

PI THETA EPSILON

The National Honor Society for Occupational Therapy



Student Membership Handbook

A Program of
The American Occupational Therapy Foundation

Background

Mission

The mission of Pi Theta Epsilon is to:

Support the practice of occupational sciences and the practice of authentic occupational therapy by promoting research, leadership and scholarly activities by its members. In this way, the organization serves not only the profession, but helps to ensure quality health care services for the general public.

Ideals

The ideals of Pi Theta Epsilon are to stimulate, recognize, and reward:

- ‡ Clinical practice that demonstrates the principles of authentic occupational therapy; and
- ‡ Educational systems that support excellence in scholarship, research, and critical thinking (related to authentic OT) in its students and faculty.

For example, we want to support educational systems which prepare students to:

- ‡ Become practitioners of authentic occupational therapy
- ‡ Endeavor to conduct research
- ‡ Strive to attain the ideals of PTE and
- ‡ Stimulate research through a program of awards and mentorship.

Purpose

- ‡ Recognize and encourage scholastic excellence of occupational therapy students
- ‡ Contribute to the advancement of the field of occupational therapy through scholarly activities, such as research development, continuing education, and information exchange between student and alumni members and
- ‡ Provide a vehicle for students enrolled in accredited programs in Occupational Therapy to exchange information and to collaborate regarding scholarly activities.

History

Pi Theta Epsilon is the national honor society for occupational therapists. Established in 1958, at the University of New Hampshire (UNH), Pi Theta Epsilon has evolved into a nationally recognized organization with purposes of which all occupational therapists can be proud and with a structure that supports these purposes and the resulting programs.

Why an honor society in occupational therapy? The students at UNH believed that it was important to recognize outstanding members of their classes; they wanted to be able to bestow a unique honor upon their own graduates and those of other programs. Dr. Anne Henderson, now professor emerita at Boston University, was instrumental in helping to form the chapter, as were three founding members: Nancy Anne Morehouse (Marshall), Faith Barnett, and Mickey Lane Leavey (Gresh). Charter members included Penny Webb, Priscilla Radcliff, Betty Ann Caton, Janet Marie Allaire (Kay), and Elizabeth Ellen Bunker (Lovejoy). The Alpha Chapter at UNH, which served as national headquarters for Pi Theta Epsilon between 1959 and 1970, remains active today.

Beta Chapter, formed at Colorado State University, was the second chapter of Pi Theta Epsilon, followed by Gamma Chapter at Kalamazoo State University (now Western Michigan) and Delta Chapter at Texas Woman's University. They maintained careful records of inductees and initiated several studies to determine the similarity of the occupational therapy programs of the time. For example, they made an effort to exchange information regarding curriculum content at the different programs.

However, the society had no national structure at the time. With the occupational therapy requirement for fieldwork education immediately upon completion of the academic portion of the program, no alumni were available to work toward the development of a national structure. The organization was seen as being for student members; students held office in their local chapters and made efforts to correspond with colleagues in other educational programs. A book of minutes from the Alpha Chapter indicated that members in 1959 created a poster about Pi Theta Epsilon for the next annual American Occupational Therapy Association (AOTA) conference. Pi Theta Epsilon members suggested holding annual Pi Theta Epsilon meetings in conjunction with the AOTA Conference.

In 1983, national headquarters moved to the University of North Dakota where an occupational therapy faculty member, Dory Marken, provided an invaluable service by establishing a record-keeping system. Each chapter was asked to send her a list of inductees each year. These records have made it possible to trace many of the older members of Pi Theta Epsilon.



History, cont.

The urge to become a national organization arose periodically. Student members were eager to see Pi Theta Epsilon affiliated with the Association of College Honor Societies (ACHS). In 1987 the American Student Committee of the Occupational Therapy Association (ASCOTA), now the Assembly of Student Delegates (ASD), conducted a survey of existing chapters, inquiring about standards to establish and maintain a national honor society. Respondents were strongly in favor of working to achieve the standards required by ACHS, which required a minimum of 10 chapters and adoption of a unified constitution and a uniform set of eligibility criteria by all chapters. In 1987, there were 19 chapters across the country, but they had no means of communication, no shared constitution, no standard eligibility requirements, and no recognition by universities as a national honor society.

In 1988, ASD asked the Board of Directors of the American Occupational Therapy Foundation (AOTF) to sponsor Pi Theta Epsilon toward achieving recognition as a national honor society. AOTF had already established the Academy of Research in 1983 for selected scholars whose work exemplified the highest academic and scientific work. Sponsorship of Pi Theta Epsilon was seen by AOTF as an opportunity to lay the groundwork for future scholars and Academy members.

UNH and the Texas Woman's University met in 1988 in Baltimore during the annual conference with Carolyn Baum, then a member of the AOTF Board of Directors, as chairperson. Other members of the group included Mary J. Bridle, Dory Marken, Paula Kraemer, and Truby La Garde. The group developed plans for a national structure and a national agenda to be carried out by the student members of a local working committee: Faye Job, Sheila Rae Krajnik, Michelle Cullen, and Susan Lin. Mary J. Bridle served as the faculty advisor, while Nedra Gillette served as the AOTF staff liaison. In 1991, a second advisory group was convened with Marilynne Mitcham as chairperson and Virginia Stoffel and Sandy Cash as members.

AOTF provided an operating budget to support Pi Theta Epsilon activities through 1994. This loan of nearly \$10,000 has now been repaid through the successful dues structure of the new organization. Work was undertaken by the student leaders to (a) increase the number of existing chapters; (b) incorporate the society (c) register its trademark (the pin worn by Pi Theta Epsilon members); and (d) apply successfully to ACHS. By March 1995, all of these goals had been accomplished except ACHS membership, which was finally achieved in February 1996. By March 1995 there were 43 chapters!

In 1990, a constitution was adopted through ratification by all existing chapters. This constitution supersedes any governing documents previously adopted by any specific chapter, although chapters are still encouraged to develop their own bylaws to govern their local operations. A uniform dues and fees structure was adopted through the constitution, thus creating the first fiscal base for the organization and putting it on the road to financial independence (one of the requirements of ACHS).

A quarterly newsletter was adopted as the primary means for fostering communications between chapters and between chapters and the national society. The Scroll & Pen



History, cont.

serves as the vehicle for soliciting nominations for officers, promoting the agenda for the annual national meetings, and alerting members to important events such as the President's Award, the Award of Excellence, and the Mary J. Bridle First Research Award.

In 1992, the Pi Theta Epsilon Executive Committee developed a long-range plan for the society. This plan helps the organization monitor its goals and see to what extent its programs actually achieve these goals. Goals are not easily accomplished in the absence of staff, of course, and the Executive Committee had to face this problem early on. For the first few years of its life, Pi Theta Epsilon was staffed by the secretary to the Research Division at AOTF. The secretary also had the responsibility of producing *The Scroll & Pen*. By 1995 an independent coordinator was recognized as being essential, although only a half-time position could be afforded within the budget. The coordinator role is vital to the success of the organization and includes responsibility for overseeing arrangements of the annual meeting, soliciting dues and maintaining a membership database, and producing *The Scroll and Pen*. In addition, the coordinator works closely with the Executive Committee, facilitating the quarterly conference calls that help to shape the agenda. Today, the PTE Coordinator helps with coordinating monthly calls with the EC, prepares and executes the national voting process of the EC as well as developing a Monthly Newsletter in addition to the *Scroll & Pen*.

Since 1995, a new program providing for retroactive membership has taken place. Through this program, occupational therapists who did not have the opportunity to become members of Pi Theta Epsilon while they were in school will now be allowed to join by providing evidence of their qualifications at the time they entered the field. Alumni members who do not live within a convenient distance of an occupational therapy program having a Pi Theta Epsilon chapter are invited to join a national satellite chapter; this affords them the opportunity to have a vote in national affairs and to get a chance to be in an honor society. Alumni are encouraged to inquire about these opportunities. New Pi Theta Epsilon members are also encouraged to become lifetime members by paying a single fee.

PTE has an extensive database of names that are routinely sent a new form of communication in the form of a Monthly Newsletter. Other initiatives that have brought PTE up to 2024 are the streamlining of accepting new Chapters, being involved in Chapter inductions, and updates of current faculty advisors along with Chapter Executive team members. There has been a heavy push for Inter-Chapter collaboration and using the over 140 chapters as resources to better serve the PTE membership.

The Executive Committee poses three purposes as the focus of the organization during (a) to stimulate, recognize, and reward clinical practice that demonstrates authentic occupational therapy; (b) to stimulate, recognize and reward educational systems that support scholarship, research, and critical thinking in students and faculty; and (c) to stimulate research through a program of awards and mentorship.



History, cont.

Trademark

On November 23, 1993 the Pi Theta Epsilon Service Mark (below) was published in the Trademarks Official Gazette. A Certificate of Registration was issued soon thereafter. This logo is depicted on the official pin that can be worn only by Pi Theta Epsilon members.



Code of Ethics

In accordance with the national code of ethics for occupational therapists, Pi Theta Epsilon believes that each of its members shall conduct themselves with the highest moral and professional standards. The policies of Pi Theta Epsilon shall be that:

PTE prohibits the practice of hazing or discrimination in any form.

The use of illegal substances is strictly forbidden.

The use of alcoholic beverages shall be in accordance with all laws and entities governing the society.

Buildings used for official PTE business shall be in compliance with the American Disabilities Act (ADA) and local fire and health codes.

Pi Theta Epsilon & the Association of College Honor Societies

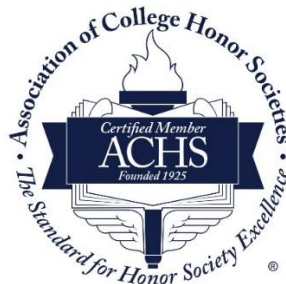
Pi Theta Epsilon is a member of the Association of College Honor Societies (ACHS). The mission of [ACHS](#) is:

To build a visibly-cohesive community of national and international honor societies that promotes the values of higher education; fosters excellence in scholarship, leadership, service, and research; and adheres to the standards of honor society excellence. (ACHS, 2021).

For further information about ACHS, visit: [ACHS](#)

What does this mean for PTE?

- x PTE is one of less than 70 certified honor societies in the United States.
- x PTE ascribes to the high standards for scholastic eligibility and organizational excellence set by ACHS.
- x Member participation in governance is assured to advance the interests of individual members.



Functions of Honor Societies

(from Association of College Honor Societies Article IV)

Section 1. An honor society is an association of primarily collegiate chapters whose purposes are to recognize and encourage high scholarship and/or leadership achievement in some broad or specialized field of study.

Section 2. The following functions are properly served by an Honor Society:

- a. It confers distinction for high achievement in undergraduate, graduate, and professional studies; in student leadership; and in the various fields of research.
- b. It fosters the spirit of liberal culture.
- c. It stimulates and encourages mental development.
- d. It stands for freedom of mind and spirit and for democracy of learning.
- e. It provides spiritual and intellectual leadership.
- f. It preserves valuable traditions and customs.
- g. It associates outstanding leaders in mutual understanding for the advancement of society in the art of democratic living.
- h. It stimulates worthy attitudes for the improvement of the general welfare of the institution.
- i. It imposes upon members high citizenship responsibilities and emphasizes deeper study and discussion of the American tradition, its characteristics, ideals, and possibilities.



Benefits of Membership

- x Apply for exclusive scholarships and awards including the Mary J. Bridle First Research Award, the Martha Kirkland Scholarship, the President's Award and the Inter-Chapter Collaboration.
- x Lifetime Members are given the opportunity to take part in an ot.com CEU course three times an academic year
- x Attend the PTE Annual Business Meeting with special presentation by guest speakers in OT at the AOTA Annual Conference.
- x Network with past and present OT members at the annual PTE Alumni Reception at the AOTA Annual Conference.
- x Receive a one-year electronic subscription to *OTJR: Occupation, Participation and Health* beginning the first summer after your induction ceremony (may vary according to printing deadlines with the publisher).
- x Name printed in *OTJR* (may vary according to printing deadlines with the publisher).
- x Attend PTE sponsored sessions at AOTA Annual Conference.
- x PTE members seeking federal employment *may* be eligible for a GS level upgrade according to the U.S. Office of Personnel Management's General Schedule Qualification Policies. Section 4 reviews the Educational and Training Provisions or Requirements necessary to be eligible for the upgrade. Some of the provisions and requirements are based on class standing, grade point average or honor society membership, and may mean a higher level of pay. Keep in mind this is not a PTE managed benefit, it is federal policy. Questions regarding this policy should be directed to the Human Resources department associated with the position being applied for.
- x Receive three issues of The Scroll & Pen, the PTE electronic newsletter. There are opportunities to write articles and be featured in The Scroll & Pen.
- x Receive issues of The Monthly Newsletter, another PTE electronic newsletter to keep members informed as Chapter growth continues to rise.
- x Gain leadership experience by serving on a local chapter, the national board or on a committee;
- x Wear an honor cord at graduation to signify membership in an elected honor society.
- x Receive a personalized PTE certificate to display and a membership card.
- x Wear the official PTE membership pin on professional apparel.



Membership

Eligibility

The Association of College Honor Societies (ACHS) requires that specialized honor societies be established to recognize and encourage superior scholarship in a specialized field at either undergraduate or graduate levels.

Election of new members shall include those who have demonstrated superior scholarship. Those who are eligible shall:

- x Rank not lower than the highest 35% of their class in scholarship;
- x Have completed the number of credit hours used by the institution to designate one full academic term equivalency in an entry-level baccalaureate or post - baccalaureate program in occupational therapy.
- x Submit a piece of scholarly written work, completed while enrolled in the occupational therapy program;
- x Submit a short essay (250 words) stating why she/he wishes to join PTE.

An eligible student need not apply for membership in the semester in which she or he becomes eligible, but may apply any time until the beginning of the final academic semester/ quarter prior to beginning fieldwork. **A student must have at least one entire semester remaining after initiation before leaving for a fieldwork placement.**

Membership in a local chapter automatically bestows membership in the national society.

ACHS does not permit a national honor society to require membership in any other organization (such as the American Occupational Therapy Association).

Candidates will be reviewed by a Review Board comprised of the PTE chapter president and any TWO of the following individuals: a) the chapter advisor, b) an alumni member, c) a member of a local support chapter, and/or d) a faculty member of the OT program not affiliated with PTE.

Pi Theta Epsilon does not discriminate against any prospective member on the basis of race, gender, religion, ethnicity, disability, sexual orientation, or age.



Part-time Students

Part-time students are eligible for membership. Part-time students are those for whom the total span of time allotted to complete all requirements for the degree program is greater than the usual number of required semesters or quarters. To be eligible, part-time students must have completed the number of graduate credit hours used by the institution to designate one full academic term equivalency in an entry-level post baccalaureate program in occupational therapy. Class rank shall be figured separately for each student, relative to a current full-time class in the program.

Other circumstances

Occupational therapists who were enrolled in a post-professional program leading to a Doctoral Degree in Occupational Therapy may become members of a PTE chapter as well under these circumstances:

- x Therapists who were already inducted as PTE members in good standing may maintain membership as alumni at a local chapter.
- x Therapists who have never been members of PTE (for example, if their OT program did not have a chapter) may be inducted if they meet the eligibility criteria stated above and provide records of eligibility.



Types of Membership

Membership in Pi Theta Epsilon is unique from other student organizations in that upon induction there is no expiration date on your membership. To remain an *active member in good standing*, membership dues must remain up-to-date. If payment of membership dues lapses, you are an *inactive member*.

There are a variety of options to join:

Student members

Student members shall be those who have been elected according to the qualifications set forth in the constitution. Student members have the option of paying annual student membership dues OR a one-time lifetime membership dues payment.

Alumni members

Alumni members shall be those past student members who were members in good standing upon graduation. Alumni members are eligible to belong to any chapter upon payment of dues. Alumni members can pay annual alumni member dues or upgrade to lifetime membership.

Sustaining members

Sustaining members shall be those members who desire to support the purposes of this organization by contributing any amount larger than their designated dues.

Lifetime Membership

Lifetime membership is available to student members who select payment of **life membership** dues. \$25 of their dues payment is returned to the chapter of her/ his choice.

Alumni members may upgrade to **lifetime membership**.

Honorary members

Honorary membership may be conferred by an active chapter or at a national meeting upon individuals who have made an outstanding contribution to the field of occupational therapy. Chapters will determine the individual to bestow the honorary membership based on the chapter's criteria. The individual who receives the honorary membership will have all voting rights with PTE. Chapters are responsible for paying the lifetime membership fee of \$125.00 for individuals to whom they are awarding the honorary lifetime membership. Payment shall be made to the National PTE office with the individual's name and contact information within 60 days of the awards ceremony.

Retroactive members

Retroactive membership may be conferred on any occupational therapist not a member of PTE during their time as a student. The prospective member will be responsible for obtaining his or her transcripts and pertinent information for review, submitting this information to the Review Board as designed by the Executive Committee at the national office for membership. The prospective member must meet the following eligibility requirements:

- Graduate of an accredited program in occupational therapy
- Graduate in the top 35% of the OT class



- Evidence of three or more of the following, achieved either while a student is in an occupational therapy program or during his/her career as an occupational therapist:
- Membership in professional organization

Retroactive members, cont.

- Scholastic recognition and awards
- Research
- Evidence that papers have been submitted to and/or accepted for local or national meetings and publications
- Documented leadership, e.g. service organizations or community activities requiring commitments to scholarship

Retroactive membership fee is established at \$125.00 which also bestows Lifetime membership in Pi Theta Epsilon. Applicants who are accepted may join a local chapter, adhering to any other standards/ requirements that the chapter may have established.



Membership Fees and Dues

Options for Newly Inducted Student Members:

Option 1: Newly Inducted – One-Year Membership (Annual)

Who pays: Newly inducted members who are not selecting lifetime membership

Total: **\$75** (\$50 one-time induction fee, \$25 first year annual due)

Option 2: Newly Inducted – Lifetime Membership

Who pays: Newly inducted members selecting lifetime membership. Choosing this options means that you will never have to pay membership dues for Pi Theta Epsilon again.

Total: \$175 (\$50 one-time induction fee, \$125 lifetime fee; \$25 is donated back to chapter to support its operations)

Options for Second and Third-Year Student Members:

Option 3: 2nd and 3rd Year Members – One-Year Membership (Annual)

Who pays: Students in their second or third year of PTE who selected Option 1 as a newly inducted member and would not like to renew as a lifetime member

Total: \$25

Option 4: Lifetime Membership

Who pays: Students in their second or third year in PTE who selected Option 1 as a newly inducted member and would like to renew as a lifetime member.

Total: \$125

Honorary Members:

Who pays: The chapter on behalf of any honorary members they have chosen for the year

Total: \$250

Alumni Members:

Who pays: Alumni of PTE who selected annual memberships as students. Payment as an “alumni” member ensures that you remain an active member of PTE. At any time, an alumni can select to pay the one-time lifetime membership fee to avoid future dues payments.

Total: \$50

Retroactive members

Who pays: Please see “Types of Membership”

Total: \$125



Paying for Membership Fees & Dues

Your local chapter advisor and officers are the best resource to determine how to pay dues at your chapter. Options available for payment are listed below for your reference.

The chapter advisor must always send in the Annual Membership & Dues Payment Form to the national office regardless of method of payment selected.

This allows the national office to communicate with all newly inducted members. If you are a new member and do not receive communications from national, please verify with your local chapter that an Annual Membership & Dues Payment form was sent to the national office.

Option 1:

Chapter advisor collects cash or checks from all active chapter members and sends one or multiple check(s) **made payable to American Occupational Therapy Foundation (AOTF)** to:

AOTF - Pi Theta Epsilon
12300 Twinbrook Pkwy, Suite 520
Rockville, MD 20852

Please send the Annual Membership & Dues Payment Form with your chapter check.

Option 2:

Each individual member can pay online at the [PTE Store](#)

One representative from the chapter may also pay on behalf of all students online.

The chapter must still send the Annual Membership & Dues Payment Form to the national office on behalf of all students paying online. (Students do not need to individually send their form).

Option 3: Chapter makes a bulk payment via phone to the AOTF Accountant at the national office at (240) 292-1034.

The chapter must still send the Annual Membership & Dues Payment Form to the national office on behalf of all students paying online.



Frequently Asked Questions

What scholarships and awards are available for PTE members?

PTE has four awards available to students: the Mary J. Bridle First Research Award, the Martha Kirkland Endowed Scholarship, the President's Award and the Inter-Chapter Collaboration. Information on the criteria for these awards is available [On the PTE Awards page](#)

Who can I contact with questions concerning PTE?

First, contact your chapter president and/or faculty advisor. Questions may also be directed to the National Coordinator at pte@aotf.org or (240) 292-1077.

How can I stay informed about activities from the national office?

Periodically, the National Coordinator will distribute necessary information to all chapters. This information is sent directly to the faculty advisors in order for the information to be passed to all chapter members. Please contact your advisor or local chapter if you are not receiving updates. Increasingly, communications from the national office have been sent directly to members via electronic mail. You may update your email address with the national office at any time by emailing pte@aotf.org. Please add pte@aotf.org as a known contact to ensure you receive all communications.

What can I do after graduation?

As an alumni member, you can serve PTE in a number of ways. An alumni member has the option of remaining an active member in a local chapter or they can serve on various committees at the national level, such as the executive committee, minutes review committee, nominations committee, or alumni committee. You may also express interest to volunteer with other PTE projects throughout the year. Contact the national office for more details.

Plan to attend the annual Pi Theta Epsilon alumni reception at AOTA Annual Conference for a valuable networking opportunity. To update your contact information, please email pte@aotf.org

What are my national and local dues used for?

PTE is a non-profit organization. Membership dues at the national level fulfill the annual expenses that support and expand PTE and its values. Dues go toward scholarships, annual business meetings and member-exclusive presentations, membership cards and certificates, and other scholarly activities. Each local chapter has the option to assess dues to provide monetary support for activities specific to that chapter.

How can I serve my local chapter?

Each chapter governs the election of officers, planning of events, and service on committees that assist with promoting scholarly activities at their college or university. Contacting the chapter president or faculty advisor is the first step to learn more about your chapter and ways in which you can serve.

How long will my membership last?

PTE is a lifetime membership. However, in order to remain a member in good standing yearly and receive the benefits of membership, annual fees are required.

Will I be notified of membership renewal?

Yes. However, as a member, you must inform the national office of any physical or electronic address changes. Send address changes to: pte@aotf.org.



Awards and Scholarships

The most updated information on awards and scholarships is available on the Pi Theta Epsilon website at [the PTE Awards Page](#). Below is an overview of available awards and scholarships for members and chapters.

Mary J. Bridle First Research Award

The purpose of the award is to foster scholarship and first research efforts within the occupational therapy community of students, young practitioners, and early researchers. The Mary J. Bridle Award provides an opportunity for Pi Theta Epsilon members to have a research manuscript reviewed by experts in the field and pursue publication in *OTJR: Occupation, Participation, and Health*. A cash award of \$750.00 is given. The Mary J. Bridle Award will be available annually but will be awarded only when manuscripts of sufficient caliber are submitted.

Martha Kirkland Endowed Scholarship

With the support of Pi Theta Epsilon chapters nationwide to endow the scholarship, Pi Theta Epsilon began offering the Martha Kirkland Scholarship to members in the 2000s. Pi Theta Epsilon membership is a requirement to be considered for this scholarship. The amount of the scholarships varies each year, but is approximately between \$500 and \$1,200 each year, provided to one or multiple members.

The application for this award immediately considers you for up to 50 scholarships organized by the American Occupational Therapy Foundation scholarship program.

Pi Theta Epsilon President's Award

The President's Award recognizes Pi Theta Epsilon chapters that organize and implement outstanding scholarly activities developed to increase knowledge, develop professional skills, and contribute to the advancement of the occupational therapy profession. Each chapter may submit one application detailing one scholarly chapter event.

Pi Theta Epsilon Inter- Chapter Collaboration Grant

The Excellence in Inter-Chapter Collaboration Grant has been established to honor and facilitate Pi Theta Epsilon chapters who desire to create exceptional inter-chapter collaborations which support the PTE mission. Inter-chapter collaborations must be organized and implemented by two or more chapters with the aim to increase knowledge, develop professional skills, and/or contribute to the advancement of the occupational therapy profession. Examples of inter-chapter collaborations include, but are not limited to events, workshops, educational/scholarly papers, and research panels.

One grant application co-authored by all involved chapters is required for eligibility. Applications from multiple chapters working together on the same project will be automatically disqualified. The application must detail the inter-chapter collaboration/event the chapters are seeking to host in the upcoming year. Applications are accepted on a rolling basis with an annual review beginning on February 1st each year. Applications must be submitted via email to the PTE National Office (pte@aotf.org) by midnight local time on January 31st for projects seeking to be completed that year.





Pi Theta Epsilon is a program of The American Occupational Therapy Foundation.

AOTF - Pi Theta Epsilon
12300 Twinbrook Pkwy,
Suite 520
Rockville, MD 20852

Email: pte@aotf.org

Phone: (202) 292.1077

www.aotf.org/pithetaepsilon

