**Introduction**

Welcome!!! We hope your experience as a student in the Occupational Therapy program at Stony Brook University will be rewarding. You are embarking on a road that will lead you to a wonderful, fulfilling career.

This manual has been created to further introduce you to the Occupational Therapy program. It is important that you use this manual in conjunction with the School of Health Technology and Management Bulletin for 2020-2021 and with the SHTM Student Handbook of Policies and Procedures. Each publication is regularly updated and will be helpful to you in your current and future clinical and academic endeavors. Please keep the manual, bulletin, and handbook in an easily accessible place so that you can refer to each for policy and procedure clarification throughout your Stony Brook University experience.

Any information in this manual is subject to change.
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Philosophical Base and Mission—MSOT Program

Mission Statement:

The Stony Brook University Occupational Therapy Program has a five-part mission:

- **Education:** To provide comprehensive professional education to meet the demands and needs for 21st century occupational therapy practice for individuals and communities across the life span;
- **Scholarship:** To promote research and intellectual endeavors of the highest standards to advance occupational therapy;
- **Service:** To address community, national, and global needs of individuals, families, and populations, including being resources to health care and human services organizations, educational institutions, and government public health and social service agencies;
- **Leadership and Advocacy:** To promote leadership and advocacy to enable individuals and populations to maximally participate in life occupations, access health and human services, and leadership within the occupational therapy profession;
- **Globalization:** To advance knowledge and appreciation of diversity and its influence on human occupation, health and wellbeing at local, national and international levels.

Progressive Philosophy of Education:

**Purpose of education is to:**
- promote societal well-being
- enhance an individual’s effectiveness in society

**Education provides learners:**
- with practical knowledge
- problem solving skills

Humanist Philosophical Base

**Purpose of education is to:**
- enhance personal growth and development
- facilitate self-actualization

**Education provides learners:**
Self—reflection abilities & skills
Self—directed learning abilities & skills

Faculty believe that an individual’s needs, interests and experiences are key elements in learning; that people have unlimited potential to be developed through education. We believe that it is important for students, graduates and faculty to recognize the importance of being motivated and self-directed. All individuals must take responsibility for their own learning.

The program design stresses the importance of:

- Individuality
- Pragmatic knowledge
- Problem solving
- Experiential learning
- Empowerment
- Self-directedness
- Lifelong learning
- Democratic ideals
- Social responsibility
**Course Sequence**

The curriculum within the School of Health Technology and Management follows a “Module” system. Each module is approximately five weeks in length. A course may be offered in a combination of modules depending upon the credit assignment. Contact hours and credit allotment are calculated on the Carnegie system. Courses are scheduled within one or more modules to accurately meet the credit assignment of the course. **Please note: Modular Schedules are subject to change and this Course Credit load may also change due to curriculum redesign. In an effort to provide the best educational experiences certain courses will be offered in the evenings and/or on weekends. These courses will be taught by experts in those fields. All students registered for these courses are expected to attend.**

**Carnegie credit hour:** Courses are described to be either: lecture courses, courses that have both lecture and labs; independent study, tutorials or seminars. Each of these descriptions represents a certain number of hours that learning must be covered. For example, if a course is 3 lecture credits, it means that there are 45 hours of learning (instruction) to be covered. So, one credit of lecture is 15 hours of learning. For every one credit for courses that are described as lab courses 30 hours of learning must be covered; so if a course is a 2 credit lab course, the learning must be 60 hours’ worth. The same is true for seminars and tutorials. Independent study courses require 45 hours per credit load, so a 2 credit independent study would require 90 hours of instruction.

Please see the School of Health Technology and Management bulletin for a description of each course.

**First Year Graduate**

<table>
<thead>
<tr>
<th>Course</th>
<th>Title</th>
<th>Credits</th>
<th>Module(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>HAO 561</td>
<td>Functional Anatomy Review</td>
<td>4</td>
<td>Summer</td>
</tr>
<tr>
<td>HAO 504</td>
<td>Intro to Historical &amp; Contemporary Practices of OT</td>
<td>3</td>
<td>Summer</td>
</tr>
<tr>
<td>HAO 505</td>
<td>Foundations in OT</td>
<td>3</td>
<td>1-4</td>
</tr>
<tr>
<td>HAO523</td>
<td>Assessment &amp; Intervention of Psychosocial Issues</td>
<td>4</td>
<td>1-4</td>
</tr>
<tr>
<td>HAO 519</td>
<td>Kinesiology</td>
<td>4</td>
<td>1-4</td>
</tr>
<tr>
<td>HAO 506</td>
<td>Growth and Development</td>
<td>3</td>
<td>3-5</td>
</tr>
<tr>
<td>HAO 573</td>
<td>Prof Behaviors I</td>
<td>1.5</td>
<td>4-5</td>
</tr>
<tr>
<td>HAO 507</td>
<td>Clinical Conditions</td>
<td>2</td>
<td>4-6</td>
</tr>
<tr>
<td>HAO 500</td>
<td>Functional Neuroscience</td>
<td>4</td>
<td>5-8</td>
</tr>
<tr>
<td>HAO 586</td>
<td>Fieldwork IA</td>
<td>1</td>
<td>5-8</td>
</tr>
<tr>
<td>HAO 508</td>
<td>Theories of Adult Rehabilitation</td>
<td>2</td>
<td>6-8</td>
</tr>
<tr>
<td>HAO 509</td>
<td>Pediatrics Theory/Practice</td>
<td>4</td>
<td>6-8</td>
</tr>
</tbody>
</table>
### Second Year Graduate

<table>
<thead>
<tr>
<th>Course</th>
<th>Title</th>
<th>Credits</th>
<th>Module(s)</th>
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<tr>
<td>HAO 520</td>
<td>Substance Abuse</td>
<td>2</td>
<td>Summer</td>
</tr>
<tr>
<td>HAO 522</td>
<td>Assessment &amp; Treatment of Adult Rehabilitation</td>
<td>3</td>
<td>Summer</td>
</tr>
<tr>
<td>HAO 587</td>
<td>Fieldwork IB</td>
<td>1</td>
<td>Summer</td>
</tr>
<tr>
<td>HAO 525</td>
<td>Vision, Cognition, Perception</td>
<td>2</td>
<td>1-2</td>
</tr>
<tr>
<td>HAO 524</td>
<td>Assessment &amp; Interventions of Upper Extremities</td>
<td>3</td>
<td>1-3</td>
</tr>
<tr>
<td>HAO 526</td>
<td>Gerontology</td>
<td>3</td>
<td>1-3</td>
</tr>
<tr>
<td>HAO 588</td>
<td>Fieldwork IC</td>
<td>1</td>
<td>1-3</td>
</tr>
<tr>
<td>HAO 549</td>
<td>Intro to Research Design</td>
<td>3</td>
<td>2-3</td>
</tr>
<tr>
<td>HAO 527</td>
<td>Sensory Integration</td>
<td>2</td>
<td>3-5</td>
</tr>
<tr>
<td>HAO 516</td>
<td>Universal Design</td>
<td>3</td>
<td>4-5</td>
</tr>
<tr>
<td>HAO 542</td>
<td>Patient Education</td>
<td>2</td>
<td>4-5</td>
</tr>
<tr>
<td>HAO 574</td>
<td>Professional Behaviors II</td>
<td>1</td>
<td>4-5</td>
</tr>
<tr>
<td>HAO 551</td>
<td>Research Design</td>
<td>3</td>
<td>4-5</td>
</tr>
<tr>
<td>HAO 596</td>
<td>FW IIA</td>
<td>12</td>
<td>6-8</td>
</tr>
</tbody>
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### Third Year Graduate

<table>
<thead>
<tr>
<th>Course</th>
<th>Title</th>
<th>Credits</th>
<th>Module(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>HAO 530</td>
<td>Community, Occupational and Health</td>
<td>4</td>
<td>Summer</td>
</tr>
<tr>
<td>HAO 580</td>
<td>Special Topics</td>
<td>2</td>
<td>Summer</td>
</tr>
<tr>
<td>HAO 597</td>
<td>FW IIB</td>
<td>12</td>
<td>1-3</td>
</tr>
<tr>
<td>HAO 585</td>
<td>Disability and OT</td>
<td>2</td>
<td>4-5</td>
</tr>
<tr>
<td>HAO 562</td>
<td>Principles of Instruct</td>
<td>3</td>
<td>4-6</td>
</tr>
<tr>
<td>HAO 534</td>
<td>OT Manager</td>
<td>3</td>
<td>4-6</td>
</tr>
<tr>
<td>HAO 593</td>
<td>Case Studies</td>
<td>2</td>
<td>5-6</td>
</tr>
<tr>
<td>HAO595</td>
<td>Service Learning &amp; Capstone Project</td>
<td>2</td>
<td>5-8</td>
</tr>
<tr>
<td>HAO 570</td>
<td>Global Communities Occupation &amp; Health</td>
<td>2</td>
<td>6-8</td>
</tr>
<tr>
<td>HAO 575</td>
<td>Professional Transition</td>
<td>2</td>
<td>6-8</td>
</tr>
</tbody>
</table>
**Grading Criteria and Policy**

Unless indicated differently in the course outlines provided by the instructor, the following is the grading criteria.

<table>
<thead>
<tr>
<th>Minimum Percent</th>
<th>Grade</th>
<th>Quality Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>92.5</td>
<td>A</td>
<td>4</td>
</tr>
<tr>
<td>89.5</td>
<td>A-</td>
<td>3.67</td>
</tr>
<tr>
<td>86.5</td>
<td>B+</td>
<td>3.33</td>
</tr>
<tr>
<td>82.5</td>
<td>B</td>
<td>3</td>
</tr>
<tr>
<td>79.5</td>
<td>B-</td>
<td>2.67</td>
</tr>
<tr>
<td>76.5</td>
<td>C+</td>
<td>2.33</td>
</tr>
<tr>
<td>72.5</td>
<td>C</td>
<td>2</td>
</tr>
<tr>
<td>69.5</td>
<td>C-</td>
<td>1.67</td>
</tr>
<tr>
<td>66.5</td>
<td>D+</td>
<td>1.33</td>
</tr>
<tr>
<td>62.5</td>
<td>D</td>
<td>1.0</td>
</tr>
<tr>
<td></td>
<td>S = Passing (&quot;C&quot; or higher)</td>
<td>----</td>
</tr>
<tr>
<td></td>
<td>F = Failure</td>
<td>----</td>
</tr>
</tbody>
</table>

Students must be in good academic standing (professional GPA 3.0 and overall GPA of 3.0 throughout the program. Graduate students must maintain a GPA of 3.0 to be considered in good standing.

The occupational therapy program offers all courses starting with HAO. The occupational therapy program faculty believes that each course offered in the curriculum is essential to developing an occupational therapy professional; therefore, all courses within the curriculum are considered professional courses.

**Grading policy**

In addition to the School of Health Technology and Management’s academic policies and procedures, all graduate HAO courses in the Occupational Therapy curriculum must be successfully completed with a minimum grade of B, except for first-year science-based courses (Functional Anatomy Review, Kinesiology, and Functional Neuroscience), which require a grade of B- to pass. Failure to earn a minimum grade in HAO graduate courses will require a student to repeat the course and prevent the student from participating in clinical affiliations. A student may repeat a course only once, inability to successfully pass the course when repeated, may result in recommendation for dismissal from the program.

Students must also maintain a professional grade point average of 3.0 in the occupational therapy graduate program courses and a 3.0 grade point average in occupational therapy graduate program courses. Failure to successfully complete 3 or more courses during the three-year curriculum will result in the student being subject to termination from the program.

*Please refer to SHTM policies on academic standing found in the SHTM Student Handbook.*
Program and Classroom Policies

Evaluation of Student Learning

Evaluation of student learning takes place at several levels -- daily in the classroom, periodically as the result of tests and graded assignments, and during fieldwork experiences. It is a key component of teaching and learning. In keeping with the concept that students are individuals with individual styles of learning and communication, faculty is encouraged to use multiple methods of evaluation throughout the coursework. Occupational Therapy students are evaluated through objective tools and essay tests, multiple choice questions, case studies, lab and practical work, written and oral assignments, class presentations, Professional Behavior Monitors and professional organization fieldwork evaluation forms during fieldwork experiences.

It is the prerogative of the instructor to select the specific method for evaluating learning by the student in each course. However, the evaluation methods must be included in the course outline, reviewed and recommended for approval by the School of Health Technology and Management’s Curriculum Committee and the Dean.

The purpose for Fieldwork I and II, the intended learning outcomes, and the faculty, student, clinical fieldwork supervisors’ expectations and responsibilities, as well as the evaluation methods are reviewed with the students prior to their attending fieldwork. Students have an opportunity to offer feedback about their grading concerns, and their opinions about fieldwork sites and their experiences in writing and verbally.

Course syllabi are given to and reviewed with the students during the first week of each class. This information includes the methods of evaluation, the weighting of the methods, and criteria for grading. As an example, if the instructor is employing a mastery learning policy for an assignment, and a “B” is the passing grade, then the students are informed of this by discussion and in the course syllabus.

Course and Instructor Evaluations

Students have the opportunity to complete course and instructor evaluations at the end of each course. Once the evaluations have been rated, they are returned to the Program Director for review with the faculty. Faculty and the director review the outcomes annually.

It is only through such input that growth and change can occur. This evaluation method not only benefits you as a student, but it assists the faculty and the program administrators in their endeavor to provide students with the best program and faculty possible. Students are encouraged to provide constructive feedback to the instructor about the knowledge disseminated during the course. Providing constructive feedback is an integral part of being an occupational therapist and of professional behaviors.
Attendance

Punctual attendance in all classes is expected of all students. Excessive absences/lateness may be grounds for recommendation to be dismissed from the program, or for being placed on academic probation. If a student knows he/she will be absent from class or scheduled activity, he/she must personally notify the course instructor in advance. Faculty and staff e-mail and phone extensions are listed in this manual. Documentation for absences may be requested, and if requested of the student, the student is under obligation by Program Policy to produce said documentation.

If an emergency occurs and the student will not be able to attend class, or if the student is going to be late due to an emergency, the student must notify the course instructor within 24 hours of the scheduled class explaining the absence. Note that it is still the discretion of the course instructor to consider it an excused absence. Attendance and participation are expected in every course. Each student is expected to be on time and remain in class for the full session.

Once the lecture or lab activity starts you are considered late. It is your responsibility to notify the instructor via phone or e-mail prior to the absence/lateness within 24 hours of class. Failure to notify the instructor will result in an unexcused absence [no call or no email, no show]. It is not acceptable to have your classmate or another designated person to call or email your attendance status to the instructor. The only circumstance where this may be acceptable is in the event you are traveling to class and there is traffic that may delay you arriving on time to class. Every two unexcused absences will result in a decrease in your overall course grade by 5 points. Program Policy: Attendance is taken at the beginning of each class.

Three lateness will equal one unexcused absence. Every three excused absences may also result in a 5 point decrease in overall course grade (may be considered excessive absences, even though they are excused- this is at the discretion of the instructor). Please note that the course instructor may have different policy on attendance, in which case, these will be enforced for that particular course. Your academic advisor will be informed of absences, lateness and any display of unprofessional behavior or lack of participation.

Stony Brook E-mail account and Blackboard must be checked regularly for class information or announcements from the instructor and/or for program changes or notifications.

Make-Up Exams and Lateness Assignments

Policies and procedures regarding make up exams (e.g. quizzes, mid-term exams, short exams) are established at the discretion of the individual course instructor. Students are expected to notify the course instructor at the beginning of the course if the student requires rescheduled time for a makeup exam. This make up time will follow the policy and procedure of absences and lateness of the program. Students will be required to provide documentation to support their reasons for requested make up exam time, if the course instructor consents to a makeup exam. There will be no make up for final and practical exams, unless there is a death in the family or an unexpected trauma emergency. In these cases, the student must inform the course instructor within 4 hours of the emergency. Documentation of the said emergency will be requested of the student, and the student is under obligation by Program Policy to produce said documentation.
All assignments are to be handed in on or prior to the due date. Five points will be deducted for each day of lateness, weekends included. All assignments are to be typed and saved on disk/flash drive in case revisions are necessary.

Any assignments done in groups are the responsibility of all group members. Group members must sign the final copy to acknowledge equal contribution and an understanding that each group member receives the same grade for the final project.

**Student Grievance Policy and Procedures**

Historically, the university administration, faculty and graduate students have worked together toward establishing fair policies and procedures regarding graduate students' rights and responsibilities. Graduate students, faculty and administrators assume a variety of roles and responsibilities with respect to one another. Successful graduate education requires fairness and mutual trust in these various roles and responsibilities.

Below is the link for the University’s policies and procedures for Graduate Student grievances:

[https://www.grad.stonybrook.edu/pdf/about/policy/Grievances_Appeals.pdf](https://www.grad.stonybrook.edu/pdf/about/policy/Grievances_Appeals.pdf)

If a graduate student feels that she or he has been discriminated against on the basis of any of the above, that person should refer to the Grievance Procedure for Review of Allegations of Discrimination. Contact the University Affirmative Action Office for information and documentation of these procedures.

We encourage all students to begin resolving grievances first with the faculty member. If the matter cannot be resolved, or the student is uncomfortable with bringing this matter to the attention of the faculty member, then the student is encouraged to present the matter to the program chairperson. A resolution of the alleged violation should be sought through a conference among the accused, the accuser, and the graduate program director, if possible. Grievances that cannot be resolved at the level of the program may be brought to the Dean of the school.
Progression Policy Requirements in the Occupational Therapy Program

Students must be in good academic standing (GPA of 3.0) throughout their three years in the program, including receiving a minimum final letter grade of a B for each course. Students who fail a course must satisfactorily repeat the course prior to moving on to the next course. This also includes all Fieldwork Level I and Fieldwork II courses. Failing a course could result in a student having to "step out" of the curriculum sequence. If the repeated course is successfully completed, the student will then be able to "step back" into the curriculum. The need to "step out" and "step back" in could result in a student registering for a modified curriculum plan which could extend the amount of time it takes to complete the curriculum from the student's initial year of entry.

The opportunity to repeat a Fieldwork Level I course because of failure is limited to one time per fieldwork level I course. The opportunity is offered on a case-by-case basis and in accordance with the School of Health Technology and Management's Student Handbook of Policies and Procedures (see section on Academic Standing). Failing two consecutive fieldwork level I placements may result in termination from the program. Failure to successfully complete 3 or more courses during the three-year curriculum will result in the student being subject to termination from the program.

Students must be in good academic standing the semester prior to fieldwork (a GPA of 3.0) and during ALL graduate level coursework as a requirement for FWII courses. Students must successfully pass all coursework as well as all FW courses in order to graduate from the program. Successful completion of Level II fieldwork translates as entry level competence, along with completion of all other academic & research requirements; all of this is necessary for you to sit for the National Board for Certification in Occupational Therapy [NBCOT] exam.

To register for Fieldwork Level II courses (HAO 596, HAO 597) students must have successfully passed all Fieldwork Level I experiences, HAO 586 Professional Behaviors I, and have received a grade of “B” or above in HAO 574 Professional Behaviors II. Please note that some FW sites have additional requirements such as drug screening, background checks, fingerprinting, etc. Students are responsible for all expenses related to any additional requirements. You will be informed of these at time of placement.

Students who fail Fieldwork Level II courses may be required to “step out” of the curriculum sequence. The opportunity for remediation and for repeating the failed fieldwork course is offered on a case-by-case basis and in accordance with School of Health Technology and Management’s Student Handbook of Policies and Procedures (see section on Academic Standing). The opportunity to repeat a fieldwork course because of failure or the need for remediation is limited to one time per Fieldwork Level II course. If the repeated course is successfully completed, the student will then be able to “step back” into the curriculum. The need to “step out” and “step back in” will result in a student registering for a modified curriculum plan and extending the amount of time it takes to complete the curriculum from the student’s initial year of entry. Students who fail two consecutive fieldwork placements will be dismissed from the program. All fieldwork MUST be completed within 12 months of coursework.
**Social Networking Guidelines**

Being health care professionals, you now need to consider the following social network guidelines to ensure you are not unintentionally noncompliant with HIPAA regulations.

Students are **not** allowed to contact ANY faculty, staff member (this includes core faculty, adjunct faculty, Clinical Field Work Supervisors- both FW Level I and FW Level II, and any facility staff members) or clients via any social type of networking while they are in the OT Program. After graduation, students may contact anyone they wish to “friend” via social network. In addition, students are expected to maintain privacy regulations when it concerns the program and clinical sites, as well as clinical supervisors. Students **cannot** post on their social network any information regarding their experiences in the program where the program or the faculty member is easily identified, or with any Clinical Supervisors or Field Work clinical sites, this also includes pictures or videos of any nature that contains any information (whether it is written, visual or auditory presentation) of the clinical site, clients, clinical staff members, or clinical supervisors. Any comments posted on such sites is considered a violation of privacy and/or slanderous. Under **NO** circumstances will such postings by tolerated by the program.

Such acts will be considered as unprofessional behaviors and will be addressed accordingly, including, but not limited to, removal of the student from that site, failing the student for that Field Work experience, or being immediately being placed on probation or recommended for dismissal from the program.

1. When speaking with your peers while on FW II, you must also recognize you cannot share any information related to fieldwork on Facebook, Twitter, Instagram or any other social media.

2. It is a HIPAA violation if you mention a client/patient with enough information that the person might be identified, even if you avoid PHI. The consequences for violations, as you know, are severe. For more information: http://www.aota.org/-/media/Corporate/Files/Practice/Ethics/Advisory/Social-Networking.ashx

3. Names of supervisors, comments, and/or criticism about sites or information about what is happening at sites should not be posted on public social network sites.

4. Students should not put posts or photos on social networks about fieldwork experiences (including location, clients, diagnosis, treatment, fieldwork educators and staff etc.).

5. Do not ask your supervisor or anyone at the clinical site to "friend" you while on fieldwork. You are not permitted to accept requests from these individuals. This is to protect your privacy and maintain the boundaries of the professional relationship. If you mutually decide to do this after graduation, this is your personal choice.

6. Do not ask or receive requests on social media from the clients and/or from family members/significant others of clients you interact with while on fieldwork. If you mutually decide to do this after graduation, this is your personal choice.

7. If there is any question or you are unsure of something regarding social networking, call the Academic Fieldwork Coordinator for advice.
8. If you are attached to your cell phone and have to look at it constantly, it is advised you leave your cell phone in your car or in the office so you are not tempted to pull it out while you are with a client, caregivers, your clinical supervisor, etc.

9. Consider what you post on any social networking site. Many potential employers go to these sites to see what you have posted and often determine if they are interested in having you as an employee. Consider Googling your name to discover what is in cyberspace that others can see about you.

I have read and agree to follow the above Social Networking Guidelines

Signature: _________________________________________________

Name: ____________________________________________________

Date: _____________________________________________________

Adapted from: Occupational Therapy Program, College of Health Sciences, The University of Texas at El Paso & East Carolina University, Policy on Social Networking
**Electronic Devices**

No electronic communication devices are to be used in the classrooms during any learning activities. In the event that you are waiting for an important text or phone message, you **MUST**:

- **First**, notify your course instructor prior to class explaining the urgency of such text or phone call
- Then, with permission of your course instructor, place your phone on vibrate and step out of the room to respond. No texting or twittering during any class activities, (even if it is to post how much you love this program or course!).

The use of laptops for note taking purposes must be approved by the course instructor prior to class time. The course instructor has the right to require that all laptops must be closed and not used during class time - unless the student is using the laptop as a mode of ADA accommodation requirements. Any student using the laptop for purposes other than note taking (after instructor’s approval) during class time without prior approval by the course instructor will not be allowed to bring in a laptop and will receive a reprimand in their file.

University phones located in the classrooms are for **EMERGENCY** purposes only. Use of the phone for other than emergency purposes **without the expressed permission** of a faculty or staff member will be considered unprofessional conduct.

**Dress Code**

Students will dress appropriately. Students are expected to dress neatly and conservatively. Only under the direction of a faculty member will students wear shorts, t-shirts or sweats for a class. No shirts/blouses that are low cut will be permitted; Jeans and slacks are to be worn at waist level and should remain at that point upon movement. Failure to dress responsibly will result in a penalty for professional behavior grading and a reprimand in the student folder. A reprimand will result in the student being placed on probation.

Caps, hoods, hats, or any other outerwear head cover that are **not** worn for religious, cultural, or medical reasons are considered unprofessional attire and must be removed and remain off during class time.

**Email and Blackboard Accounts**

Timely and efficient communication is necessary in the academic and professional environments. All students must use their Stony Brook email account for all correspondences regarding school related information. Students are also expected to check this email account daily as well as BlackBoard course accounts and Program account for any information such as registration charts and notices.

In addition, any changes in student’s personal contact telephone number(s) and address must be provided to the Occupational Therapy Program administrative assistant immediately in order to always maintain current emergency contact information. All students are responsible for updating this information on SOLAR.
**Professional Behavior**

Attitude and professional behavior, along with knowledge and skill, are evaluated during all classroom and fieldwork experiences. Please remember, this is a professional program. The faculty believe that students’ knowledge, skills, and attitudes exhibited in the classroom are reflective of those they will exhibit during fieldwork experiences. The faculty encourage students to view the classroom setting (lectures, laboratories) as an extension of the clinical setting.

The faculty expect students to utilize their critical thinking, communication skills, and reflective reasoning at all times. Seeing these abilities on an ongoing basis assists the faculty when they are assessing the students’ professional development. **Any student who communicates in a manner that is deemed unprofessional either through behaviors or means of communication will be spoken to first and will be placed on academic probation if this behavior should occur a second time. A formal reprimand will always be placed in the student’s folder. Bullying of any form is not tolerated and is deemed an unprofessional behavior. If, after noted offenses, the student does not correct the noted unprofessional behaviors, it may be recommended that the student be dismissed from the program.**

Whether on fieldwork, attending classes on campus, or enjoying special activities/events, students must remember that they are a reflection of the school, faculty, and the profession. Students are expected to be prompt, to follow the rules and regulations of the facility, to be courteous and to dress professionally. Failure to do so will result in placing the student on probation and having a formal reprimand on file.

Please be respectful to fellow students, the faculty, and staff of the Health Sciences Center. This means speaking quietly in the hallways and limiting participation in any stress relieving, physical recreation activities to the areas outside of the Health Sciences Center.

**Program Events/Activities**

Several times during the school year, the program will host a community event where all faculty and students are expected to attend and actively participate. These events are important as they are representative of our program mission statement and represent our conviction and commitment to making a difference in our communities as occupational therapists. It is expected that students will make arrangements to attend and participate in those functions, which may take place on week nights or weekends.

**Social Events**

There will be times when the students and faculty will gather together for social events designed for enjoyment of all and entertainment. All students are encouraged to attend such events. Please remember, although the venue is of entertainment and social interactions with the faculty members, students are expected to behave towards the faculty in a manner reflective of professionalism and respect. A good time can be had by all while maintaining respect towards the faculty.

**Withdrawal/Leave of Absence**

Please refer to the School of Health Technology and Management student handbook. If withdrawing or requesting a leave of absence, students must follow the policies and procedures delineated in the School of Health Technology and Management bulletin and the SHTM Student Handbook of Policies and Procedures.
**Pregnancy Policy**

In the event a student is pregnant while in the program, it is important to inform the Program Chairperson to determine if the student or the baby is at risk for harm depending on the course work and any materials that are to be handled. As for accommodations for coursework or class time during or after pregnancy, it is important to discuss with the course instructors what accommodations can be made without compromising the student’s quality of education. It may be possible that the student may need to take a leave of absence and step out of course sequence, which may delay graduation by one year.

**Plagiarism**

The Occupational Therapy Faculty will not tolerate ANY form of academic dishonesty. The faculty will readily enforce the policies and procedures regarding academic dishonesty as set by the Health Sciences Bulletin and the School of Health Technology and Management. Please refer to the Health Sciences Bulletin and the School of Health Technology and Management Student Handbook of Policies and Procedures for further information regarding the definitions of plagiarism, as well as the definitions of academic dishonesty.

Students are expected to follow the examples given in the American Psychological Association reference manual for proper citation, references of work and format of paperwork. Students are expected to purchase said manual prior to the start of OT coursework. The current edition of the APA manual is the 6th edition; the purchase of the APA software is suggested. It is the student’s responsibility to be aware of all steps needed to avoid plagiarism and other academic dishonesty behaviors; i.e. the rules and recommendations for proper citation and referencing.

All work must be original to the course. If a student submits a paper or posts on Blackboard, any body of work that was submitted previously in another course without approval of current professor, this action will be considered an act of plagiarism. Only with the course instructor’s approval may a student submit a previously written body of work.

Any assignments done in groups are the responsibility of all group members. Group members must sign the final copy to acknowledge equal contribution and an understanding that each group member receives the same grade for the final project. Unless otherwise directed by the course instructor or the course instructor consents with prior approval, all assignments are to be completed individually and is considered to be the sole representation of that individual student’s work. Without prior course instructor’s approval, any unauthorized group work is considered an act of plagiarism.

Also see appendix for AOTA Advisory on Plagiarism.

**Academic Honesty Policy for Distance Education Courses**

Honesty in any college class is critical to your success as a student. Stony Brook University is committed to maintaining the highest ethical standards possible related to student academic performance in our distance and face-to-face courses.

As a Stony Brook Occupational Therapy student, when you are given access to Blackboard, our online course software, you are expected to keep confidential your username and password and to never allow anyone else to log-in to your account. Sharing access or passwords to Blackboard is considered a breach of academic integrity and could result in you being removed from your class.
When you log-in to Blackboard, you do so with the understanding and agreement to produce your own work, to complete course activities yourself, including online discussions, and to take course exams, tests or quizzes without the assistance of others.

Allowing others to complete your course work, discussions, or to take your quiz, test, and exams is considered cheating and could subject you to receiving an "F" for the course. In addition, this type of dishonesty can result in formal disciplinary action being taken against you by the college.

**Copyright Materials**

It is required that all Occupational Therapy program faculty, staff, and students adhere to the laws of copyright. When appropriate, the Occupational Therapy Program faculty, if using copyright material for educational purposes will provide a single copy of the material for student and class use. The material will be made available in class or through the “reserved” area of the Health Sciences Center Library and the Southampton Library. Under no circumstances should a student or class interpret the access to the single copy as having permission to make multiple copies of the material. Multiple copies may only be made with the expressed and/or written permission of the author(s).

**COURSE CONTENT:** Course material accessed from Blackboard, SB Connect, SB Capture or a Stony Brook Course website is for the exclusive use of students who are currently enrolled in the course. Content from these systems cannot be reused or distributed without written permission of the instructor and/or the copyright holder. Duplication of materials is protected by copyright, and cannot be disseminated without permission of the copyright holder. It is a violation of the Federal copyright law, as well as a violation of Stony Brook's Academic Integrity and Student Conduct Codes:

http://www.stonybrook.edu/uaa/academicjudiciary/policies.shtml (you may have to copy and paste the address in a browser).

**Recording Classroom Lectures and Activities**

No student may record, tape or photograph any faculty presentation or classroom activity without the express written consent of the faculty or instructor. Generally, faculty has the discretion as to whether students are permitted to audio tape or video record lectures for their personal use. There may be circumstances, however, when such audio taping or video recording is necessary as a reasonable accommodation of a properly documented disability. Assistance and advice with respect to such requests may be obtained from the department chair, the dean’s office, the Office of Student Services.

If a student believes that he/she has a disability that requires a reasonable accommodation for audio or visual recording of lectures and classroom activities, he/she should contact Disability Support Services at (631) 632-6748 to request an appropriate accommodation.

The use of laptops for note taking purposes must be approved by the course instructor prior to class time. Any student using the laptop for purposes other than note taking during class time without prior approval by the course instructor will not be allowed to bring in a laptop and will receive a formal reprimand in their file.

**Confidentiality**

Faculty, as ethical professionals, are expected to respect students’ and clients’ rights to confidentiality. It is also imperative that students pursuing a professional career understand that they are held to the same ethical standards in clinical placements and academic areas of the program. Students are
expected to complete HIPAA training and adhere to regulations regarding ethics and privacy matters.

Fellow students’ personal information, i.e. grades, concerns, and behaviors revealed in or out of class should not be openly shared with others since it is in direct violation of school and clinic policies.

Patient information is regarded as confidential. Any reports completed for submission to class are not to reveal the patient’s name. Students must use the first name, a pseudonym, or initials. This also pertains to any discussions students may have about the patient outside of the clinic and or classroom. Students may not copy or remove medical records on any client unless it has been indicated in writing that the facility has permission from the patient and is authorized to grant approval to do so. It is the responsibility of the student to clearly ask for and to understand the facilities rules and regulations regarding confidentiality.

**HIPAA (Health Insurance Portability and Accountability Act)**

See School of Health Technology and Management Policy and Procedures Manual regarding HIPAA and student’s responsibilities to adhere to HIPAA regulations.

**Annual Physical History/Assessment and Immunization Record**

All Occupational Therapy students are required to complete and submit the Stony Brook University, School of Health Technology and Management, physical history, health assessment form and immunization record prior to beginning coursework. The information on the forms is to be updated annually. The school provides these forms. Forms may be completed by making an appointment with the Student Health Services on West Campus, or by your own physician.

Students who have submitted incomplete forms, or students who have not submitted forms, will not be allowed to attend Fieldwork Level I or II until the forms are submitted and/or properly completed. Student Health Services must advise the Occupational Therapy Academic Fieldwork Coordinator that all health obligations have been satisfactorily met before a student will be placed on any fieldwork assignment. Failure to comply by the program and/or school recommended date may result in the student being placed on academic probation. *(See SHTM Student Handbook of Policies and Procedures regarding academic probation).* Please note: even if you have been a student at SUNY Stony Brook you are still required to complete the School of Health Technology and Management’s health forms.

**Student Advisement**

Each student is assigned a faculty member as an advisor. It is the responsibility of the student to formally meet with the advisor during which time the Professional Behavior Monitor will be reviewed. All students are expected to initiate and maintain contact with their advisors.

**Student ID’s**

Unless otherwise instructed, students are to utilize the Stony Brook University, School of Health Technology and Management identification badge as their official identification during any school or program related activity, on or off campus. Some activities or locations may require the students to block out their last name. Students may do so by adding a piece of masking or colored tape to the badge cover.
**Graduation Criteria**

Graduation is dependent upon the successful completion of all prerequisite, basic sciences, core, as well as the research sequence and final results pages and professional courses including HAO 596 and HAO 597 (Fieldwork Level II). Fieldwork Level II must be completed within 12 months of successful completion of all coursework.

The Program and School must review all student records prior to notifying the New York State Department of Education of the student’s graduation date, or before issuing a diploma. The student may then apply for a New York State limited permit (See New York State Licensure) to practice Occupational Therapy and may sit for the National Board for Certification examination in Occupational Therapy.

**Certification by the NBCOT**

The National Board for Certification in Occupational Therapy (NBCOT) administers a national certification examination to all students graduating from an accredited Occupational Therapy curriculum, and maintains a roster of all certified occupational therapists.

Students must register for this examination directly with the testing agency, and pay all required fees. To be eligible to sit for the examination, all academic and clinical work must be successfully completed.

The examination is given “on demand” at designated computerized testing sites. Students will receive specifics about the exam application process as they near graduation.

*A felony conviction may affect a graduate’s ability to sit for the NBCOT certification examination or attain state licensure. Any students who are not certain if they can sit for the exam should go to the website: www.NBCOT.org*

**New York State Licensure**

To practice occupational therapy in New York and most other states, a therapist must hold a valid, current professional license with the state. The purpose of licensure is to protect the public from unqualified and incompetent practitioners. To obtain a professional license in New York State, the individual must file an application for licensure, submit final college or university transcripts, submit the NBCOT examination results indicating successful passage of the examination, and pay all necessary fees. New York State uses the NBCOT exam as the state licensure examination, but a separate application for licensure must be filed with the New York State Department of Education, Division of Professional Licensing, in Albany, New York.

http://www.op.nysed.gov/

Students who have completed all their degree requirements and have secured employment, but have not yet taken the certification examination, will be able to apply for a “Limited Permit” to practice Occupational Therapy. While working under a limited permit, you must be supervised by a licensed, registered Occupational Therapist. Your potential employer must sign the limited permit application forms to verify that you will be practicing under the supervision of a licensed, registered occupational therapist. The limited permit is good for one year, or until the student passes or fails the certification exam. Passage leads to full licensure; failure leads to the cancellation of the permit.
Once licensed, occupational therapists are expected to practice ethically and safely, and to maintain their licensure registration. License registration is required to be renewed every three years. A therapist can lose their professional license for unethical, illegal or immoral practices, or for infraction of the licensure law. It is imperative that you understand this law, and practice within its scope.

Students intending to practice in another state must file for a license in that state. Contact that state’s licensure division, or American Occupational Therapy Association for information and assistance in obtaining state licensure.

**Student and Professional Organizations**

Students are encouraged to join and participate in the student associations at Stony Brook University and in the School of Health Technology and Management.

The Student Occupational Therapy Association here at Stony Brook University is listed with the American Occupational Therapy Association (www.aota.org) and there is a student delegate who attends student meetings at the AOTA Annual Conference. Students play an important part in helping our profession stay current and progressive. Each organization provides a basis for student’s professional growth through the offering of various meetings, conferences, and publications. Many of these offerings are available at reduced rates to the organization’s members.

Please see Stony Brook University SOTA by-laws in appendix. SOTA elections occur in July of each academic year.

Applications for student membership in the New York State Occupational Therapy Association (NYSOTA) and the American Occupational Therapy Association are made available to each student. AOTA student membership is a requirement and proof must be submitted in the Professional Behavior courses. All students are expected to maintain active membership in NYSOTA and AOTA until graduation.

Pi Theta Epsilon (PTE) is the national honor society for occupational therapists (www.pithetaepsilon.org). PTE requires a membership fee for students and provides opportunity for lifetime participation. Student members are acknowledged at graduation and wear an honor cord that identifies them as a member of PTE. The mission of Pi Theta Epsilon is to support the practice of occupational sciences and the practice of authentic occupational therapy by promoting research and other scholarly activities by its members. In this way, the organization serves not only the profession, but helps to insure quality health care services for the general public.

Alpha Eta Health Professional Honor Society - Every year, just before graduation, faculty from each SHTM program reviews the academic records of their students. A limited number of the graduates from any one program who have demonstrated outstanding scholarship and exceptional leadership are nominated for induction into our local chapter of Alpha Eta---the National Honor Society for Allied Health Professionals.

Lifetime membership in Alpha Eta, which includes your membership certificate, Alpha Eta pin, and honor cord to be worn at graduation, entails a one-time fee of $30. In addition, your official university transcript will permanently designate your induction into the honor society.

Any student who receives formal reprimand, is on academic probation, or who is not in good academic standing may be disqualified from being inducted to any honor society or from applying to any health professions scholarship.
Job Placement/Listings
The Occupational Therapy program receives many job listings and job fair announcements from various schools and agencies in the metropolitan area.

The job listings that the Occupational Therapy program receives are posted on the program’s bulletin board or filed in the Occupational Therapy Office. Students are welcome to review the postings at any time. In addition, many journals and periodicals that list Occupational Therapy openings are made available to students by the Occupational Therapy faculty and through the Health Sciences Library.

Graduates of the program are encouraged to provide the program with up-to-date email and mailing addresses. The program strives to notify alumni of job vacancy postings as frequently as possible or as they become known to us.

Scholarship Announcements
The OT program receives announcements from various schools and agencies in the metropolitan area. These will be posted on the program’s bulletin board and/or sent via e-mail to all students.

Americans with Disabilities Act
If you have a physical, psychological, medical or learning disability that may impact your coursework, please contact Disability Support Services, 128 ECC Building, Telephone (631) 632-6748. They will determine with you what accommodations are necessary and appropriate. All information and documentation is confidential.

Students who require assistance during emergency evacuation are encouraged to discuss their needs with their professors and Disability Support Services. For procedures and information, go to the following website: http://www.ehs.sunysb.edu and search for ‘Fire Safety and Evacuation/Physical Disabilities’.

Supporting the Occupational Therapy Program
The success of our program is not just excellence in teaching; it also involves excellence in providing support to our communities, as well as excellence in supporting our students in different activities. We are able to support our students in many ways, including, but not limited to, providing activities (end of the year dinner, program field trips, purchasing of special equipment, etc.) ceremonial pins (graduation pins, Level I FW Program Professional Shirts, etc.), and honor awards (Vera Jean Clark-Brown Leadership Award, Jacqueline Barrera Distinguished Student Award) These types of activities, awards and ceremonial recognition are funded through the OCCUPATIONAL THERAPY IN EXCELLENCE FUND (SBF account number 297250), NOT through the SBU Alumni Association Fund.

As a Program Chairperson, I cannot stress the value and importance of the Occupational Therapy in Excellence Fund. It is an account that allows us to do many things for the students in our program that the SBU Alumni Association Fund cannot do for the program. Please consider supporting the Occupational Therapy in Excellence Fund not only during your time here with us, but also after you graduate and are representing our program in your community as a highly trained professional. When you are ready to support the OT in Excellence Fund, please make your check out to:

OT in Excellence Fund account number SBF 297250
Appendix

1. Curriculum Chart and Credit Hour Information
2. OT Curriculum
3. SOTA Bylaws
4. Faculty Advisors List
5. Professional Behavior Monitor
6. OT Program Flowchart
8. Guidelines: OT Practice Framework (separate document)
Appendix 1 - Curriculum Chart and Credit Hour Information
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Appendix 2 – OT Curriculum Design
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Appendix 5 - Professional Behavior Monitor
Stony Brook University
Occupational Therapy Program

Student Academic Advisement Form
All students are to meet with their faculty advisor a minimum of two times an academic year. The purpose of this form is to document and review academic progress. The student is to come prepared for the advisement session by completing the student sections on academic progress/goals [below] and professional behaviors [reverse side]. This information will be reviewed with the academic advisor. Following completion of this form, it is to be signed by the student and advisor. It is to be kept on file by the student advisor. All forms are reviewed annually by the program faculty and program director during a scheduled faculty meeting. These forms will be available for review by the School of Health Technology and Management Academic Standing Committee should a student’s academic performance be in question.

Student Name: ___________________________                SBID Number: ____________
Year of Graduation: ________________________               ____________
GPA: ____________________________

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<td>Student’s Academic goals:</td>
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<td>Advisor’s Review of Academic Progress:</td>
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__________________________  ______________________
Student Signature          Date

__________________________  ______________________
Advisor Signature          Date
# PROFESSIONAL BEHAVIOR AND ATTENDANCE

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<th>Discussion/Comments</th>
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<td>Contacts appropriate faculty member when late/absent from class</td>
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<tr>
<td>Full utilization of lab/class time</td>
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<tr>
<td>Appropriate dress for lab/class activities</td>
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<tr>
<td>Appropriate role play as both the client and the OT</td>
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<tr>
<td>Hands in assignments/papers when due</td>
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<td>Appropriate use of safety precautions</td>
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<tr>
<td>Arriving prepared for lab/class</td>
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<tr>
<td>Assisting in set-up of material used during lab/class</td>
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<td>Assisting in cleanup of material used during lab/class</td>
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Action plan: __________________________________________________________

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Faculty/advisor __________________________________________ Date __________
Student _________________________________ Date _________________
Definitions: Professional Behavior

**Arrival to lab/class on time:** Student is present and ready to participate at the assigned time.

**Full utilization of lab/class time:** Utilizes lab time to review materials presented, spends time interacting with tools (e.g., ADL equipment), participates in lab discussions/questions and asks appropriate questions of faculty related to course content/practice/clinical issues.

**Appropriate dress for lab/class activities:** Clothing which allows for full participation in lab experiences while maintaining decency. Clothing for class presentation should be congruent with standards in that area of clinical practice.

**Respect of peers and faculty:** Student is listening when faculty/peers present information without side conversations or completing alternate tasks (e.g., answering emails/text), student respects opinions which differ from his/her own.

**Displays appropriate communication skills and/or interactions with peers:** Student responds to direction given by faculty/peers, utilizes appropriate empathy (e.g., adapts lab experience based on partner’s response, eye contact, etc.). Communication with faculty should be honest and direct. Student should demonstrate support and empathy for peers. Should be able to offer meaningful feedback to peers as it applies to course content and lab experiences.

**Role play as both the client and the OT:** *As the OT:* Utilizes appropriate practice framework terminology for client, completes introduction, asks permission to handle client, etc. *As the client:* Stays in client role without demeaning clients in any way or overacting within the role.

**Proper use of safety precautions:** Reviews and practices safety procedures with all modalities and activities as per protocol.

**Arriving prepared for lab/class:** Has all materials prepared which were assigned for lab.

**Assisting in setting up of materials used during lab/class:** Retrieves materials and places in the proper locations for use during lab/class.

**Assisting in cleanup of materials used during lab/class:** Replaces material to the proper locations after use. Cleans up personal space after class.
Appendix 6 - OT Program Flow Chart
STONY BROOK UNIVERSITY
SCHOOL OF HEALTH TECHNOLOGY AND MANAGEMENT
OCCUPATIONAL THERAPY PROGRAM CURRICULUM OUTLINE

A Professional Graduate Entry-Level Program Leading to the MSOT Degree

BEGINNING (YEAR 1)
Courses provide foundation in the basic sciences, history of occupational therapy, nature of human occupation; begin to develop self-awareness, professional behavior, problem-solving, and critical thinking, and evidence based practices.

YEAR 1
- Functional Anatomy
- Historical & Contemporary Perspectives in O.T.
- Foundations of O.T.
- Assessment & Interventions of Psychosocial Issues
- Kinesiology
- Growth & Development
- Functional Neuroanatomy
- Prof. Behaviors I
- Theories of Adult Rehabilitation
- Clinical Conditions
- Pediatrics Theory & Practice
- Fieldwork IA

INTERMEDIATE (YEAR 2)
Courses and introductory fieldwork experiences reflect principles of practice in OT and continue to develop students’ professional skills, therapeutic use of self, problem-solving behaviors, and clinical reasoning. Documentation, clinical conditions, theories that guide practice, and treatment interventions, modalities, and techniques are taught in the context of occupation. Beginning research skills are taught, as well as, advanced applications of evidence-based practices.

YEAR 2
- Assessment & Treatment of Adult Rehabilitation
- Assessments & Interventions of Upper Extremities
- Vision, Perception & Cognition
- Substance Abuse & OT
- Universal Design
- Gerontology and O.T.
- Sensory Integration
- Fieldwork IA
- Intro to Research Design
- Research Design
- Fieldwork 1B, 1C
- Professional Behaviors II

ADVANCED (YEAR 3)
Courses and fieldwork experiences focus on preparation for practice in traditional and emerging areas that involve the application of scholarly inquiry, and sophisticated professional behaviors to solve complex problems. Independent work is encouraged as student transitions to professional roles. Beginning research skills are enhanced and students continue to develop evidence-based practices.

YEAR 3
- Fieldwork III
- The O.T. Manager
- Principles of Instruction
- Community, Occupation and Health
- Case Studies
- Global Communities, Occupation, & Health
- Professional Transition Seminar
- Disability Studies & OT
- Special Topics
- Service Learning & Community Based Research

KNOWLEDGE OF:
- learning theories
- measurement outcomes
- relationship between occupation and health
- reimbursement systems
- emerging practice areas
- concepts of disabilities and development, culture, and society
- management theories

SKILLS FOR:
- advanced application of O.T. theory/practices
- advanced documentation that maximizes reimbursement
- seeking out information independently

ATTITUDES THAT LEAD TO:
- culturally competent practice
- self-directed learning
- leadership & advocacy skills
- professional commitment
- self-awareness for on-going personal/professional growth

KNOWLEDGE OF:
- research methodology/developing proposals
- patient education principles
- basic statistical analysis
- normal aging process
- evidence based practice
- culturally competent practice
- O.T. interventions in all diagnostic categories

SKILLS FOR:
- fabricating orthoses
- prosthetic training
- assessing strength, sensation, vision, perception & cognition
- administering standardized & non-standardized evaluations
- transfer training and functional mobility
- applying PAMS as an adjunctive modality
- collecting, analyzing and interpreting data
- participation in scholarly activities

ATTITUDES THAT LEAD TO:
- interactive reasoning
- active collaboration within & outside of discipline
- realization of individual treatment needs
- client-centered practice and therapeutic use of self

KNOWLEDGE OF:
- bio-mechanical concepts
- basic anatomical structures & physiological function
- human growth and developmental processes
- mental health & substance abuse concepts
- history of profession & core values of OT
- ethics, issues in current healthcare & universal precautions

SKILLS FOR:
- goniometry & manual muscle testing
- interviewing individuals to collect information
- establishing therapeutic relationships with consumers
- performing mental health assessment/evaluations
- designing, implementing & conducting group protocols
- professional writing & clinical documentation

ATTITUDES THAT LEAD TO:
- critical thinking
- demonstrating an understanding of professional behavior
- procedural reasoning
- responsibility & organization
- effective time management strategies
Appendix 7 - AOTA OT Code of Ethics and Ethics Standards (2015)
Occupational Therapy Code of Ethics and Ethics Standards (2015)

Preamble
The 2015 *Occupational Therapy Code of Ethics* (Code) of the American Occupational Therapy Association (AOTA) is designed to reflect the dynamic nature of the profession, the evolving health care environment, and emerging technologies that can present potential ethical concerns in research, education, and practice. AOTA members are committed to promoting inclusion, participation, safety, and well-being for all recipients in various stages of life, health, and illness and to empowering all beneficiaries of service to meet their occupational needs. Recipients of services may be individuals, groups, families, organizations, communities, or populations (AOTA, 2014b).

The Code is an AOTA Official Document and a public statement tailored to address the most prevalent ethical concerns of the occupational therapy profession. It outlines Standards of Conduct the public can expect from those in the profession. It should be applied to all areas of occupational therapy and shared with relevant stakeholders to promote ethical conduct.

The Code serves two purposes:

1. It provides aspirational Core Values that guide members toward ethical courses of action in professional and volunteer roles, and
2. It delineates enforceable Principles and Standards of Conduct that apply to AOTA members.

Whereas the Code helps guide and define decision-making parameters, ethical action goes beyond rote compliance with these Principles and is a manifestation of moral character and mindful reflection. It is a commitment to benefit others, to virtuous practice of artistry and science, to genuinely good behaviors, and to noble acts of courage. Recognizing and resolving ethical issues is a systematic process that includes analysis of the complex dynamics of situations, weighing of consequences, making reasoned decisions, taking action, and reflecting on outcomes. Occupational therapy personnel, including students in occupational therapy programs, are expected to abide by the Principles and Standards of Conduct within this Code. Personnel roles include clinicians (e.g., direct service, consultation, administration); educators; researchers; entrepreneurs; business owners; and those in elected, appointed, or other professional volunteer service.

The process for addressing ethics violations by AOTA members (and associate members, where applicable) is outlined in the Code’s Enforcement Procedures (AOTA, 2014a).

Although the Code can be used in conjunction with licensure board regulations and laws that guide standards of practice, the Code is meant to be a free-standing document, guiding ethical dimensions of professional behavior, responsibility, practice, and decision making. This Code is not exhaustive; that is, the Principles and Standards of Conduct cannot address every possible situation. Therefore, before making complex ethical decisions that require further expertise, occupational therapy personnel should seek out resources to assist in resolving ethical issues not addressed in this document. Resources can include, but are not limited to, ethics committees, ethics officers, the AOTA Ethics Commission or Ethics Program Manager, or an ethics consultant.

Core Values
The profession is grounded in seven long-standing Core Values: (1) Altruism, (2) Equality, (3) Freedom, (4) Justice, (5) Dignity, (6) Truth, and (7) Prudence. *Altruism* involves demonstrating concern for the welfare of others. *Equality* refers to treating all people impartially and free of bias.
Freedom and personal choice are paramount in a profession in which the values and desires of the client guide our interventions. Justice expresses a state in which diverse communities are inclusive; diverse communities are organized and structured such that all members can function, flourish, and live a satisfactory life. Occupational therapy personnel, by virtue of the specific nature of the practice of occupational therapy, have a vested interest in addressing unjust inequities that limit opportunities for participation in society (Braveman & Bass-Haugen, 2009).

Inherent in the practice of occupational therapy is the promotion and preservation of the individuality and Dignity of the client, by treating him or her with respect in all interactions. In all situations, occupational therapy personnel must provide accurate information in oral, written, and electronic forms (Truth). Occupational therapy personnel use their clinical and ethical reasoning skills, sound judgment, and reflection to make decisions in professional and volunteer roles (Prudence).

The seven Core Values provide a foundation to guide occupational therapy personnel in their interactions with others. Although the Core Values are not themselves enforceable standards, they should be considered when determining the most ethical course of action.

Principles and Standards of Conduct
The Principles and Standards of Conduct that are enforceable for professional behavior include (1) Beneficence, (2) Nonmaleficence, (3) Autonomy, (4) Justice, (5) Veracity, and (6) Fidelity. Reflection on the historical foundations of occupational therapy and related professions resulted in the inclusion of Principles that are consistently referenced as a guideline for ethical decision making.

Beneficence
Principle 1. Occupational therapy personnel shall demonstrate a concern for the well-being and safety of the recipients of their services.
Beneficence includes all forms of action intended to benefit other persons. The term beneficence connotes acts of mercy, kindness, and charity (Beauchamp & Childress, 2013). Beneficence requires taking action by helping others, in other words, by promoting good, by preventing harm, and by removing harm. Examples of beneficence include protecting and defending the rights of others, preventing harm from occurring to others, removing conditions that will cause harm to others, helping persons with disabilities, and rescuing persons in danger (Beauchamp & Childress, 2013).

Related Standards of Conduct
Occupational therapy personnel shall
A. Provide appropriate evaluation and a plan of intervention for recipients of occupational therapy services specific to their needs.
B. Reevaluate and reassess recipients of service in a timely manner to determine whether goals are being achieved and whether intervention plans should be revised.
C. Use, to the extent possible, evaluation, planning, intervention techniques, assessments, and therapeutic equipment that are evidence based, current, and within the recognized scope of occupational therapy practice.
D. Ensure that all duties delegated to other occupational therapy personnel are congruent with credentials, qualifications, experience, competency, and scope of practice with respect to service delivery, supervision, fieldwork education, and research.
E. Provide occupational therapy services, including education and training, that are within each practitioner’s level of competence and scope of practice.
F. Take steps (e.g., continuing education, research, supervision, training) to ensure proficiency, use careful judgment, and weigh potential for harm when generally recognized standards do not exist in emerging technology or areas of practice.
G. Maintain competency by ongoing participation in education relevant to one’s practice area.
H. Terminate occupational therapy services in collaboration with the service recipient or responsible party when the services are no longer beneficial.
I. Refer to other providers when indicated by the needs of the client.
J. Conduct and disseminate research in accordance with currently accepted ethical guidelines and standards for the protection of research participants, including determination of potential risks and benefits.

Nonmaleficence
Principle 2. Occupational therapy personnel shall refrain from actions that cause harm.
Nonmaleficence “obligates us to abstain from causing harm to others” (Beauchamp & Childress, 2013, p. 150). The Principle of Nonmaleficence also includes an obligation to not impose risks of harm even if the potential risk is without malicious or harmful intent. This Principle often is examined under the context of due care. The standard of due care “requires that the goals pursued justify the risks that must be imposed to achieve those goals” (Beauchamp & Childress, 2013, p. 154). For example, in occupational therapy practice, this standard applies to situations in which the client might feel pain from a treatment intervention; however, the acute pain is justified by potential longitudinal, evidence-based benefits of the treatment.

Related Standards of Conduct
Occupational therapy personnel shall
A. Avoid inflicting harm or injury to recipients of occupational therapy services, students, research participants, or employees.
B. Avoid abandoning the service recipient by facilitating appropriate transitions when unable to provide services for any reason.
C. Recognize and take appropriate action to remedy personal problems and limitations that might cause harm to recipients of service, colleagues, students, research participants, or others.
D. Avoid any undue influences that may impair practice and compromise the ability to safely and competently provide occupational therapy services, education, or research.
E. Address impaired practice and when necessary report to the appropriate authorities.
F. Avoid dual relationships, conflicts of interest, and situations in which a practitioner, educator, student, researcher, or employer is unable to maintain clear professional boundaries or objectivity.
G. Avoid engaging in sexual activity with a recipient of service, including the client’s family or significant other, student, research participant, or employee, while a professional relationship exists.
H. Avoid compromising rights or well-being of others based on arbitrary directives (e.g., unrealistic productivity expectations, falsification of documentation, inaccurate coding) by exercising professional judgment and critical analysis.
I. Avoid exploiting any relationship established as an occupational therapy clinician, educator, or researcher to further one’s own physical, emotional, financial, political, or business interests at the expense of recipients of services, students, research participants, employees, or colleagues.
J. Avoid bartering for services when there is the potential for exploitation and conflict of interest.

Autonomy
Principle 3. Occupational therapy personnel shall respect the right of the individual to self-determination, privacy, confidentiality, and consent.
The Principle of Autonomy expresses the concept that practitioners have a duty to treat the client according to the client’s desires, within the bounds of accepted standards of care, and to protect the
client’s confidential information. Often, respect for Autonomy is referred to as the *self-determination principle*. However, respecting a person’s autonomy goes beyond acknowledging an individual as a mere agent and also acknowledges a person’s right “to hold views, to make choices, and to take actions based on [his or her] values and beliefs” (Beauchamp & Childress, 2013, p. 106). Individuals have the right to make a determination regarding care decisions that directly affect their lives. In the event that a person lacks decision-making capacity, his or her autonomy should be respected through involvement of an authorized agent or surrogate decision maker.

**Related Standards of Conduct**

**Occupational therapy personnel shall**

A. Respect and honor the expressed wishes of recipients of service.
B. Fully disclose the benefits, risks, and potential outcomes of any intervention; the personnel who will be providing the intervention; and any reasonable alternatives to the proposed intervention.
C. Obtain consent after disclosing appropriate information and answering any questions posed by the recipient of service or research participant to ensure voluntariness.
D. Establish a collaborative relationship with recipients of service and relevant stakeholders, to promote shared decision making.
E. Respect the client’s right to refuse occupational therapy services temporarily or permanently, even when that refusal has potential to result in poor outcomes.
F. Refrain from threatening, coercing, or deceiving clients to promote compliance with occupational therapy recommendations.
G. Respect a research participant’s right to withdraw from a research study without penalty.
H. Maintain the confidentiality of all verbal, written, electronic, augmentative, and nonverbal communications, in compliance with applicable laws, including all aspects of privacy laws and exceptions thereto (e.g., Health Insurance Portability and Accountability Act, Family Educational Rights and Privacy Act).
I. Display responsible conduct and discretion when engaging in social networking, including but not limited to refraining from posting protected health information.
J. Facilitate comprehension and address barriers to communication (e.g., aphasia; differences in language, literacy, culture) with the recipient of service (or responsible party), student, or research participant.

**Justice**

**Principle 4. Occupational therapy personnel shall promote fairness and objectivity in the provision of occupational therapy services.**

The Principle of *Justice* relates to the fair, equitable, and appropriate treatment of persons (Beauchamp & Childress, 2013). Occupational therapy personnel should relate in a respectful, fair, and impartial manner to individuals and groups with whom they interact. They should also respect the applicable laws and standards related to their area of practice. Justice requires the impartial consideration and consistent following of rules to generate unbiased decisions and promote fairness. As occupational therapy personnel, we work to uphold a society in which all individuals have an equitable opportunity to achieve occupational engagement as an essential component of their life.

**Related Standards of Conduct**

**Occupational therapy personnel shall**

A. Respond to requests for occupational therapy services (e.g., a referral) in a timely manner as determined by law, regulation, or policy.
B. Assist those in need of occupational therapy services to secure access through available means.
C. Address barriers in access to occupational therapy services by offering or referring clients to financial aid, charity care, or pro bono services within the parameters of organizational policies.
D. Advocate for changes to systems and policies that are discriminatory or unfairly limit or prevent access to occupational therapy services.
E. Maintain awareness of current laws and AOTA policies and Official Documents that apply to the profession of occupational therapy.
F. Inform employers, employees, colleagues, students, and researchers of applicable policies, laws, and Official Documents.
G. Hold requisite credentials for the occupational therapy services they provide in academic, research, physical, or virtual work settings.
H. Provide appropriate supervision in accordance with AOTA Official Documents and relevant laws, regulations, policies, procedures, standards, and guidelines.
I. Obtain all necessary approvals prior to initiating research activities.
J. Refrain from accepting gifts that would unduly influence the therapeutic relationship or have the potential to blur professional boundaries, and adhere to employer policies when offered gifts.
K. Report to appropriate authorities any acts in practice, education, and research that are unethical or illegal.
L. Collaborate with employers to formulate policies and procedures in compliance with legal, regulatory, and ethical standards and work to resolve any conflicts or inconsistencies.
M. Bill and collect fees legally and justly in a manner that is fair, reasonable, and commensurate with services delivered.
N. Ensure compliance with relevant laws and promote transparency when participating in a business arrangement as owner, stockholder, partner, or employee.
O. Ensure that documentation for reimbursement purposes is done in accordance with applicable laws, guidelines, and regulations.
P. Refrain from participating in any action resulting in unauthorized access to educational content or exams (including but not limited to sharing test questions, unauthorized use of or access to content or codes, or selling access or authorization codes).

**Veracity**

**Principle 5. Occupational therapy personnel shall provide comprehensive, accurate, and objective information when representing the profession.**

Veracity is based on the virtues of truthfulness, candor, and honesty. The Principle of Veracity refers to comprehensive, accurate, and objective transmission of information and includes fostering understanding of such information (Beauchamp & Childress, 2013). Veracity is based on respect owed to others, including but not limited to recipients of service, colleagues, students, researchers, and research participants.

In communicating with others, occupational therapy personnel implicitly promise to be truthful and not deceptive. When entering into a therapeutic or research relationship, the recipient of service or research participant has a right to accurate information. In addition, transmission of information is incomplete without also ensuring that the recipient or participant understands the information provided.

Concepts of veracity must be carefully balanced with other potentially competing ethical principles, cultural beliefs, and organizational policies. Veracity ultimately is valued as a means to establish trust and strengthen professional relationships. Therefore, adherence to the Principle of Veracity also requires thoughtful analysis of how full disclosure of information may affect outcomes.

**Related Standards of Conduct**

**Occupational therapy personnel shall**
A. Represent credentials, qualifications, education, experience, training, roles, duties, competence, contributions, and findings accurately in all forms of communication.
B. Refrain from using or participating in the use of any form of communication that contains false, fraudulent, deceptive, misleading, or unfair statements or claims.
C. Record and report in an accurate and timely manner and in accordance with applicable regulations all information related to professional or academic documentation and activities.
D. Identify and fully disclose to all appropriate persons errors or adverse events that compromise the safety of service recipients.
E. Ensure that all marketing and advertising are truthful, accurate, and carefully presented to avoid misleading recipients of service, research participants, or the public.
F. Describe the type and duration of occupational therapy services accurately in professional contracts, including the duties and responsibilities of all involved parties.
G. Be honest, fair, accurate, respectful, and timely in gathering and reporting fact-based information regarding employee job performance and student performance.
H. Give credit and recognition when using the ideas and work of others in written, oral, or electronic media (i.e., do not plagiarize).
I. Provide students with access to accurate information regarding educational requirements and academic policies and procedures relative to the occupational therapy program or educational institution.
J. Maintain privacy and truthfulness when utilizing telecommunication in delivery of occupational therapy services.

Fidelity
Principle 6. Occupational therapy personnel shall treat clients, colleagues, and other professionals with respect, fairness, discretion, and integrity.
The Principle of Fidelity comes from the Latin root fidelis, meaning loyal. Fidelity refers to the duty one has to keep a commitment once it is made (Veatch, Haddad, & English, 2010). In the health professions, this commitment refers to promises made between a provider and a client or patient based on an expectation of loyalty, staying with the patient in a time of need, and compliance with a code of ethics. These promises can be implied or explicit. The duty to disclose information that is potentially meaningful in making decisions is one obligation of the moral contract between provider and client or patient (Veatch et al., 2010).

Whereas respecting Fidelity requires occupational therapy personnel to meet the client’s reasonable expectations, the Principle also addresses maintaining respectful collegial and organizational relationships (Purtilo & Doherty, 2011). Professional relationships are greatly influenced by the complexity of the environment in which occupational therapy personnel work. Practitioners, educators, and researchers alike must consistently balance their duties to service recipients, students, research participants, and other professionals as well as to organizations that may influence decision making and professional practice.

Related Standards of Conduct
Occupational therapy personnel shall

A. Preserve, respect, and safeguard private information about employees, colleagues, and students unless otherwise mandated or permitted by relevant laws.
B. Address incompetent, disruptive, unethical, illegal, or impaired practice that jeopardizes the safety or well-being of others and team effectiveness.
C. Avoid conflicts of interest or conflicts of commitment in employment, volunteer roles, or research.
D. Avoid using one’s position (employee or volunteer) or knowledge gained from that position in such a manner as to give rise to real or perceived conflict of interest among the person, the employer, other AOTA members, or other organizations.
E. Be diligent stewards of human, financial, and material resources of their employers, and refrain from exploiting these resources for personal gain.

F. Refrain from verbal, physical, emotional, or sexual harassment of peers or colleagues.

G. Refrain from communication that is derogatory, intimidating, or disrespectful and that unduly discourages others from participating in professional dialogue.

H. Promote collaborative actions and communication as a member of interprofessional teams to facilitate quality care and safety for clients.

I. Respect the practices, competencies, roles, and responsibilities of their own and other professions to promote a collaborative environment reflective of interprofessional teams.

J. Use conflict resolution and internal and alternative dispute resolution resources as needed to resolve organizational and interpersonal conflicts, as well as perceived institutional ethics violations.

K. Abide by policies, procedures, and protocols when serving or acting on behalf of a professional organization or employer to fully and accurately represent the organization’s official and authorized positions.

L. Refrain from actions that reduce the public’s trust in occupational therapy.

M. Self-identify when personal, cultural, or religious values preclude, or are anticipated to negatively affect, the professional relationship or provision of services, while adhering to organizational policies when requesting an exemption from service to an individual or group on the basis of conflict of conscience.

References

Ethics Commission (EC)
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