from school including dates of fieldwork and name of fieldwork student.
21	Level II fieldwork direct supervision (must not be one's primary role).	1 unit per 1 week of supervision per student supervised	18 units	Letter of verification or certificate from school that includes the dates of fieldwork. DO NOT submit student evaluation form as verification. Co-supervision is acceptable; record dates and times when acting as primary student supervisor. Supervision of more than one student at a time is acceptable; record dates and times of supervision provided to each student. Apply appropriate PDU number based on time spent supervising.
22	Entry-level or post-doctoral advanced fieldwork direct supervision (must not be one's primary role).	1 unit per 1 week of supervision per student supervised	18 units	Letter of verification or certificate from school that includes the dates of fieldwork, DO NOT submit student evaluation form as verification. Co-supervision is acceptable; record dates and times when acting as primary student supervisor. Supervision of more than one student at a time is acceptable; record dates and times of supervision provided to each student. Apply appropriate PDU number based on time spent supervising.
PUBLISHING				
23	Primary or co-author of practice-area related article in <u>non-peer-reviewed</u> professional publication (e.g., <i>OT Practice</i> , <i>SIS Quarterly</i> , <i>Advance</i>).	1 article = 5 units	36 units	Copy of published article.
24	Primary or co-author of practice-area related article in <u>peer-reviewed</u> professional publication (e.g., journal, book chapter, or research paper.)	1 article = 10 units	36 units	Copy of published article.
25	Primary or co-author of practice-area related article in lay publication (e.g., community newspaper or newsletter).	1 article = 2 units	36 units	Copy of published article.
26	Primary or co-author of chapter in practice-area related professional textbook.	1 chapter = 10 units	36 units	Copy of published chapter OR letter from editor.
27	Primary or co-primary investigator in extensive scholarly research activities or outcome studies, or externally funded service/training projects associated with grants or post-graduate studies.	10 units per study	18 units	Grant funding number OR abstract/executive summary OR copy of the completed research/study that indicates certificant as primary/co-primary investigator.
28	Developing instructional materials—training manuals, multimedia, or software programs—that advance the professional skills of others (not for proprietary use; must not be part of one's primary role)	5 units	18 units	Program description (Note: Media and software materials may be requested by NBCOT).

Verification of Fieldwork Supervision

12
ID 26 rev020910



National Board for
Certification in
Occupational Therapy

Clinical Fieldwork Supervisor:

NBCOT Certification Number:

has provided the following
fieldwork supervision:

Fieldwork Level: Level I Level II

Number of OTR Students Supervised:

Number of COTA Students Supervised:

Name of Facility:

Dates of Supervision:

Signature, Academic Fieldwork Coordinator

Print Name

Date
