



ACOTRO Position Statement regarding Utilizing Occupational Therapist Assistants in Occupational Therapy Service Delivery

Purpose

Regulation of health professions is a public protection measure to ensure safe, effective care by a health care provider to the public. Occupational therapists may include assistants in their delivery of services to optimize service delivery. This position statement is to assist ACOTRO members to agree on a common understanding of the use of OTAs and the expectations of occupational therapists who supervise them, regardless of the presence of provincial differences in the management of such services.

Legislative Authority

1. Each province gains their regulatory authority through provincial legislation.
2. The oversight of occupational therapist assistants is through an occupational therapist.
3. Each province is responsible for the standards related to specific requirements for occupational therapists in their supervision of assistants.

Role of the occupational therapist when Utilizing assistants to deliver OT services

- Initiation of OT service
- Conducting OT assessments, especially when clinical judgement is required
- Interpretation of assessments
- Intervention planning, setting goals
- Communication requiring clinical judgment
- Discharge decisions/planning
- Determining if an assignment of occupational therapy service components to assistants, related to intervention plans and goals is appropriate.

Role of the occupational therapist assistant

- Carry out intervention plans assigned to them by an occupational therapist
- Represent themselves as an assistant to an OT and works under the direction/supervision of an OT. OTA's do not work independently.

Terminology

- **Titles for occupational therapist assistants**
 - OTA, Support person, Rehabilitation assistant, OTA/PTA, rehabilitation support worker etc.



- Assistants do not need to graduate from an OTA program to provide support or assistance to an OT, however, should have the ability to provide the needed service components assigned to them.
- **Use of Title OTA**
 - The title OTA, or occupational therapist assistant is not protected in Canada. This is used to convey a job title for service providers who are assigned OT service components under the supervision of an OT.
 - The title “OT” or occupational therapist, in contrast, is a legally protected title in each province in Canada. No one who is not duly registered can use the title, its variations or imply they are an OT.
- **Terminology**
 - An OTA is a service provider who completes *work* under supervision.
 - An OT is an autonomous professional, accountable for their *practice*.
 - Work or OT service components are assigned to an OTA. The use of the term ‘delegation’ has specific meaning in some provinces to mean the delegation of a regulated activity, restricted act, or controlled act, to another provider.

Accountability

- The OT is fully accountable for all OT service components assigned by them to an OTA and should only assign activities that the OTA is competent to perform.
- An OTA cannot function in their OTA role if there is no OT available to provide supervision.
- When an OTA is performing additional tasks that do not fall under the responsibility of the OT, the OTA is accountable to their direct supervisor or another regulated health professional. E.g. if administering a mobility plan assigned by a physiotherapist or performing administrative tasks in a facility. Overall performance management of the OTA may or may not be the accountability of the OT. This depends on the organizational design.

Supervision

- Supervision includes the assignment of appropriate activities, monitoring the progress of the client and modifying the assigned activities, and ensuring that the activities are being carried out safely and effectively.
- Supervision can include meetings with the OTA, direct observation of interventions, and chart review.
- Supervision can be direct, indirect, or remote.
 - *Direct – the OT is in the vicinity of, or in direct visual contact with the OT*



- *Indirect – the OT is in the same facility and may be easily contacted*
- *Remote – there is no OT onsite. In these cases, there must be a documented supervision plan, a plan for emergencies, a designated on-site health care professional for concerns or emergencies, the OT is available by teleconference.*
- When supervising multiple OTAs, ensure clients receive safe and effective service by each OTA and that the OT can provide effective supervision. There is no maximum ratio of OTAs to OTs that have been defined, however, the principles of safety and effectiveness would need to be considered to ensure client safety.

Consent

- Ensure that clients know and consent to an OTA's involvement in their service.

Record Keeping and Billing

- The OT is responsible to ensure that appropriate records are kept related to assignment of tasks to an assistant.
- Records do not need to be co-signed by the OT, if completed by an OTA, however, if a facility requires this, it is acceptable for an OT to acknowledge the documentation of an OTA, by indicating this in the record. This may take the form of a co-signature.
- OTs should transparently communicate any fees associated with OTA services when obtaining client consent for the involvement of the OTA.

Risk Management and Safety

- The OT is responsible to assign only those activities that can be safely performed by the OTA. Each OTA's competencies are different, so assignments must be confirmed for each OTA.

Consultation and Programming

- When an OT works in the capacity of a consultant for providing education, recommendations or programming that is then carried out by staff in a facility or by service providers, these staff or service providers are not acting in the capacity of an OTA. The OT is accountable for their recommendations and programming but is not directly responsible for the personnel that carry them out.
- OTs must be clear with themselves and those involved, about the distinction between situations that involve the use of OTAs and situations when the OT is in a consulting or programming role.