



Sacred Heart UNIVERSITY

Special Trimester Late Spring/Summer 2026
Course # OT 575

TRANSFORMATION THROUGH HUMAN OCCUPATION: TEAM COLLABORATION IN ADULT & GERIATRIC PHYSICAL DISABILITY

SYLLABUS AND TOPICAL OUTLINE

	Instructor Information
Faculty	Amanda Wheeler, PhD, OTR/L, CLT Madison Altermatt, MS, OTR/L Shawn Cariglio, MS, OTR/L Raquel Collins, MS, OTR/L Stephanie Doyle, MS, OTR/L, CHT, CLT
Contact	#203-365-4777 (Amanda) Contact your assigned faculty member via SHU email or Dr. Wheeler semester coordinator via email or phone
Office Hours	By appointment
Office Location	N125 (Amanda)

Course Overview

	Course Information
Course Meeting Times	Sections A, B, C Thursday 12:00-3:00pm, Section D, E Thursday 4:00-7:00pm
Format	This course series is designed utilizing an experiential approach to learning. The content will be provided through self-directed activities, case studies analysis, lectures and discussions, problem solving in small groups, hands-on activities, and special lab experiences (including clinical simulation and community site visits). The Team Collaboration portion of this content will be provided in synchronous class meetings once per week.
Location	Building location: CHE, 4000 Park Avenue, Fairfield, CT Class location: refer to SPA for your specific section room assignment
Credit & Workload	This is a 3-credit course. The course is offered in a 15-week special trimester calendar. One (1) credit hour represents 45 hours of work over the course of a term, which includes activities such as lectures,



	discussions, group work, individual work, and experiential activities For a three (3) credit hour course, the total expected workload is 135 hours. In a 15-week course, this course averages approximately 9 hours per week.
Prerequisites	Not applicable

Course Information

COURSE DESCRIPTION and PURPOSE:

This course is designed for graduate occupational therapy students and will support development of clinical skills pertaining to evaluation, treatment planning and implementation, and documentation. This course is the second in a series of three that are scaffolded by level of complexity. The problem-based and team-based learning methods will be utilized to conduct classroom activities in this course. Students will be presented with clinical case studies prompting consideration of scientific evidence in relation to areas of occupation, client factors, performance skills, performance patterns, contexts/environments, and activity demands as well as culture, spirituality, and the meaning of occupations will also be considered. Case studies and assignments will encourage students to adopt a holistic view of clients and their caregivers during evaluation and treatment planning, and communication skills required to work on an interprofessional healthcare team. Transformation through Human Occupation: Team Collaboration with Adult & Geriatric Physical Disabilities will place specific emphasis on team-based case analysis of adult and geriatric clients.

COURSE RELATIONSHIP TO OCCUPATIONAL THERAPY PRACTICE AND AOTA VISION 2030:

"Vision 2030 is:

- The guiding force and definitive aspiration for the profession, to which AOTA aligns its organizational, strategic, and operational plans for maximum mission impact over the next five years.*
- Inextricably linked to AOTA's mission to advance occupational therapy practice, education, and research through standard setting and advocacy on behalf of its members, the profession, and the public.*
- Essential to the profession's ongoing viability and success," ([AOTA, 2025](#)).*

"As an inclusive profession, occupational therapy maximizes health, well-being, and quality of life for all people, populations, and communities through effective solutions that facilitate participation in everyday living," ([AOTA, 2025](#)).



Vision Statement: Enriching life for ALL individuals and society through meaningful engagement in everyday activities.

Foundational Pillars			
Inclusive and Equitable Professional Community	Evidence-Based, Client-Centered, and Innovative Practice	Universally Recognized with Valued Excellence	Occupational Justice and Advocacy
Creates a supportive environment fostering belonging, collaboration, networking, and continuous learning for all professionals to enhance growth and development.	Delivers high-quality and skilled care using latest research, focusing on individual client needs and goals while encouraging innovative approaches to enhance treatment outcomes.	Establishes occupational therapy's importance across various settings, demonstrating its unique value in improving individuals' quality of life and functional abilities.	Promotes education, advocacy, accessibility, and the right for ALL to engage in meaningful occupations through collaboration with consumers, other professionals, and policymakers.

([AOTA](#), 2025)

OUR THOUGHTS ABOUT LEARNING IN RELATION TO THIS COURSE

While it may appear that knowledge is certain, that there are facts we can count on, in reality knowledge changes over time. What we did in occupational therapy in the 1950's is not what we do today. We can teach you skills, assessment tools, and specific diagnostic categories, but all of that may be different in 20 years. That tool may no longer exist, the DSM may change the criteria for a diagnosis or drop it altogether, and the skills you rely on today may be shown to be ineffective by tomorrow's research.

Therefore, an important characteristic for you to develop is your capacity for curiosity and the desire to continually learn and improve. If you remain static in OT, you may become bored and may burn out. If the profession remains static, we may become irrelevant. All of us must engage in continual improvement for our profession to remain viable and for us to achieve our centennial vision.

We believe that all our students can learn given sufficient resources, proper instruction, and adequate motivation and effort. For you to continue a path of lifelong learning as an OT, and not become stifled and complacent, you will need the intention to do so, the motivation, drive, and curiosity to ensure you do not become bored or boring, in your practice. We will make this course playful and silly wherever it is appropriate to do so.



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We also believe in evidence-based teaching and have crafted activities and assignments that research suggests will help you learn the material. There is abundant evidence that repetition is important, that writing (in pencil) helps you to remember, that merely reading and highlighting content is not sufficient for long term learning, and that quizzes, and self-questioning will help you learn. We will use many, if not all, of these strategies this semester.

RELATIONSHIP TO CURRICULUM DESIGN:

The cornerstone of the MSOT program and curriculum at SHU is “**Transformation through values-based education.**” Our curriculum design is a blueprint for learning. The curriculum reflects the mission, vision, and philosophy of our program. Our program philosophy contains our beliefs about occupations, human beings, learners, and teaching practices. Consequently, the design of the curriculum has emerged from our philosophical beliefs. The Sacred Heart University occupational therapy program curriculum-design is based on the longstanding symbol of occupational therapy, the profession, going back to our professional history and roots, to that of weaving. Weaving is the craft of fabric production, in which two distinct sets of yarns or threads are interlaced at right angles to form a fabric or cloth. The visual representation of a piece of cloth shows the intersections of the warp and weft of the woven fabric. Our curriculum design utilizes the warp as a representation of the values of the profession, the program, and the university. Within this course, the values of *authenticity, justice, integrity, altruism, and open-mindedness* are emphasized. The weft are the threads or streams of occupational therapy content, knowledge, skills, the experiences that comprise the foundation of our program (occupational performance analysis and interpretation, enabling occupations, scholarship, professional communication, interpersonal skills, and professionalism).

INSTRUCTIONAL METHODS:

The Transformation through Human Occupation course series utilizes a multimodal approach to teaching and learning, including didactic lectures, large and small group discussions, experiential learning activities, and self-directed learning. There will be opportunities to learn through demonstration and hands-on skill development. Instruction may also include on-line synchronous and asynchronous experiences. This course will also introduce learning strategies used in Problem- and Team-Based Learning (PBL/TBL) curriculum as a means to foster students’ independent and collaborative learning. The self-directed time designated in your semester schedule is mandatory. Students are expected to have completed assigned readings prior to class. Other research resources include but are not limited to journal articles, media sources,



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and any material from the previous semester(s). It may also include notes and readings from other courses.

Small groups will break down a case study and will assign students to find out necessary information and bring it back to the group in order to make clinical decisions. Students are expected to discuss current literature and evidence to assist with clinical decision making. You are also expected to utilize creative methods when presenting your research findings to your small groups.

As a group, you will select and demonstrate appropriate evaluation and intervention methods for the clients portrayed in the case studies. You will determine treatment priorities, conduct activity analysis, formulate short-and long-term goals (using the SMART format), and write SOAP notes and treatment plans individually and as a team for the clients portrayed in the case studies. For some of the case studies, your groups will engage in a mock treatment planning meeting involving the “client”, their caregiver(s), other professionals and stakeholders. In addition, you will be expected to present to your peers and instructors as if you were an occupational therapist providing an in-service.

The primary teaching method that will occur in OT575 is problem-based learning (PBL). PBL as a pedagogy and within this course specifically is a student-centered instructional strategy where learners collaboratively explore, and solve complex, open-ended case scenarios to develop critical thinking, clinical reasoning, content knowledge, and self-directed learning skills. You will be graded weekly on your group interactions and presentations.

COURSE POLICIES: All university programs and courses adhere fully to the University Policy on Academic Integrity, as stated in the [Undergraduate and Graduate Catalogs](#) and on the [Academic Integrity Web Page](#). Academic dishonesty (e.g., cheating, plagiarism, and other unethical behavior) could result in a grade of F for the assignment and/or course.

This syllabus and course outline are subject to change by the instructor during the semester. Changes may be necessary because of students’ specific interest(s), general class progression, and class cancellations. If such changes are implemented, they will be announced in class and posted online. This syllabus and any addendums attached shall not be construed by the student as a contract, implied or expressed, between the student and/or the professor and the University.

COURSE MATERIALS:

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REQUIRED TEXTS NEW TO THIS COURSE:

Schofield, K. & Schwartz, D. (2019). *Orthotic Design and Fabrication for the Upper Extremity: A Practical Guide* (1st ed.). Slack. ISBN-13: 978-1630915902

REQUIRED TEXTS FROM PRIOR COURSES

American Psychological Association. (2020). *Publication manual of the American Psychological Association* (7th Ed.). <https://doi.org/10.1037/0000165-000>

Cole, M. B. & Tufano, R. (2020). *Applied theories in occupational therapy: A practical approach* (2nd Ed.). SLACK Incorporated.

Pendleton, H. M. & Schultz-Krohn, W. (2024). *Pedretti's Occupational therapy practice skills for physical dysfunction* (9th ed.). St. Louis, MO: Elsevier. ISBN: 978-0323792554

Sames, K.M. (2015). *Documenting occupational therapy practice* (3rd Ed.). Pearson Education Inc.

Smith-Gabai, H. & Holm, S. E. (2024). *Occupational therapy in acute care* (3rd ed.) Bethesda, MD: AOTA Press. ISBN 13: 978-1-56900621-4

RECOMMENDED TEXTS:

Gillen, G. (2020). *Stroke rehabilitation: A function-based approach* (5th ed.). Philadelphia, PA: Elsevier. ISBN 978-0-323-63994-1

Additional documents will be scanned to Blackboard

Link to SHU Bookstore: [SHU Bookstore](#)

STUDENT BUDGET FOR COURSE SUPPLIES: All materials for this course will be provided by your instructors. The Occupational Therapy Department has already selected and purchased a wide range of materials for use during this course. If, for any reason, you choose to engage and teach an activity for which we do not have the specific materials, you may have to purchase those materials from your own funds. Adjust as needed for your course

INDIVIDUAL AND GROUP WORK: Students are responsible for independent reading of all materials. Students are responsible for independent work, unless there is a requirement for group work. If group work is a requirement, students are expected to



participate fully, collaborate, share, and exchange in equal measure. Adjust as needed for your course

LEARNING OBJECTIVES AND OUTCOMES: Each program in OT must meet the same Accreditation Council for Occupational Therapy Education (ACOTE) standards. How they are met varies from program to program. The standards that are addressed in this course are listed in the table below. This link will allow you to review all the [ACOTE standards](#).

The course objectives, program objectives, the mission and vision of the department and the overall curricular design are all linked to the ACOTE standards. Table 1 shows the connection between the entire course series objectives, the program objectives they are linked to, and the ACOTE standards that are addressed in this course, as well as how we plan to meet and measure the learning objectives for this course.

Table 1- Program Outcomes, Course Objectives, ACOTE Standards, Learning Activities & Measures

Program Outcomes	Course Objective	ACOTE Standard	Learning Activities	Learning Measures
Apply ethical reasoning aligned with the AOTA and the program's values to make decisions and practice professionally.	Apply OT theories and frames of reference to occupational therapy client cases.	B.2.7. Activity Analysis B.3.2 Professional Reasoning	Weekly case breakdown and discussion	Weekly topic presentations and/or case assignments
Demonstrate the knowledge and skills required of an entry level occupational therapist, including critical	Formulate measurable goals and appropriate intervention strategies.	B.3.3. Standardized and Nonstandardized Screening and Assessment Tools		
	Value client centered care and family	B.3.9. Establish, Restore, and Modify		



thinking and clinical reasoning.	centered practice in adult and geriatrics.	B.3.15. Assistive technologies and devices		
Demonstrate leadership through scholarship and professional service	Demonstrate respect for diversity and consider cultural differences in choices regarding assessment, goals, and intervention.	B.3.12. Functional Mobility B.3.11. Community Mobility		
Exhibit team collaboration skills, inter-professional practices, and culturally competent communication	Present complex information clearly so that peers (team members) can understand it.	B.3.14. Superficial Thermal, Deep Thermal, and Electrotherapeutic Agents and Mechanical Devices		
Promote justice through compassionate service to the local and global communities.	Come to conclusions regarding occupational therapy clinical decisions with a case and defend decisions using	B.3.8. Grade and adapt processes and environments B.3.21 Effective communication		
Engage in continual learning and evidence-based practice with		B.4.8 Quality management and improvement		



<p>intellectual open-mindedness.</p>	<p>evidence.</p> <p>Share information with peers/ team members using appropriate terminology, concise communication, and professional demeanor.</p> <p>Work effectively with peers / team members to gather information and make clinical decisions.</p> <p>Discuss client issues with empathy and with thought to their privacy and confidentiality.</p> <p>Initiate and</p>			
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	<p>propose appropriate ideas to help the work of the team.</p> <p>Explain and summarize information within the time-frame allotted</p> <p>Illustrate concepts in PBL for peers/ team members using visuals such as demonstration, images, videos, catalogs, or actual tools and equipment from the labs.</p> <p>Modify behavior in response to team needs.</p> <p>Demonstrate ethical and</p>			
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	<p>professional behaviors as a beginning occupational therapist.</p> <p>Come to conclusions regarding occupational therapy clinical decisions with a case and defend decisions using evidence.</p>			
<p>Demonstrate the knowledge and skills required of an entry level occupational therapist, including critical thinking and clinical reasoning</p>	<p>Demonstrate respect for diversity and consider cultural differences in choices regarding assessment, goals, and intervention</p> <p>Apply OT theories and frames of</p>	<p>B.4.3. Documentation of services</p>	<p>Weekly case breakdown and discussion</p> <p>Goal writing & SOAP Note mini-lectures and practice in class</p>	<p>Goal Writing Assignments</p> <p>SOAP Note Assignments</p>



	reference to occupational therapy client cases.			
	Formulate measurable goals and appropriate intervention strategies.			
Exhibit team collaboration skills, inter-professional practices, and culturally competent communication	Work effectively with peers / team members to gather information and make clinical decisions.	B.3.2. Professional Reasoning	Weekly case breakdown and discussion	Dysphagia and Self-feeding Evaluation assignment
Demonstrate the knowledge and skills required of an entry level occupational therapist, including critical thinking and clinical reasoning	Share information with peers/ team members using appropriate terminology, concise communication, and professional demeanor.	B.3.3. Standardized and Nonstandardized Screening and Assessment Tools	Interprofessional Swallowing Workshop with SLP&OT	
	Apply OT theories and	B.3.13. Dysphagia and Feeding		



	frames of reference to occupational therapy client cases. Formulate measurable goals and appropriate intervention strategies.			
Apply ethical reasoning aligned with the AOTA and the program's values to make decisions and practice professionally Promote justice through compassionate service to the local and global communities Demonstrate the knowledge and skills required of an entry level	Explain and summarize information within the time-frame allotted Demonstrate ethical and professional behaviors as a beginning occupational therapist. Share information with peers/ team members using appropriate terminology, concise communication,	B.2.5. Role in promotion of health and prevention	Weekly case breakdown and discussion	OT Advocacy Presentation



<p>occupational therapist, including critical thinking and clinical reasoning</p>	<p>and professional demeanor.</p> <p>Value client centered care and family centered practice in adult and geriatrics.</p> <p>Apply OT theories and frames of reference to occupational therapy client cases.</p>			
<p>Exhibit team collaboration skills, inter-professional practices, and culturally competent communication</p> <p>Apply ethical reasoning aligned with the AOTA and the program's values to make decisions and</p>	<p>Work effectively with peers / team members to gather information and make clinical decisions.</p> <p>Explain and summarize information within the time-frame allotted.</p>	<p>B.4.6. Care coordination, case management, and consultation</p>	<p>Weekly case breakdown and discussion</p>	<p>Interprofessional Role Play Assignment</p>



<p>practice professionally.</p>	<p>Demonstrate ethical and professional behaviors as a beginning occupational therapist.</p> <p>Come to conclusions regarding occupational therapy clinical decisions with a case and defend decisions using evidence.</p> <p>Formulate measurable goals and appropriate intervention strategies.</p>			
<p>Demonstrate the knowledge and skills required of an entry level occupational therapist, including critical thinking and clinical</p>	<p>Demonstrate ethical and professional behaviors as a beginning occupational therapist.</p> <p>Come to</p>	<p>B.3.10. Plan for discharge</p>	<p>Weekly case breakdown and discussion</p>	<p>Discharge plan assignment</p>



<p>reasoning</p> <p>Apply ethical reasoning aligned with the AOTA and the program's values to make decisions and practice professionally</p> <p>Exhibit team collaboration skills, inter-professional practices, and culturally competent communication</p>	<p>conclusions regarding occupational therapy clinical decisions with a case and defend decisions using evidence.</p> <p>Explain and summarize information within the time-frame allotted.</p> <p>Apply OT theories and frames of reference to occupational therapy client cases.</p> <p>Formulate measurable goals and appropriate intervention strategies.</p>			
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Topical Outline & Course Schedule:

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See separate document with comprehensive outline for all courses associated with Transformation Through Human Occupation: Adult & Geriatric Physical Disabilities (OT574, OT575, OT576)

Final Grades

Please read this section carefully. Final grades will be determined by student performance according to the following:

Assignment/Assessment	Percentage of Grade
<p>PBL Participation/ Topic Presentations</p> <p>Each week you will be graded on your participation in case breakdown and team interactions.</p> <p>Each week as a team, your PBL group will break down a case. As you review your case and identify key learning issues, you will be required to create a brief presentation about one of the learning issues to teach your peers about the information learned (e.g., PPT, mock demonstration, engaging games – creativity is encouraged). You will be graded using the Clinical Reasoning Rubric posted to BB. Facilitators will grade all learning issue presentations.</p>	<p>50% (13 total)</p>
<p>Goal Writing</p> <p>You will be graded 5 times during the semester on the goals you write for the PBL case. These goals should be submitted separately from your group template. You are expected to use the SMART format from the Sames textbook. The grading rubric is located on blackboard.</p> <p>Cases 2, 5, 7, 10, 11</p> <p>All submissions due BEFORE the start of your section class time</p>	<p>10% (5 @ 2% each)</p>
<p>SOAP note Assignment</p> <p>You will submit a SOAP note individually for a patient in cases #4, 8, 9, 12. This is <u>NOT</u> a group assignment. The assignment template and grading rubric are posted to Bb</p>	<p>8% (4 total @ 2% each)</p>



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Home Safety Checklist This is a Pass/Fail assignment, if you submit and it is completed you receive full credit. Your facilitator will provide feedback.	2%
OT Advocacy Presentation You will prepare an in-service for the community members at a senior center. This will be assigned in week 8 and you will present in week 9. The grading rubric is posted to Bb.	10%
Discharge Plan Assignment You will discuss and write a discharge plan with your group. You will be required to include information from the other members of the healthcare team. A template and grading rubric are posted to Bb. Based on case #10, Due Week 11 at time of class	5%
Interprofessional Role Play- Team Meeting Assignment This assignment will help you prepare for an interprofessional team discharge meeting. You will be assigned a role by your facilitator in week 12. You will prepare for your role and present at the team meeting in week 13 (based on PBL case #12). The rubric for this assignment is posted on Bb. You will be graded on your presentation as the assigned member of the team.	10%
Feeding & Swallowing/Dysphagia Evaluation You will work with your PBL group to write an evaluation report for the swallowing and feeding issues for the patient in case #13. You will write the evaluation together. Use the additional information provided to you to complete this comprehensive assessment. The rubric and template are posted to Bb.	5%
Total	100%

The final letter grade is assigned in accordance with the university grading policy: [SHU Graduate Grading System](#).



Student Expectations

ATTENDANCE: As per program policy, a 100% attendance rate for all courses is required. Per university policy, attendance will be recorded on Blackboard for each class and for each student. Absences from classes are allowed only under extraordinary circumstances, such as illnesses, emergencies, religious obligations, or important family events; for example, a wedding of an immediate family member. Documentation for an absence due to an important family event requires at least three weeks advance notice, and documentation of all other absences confirming circumstances that caused them are required within a week of returning to school. Please contact the course instructor in advance of an absence unless it is an emergency. In case of emergency, notify the department as soon as possible.

Failure to follow these procedures will result in the total grade reduction of one letter grade increment for each unexcused absence. Please refer to COVID Contingencies policy in the Student Manual with regards to absences/isolation for colds and flu symptoms, or the SHU [Coronavirus](#) web page. Please note that, while classes might take place online (using Zoom, Webex, or Microsoft Teams) in case of inclement weather or other unforeseen circumstances, attendance policies for the online classes are the same as for the in-person classes.

To the extent permitted by federal and state copyright laws, the class lectures and materials provided by the professor are copyrighted. By participating in the class lectures, students consent to the video and audio recording of said lectures. As part of the requirements of the course, students are required to participate, whether in person or via electronic communications. At the professor's discretion, students may be required to leave their audio and video devices on during the class lectures.

ACADEMIC INTEGRITY and PARTICIPATION: Please refer to the 2025-2027 OT Student Handbook.

PROFESSIONAL BEHAVIORS: Please refer to the 2025-2027 OT Student Handbook.

ARTIFICIAL INTELLIGENCE PLATFORMS: In accordance with Sacred Heart University's [Academic Integrity Policy](#), the use of Artificial Intelligence platforms is on a case-by-case basis in the Department of Occupational Therapy. Students are permitted to use artificial intelligence chatbots (such as ChatGPT) **only when explicitly directed by the instructor**. If you are ever unsure whether the use of an artificial intelligence chatbot is allowed, please contact the instructor prior to using it.

How We Support Your Learning at SHU

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WHAT YOU CAN EXPECT FROM YOUR OCCUPATIONAL THERPAY FACULTY:

- Your materials will always be available to you at least one week before class (usually much earlier than that).
- We will answer your emails during the work week within 24 business hours.
- We will grade your papers and have things back to you within 3 weeks of your turning them in (if you turn them in on time).
- We will explain why we are doing what we are doing. We don't believe in 'busy work' and won't give you any.
- We will have very high standards for your behavior and ours. We believe in Stephen Covey's 7 habits of highly effective people. We also believe that to demonstrate and model responsibility and efficacy, we must have integrity. Integrity starts with making and keeping promises and commitments. We pride ourselves on being dependable and keeping our commitments.
- When we are meeting with you, and in class with you, you will have our undivided attention. We will all practice 'being present' in the moment in our communication with each other. 'Being present' in the moment is an important skill to learn. If it ever seems like we are distracted and not listening fully, please say so. If you ask a question when we are distracted or when we cannot give you our full attention (for example at the beginning of class while setting up), we will tell you so and will tell you when we will be able to give you our full attention.
- We will start and end class on time, unless there are extreme events.
- We spend a lot of time planning what we will do in class and what we think are activities that will help you learn this material- but that will also be fun.
- We will model the same professional behaviors we expect of all of you. We will treat you as a future colleague and an adult student. Please speak with us if you're having any difficulties with the material or assignments. However, we also believe in personal responsibility.

University Supports (Read the University Syllabus Extension)

The university has many supports, services, and policies available to support your success at Sacred Heart University. Be sure to visit this course on Blackboard and click "Syllabus Extension" under the Syllabus module to read important information regarding academic integrity, academic accommodations, learning support services, and more. If you have any questions, please contact your instructor.