

# Using Occupational Therapy Assistant Perspectives to Teach Occupational Therapy Supervisory Roles and Expectations

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## Abstract

Occupational therapy assistant (OTA) supervision is an expected skill and role of entry-level occupational therapists (OTRs). The purpose of this convergent mixed-methods study is to provide occupational therapy students (OTSS) with an interactive and collaborative educational opportunity, using an OTA-perspective panel discussion to improve the learning of effective supervision and role delineation. Participants consisted of OTSS ( $n = 11$ ) in a graduate master's program and a panel of OTAs ( $n = 10$ ). All participants were provided with a standard lecture on the topic of supervision, followed by a pre-test survey. Then, they participated in a guided panel discussion followed by a post-test survey. Results suggest that an OTA-perspective panel discussion can enhance the learning of supervisory roles and expectations to OTSS, beyond what was provided in the standard lecture ( $p = 0.007$ ). Further data was gathered of all participants consisting of qualitative perspectives. Thematic analysis resulted in enhanced learning of role-delineation, professional perspectives, and supervisory experiences. The results of this study suggest that occupational therapy programs would benefit from similar OTA-led perspective discussions to enhance OTSS understanding of skills needed to be effective supervisors as entry-level occupational therapists.

**Keywords:** Intraprofessional education, occupational therapy assistant, supervision

## 1. Introduction

According to the Accreditation Council for Occupational Therapy Education (ACOTE) (2020) Standards, occupational therapy students (OTSS) are expected to understand and demonstrate intraprofessional occupational therapist (OT)/occupational therapy assistant (OTA) collaboration skills within the OT educational program in preparation for entry-level practice. OTs and OTAs often collaborate to deliver services efficiently and effectively. However, students have limited exposure to learning about the intraprofessional relationship within didactic coursework, limiting their ability to effectively collaborate with OTAs as entry-level practitioners (Nardella et al., 2018).

A survey of 123 OTs practicing in the state of Maine reported key insights to the perception of OTs preparedness to supervision. Less than 70% indicated they were comfortable with supervising OTAs. Furthermore, only 21% reported learning about OTA regulation and rules from their formal educational OT programs, despite this being an ACOTE requirement (Johnson, Lamere-Wallace, & Gardner, 2000).

It appears OT students are not getting the foundational concepts regarding supervision, which limits the quality of the OT/OTA interdisciplinary partnership as well as the effectiveness of the potential working relationship. These issues translate to practice and the OTA's work experience. Penner and colleagues (2020) described some of the challenges OTAs perceive, such as being 'left out of the loop', unclear role delineation, unclear management roles, lack of career development options, as well as internal and external norms and attitudes related to being an 'assistant'. This supervision and role delineation learning process is essential and sparsely occurs in the educational setting, resulting in entry-level occupational therapists lacking the skills to provide adequate supervision and mentoring of OTAs within their scope of roles (Penner et al., 2020). Educators have some intraprofessional collaboration opportunities in fieldwork, but collaboration between OT and OTA students within didactic coursework is limited (Carson et al., 2018).

Dennehy (2017, 2022) described the skills needed for effective intraprofessional collaboration as consisting of

communication, trust, respect, and kindness. Furthermore, diversity and empathy-related behaviors are also described as facilitators for the collaborative process. However, practitioners develop these attributes over time and in the clinical practice setting. In a study in which OTs and OTAs participated in a collaborative fieldwork placement experienced aimed at improving intraprofessional collaboration, the themes that emerged consisted of *understanding the importance of relationships*, *understanding roles*, and *recognizing environment influences learning*. As a result, essential entry-level readiness was gained by participants through an experiential learning opportunity occurring beyond the classroom (Jung, Salvatori, & Martin, 2008).

While there has been increased attention for the need to enhance intraprofessional competencies in the educational setting, prior to work-entry, textbooks and educational institutions are generally inadequate at meeting these needs (Diamant et al., 2018). A survey of 465 practicing OTs and OTAs described the work environment as the primary setting where intraprofessional competencies develop; as opposed to fieldwork, OT education, or continuing educational opportunities (Pitonyak, Corsilles-Sy, Diamant, & James, 2020).

The literature suggests there is a need to develop more effective learning strategies for the OTs to learn about the OT/OTA relationship in the classroom (Penner et al., 2020). Opportunities for collaboration in educational institutions provide gateways to developing and enhancing the OT/OTA relationship, role delineation, and dynamic outcomes through effective intraprofessional collaboration throughout the occupational therapy process (ACOTE, 2020).

The purpose of the present study was to examine whether an OTA-led panel discussion improved master's student's preparedness for fieldwork and entry-level practice regarding the ACOTE Standards for the OT/OTA intraprofessional supervision relationship. This survey study is guided by the following research question: *Does an OTA-led panel discussion improve how OT students learn about intraprofessional collaboration, including role delineation and supervision skills?* The present authors hypothesized that the panel discussion would improve how OTs learn about intraprofessional collaboration beyond what was provided in the standard lecture. The present authors believe achieving this goal entails implementing a discussion that offers insight into perceptions of intraprofessional experience from the OTAs perspective.

## 2. Theoretical Framework

The literature describes the benefits of intraprofessional learning opportunities between OT and OTA students in terms of developing teamwork skills and meeting specific learning objectives (Fan et al., 2021; Johnston et al., 2013). Dillon (2002) gathered information from OT-OTA perspectives that shed light on positive attitudes in practice. Dillon concluded that *mutual respect*, *professionalism*, and *two-way communication* were essential aspects of the intraprofessional collaboration that result in better occupational therapy services. These findings, along with the Intentional Relationship Model (Taylor, 2008), were instrumental in guiding the panel discussion and pre/post survey questionnaire used in the present study.

The Intentional Relationship Model emphasizes the importance of developing interpersonal skills toward creating a therapeutic alliance (Taylor, 2008). This can be achieved through a) collaboration: the supervising therapist facilitates autonomy, b) instructing: the therapist provides clear expectations in clinical practice, and c) problem solving: the therapist uses reasoning to develop most successful strategies for optimal outcomes.

The present study seeks to engage OTs in a meaningful discussion regarding the OT/OTA relationship from this collaboration, instructing, problem solving perspective. By having OTAs share their professional experiences, OTs can better identify role delineations, collaborative working experiences, and understanding of the OT/OTA working relationship toward creating effective patient outcomes. Thus, the current study may help to inform a process for enhancing OT program education in preparing entry-level practitioners for the demands and challenges of OTA supervision (Dennehy, 2017; Dillon, 2002).

## 3. Methods

The present convergent mixed-methods survey study was conducted at Dominican University of NY, in which the master's OT program also offers a bridge program for OTAs seeking an OT degree. The present authors benefited from having access to OTAs within the program to serve as the panelists for the discussion (intervention). The current study received approval by the Dominican University of New York Institutional Review Board.

### 3.1 Participants

A convenience sample was used to recruit participants consisting of first year master's OT students ( $n = 21$ ) in the weekend OT program at Dominican University of New York. Within this cohort were non-OTAs ( $n = 11$ ) and OTAs ( $n = 10$ ). The OTAs are part of the 'bridge' program in which they are seeking a master's degree. These

participants were all enrolled in their first-semester *Foundations* course, where they learn about the OT/OTA supervision and role delineation. All students in this course were invited to participate voluntarily and provided consent. All students participated in the lecture and panel discussion as part of the standard curricular activity, regardless of consent to participate in the data gathering aspect of the research study. Those who declined to participate in the study resulted only in non-participation in the survey questionnaire. All eligible participants consented and participated in the study.

The OTAs made up the panel participants, while the non-OTAs served as the true participants of the study. Only the non-OTA's quantitative data gathered from the pre/post-test surveys were analyzed, as the OTAs presented with high-level of baseline knowledge on the topic due to their prior work experience. However, in terms of qualitative data, all students served as study participants as open-ended question data was gathered from both OTAs and non-OTAs to glean information on how this intervention may have impacted both groups.

### 3.2 Procedure

All participants attended a standard lecture on OT/OTA role delineation and supervision prior to filling out a (pre-test) questionnaire intended to measure their preparedness to effectively communicate and supervise OTAs. The pre-test questionnaire was administered after the standard lecture and before the panel discussion. The participants then participated in a panel discussion in which the OTAs described their work-experiences as supervisees in the OT/OTA intradisciplinary relationship. The post-test questionnaire was administered after the panel discussion. This convergent mixed methodology is intended to help quantify the impact of the panel discussion, while also explaining qualitatively how the participants benefited from the procedure.

The course instructor mediated the panel discussion by using guided questions directed at the OTAs to induce context-rich information regarding their perspectives as supervisees. Non-OTAs were provided opportunities to pose their own follow-up questions and interact with OTA responses as appropriate to the topic. The aim was to create a semi-formal platform for storytelling and exchanging of ideas from the OTA perspective.

As stated above, all participants completed the post-test questionnaire; however, the OTAs demonstrated a high-level of baseline knowledge due to prior experience. Incorporating their results into the quantitative analysis would likely have led to a type II error due to a ceiling effect. Thus, only non-OTAs pre/post survey scores were analyzed as they were the group for which increase in knowledge could be measured. The survey consisted of four competencies regarding intraprofessional collaboration: *communication*, *role delineation*, *supervision*, and *OTAs contribution to the learning of intraprofessional skills*. While this last item does not appear logical, for the pre-test questionnaire (prior to panel discussion), the authors were curious to see how the participants in general perceived the benefit of having OTAs as their classmates throughout the program. Participants were asked to rank their level of perceived competency on a 1-5 Likert scale.

The post-test questionnaire also asked participants to provide comments on their perception of the discussion panel. All participant responses were analyzed as it became apparent that OTAs also found the panel discussion beneficial in a way that was not measurable quantitatively.

## 4. Findings

### 4.1 Quantitative Data Analysis

Due to the small sample size ( $n = 11$ ) for the non-OTAs, the pre-and post-tests comparisons were computed with nonparametric statistics, specifically, the Wilcoxon Signed-Rank test. The results suggested that the panel discussion significantly improved the students' understanding of the OT/OTA intraprofessional relationship ( $Z = -2.687$ ,  $p = 0.007$ ). Statistical significance was found for the individual components: *communication* ( $Z = 2.333$ ,  $p = 0.020$ ), *role delineation* ( $Z = 1.732$ ,  $p = 0.083$ ), and *supervision* ( $Z = 2.121$ ,  $p = 0.34$ ).

These findings suggested that the panel discussion was effective at improving student learning of the OT/OTA intradisciplinary relationship, despite the small sample size of 11 participants (see Table 1). The fourth component, *OTAs contribution to the learning of intraprofessional skills*, did not significantly improve ( $Z = 1.342$ ,  $p = 0.180$ ), however a ceiling effect may be attributable to the wording of this item. Most participants scored the item high on both the pre and post-tests.

Table 1. Wilcoxon Signed-Rank Test Comparison of Non-OTA Students' Survey Results

	Pre-Test Mean (SD)	Post-Test Mean (SD)	Z statistic	Significance Level (p-value)	Effect size <i>r</i>
Communication	3.00 (.89)	3.64 (.81)	2.333	.020**	.703
Role delineation	4.09 (.54)	4.36 (.50)	1.732	.083*	.521
Supervision	2.00 (.89)	2.64 (.92)	2.121	.034**	.639
OTA perspective	4.55 (.69)	4.82 (.40)	1.342	.180	.404
Total	13.64 (1.91)	15.45 (2.02)	2.687	.007***	.809

Note. Students' responses were gathered following a standard class lecture. \*Statistical significance with  $p < .1$ . \*\*Statistical significance  $p < .05$ . \*\*\*Statistical significance  $p < .01$ .

#### 4.2 Qualitative Data Analysis

The authors developed open-ended guided questions for the post-survey questionnaire to extract more descriptive information regarding the benefits of the panel discussion. These questions were validated by an expert panel consisting of two occupational therapy/research instructors who also served as present study project mentors. These questions included:

- 1) What did you like most about the panel discussion?
- 2) Describe how this panel discussion improved your knowledge of the supervision process.
- 3) What aspects of the supervisory role stood out to you the most?

The data gathered was coded by the present study authors. This consisted of a group of second-year graduate occupational therapy students and the primary investigator who is an experienced research instructor in mixed-methods analysis. The authors came together to discuss and agree upon the common emerging themes through a process of peer debriefing. The qualitative analysis identified the following themes as the learned outcomes of the panel discussion: *role-delineation*, *professional perspectives*, and *supervisory expectations*.

#### 4.3 Role-Delineation

Both groups of participants OTAs and non-OTAs expressed benefits from the panel discussion. Several participants expressed how the panel discussion helped to clarify or provide further nuances to the role-delineation beyond what was provided in the formal lecture. This context-rich perspective through varied stories and examples engaged the participants in discussion in which both OTAs and non-OTAs asked further probing questions or provided examples. One non-OTA reported, "I liked how we got to see the perspectives of people who work directly with occupational therapy practitioners because it showed us what their relationships are like and what the role of an occupational therapist is in practice".

#### 4.4 Professional Perspectives

The participants also described the general benefit of learning about the contextual differences between settings, populations, and management/administrators. Furthermore, participants described a benefit from hearing each therapist's unique perspectives and discussions which led to both ethical dilemma and problem-solving discussions. One OTA reported, "While I enjoyed sharing my own experiences; I enjoyed hearing the differences and similarities in everyone's responses. As an OTA, I learned from this process as well". One OTS described the benefit of discussing specific examples of how issues arose in the clinic, stating, "it was interesting to hear how the OT didn't consult with the OTA regarding issues that impacted [the OTA's] ability to provide services." This participant further described how this has influenced her to "consider how my decisions impact the team".

#### 4.5 Supervisory Expectations

Finally, participants described the benefit of discussing the intricacies and nuances of supervisory expectations directly from OTA who are experiencing them as present-day practitioners working in the clinical setting. Despite the formal supervisory guidelines provided in the lecture, participants described learning what could be expected of them as entry-level practitioners and the realistic needs of OTAs they might be asked to supervise.

While this supervisory role expectation can be provided through the standard lecture and through the course instructor's perspective, it appears through the qualitative data that participants valued hearing the OTAs perspective as well.

## 5. Discussion

Effective collaboration is crucial for the skilled delivery of occupational therapy services (AOTA, 2020). This study examined the impact of an OTA perspective panel discussion to enhance the learning of OT students in a master's program regarding the OTR/OTA supervision process. In general, the students described benefits from hearing the real-world perspectives of OTAs and demonstrated enhanced knowledge and understanding of the intraprofessional relationship.

Specifically, the quantitative results indicated that OTSs felt better prepared to communicate with OTAs, have a greater understanding of OTR/OTA role delineation, and have enhanced confidence to supervise OTAs when they entered the field as entry-level practitioners. The results of this study indicated that an OTA panel discussion enhanced knowledge in intraprofessional skills beyond what the standard lecture was able to provide. Additionally, the qualitative aspects of the study resulted in findings suggesting both the non-OTAs and OTAs both benefitted from the discussion, by gaining an enhanced understanding of the soft skills and nuances associated with successful supervision processes.

This panel discussion met the essential Accreditation Council for Occupational Therapy Education [ACOTE] Standard (2020) requirements which are not consistently being met across programs (Penner et al., 2020). Furthermore, the results suggested that participant's learning of supervisory roles were enhanced beyond meeting essential standards, such as the soft skills which are typically gained only through time, experience, and experiential learning opportunities (Dennehy, 2022; Jung et al, 2008); which are typically thought of as possible only in the work environment (Diamant et al., 2018).

In other words, the panel discussion appeared to have enhanced or even accelerated student learning of supervisory roles prior to reaching the fieldwork and work setting phase where those soft skills are typically developed. Not only did the panel discussion support the Accreditation Council for Occupational Therapy Education [ACOTE] Standard (2020) aims to promote professional growth, enhance education, and establish intraprofessional OTA and occupational therapy collaboration skills, but it may have increased the participant's confidence to take on these supervisory roles early on in their education.

### 5.1 Contributions

This study suggests that OTSs can be better prepared for entry-level practice in a supervisory role of OTAs through participation in a panel discussion in which OTAs describe their experiences and perspectives within the curriculum. Current findings contribute to key stakeholders such as OT educators who are responsible for meeting ACOTE (2020) program standards, as well as preparing students for entry level practice. These findings suggest OTS participation in a panel discussion with experienced OTAs may benefit with increased preparedness of performance in fieldwork and entry-level practice. Furthermore, the panel discussion provides OT programs a context-rich and engaging exemplary method for educators to develop competencies in compliance and support of the ACOTE (2020) Standards regarding OTR/OTA supervision, communication, and role delineation.

### 5.2 Limitations and Future Study Suggestions

The present study used a convenience sample from one college, with a small sample size, thus limiting the generalizability of the study findings. Furthermore, a ceiling effect in the pre/post-test questionnaire may have led to limited statistical significance among the *OTAs contribution to the learning of intraprofessional skills* item, as the wording may have lacked sensitivity to the construct of interest.

Future studies should consider analyzing data from various OT programs and attempt to measure the real-world impact on entry-level readiness related to supervisory roles. While the qualitative analysis of the present study sought to understand the OTR student learning perspectives, the panel discussion can also be analyzed for themes as a qualitative description of the OTA supervisee perspectives. In other words, in addition to understanding *how* the students benefitted from the OTA perspective, future research should analyze *what issues do OTAs face as supervisees...and how can OTR students learn and improve from this information?*

### 5.3 Implications for Occupational Therapy Education

Occupational therapy academic programs need to consider the benefits of having OTAs provide their working experiences to OTSs. OTA perspective discussions, in general, should be included in the curriculum to promote intraprofessional collaboration experiences to develop their confidence and effectiveness in supervision (Nardella et al., 2018). The present study benefitted from the unique design of this bridge OTA-to-OT program in which the OTS' experience is greatly enhanced by the presence of some OTAs, who are also in the formative stage of becoming OTs. The results of this study can assist educators in developing programs that promote collaborative

educational experiences that truly foster a deeper understanding of the intraprofessional relationship.

## 6. Conclusion

This study aimed to determine whether OTAs contribute to OTS' understanding of the intraprofessional relationship. The results from the quantitative analysis suggest that the participant's knowledge of the supervisory role improved as a result of participating in an OTA-led panel discussion. In addition, qualitative findings suggest that *both* OT and OTA students benefited from the panel discussion, in which three major shared themes emerged: *role delineation, professional perspectives, and supervisory expectations*. Findings suggest that incorporating OTA-led panel discussions may be beneficial for achieving ACOTE standards and entry-level clinical preparedness. Ultimately, the facilitation of improved intraprofessional OTR/OTA supervision relationships leads to better outcomes for the patient; therefore, effective collaboration between OTRs and OTAs at the educational level warrants more investigation, further attention, and increased opportunities to prepare students with these essential skills.

## Competing Interests Statement

The authors declare that there are no competing or potential conflicts of interest.

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