

## **SPECIALIZED KNOWLEDGE AND SKILLS IN TECHNOLOGY AND ENVIRONMENTAL INTERVENTIONS FOR OCCUPATIONAL THERAPY PRACTICE**

### **Purpose**

The purpose of this document is to describe the knowledge and skills that are necessary for occupational therapists and occupational therapy assistants<sup>1</sup> to provide ethical, competent occupational therapy services related to technology and environmental interventions. Intended for internal and external audiences, it provides information about occupational therapy practitioners' roles and collaborative partnerships with other professionals in technology and environmental interventions, outlines professional development and supervision guidelines, defines terms related to technology and environmental interventions, and describes entry- and advanced-level knowledge and skills. In this document, the phrase *technology and environmental interventions* represents the broad range and combination of technology, environmental interventions, and reasonable accommodation strategies. The emphasis is on technology and environmental interventions that support the ability of people with or without disabilities to fully participate in their daily lives in accessible environments and livable communities and through engagement in occupations.

### **Introduction**

Occupational therapy practitioners have long-standing expertise in providing occupational therapy services to clients that incorporate technology and environmental modification, often in collaboration with other professionals. Clients include individuals, organizations, and populations (American Occupational Therapy Association [AOTA], 2008). When addressing technology and environmental interventions, occupational therapy practitioners consider the context in which people engage in daily life occupations that support their participation, health, and wellness. On the basis of their understanding of their clients' occupational engagement desires and needs, capacities, and contexts, occupational therapy practitioners collaborate with the client and with other professionals in the evaluation, design, fabrication, customization, modification, and application of new or existing technologies and environmental interventions. They also conduct outcome studies, support advocacy initiatives, offer guidance regarding funding resources and referrals, and provide training and consultation (Hammel & Angelo, 1996). Occupational therapy practitioners deliver technology and environmental-related services in a variety of settings, such as hospitals, rehabilitation centers, skilled nursing facilities, outpatient facilities, home health agencies, schools, work sites, industry, homes, and communities and in a variety of roles such as the primary service provider, team member, advocate, and expert consultant.

### **Occupational Therapy's Role in Technology and Environmental Modification**

Technology and environmental interventions can support people's participation in occupations which, by definition, hold purpose and meaning for them. This is especially beneficial when the

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<sup>1</sup> Occupational therapists are responsible for all aspects of occupational therapy service delivery and are accountable for the safety and effectiveness of the occupational therapy service delivery process. Occupational therapy assistants deliver occupational therapy services under the supervision of and in partnership with an occupational therapist (AOTA, 2004a). When the term *occupational therapy practitioner* is used in this document, it refers to both occupational therapists and occupational therapy assistants (AOTA, 2006).

activities are otherwise too difficult or challenging. Occupational therapy practitioners collaborate with the client and other professionals to create a successful match among the client, the technology, and environmental interventions and the context for their use. As part of therapeutic services, occupational therapists are trained to conduct comprehensive evaluations to identify the skills and abilities of the client and to guide the recommendation for services. The evaluation includes the development of an occupational profile and selecting, administering, and interpreting assessments to analyze the occupational performance of individuals, organizations, and populations. This includes consideration of the client's performance skills, capacities, and performance patterns, the characteristics of the technology and the environmental interventions, the activity demands, and the contexts for the technology and environmental interventions. Occupational therapy assistants contribute to the evaluation process by gathering data and administering selected assessment tools or measures for which they have demonstrated competence (AOTA, 2004a).

During intervention, both occupational therapists and occupational therapy assistants select, administer, and adapt technologies and environments that support the intervention plan developed by the occupational therapist. The goal is to promote, improve, or maintain the ability of people to engage in basic and instrumental activities of daily living: work, education, leisure, play, social participation, and sleep occupations that are meaningful and necessary (AOTA, 2008). Examples include the selection and adaptation of computers and software to support education and work; the positioning and modification of speech and communication devices to facilitate social participation; the design and customization of seating devices, mobility equipment, and physical environments to promote play and leisure participation; the selection and training in the use of environmental controls and of vision and hearing technologies to support involvement in instrumental activities of daily living; and the fabrication and modification of assistive devices for self-care tasks. Interventions also may focus on advocacy initiatives, educational and training programs for organizations and populations, and policy development that promote accessible environments and livable communities.

When measuring the outcomes of interventions, occupational therapy practitioners focus on how the technology and environmental interventions support the client's health, participation (World Health Organization, 2001), and engagement in occupation (AOTA, 2008). The selected outcomes need to be measurable, reliable, and valid; sensitive to measuring change; reflective of clients' goals; and consistent with payer needs. Outcomes include subjective impressions such as improved competence, well-being, self-efficacy, hope, and quality of life (AOTA, 2008). Outcomes also include objective measurements such as improved efficiency, accessibility, task completion, independence or interdependence, and the ability of the client to assume or regain valued life roles and occupations.

Occupational therapy practitioners must adhere to state and agency regulatory laws when providing services across practice setting and the continua of care. Reimbursement for services may be available through various sources, including legislation (e.g., Individuals with Disabilities Education Improvement Act, Medicare), private insurance, Medicaid, and private pay.

### **Professional Development**

For both occupational therapists and occupational therapy assistants, the progression from entry-level to advanced-level knowledge and skills related to technology and environmental

interventions evolves through education and experience. At a level commensurate with their respective academic programs, occupational therapy and occupational therapy assistant students receive education in the structure and function of the human body, including the biological and physical sciences; human development throughout the life span and human behavior, including the behavioral and social sciences; and effects of mental and physical health, disease processes, genetic conditions, trauma, and context on occupational performance. They acquire foundational knowledge and skills regarding technology and environmental interventions, and they develop clinical-reasoning skills to consider the interplay of physical, cognitive, environmental, and sociocultural factors in providing effective services (AOTA, 2007a, 2007b, 2007c). Over time, as they advance in their education and arena of practice, occupational therapy practitioners may develop additional expertise in technology and environmental interventions. They ensure advanced knowledge and skills in technology and environmental interventions by maintaining and documenting competence in practice, education, and research and by participating in professional development, educational activities, and critical examination of available evidence (AOTA, 2004c). Examples include participating in local and national continuing education conferences such as those sponsored by AOTA, the Assistive Technology Industry Association (ATIA), Closing the Gap (CTG), the California State University National Conference (CSUN), and the Rehabilitation Engineering and Assistive Technology Society of North America (RESNA); completing postsecondary courses; and seeking advanced competency and specialty certification through AOTA or external organizations, such as RESNA. In addition, they gain higher level knowledge, skills, and clinical reasoning through experience and mentoring opportunities.

The occupational therapy practitioner's acquisition of advanced-level knowledge and skills related to technology and environmental interventions is individualized; thus, a practitioner may possess differing levels of expertise in a wide variety of skill areas and populations served by occupational therapy. For example, an occupational therapy practitioner may have advanced-level skills in computer and information technologies for students in school systems but only entry-level knowledge in vehicle modification and transportation for older adult populations. It is the ethical responsibility of occupational therapy practitioners to ensure that they are competent in the services they provide and routinely seek out new knowledge and techniques that apply to their practice (AOTA, 2004c).

### **Supervision Considerations**

The amount of supervision provided to occupational therapy practitioners in the area of technology and environmental interventions directly relates to their training and experience and state practice acts. Occupational therapy assistants and entry-level occupational therapists should seek supervision and mentoring from a more experienced occupational therapist or an occupational therapist with advanced knowledge and skills in technology and environmental interventions. The occupational therapist and occupational therapy assistant also may supervise other non-licensed personnel when providing technology and environmental modification to clients (AOTA, 2004a). Most state practice acts mandate the frequency and duration for supervision of entry-level occupational therapists, occupational therapy assistants, and non-licensed personnel. The occupational therapist has the primary role in evaluation and intervention planning; the occupational therapy assistant collaborates with the occupational therapist in the provision of specific interventions (AOTA, 2004a, 2004b, 2004c).

## Terminology and Definitions

- **Assistive technology device (ATD):** “Any item, piece of equipment, or product system, whether acquired commercially, modified, or customized, that is used to increase, maintain, or improve functional capabilities of individuals with disabilities.” *Assistive technology service* means “any service that directly assists an individual with a disability in the selection, acquisition, or use of an assistive technology device” (Assistive Technology Act of 2004, P.L. 108-364), including evaluation, fitting and customization, coordination of services, and training.
- **Basic technology:** Commonly used technologies or environmental interventions such as activities of daily living equipment and basic home modifications (Hammel & Angelo, 1996).
- **Complex technology:** Technology and environmental interventions that require advanced or specialized knowledge, training, and experience to evaluate, provide interventions, and measure outcomes such as custom seating and mobility and integrated systems (e.g., mobility + environmental control + computer access) (Hammel & Angelo, 1996).
- **Electronic and information technology:** Information technology, equipment, and interconnected systems or subsystems of equipment that are used in the creation, conversion, or duplication of data or information. It includes, but is not limited to, telecommunications products (e.g., telephones), information kiosks and transaction machines, Internet sites, multimedia, and office equipment such as copiers and fax machines (U.S. Access Board, 2000).
- **Rehabilitative and educational technologies:** Technology “used as a tool for remediation or rehabilitation,” such as visual perception or cognitive training, improvement in motor control, or identification of letters and numbers. Depending on the client contexts, rehabilitation and educational technologies have the role of remediation, restoration, or acquisition of foundational skills (Cook & Polgar, 2008, p. 6).
- **Technology:** The combination of assistive, basic, complex, electronic and information, and rehabilitative and educational technologies.
- **Technology and environmental competency (TEC):** The combination of technology (e.g., assistive, electronic and information, rehabilitative), environmental interventions, and reasonable accommodation strategies used to increase, maintain, or improve functional capabilities of individuals with disabilities and/or create accessible environments (e.g., home, work, school, community, virtual).
- **Universal design:** The design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design (Center for Universal Design, 1997).

## Entry- and Advanced-Level Knowledge and Skills

The appendix provides a matrix that outlines the entry- or advanced-level knowledge and skills that occupational therapists and occupational therapy assistants should demonstrate when

providing occupational therapy services related to technology and environmental interventions. An *X* denotes the minimum knowledge and skills that the occupational therapist or occupational therapy assistant should demonstrate to practice competently at that level; an *A* denotes that the occupational therapist or the occupational therapy assistant may assist or contribute information but is not able to perform the task alone and requires supervision. Occupational therapy practitioners have a professional responsibility to work within their own level of competency, as well as within the scope of practice as defined and regulated by state licensure and *Occupational Therapy Code of Ethics*, including the duty to maintain high standards of competency within a practice area and to seek out supervision and continuing education in those areas of practice that are above their level of competency (AOTA, 2004b, 2005).

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### **Authors**

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This 2008 paper was revised by

Joy Hammel, PhD, OTR/L, FAOTA, *Chairperson*  
Daniel Knowland, OTR/L  
Roger Smith, PhD, OT, FAOTA  
Lynn Gitlow, PhD, OTR/L, ATP  
Robin Jones, COTA, ROH  
Susan Leech, EdD, OTR, ATP  
Beth Goodrich, MEd, MS, OTR, ATP  
Brent Braveman, PhD, OTR/L, FAOTA

With contributions from

Janet V. DeLany, DEd, OTR/L, FAOTA  
Kim Hartmann, PhD, OTR/L, FAOTA

for

The Commission on Practice  
Susanne Smith Roley, MS, OTR/L, FAOTA, *Chairperson*

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**APPENDIX. Specialized Knowledge and Skills in Technology and Environmental Interventions**

X = able to perform the task.

A = assists with the task.

■ = does not perform the task.

		Entry-Level		Advanced	
Knowledge and Skills		OTA	OT	OTA	OT
<b>All knowledge and skills assume active collaboration with the client, consumer, or user of the technology and environmental solutions, significant others relevant to the situation (e.g., family, caregivers), service delivery team members, and other relevant stakeholders (e.g., case managers, funders, advocates) throughout the process.</b>					
<b>A.</b>	<b>Evaluation</b>				
<b>A.1</b>	<i>Upon referral for services, screen for occupational performance capacities and limitations, screen for environmental supports and barriers, and identify if the need for a comprehensive OT evaluation exists.</i>	<b>A</b>	<b>X</b>	<b>A</b>	<b>X</b>
<b>A.2</b>	<i>Determine technology and environmental needs as part of a comprehensive OT evaluation that includes occupational profile and an analysis of occupational performance.</i>	■	■	■	■
A.2.a	Evaluate the client’s occupational and participation needs in areas of occupation (e.g., basic and instrumental activities of daily living, education, work, play, leisure, social participation, sleep) and the potential need for technology and environment applications to support these needs.	<b>A</b>	<b>X</b>	<b>A</b>	<b>X</b>
A.2.b	Evaluate the client’s contexts, including cultural, virtual, temporal (e.g., chronological, developmental, life cycle, disability status), and environments (physical, social) for their influence on technology and environmental access, application, and use.	<b>A</b>	<b>X</b>	<b>A</b>	<b>X</b>
A.2.c	Assess prior and current use of technology and environmental interventions across existing roles, occupations, activities, and contexts.	<b>A</b>	<b>X</b>	<b>A</b>	<b>X</b>
A.2.d	Evaluate and analyze the activity demands, the client’s performance skills and performance patterns, and client factors across contexts of potential technology and environmental use, including transitions between contexts.	<b>A</b>	<b>X</b>	<b>A</b>	<b>X</b>
A.2.e	Screen and identify the level of technology and environmental intervention needed, ranging from none to basic to advanced/complex.	<b>A</b>	<b>X</b>	<b>A</b>	<b>X</b>
A.2.f	Communicate range of relevant and related interventions that could be considered (e.g., technology, environmental modification, training, pharmacology, surgery, therapy).	<b>A</b>	<b>X</b>	<b>A</b>	<b>X</b>

	Knowledge and Skills	Entry-Level		Advanced	
		OTA	OT	OTA	OT
A.2.g	Refer clients to appropriate professionals for technology and environmental resources when the services the client needs or seeks are beyond the scope of practice and competency level of the OT practitioner.	X	X	X	X
<b>A.3</b>	<i>Conduct a BASIC technology and environmental evaluation.</i>				
A.3.a	Evaluate basic technology and environmental needs within areas of occupation (e.g., basic and instrumental activities of daily living, work, education, play, leisure, social participation, sleep).	A	X	A	X
A.3.b	Compare and contrast different basic technology and environmental features and access methods in relation to the client, activity and environmental needs, supports, demands, and constraints.	A	X	X	X
A.3.c.	Integrate basic theoretical information from OT, occupational science, and other disciplines into the plan (e.g., physical therapy, speech and language pathology, audiology, disability studies, engineering, rehabilitation engineering, education, ergonomics, psychology, public health, sociology, anthropology, architecture, urban planning).	A	X	A	X
A.3.d.	Interpret and integrate basic technology and environmental evaluation results into intervention or service delivery plan and also outcome measures, reevaluating as needed.	A	X	A	X
A.3.e.	Develop occupational goals, anticipated outcomes, and intervention plans, incorporating basic technology and environmental applications as appropriate.	A	X	A	X
A.3.f.	Coordinate evaluation of OT-related needs within interdisciplinary basic technology and environmental services.	A	X	A	X
<b>A.4</b>	<i>Conduct specialized or complex technology and environmental evaluations (assumes A.1–A.3 met).</i>				
A.4.a	Conduct advanced evaluation of complex or specialized technology and environmental applications (e.g., those related to computer access, seating and positioning needs, mobility and driving programs, sensory needs, environmental control, communication alternatives).	A	A	A	X
A.4.b	Utilize information resources on specialized or complex technology and environmental applications within decision making.	A	A	X	X
A.4.c	Compare and contrast different complex, specialized, or integrated technology and environmental features and access methods in relation to the client, contexts, activity, and environmental needs, supports, demands, and constraints.	A	A	X	X
A.4.d	Integrate advanced technology and environmental theoretical information from OT, occupational science, and other disciplines into the intervention or service delivery plan	A	A	A	X

	Knowledge and Skills	Entry-Level		Advanced	
		OTA	OT	OTA	OT
	and also outcome measures.				
A.4.e	Evaluate relationship of materials and different design choices, including advantages, trade-offs, and constraints within complex technology and environmental plans.	A	A	X	X
A.4.f	Interpret and integrate results of complex technology and environmental evaluation into intervention or service delivery plans and also outcome measures, reevaluating as needed.	A	A	A	X
A.4.g	Develop advanced technology and environmental goals, anticipated outcomes, and intervention plans, with incorporation in OT intervention plan and outcome measures, as relevant.	A	A	A	X
<b>B.</b>	<b>Intervention</b>				
<b>B.1</b>	<i>Provide technology and environmental interventions as part of a comprehensive OT plan.</i>				
B.1.a	Provide basic interventions that optimize the client’s performance skills, performance patterns, and body functions. Examples include daily living skills training, cognitive rehabilitation, strengthening, ergonomic practice, visual/perceptual rehabilitation, and energy conservation.	X	X	X	X
B.1.b	Provide basic interventions that optimize the client’s engagement in areas of occupation within the home, work, school, and community contexts. Examples include environmental interventions, ergonomic design, ADA training, and disability awareness training to promote participation and accessibility.	X	X	X	X
B.1.c	Design, alter, and/or adapt tasks to meet the occupational and activity demands of the context. Examples include rewriting job descriptions, rearranging class schedules, sharing job duties, and comparing level of assistance to do task (attendant vs. technology).	X	X	X	X
<b>B.2</b>	<i>Provide access to, delivery of, and training in basic technology and environmental applications.</i>				
B.2.a	Utilize design and fabrication principles within basic technology and environment applications, including consideration of mechanics/strength of materials, mechanical components, systems, and electrical circuits and components.	A	X	X	X
B.2.b	Incorporate universal design principles within technology and environmental applications (e.g., simplicity, ease of use, equitable access).	A	X	X	X
B.2.c	Address issues of repair and maintenance in basic technology and environmental applications, including basic repair, preventative maintenance training and schedules, and limitations and violations of warranty for mechanical, electrical, and electronic equipment.	X	X	X	X

	Knowledge and Skills	Entry-Level		Advanced	
		OTA	OT	OTA	OT
B.2.d	Address factors related to cost and benefit/impact of custom versus commercial technology and environment applications.	A	X	A	X
B.2.e	Perform product trials, recommend product specifications, order technologies and environmental solutions, and install and train individuals in use, maintenance, and repair.	A	X	X	X
B.2.f	Utilize fabrication tools, materials, and machines as needed to match basic technology and environmental applications to user's needs.	X	X	X	X
B.2.g	Participate in the design, fabrication, and customization of basic technology and environmental applications within a defensible level of competence as appropriate to the case and the level of expertise required, with referral to advanced expertise as indicated.	X	X	X	X
B.2.h	Periodically reevaluate basic technology and environmental use, needs, and integration into everyday life.	A	X	A	X
<b>B.3</b>	<i>Provide access to, delivery of, and training in complex or specialized technology and environmental applications (assumes B.1–B.2 met).</i>				
B.3.a	Utilize advanced design and fabrication principles (e.g., design to address issues of corrosion, temperature, pressure over time, compatibility or integration of multiple technologies).	A	A	A	X
B.3.b	Utilize advanced environmental and universal design principles to match client needs and specific environmental demands (e.g., school, work, community, home).	A	A	A	X
B.3.c	Address issues of compatibility and integration of technologies (e.g., hardware and software interface) across different environments and systems/equipment.	A	A	X	X
B.3.e	Utilize fabrication tools, materials, and machines as needed to match user's needs.	A	X	X	X
B.3.f	Perform product trials and feature analyses; coordinate delivery and installation of technology and environmental interventions; and train technology and environmental user and important others in the use, repair, and maintenance of complex, specialized, and integrated technology and environmental applications (e.g., wheelchair, environmental control, augmentative communication for education and work).	A	X	A	X
B.3.g	Collaborate in the design, fabrication, and customization of complex or specialized technology and environmental applications within a defensible level of competence as appropriate to the case and the level of expertise required, with referral to specialized expertise as needed.	A	A	A	X

		Entry-Level		Advanced	
Knowledge and Skills		OTA	OT	OTA	OT
B.3.h	Periodically reevaluate complex technology and environmental use, needs, and integration into everyday life.	A	X	A	X
<b>C.</b>	<b>Evidence-Based Practice and Outcomes</b>				
<b>C.1</b>	<i>Participate in and apply results from evidence-based practice within OT and basic technology and environmental service delivery.</i>				
C.1.a	Identify and document the outcomes of OT and basic technology and environmental interventions, including those related to occupational performance, participation in daily life, emotional and physical health and wellness, prevention, quality of life, and consumer use and satisfaction.	X	X	X	X
C.1.b	Participate in OT and basic technology and environmental program evaluations and continuous quality improvement initiatives to improve the effectiveness and efficiency of service delivery.	X	X	X	X
C.1.c	Participate in OT, occupational science, and basic technology and environmental research.	X	X	X	X
C.1.d	Critically analyze and apply evidence-based research within OT and basic technology and environmental practice.	A	X	A	X
<b>C.2</b>	<i>Participate in evidence-based practice within OT and complex or specialized technology and environmental delivery (assumes D.1 knowledge and skills met).</i>				
C.2.a	Identify and document the outcomes of OT and advanced technology and environmental interventions, including those related to occupational performance, participation in daily life, emotional and physical health and wellness, prevention, quality of life, and consumer use and satisfaction.	A	A	A	X
C.2.b	Participate in OT and advanced technology and environmental quality improvement and program evaluation activities.	A	A	A	X
C.2.c	Participate in OT, occupational science, and advanced technology and environmental research.	A	A	X	X
C.2.d	Critically analyze and apply evidence-based research within OT, occupational science, and advanced technology and environmental practice.	A	A	A	X
<b>D.</b>	<b>Resource Coordination and Advocacy</b>				
<b>D.1</b>	<i>Provide and coordinate OT and basic technology and environmental resources, services, and supports.</i>				

	Knowledge and Skills	Entry-Level		Advanced	
		OTA	OT	OTA	OT
D.1.a	Understand and apply technology and environmental-related legislation and policies across the delivery process (e.g., ADA, IDEA, Technology Act).	X	X	X	X
D.1.b	Utilize and link clients and consumers to basic technology and environmental information resources (e.g., product databases, vendors, legislation and policies, funding/reimbursement sources, additional services, user groups, conferences, continuing education, advocacy organizations, legal).	X	X	X	X
D.1.c	Effectively communicate the role of OT practitioners in providing a global, occupation-based perspective encompassing technology and environmental use and delivery.	X	X	X	X
D.1.d	Describe the contributions of other disciplines and their roles within technology and environmental service delivery (e.g., rehabilitation engineering, physical therapy, speech and language pathology, audiology, engineering, education, vocational rehabilitation, case management).	X	X	X	X
D.1.e	Describe the role of distributors, vendors, suppliers, manufacturers, designers, and fabricators within technology and environmental delivery.	X	X	X	X
D.1.f	Describe mechanisms, regulations, and policies regarding delivery and funding/reimbursement of basic OT and technology and environmental applications.	X	X	X	X
D.1.g	Strategize different sources of funding (e.g., government funding, foundation grants, loan programs, private resources) within different settings (e.g., inpatient, community, schools, worksite) to improve access, including shared or matched funding strategies.	X	X	X	X
D.1.h	Justify and document the provision of OT and basic technology and environmental services and solutions for reimbursement.	X	X	X	X
D.1.i	Participate in advocacy activities related to technology and environment on an individual case level, and collaborate with consumer to become an informed self advocate for his or her own needs.	X	X	X	X
D.1.j	Participate in advocacy activities related to technology and environmental on a systems change level, and collaborate with the disability community in technology and environmental activism.	X	X	X	X
D.1.k	Maintain the <i>Occupational Therapy Code of Ethics and Standards of Practice</i> in primary discipline or field (e.g., therapy, engineering, education) and within technology and environmental service delivery.	X	X	X	X
<b>D.2</b>	<i>Provide and coordinate complex or specialized technology and environmental resources (assumes D.1 met).</i>				

		Entry-Level		Advanced	
		OTA	OT	OTA	OT
	<b>Knowledge and Skills</b>				
D.2.a	Utilize and link clients and consumers to complex or specialized technology and environmental information resources (e.g., product databases, vendors, legislation and policies, funding/reimbursement sources, additional services, user groups, conferences, continuing education, advocacy organizations, legal assistance).	X	X	X	X
D.2.b	Describe mechanisms for obtaining reimbursement of OT and complex or specialized technology and environmental services.	A	A	A	X
D.2.c	Justify and document the provision of OT and complex or specialized technology and environmental services.	A	A	A	X
D.2.d	Maintain the <i>Occupational Therapy Code of Ethics and Standards of Practice</i> in specialized fields of technology and environmental service delivery (e.g., seating and mobility, computer access).	X	X	X	X