

WESTERN NEW ENGLAND | **WNE**
UNIVERSITY

COLLEGE of **PHARMACY and HEALTH SCIENCES**
DEPARTMENT of **OCCUPATIONAL THERAPY**

Fieldwork Manual

Doctor of Occupational Therapy Program

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FIELDWORK EDUCATION POLICIES AND PROCEDURES

FIELDWORK WELCOME

There are professional socialization aspects of becoming an occupational therapist that are acquired through time spent observing, interacting with, and carrying out evaluations and interventions with experienced occupational therapists in multiple practice settings. These experiences are referred to as fieldwork education.

The Fieldwork Education Chapter of the OTD (Occupational Therapy Doctorate) Student Handbook is designed to acquaint you with the fieldwork education process and to define and describe the fieldwork education component of the program. It is also intended to delineate specific policies and procedures that are related to fieldwork education to guide you on your journey through the various fieldwork experiences that the WNE entry-level OTD program has to offer.

Michael Salemi, OT, OTD, OTR, Director of Fieldwork Education

FIELDWORK EDUCATION - ACOTE STANDARDS & DEFINITIONS

The Accreditation Council for Occupational Therapy Education (ACOTE) establishes Fieldwork Education Standards for entry-level OTD programs (ACOTE, 2018). The WNE OTD program was developed under the jurisdiction of the ACOTE 2011 standards and was revised to reflect changes as detailed in the ACOTE 2018 standards. As defined by ACOTE, “Fieldwork education is a crucial part of professional preparation and is best integrated as a component of the curriculum design. The fieldwork experience is designed to promote clinical reasoning and reflective practice, transmit the values and beliefs that enable ethical practice, and develop professionalism and competence in career responsibilities. Fieldwork experiences should be implemented and evaluated for their effectiveness by the educational institution. The experience should provide the student with the opportunity to carry out professional responsibilities under the supervision of qualified personnel serving as a role model. The academic fieldwork coordinator is responsible for the program’s compliance with fieldwork education requirements.” [Standard C.1.0]. As addressed in the Reference Manual of the Official Documents of the American Occupational Therapy Association (AOTA, 2016) fieldwork consists of two levels of applied learning experiences in which students participate in real-time clinical, educational or other contexts that are appropriate to the provision of occupational therapy services.

Level I fieldwork is intended to introduce OTD students to the realm of fieldwork, including interactive experiences with multiple populations. The format of time and duration of Level One fieldwork will vary from semester to semester. Level II fieldwork is an immersive 24-week experience where the OTD student has the opportunity to implement concepts learned during the didactic component of the curriculum in the practice realm, with the primary objective of gaining

entry-level competency in that specific practice area.

Level I Fieldwork – “The goal of Level I fieldwork is to introduce students to the fieldwork experience, to apply knowledge to practice, and to develop understanding of the needs of clients” (ACOTE, 2018).

- Level I fieldwork student - Occupational therapy Level I fieldwork students are those individuals who are currently in the process of taking didactic coursework which is enriched “through directed observation and participation in selected aspects of the occupational therapy process” [Standard C.1.9]. Level I fieldwork is aligned with course content knowledge and laboratory competencies.
- Level I fieldwork supervision - Occupational therapy Level I fieldwork students are supervised by either occupational therapy or non-occupational therapy personnel that are “informed of the curriculum and fieldwork program design and affirm their ability to support the fieldwork experience” and are “currently licensed or otherwise regulated” [Standard C.1.8] in their area of practice, and are cognizant of the goals and objectives of the learning experience in reference to occupational therapy practice.

Level II – Level II fieldwork consists of two separate 12-week full-time experiences, 24 weeks in total duration [Standard C.1.10.], in a minimum of one setting if it is reflective of more than one practice area, or in a maximum of four different settings [Standard C.1.10.]. Level II fieldwork must be implemented under the supervision of a licensed occupational therapist who meets state licensure requirements and who has a minimum of one year of practice experience and who is adequately prepared to serve as a fieldwork educator [Standard C 1.11.].

As stated in the 2018 ACOTE standards that govern fieldwork, “the goal of Level II fieldwork is to develop competent, entry-level, generalist occupational therapists. Level II fieldwork must be integral to the program’s curriculum design and must include an in-depth experience in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupational and research, administration, and management of occupational therapy services” (ACOTE, 2018).

- Level II fieldwork student – Occupational therapy Level II fieldwork students have completed both the didactic portion of the entry level OTD curriculum and all Level I fieldwork experiences. The Level II fieldwork student is now transforming from the primary role of a classroom learner to that of an experiential learner.
- Level II fieldwork supervision – Supervision during occupational therapy Level II fieldwork will be conducted by a qualified and prepared fieldwork educator. Additionally, all Level II fieldwork educators must be in compliance with state specific, federal and ACOTE (2018) standards governing occupational therapy student supervision.

FIELDWORK EDUCATION: PURPOSE

According to the stated mission of this entry-level OTD program, “the Doctor of Occupational Therapy (OTD) Program will educate *Transformative Leaders*, who will be guided by population health, health equity, and health literacy perspectives; shape new visions of practice using information and assistive technologies; and utilize their fieldwork experiences to assist health care practitioners to adopt an interprofessional, team-centered framework in current and emerging practice settings” (p. 10). Aligned with the program’s mission, the purpose of fieldwork education is to provide students with hands-on, real-world experiences in current health care, education and community settings in which occupational therapy is practiced. An additional purpose of fieldwork education is to develop a role for services in emerging areas of occupational therapy practice. These opportunities permit students to:

- apply knowledge and competencies accrued in didactic coursework and modeled in laboratory simulations
- engage in clinical reasoning by directly testing theories and conceptual understandings
- develop the values, beliefs and ethical standards that foster professionalism
- refine the technical and interpersonal skills needed in practice while continuing to learn from a fieldwork educator as a role model
- construct a practice style as developed from observation, interaction and feedback from a fieldwork educator

The desired outcome of the fieldwork component of the program is for students to complete the final competencies necessary to be entry-level generalist practitioners prior to implementing the Doctoral Experiential Project that demonstrates advanced level knowledge, scholarship and leadership abilities.

FIELDWORK EDUCATION: ADMINISTRATION

Fieldwork Education is administered and evaluated for compliance under the ACOTE Standards by the Director of Fieldwork Education (DFE). The primary responsibility for the ongoing development of the fieldwork component of the program and management of the fieldwork and experiential education aspects of the program resides with the DFE. The DFE fulfills the responsibility of fieldwork coordination by:

- Identifying fieldwork learning objectives specific to the OTD curriculum and the learning needs of the OTD students
- Identify OTD student preferences for fieldwork participation including geographical region and practice setting, and align preferences with fieldwork assignment within reason
- Facilitating student fieldwork education through the identification of appropriate clinical facilities, the designation of specific sites and fieldwork educators, and the establishment of close working relationships with site representatives, and occupational therapy

practitioner Ensure compliance with all ACOTE standards governing fieldwork administration

- Negotiation of contractual arrangements with identified sites that are deemed appropriate to meeting the program's fieldwork objective.

The DFE identifies medical, educational and community-based settings that are potential sites for Level I or Level II Fieldwork student placements. Once identified, the DFE is responsible for securing a Memorandum of Understanding (MOU), commonly known as a contract, between the site and the Western New England University OTD Program. The program must have evidence of valid MOUs in effect and signed by both parties before a student begins a Level I or Level II fieldwork experience [Standard C.1.6.]. The legally binding contractual agreements establish the terms of the university and fieldwork site relationship, and thus, must be in effect and active prior to the start of a student fieldwork affiliation. The DFE is responsible for ensuring that all agreements are fully executed and active for all fieldwork placements.

The University provides professional liability insurance for all matriculated OTD students during their participation in fieldwork. The policy includes \$1,000,000 of coverage per incident and \$3,000,000 of aggregate coverage. The DFE is responsible for ensuring that the coverage is up to date and for issuing a copy of the certificate of liability insurance to each fieldwork site. This coverage is for fieldwork and doctoral experiential activities only and does not include extracurricular activity or employment.

FIELDWORK EDUCATION: MANAGEMENT SYSTEM

The OTD program has contracted with the CORE Higher Education Group to secure online access to the CORE Experiential Learning Management System (CORE ELMS) to develop and manage the fieldwork education component of the program. The Director of Fieldwork/Experiential Education (DFE) has full access to the system. In addition, faculty members and students will also have varying levels of access to the system to support the fieldwork process.

CORE ELMS has been implemented for the WNE OTD program to develop a fieldwork database to manage site contact information and contractual agreements. The system is also serving as a repository for information on general student fieldwork requirements, site-specific requirements, and student fieldwork portfolios.

All WNE OTD program administration, faculty, and students are granted access. Faculty will have online access to evaluate students' core competency development. OTD students will have access to monitor and maintain background check information, health information, and fieldwork performance data. Additionally, OTD students will be able to research fieldwork site information.

Communication during fieldwork is a shared responsibility between the OTD program, the fieldwork site, and the OTD student. Communication from the DFE to students during Level II fieldwork will take place via the WNE email system. It is the student's responsibility to enter current contact information, including name, address, phone number, and e-mail address into the CORE Elms Home Page under Account Information. It is the responsibility of the OTD student to monitor and update contact information as changes occur.

Students are strongly encouraged to check their WNEU email at least daily during normal business days. Students will be held responsible for time-sensitive communications. Internet access is most likely available at fieldwork sites. However, the site is not responsible for email/web access nor are students encouraged to communicate electronically during work time.

RESPONSIBILITIES OF THE DIRECTOR OF FIELDWORK EDUCATION

- Identifying potential fieldwork sites, designating sites as appropriate, establishing fieldwork contractual agreements, and confirming fieldwork placements;
- Implementation and management of the CORE Elms fieldwork database to maintain required accreditation documentation and review data related to fieldwork education;
- Instruct students on how to navigate and utilize the CORE ELMS system for accessing information, and entering required data;
- Reviewing and evaluating data related to fieldwork objectives entered by students in CORE ELMS;
- Supporting, evaluating and modifying as needed, fieldwork program development at contracted fieldwork settings;
- Executing site visits as needed to fieldwork sites prior to and during fieldwork experiences;
- Educating students on the fieldwork/supervisory process, advising students in determining site preferences, and counseling students during the fieldwork education process;

- Obtain and disseminate necessary student and site information;
- Collaborate with clinical faculty to develop site-specific objectives (in addition to the general objectives) for Level I fieldwork;
- Collaborate with site coordinators and fieldwork educators to develop site-specific objectives (in addition to the general objectives) for Level II fieldwork;
- Communicate with fieldwork educators to provide educational assistance for meeting site-specific objectives, supporting student progress, and achieving fieldwork outcomes;
- Verify that benchmarks and specific objectives are being met at intervals during the fieldwork experience, to ensure successful student outcomes;
- Using evaluative data to modify fieldwork educator expectations and/or student performance, to ensure a successful fieldwork experience;
- Collaborate with students and fieldwork educators, as needed, to establish an individualized learning contract (APPENDIX J) with specific actions/behaviors and timelines for completion established;
- Collaborate intervention and decision-making to facilitate fieldwork conflict resolution;
- Evaluation (including data collection and analysis) of Level I and Level II fieldwork program components to ensure that the program is in compliance with ACOTE standards related to fieldwork education, and meeting program-specific fieldwork goals;
- Determine the final grade that OTD student earns for each Level II fieldwork experience.

FIELDWORK MODEL

Embodying the program’s philosophy on the concepts of self-efficacy and transformative education, the OTD program espouses a carefully designed and implemented tradition of experiential learning (McLaughlin et al., 2014; Weimer, 2013). In support of this model, the OTD program integrates academic and clinical/experiential activities early and often throughout the curriculum. Fieldwork education, as one form of experiential education, is considered to be a foundational component of OT education that supports the development of clinical excellence, personal and professional autonomy, leadership skills, and practice scholarship. These professional attributes are crucial to professional development as OTD students make their way through the healthcare and education marketplaces of today and tomorrow. The essential outcome of the fieldwork education component of the OTD program is that students will engage in professional socialization experiences that build toward role actualization as competent, responsible, culturally sensitive and ethical practitioners. Thus, the curriculum has been designed to scaffold fieldwork learning experiences for students, from exposure to independence in varied service delivery settings where occupational therapy is practiced or could be practiced.

Experiential education, especially fieldwork education, facilitates the application and integration of academic concepts with “real world” experience. Fieldwork education holds the potential for having a powerful impact on both students and fieldwork educators. Students bring new knowledge to the fieldwork setting in the form of recent research findings, and fieldwork educators contribute applied perspectives to the fieldwork process as the result of years of practice experience. For both, this can be a catalyst for personal and professional growth, or transformational learning. One approach to transform how students and fieldwork educators develop and refine important communication and team leadership skills is through intraprofessional and interprofessional collaboration in fieldwork environments. Students must also self-reflect on fieldwork experiences to maximize the impact on their learning.

Schön (1983) proposed that reflective practitioners engage in a continuous cyclical process of learning during the learning experience. He posited that both *reflection-in action*, referring to learning as part of one’s experience, and *reflection-on-action*, in which one reviews actions after the situation is complete, are essential to improving practice. Specifically, these reflective practices include gathering evidential data as a process, reflecting and making meaning of the observations, and creating plans for future practice. It is this reflective aspect of practice which serves as a foundation for clinical reasoning in occupational therapy. Clinical reasoning enables occupational therapists to “identify the multiple demands, required skills, and potential meanings of the activities and occupations, and gain a deeper understanding of the interrelationships between aspects of the domain that affect performance and that support client-centered interventions and outcomes” (OTPF 3rd edition, 2014).

In order to develop habits of reflection and excellence, fieldwork students and educators have many opportunities to document and reflect upon their interactions and interventions through focused online discussions, journaling of newly learned skills, and self-reflective assignments. Because competent professionals use clinical and research evidence as well as practical experiments to challenge, legitimize, and enhance their practical knowledge, OTD students are also expected to access and integrate multiple sources of information. They are expected to utilize metacognition and reflective practice theory to develop their knowledge, maximize their experiences, and describe how their academic and fieldwork experiences contribute to professional growth.

SUPERVISION HIERARCHY IN LEVEL II FIELDWORK

Many models of supervision have been shown to promote the development of professional competence in students. The fieldwork education component of the program incorporates situational leadership theory as a framework for conceptualizing the supervisory process (Costa, 2015; Hersey, Blanchard, & Johnson, 2001). The situational leadership model is a useful guide

for the fieldwork education component of the program because it:

- defines a distinct professional relationship between an experienced professional and a student of occupational therapy
- consists of a developmental process
- exemplifies a dynamic evolution as a student's professional competence

Using this theoretical framework, fieldwork educators adapt their supervision style and strategies to the actual performance, motivation, and confidence of students as they are learning. Four distinct supervisory styles are supported in this model:

- directing
- coaching
- supporting
- delegating

At the start of a Level II fieldwork placement, an occupational therapy fieldwork educator will choose a **directing** style of supervision early in the fieldwork experience. At this time, students are likely to feel insecure about their knowledge and abilities. At this time, supervisors provide close supervision and observation of the students' initial interactions with clientele and explicit explanation, demonstration, and practice for new ideas and technologies. Clear and concise instructions support student decision-making and increase their confidence. Directing style may be revisited with the introduction of novel tasks.

When using a **coaching** style, fieldwork educators explain the clinical reasoning behind evaluation, intervention, and interprofessional decisions and actions. Students are encouraged to ask questions as they take on more and more responsibility. Coaching supports the development of a student's level of self-confidence as she/he becomes increasingly independent in clinical reasoning and workload management.

The **supporting** style of supervision typically begins after the halfway point of fieldwork experiences. Here, the fieldwork supervisor shares ideas with students and encourages them to participate in collaboration to determine the best options in clinical decision-making. Students perform their assigned tasks fairly independently and they receive guidance as needed and feedback on appropriate performance.

In the final few weeks of Level II fieldwork, students are expected to be ready to perform as entry-level practitioners. During this final period of the affiliation, fieldwork educators implement **delegating** supervision model to assign responsibilities and let students function as independently as possible. Occupational therapy student confidence is highest at this point as they experience the successful integration of academic and experiential learning in "real world" practice.

The supervisory relationship is facilitative and evaluative by providing formal and informal feedback and evaluation (Bernard & Goodyear, 2013) during the fieldwork process. It extends over time and has the goals of:

- enhancing the professional competence and evidence-based practice of the student as she/he progresses from the classroom to the clinical environment
- monitoring the quality of the occupational therapy services provided
- serving a gatekeeping function for entry into the profession

Fieldwork education is a critical part of the OTD program and is well integrated within the curriculum design. The OTD Program integrates academic and fieldwork activities early and often throughout the curriculum. This approach is designed to enhance the applicability of course content by engaging students in clinical problem solving and to support the development of a team perspective and collaborative decision-making skills necessary for interprofessional practice.

TYPES OF FIELDWORK EDUCATION

- Traditional Level I fieldwork - This type of fieldwork occurs under the direction of occupational therapy practitioners or non-occupational therapy personnel who are certified and who know about occupational therapy and are cognizant of the goals and objectives of the experience.
- Traditional Level II fieldwork - This type of fieldwork occurs under the direct supervision of occupational therapy practitioners.
- Transformational Level I or Level II fieldwork – This type of fieldwork occurs under the direction of clinical faculty members from the program who are occupational therapists. The purpose of implementing this type of fieldwork model is to assist existing healthcare settings to open their doors to fieldwork education, without imposing supervisory responsibilities on their occupational therapy employees. The program is committed to involving students and clinical faculty in transforming existing healthcare settings and community-based settings. Therefore, this model provides sites that do not currently provide occupational therapy services with the opportunity to experience the value-added aspect of occupational therapy practice with their clientele, so long as it is compliant with the practice act governing OT student supervision in the geographical region that the fieldwork is being conducted. In addition, expanding Level I fieldwork into community-based settings fulfills the program's focus on client-centered, population-driven practice.

FIELDWORK SITE IDENTIFICATION AND DESIGNATION

The Director of Fieldwork Education (DFE) is responsible for providing appropriate Level I and Level II fieldwork opportunities for students in the OTD Program. This process requires the identification and designation of sites that are suitable for initial, intermediate and advanced fieldwork experiences. The primary criteria for identifying sites include traditional, non-traditional and emerging healthcare programs, educational, social services or community-based sites; sites representative of infants, children and youth, and young adults through older adults; and sites in national, regional and local settings represented by OTD students. The primary criteria for designating sites as potential fieldwork opportunities include the appropriateness of the settings for meeting the experiential learning objectives of OTD students as articulated in the curriculum design.

Sites are identified through geographical searches, research on institutional types, exploration of healthcare settings, collaborations with clinicians, and faculty and student recommendations. Students should direct all recommendations for fieldwork sites to the DFE and provide the facility name, address, and contact person with phone number and email address. It is the responsibility of the DFE, as the Program's fieldwork representative, to make the initial contact with sites and to negotiate fieldwork contracts and student placement assignments. **Under no circumstances should students contact a site directly to inquire about fieldwork opportunities** (or have friends, acquaintances or family members do so.)

Sites are designated as appropriate for providing Level I or Level II fieldwork, based upon the ability of the site to provide students with fieldwork opportunities that are consistent with the curriculum design (e.g., permit students to envision or enact interprofessional collaborative practice) and reflect the sequence and scope of content in the curriculum. Site visits are frequently required to meet this requirement.

Site visits permit video conferencing or face-to-face interaction with fieldwork educators and visualization of the physical setting, including clinic size, space for students, availability of equipment and intervention supplies, etc. Site visits also permit an analysis of the population being served, including ages and level of disease or disability, pace of standard treatment in the setting, daily treatment load, and opportunities for interprofessional collaboration. Fieldwork site websites and other documents are reviewed for information to assist in determining the appropriateness of the site. Whether a site is visited or whether contact is via videoconferencing, email or phone, all sites being considered for experiential learning will be asked to submit NEOTEC Fieldwork Data Forms and Site-Specific Objectives Forms. These forms will document the educational and clinical profile of the fieldwork site.

FIELDWORK SITE PROGRAM DEVELOPMENT

Sites are designated as appropriate for Level I and Level II fieldwork opportunities, based upon an evaluation process of the fieldwork program at a selected site. The initial evaluation process will include a review of the type of site, the population served, occupational therapy practice provided, and supporting manuals for fieldwork education. The evaluation will also involve communication with a site representative.

A practice site is identified as appropriate for fieldwork by evaluating its capability to provide a comprehensive learning experience. One component of this evaluation must include an assessment of the designated fieldwork educator, including the individual's supervisory experience and interest in collaboration. Fieldwork educators are encouraged to complete AOTA's Self-Assessment Tool for Fieldwork Educator Competency (2009) as a means of self-reflection regarding supervisory skills in their setting (See APPENDIX B).

An additional evaluative component includes the degree to which the site's goals for fieldwork education align with the program's fieldwork education objectives. This will require an understanding of the learning opportunities and activities to which the students will have access at the site. The results of the fieldwork program evaluation will dictate the amount of assistance that will be required to align the site's student fieldwork objectives and competencies with those of the OTD Program. Educational support may include identifying site-specific models of supervision, shaping site-specific goals, developing a week-to-week plan for student performance, and methods of providing ongoing support for fieldwork educators and students.

LEVEL II FIELDWORK SITE ASSIGNMENT PROCESS

During the Fall Semester –Year One, students must submit their Level II Fieldwork Student Preference form (See APPENDIX A) before the end of their first semester in the program, and are required to access CORE Elms to review site information to select potential options for Level II fieldwork placement. During this process, students identify fieldwork placement preferences based upon educational goals, geographic preferences, learning style, and OTD Faculty input.

The DFE assigns students to Level II Fieldwork placements by utilizing a compilation of data that includes student preference and interests, student learning style, site-specific fieldwork information, student cumulative GPA and demonstrated professional behaviors, as well as advisor and faculty input. While student preference is an important consideration in placement decisions, students must be aware of the competitive climate of fieldwork administration and thus, understand that confirmed site assignments may not be fully aligned with preferences.

The DFE will notify students about their confirmed site assignments via email. A letter of confirmation is also sent to the intended fieldwork site to finalize the student's assignment and suggested dates for the Level II fieldwork placement. Two months before the scheduled start date, students are required to contact sites to clarify logistics and to arrange an interview if the site requires one. Pre-placement interviews may be required for some fieldwork sites to ensure that students understand the fieldwork expectations and the type of experience offered. The interview *may or may not be competitive*. Sites have the right not to accept a student based upon the outcomes of the interview. If an affiliation is pending an interview, the fieldwork site is responsible for notifying the DFE within one week of interview completion to report the outcome.

Students are required to accept and complete confirmed Level II Fieldwork placements. Only in extraordinary circumstances will a student be permitted to request a Level II Fieldwork assignment change. A student who is requesting a change to a confirmed assignment must submit the request in writing to the DFE within one week of the email confirmation. To support the requested change, the student must describe the extraordinary circumstances involved. Reasons that are not considered extraordinary include, but are not limited to, travel inconveniences, wedding plans, housing changes or financial reasons. A follow-up meeting between the student, the DFE and the Program Director may be requested to clarify specific considerations. The DFE will report the final determination regarding the request for a Level II Fieldwork assignment change to the student in person (and in writing), within one week of the student's documented request.

A student whose request for a change in a Level II Fieldwork assignment is denied must attend and complete the course (OTD 675 or 775) at the assigned site or a grade of "fail" will be documented for the registered course.

A student whose request for a change in a Level II Fieldwork assignment is approved will have his/her name returned to the student fieldwork placement pool, and will begin to work with the DFE to secure an alternative assignment. A student who has been returned to the student placement pool must understand that confirmation and assignment to an alternative Level II Fieldwork site may not be possible within the same fieldwork cycle.

If an alternative assignment cannot be identified within the original fieldwork cycle, the student must understand that this condition necessitates a revised academic plan that will alter their progression in the program. The revised plan will require a delay in the initiation and completion of the Doctoral Experiential Implementation/Mentorship courses (OTD 781/784), as well as a postponement of a student's anticipated graduation date.

LEVEL II FIELDWORK ASSIGNMENT CANCELLATION

Students must be prepared for the possibility of a Level II Fieldwork placement cancellation that is imposed by the fieldwork setting. This type of cancellation can occur due to staffing changes and other unforeseen circumstances. In the event of a cancellation, the DFE will notify students as early as possible. The DFE will return the student's name to the fieldwork placement pool and work with the student to begin the process of securing an alternate placement. Reasonable efforts will be made to reassign the student within the same fieldwork cycle. However, this is not always possible and there are no guarantees that this will occur.

EXPECTATIONS FOR PROFESSIONAL APPEARANCE

Students representing Western New England University, the College of Pharmacy and Health Sciences (COPHS) and the OTD program at external fieldwork sites are expected to comply with all standards for academic, personal, professional and social conduct. **Refer to the COPHS Student Handbook for the code of conduct, discrimination/harassment/sexual misconduct/Title IX Policy information, and attire policy.**

Please note the specific attire for OT students attending Level I or Level II Fieldwork below:

- Approved polo shirt with WNE/OTD insignia or attire as directed by the fieldwork site policy
- Approved student name tag must be worn at all times
- Lab coats or other attire may be required for Level II Fieldwork
- Minimize jewelry and fragrances
- OTD students that arrive to fieldwork out of compliance with this professional appearance policy may be asked to leave the fieldwork site, under the discretion of the fieldwork educator

EXPECTATIONS OF PROFESSIONAL BEHAVIOR

During Level I and Level II fieldwork, OTD students portray an image of Western New England University. It is expected that all OTD students will represent WNE with the utmost integrity and professionalism. This includes the following:

- Actively participate in all aspects of the fieldwork experience
- Arrive to all fieldwork experiences on time
- Complete all required course work prior to and during the fieldwork experience
- Arrange transportation to and from the fieldwork sites

- Comply with all laws, policies, and procedures of the fieldwork site, Western New England University, College of Pharmacy and Health Sciences, Doctor of Occupational Therapy Program, state licensure boards, and the American Occupational Therapy Association
- Demonstrate the standards of professional behavior outlined in the COPHS Student Handbook and OTD Student Handbook Supplement, including HIPAA/FERPA, OSHA, code of conduct, patient rights and the AOTA Code of Ethics
- Demonstrate respectful interaction and communication with clients, peers, clinical educators/ supervisors, and other individuals who are part of the fieldwork experience
- Follow the chain of command at the fieldwork site for any fieldwork-related problems or issues. Refer to the *Communication Protocol for Fieldwork Issues* section of this handbook for details.
- Fulfill all tasks, assignments and duties assigned by the fieldwork educator, clinical faculty member and the DFE within the specified timeframe
- Utilize constructive feedback for personal and professional growth
- Demonstrate strong emotional intelligence consistent with the expectations of a health care practitioner
- Provide feedback regarding the fieldwork experience as requested
- Carry current health insurance and have access to proof of completing health/immunization program requirements or specific requirements for fieldwork sites
- Complete criminal background checks, fingerprinting, drug screening as often as required by fieldwork sites prior to start date of fieldwork placement
- Inform DFE of any conflict of interests that may occur at the student's fieldwork site

LEVEL I FIELDWORK: IMPLEMENTATION

Sites selected for Level I fieldwork represent both traditional and emerging settings that meet the curriculum goals to provide a broad range of occupation-based and evidence-based occupational therapy services. Under the direction of the DFE, and with collaboration with clinical faculty members, Level I fieldwork is implemented at:

- Traditional sites include but is not limited to hospital facilities with cardiac, neurological, psychiatric, pediatric units, etc.; skilled nursing facilities; long-term care facilities; private practices; residential settings; schools; outpatient rehabilitation, community agencies, and summer camps
- Non-traditional settings can include but is not limited to veteran's drop-in programs, homeless shelters, immigrant assistance programs, Alzheimer's/Dementia care respite care centers, senior centers, teen mother's support groups, primary care private practices, hospice programs, correctional facilities, transition services for older youth, substance abuse recovery programs, health/wellness centers, and ergonomics consulting groups.

Level I fieldwork is an integral part of the curriculum design as OTD students participate in coursework with the didactic portion of the program that parallels the setting of Level I fieldwork. Level I fieldwork objectives are designed to have students demonstrate professional behaviors, communication, thinking, and problem-solving through directed observations and supervised participation. Specific course objectives are determined by Clinical Faculty assigned to each course and are documented in the course syllabus.

Level I fieldwork is implemented in five, one-credit courses, that begin in the first Fall semester, and continue in each semester through the Spring semester of the second program year (OTD 518, 539, 549, 639, and 649). Reflecting the sequence and scope of the curriculum design, Level I fieldwork provides students with the opportunity to work with individuals across the lifespan in a variety of settings. Level I fieldwork occurs across a variety of practice settings, and is offered concurrently with the core practice courses that address a depth and breadth of occupational therapy practice including adult and aging practice (OTD 527 and 537), children and youth practice (OTD 547 and 637), and lifespan practice courses (OTD 517 and 657). Fieldwork experiences are designed to provide opportunities for students to engage with clients who are living with acute and chronic physical and mental disabilities, and those with psychological and social barriers to engagement in occupations.

During traditional fieldwork experiences or faculty-supervised on-site fieldwork experiences, students complete learning activities to assess the application of didactic course content. Examples of specific assignments that bridge didactic course content with fieldwork education activities may include but are not limited to include self-reflective journaling, online discussions, participation evaluations, simulated clinical documentation, and development of group format interventions.

The connection of didactic learning and experiential learning is an integral dynamic of the curriculum design of the WNE OTD program. Within this design, students complete Level I fieldwork each semester that corresponds with classroom content and population focus for each semester.

Fieldwork Course	Population	Corresponding Course
OTD 518 - Level 1-A Fieldwork	Acute mental health care, outpatient rehabilitation, mental health clinics, long-term care facilities community based programs across the lifespan	OTD 500, 506, 512 & 517
OTD 539 - Level 1-B Fieldwork	Adults in acute care hospitals, rehabilitation, post-acute facilities or community-based programs	OTD 527, 531 & 537

OTD 549 - Level 1-C Fieldwork	Pediatric medical practice in inpatient acute care, outpatient services, rehabilitation centers, residential and long-term care facilities	OTD 545 & 547
OTD 639 - Level 1-D Fieldwork	Pediatric school-based services, community-based and residential settings	OTD 637
OTD 649 - Level 1-E Fieldwork	Community based and residential settings across the lifespan	OTD 645 & 657

Clinical faculty assign students to fieldwork experiences. Students are expected to arrange their own transportation to Level I fieldwork sites and to attend fieldwork on their assigned days and times. Student performance on Level I fieldwork may include written assignments, reflective journaling, case studies, file reviews, interviews, group planning, and intervention projects, demonstrated competencies, or other specific learning activities. Student performance during Level I fieldwork is supervised and evaluated by either the clinical faculty member, the fieldwork educator, or the site supervisor. Students will receive a pass/fail grade for each fieldwork course based upon meeting specific learning objectives and the requirements outlined in the course syllabus. Evaluation of a student’s professional behaviors while on-site is an integral part of the overall Level I fieldwork grade. Successful completion of all Level I fieldwork courses is a prerequisite to begin Level II fieldwork.

Responsibilities of the Clinical Faculty in Level I includes:

- Collaborating with the DFE to determine that fieldwork course objectives meet program; and accreditation standards (including exposure to varied service delivery areas that are aligned with the curriculum);
- Negotiating the logistics and scheduling of the fieldwork experiences with site;
- Identifying the types of assessment and intervention activities to facilitate during;
 - fieldwork experiences that are in alignment with course objectives;
- Providing students with an appropriate orientation to the setting;
- Working with academic faculty to design and provide assignments integrating didactic coursework with clinical experiences;
- Observing and providing feedback to students on-site on a regular basis;
- Providing opportunities for student course advisement outside of the fieldwork setting;
- Collaborating with the DFE regarding concerns about student performance & site management;
- Document evaluative elements of fieldwork education by complete Level I fieldwork evaluations of each student’s performance (See APPENDIX H).

LEVEL II FIELDWORK: IMPLEMENTATION

Students must successfully complete all Level I fieldwork experiences and the first six semesters of academic coursework to be eligible for Level II fieldwork. No portion of Level I fieldwork may be substituted for Level II fieldwork [Standard C.1.9.]. According to ACOTE standards, Level II fieldwork must be conducted in a minimum of one (if more than one practice setting is represented) and a maximum of four settings [Standard C.1.10.]. Students in the OTD program must successfully complete two Level II affiliations in two different practice settings that are consistent with the curriculum design (e.g. hospitals, rehabilitation centers, skilled nursing facilities, school systems, community-based practice, etc.) and may include the following practice focus: adult and aging physical disabilities; adult and aging mental health and psychosocial disabilities; children and youth physical, psychosocial, and educational disabilities, and/or community health.

The first Level II fieldwork course is offered in the 6th semester of the WNE OTD curriculum, and the second Level II fieldwork is offered in the 7th semester. During each Level II fieldwork experience, students earn nine academic credits.

LEVEL II FIELDWORK: COMMUNICATION

Refer to the Communications Policy in the General Academic Policies and Procedures Section of this supplemental handbook. Specific procedures related to Level II Fieldwork communications include:

- OTD students should initiate an introduction email to be sent to their respective fieldwork educator approximately 2 months before the Level II fieldwork start date. Content of this introduction email should include confirmation of start date and location, weekly schedule, and dress code clarification.
- OTD students will contact the DFE via email during the first two weeks of the Level II fieldwork affiliation to report on progress.
- The student should initiate additional communications prior to the midterm and at two-week intervals throughout the twelve-week cycle.

Communications can include general questions regarding supervision or student performance, as well as more serious concerns regarding supervisory issues, ethical conduct, etc. Additionally, OTD students are required to participate in bi-weekly journaling as developed by the DFE as a part of the Level II Fieldwork experience, which will be conducted through Kodiak. Student are encouraged to develop peer chat rooms or secured social interactions so they can support one another through this learning phase of their development.

LEVEL II FIELDWORK: GRADING & EVALUATION

Students are assigned a “pass” or a “fail” grade for OTD 675 and OTD 775 by the DFE following completion of the 12-week affiliation after a review and analysis of all evaluative data related to fieldwork performance, assignments/projects, and professional behavior (including evidence of misconduct).

A passing grade (on a pass/fail basis) must be earned in Level II Fieldwork courses. A passing grade is based upon a number of evaluative criteria: AOTA Fieldwork Performance Evaluation (APPENDIX I), completion of assignments and projects, timeliness of submission of required documentation, and professional behavior and overall conduct. The fieldwork educator provides the Director of Fieldwork Education (DFE) with the evaluative data from the fieldwork experience and the DFE assigns the final course grade.

Specific information related to fieldwork evaluation/grading includes:

- OTD students are evaluated for overall Level II fieldwork performance at the mid-term point in each Level II fieldwork placement, and again at the end of the 12-week assignment.
- Evaluation of the OTD student’s overall performance is conducted using the AOTA online platform called Formstack. An internet link will be sent to the primary fieldwork educator, who is responsible for completing a mid-term and final evaluation of the OTD student, and that link will provide access to the online mid-term and final evaluation.
- Benchmarks objectives for student performance as determined by fieldwork sites, and supported by the DFE, are provided to the student at the beginning of the fieldwork affiliation.
- Students must meet benchmark objectives toward entry-level competence within timelines established, as the basis for the fieldwork educator and the DFE to determine if the student will be able to pass their Level II Fieldwork.
- Students may be terminated at any time during fieldwork placement, as determined by the fieldwork educator and/or site representative in consultation with the DFE. In cases where a student is terminated from a Level II fieldwork placement, a grade of FAIL will be recorded for the student.

In the event that a student is not passing at the end of the 12-week experience (as determined by failing to meet benchmark objectives for entry-level performance or professional behavior, including completion of assignments/projects, results of the AOTA fieldwork evaluation, or other evaluative criteria), a brief time extension beyond the standard 12 weeks **may** be offered. Any extensions of a Level II fieldwork placement must be approved by the DFE and the fieldwork site personnel overseeing the OTD student. In the event that a Level II fieldwork

placement extension is implemented, A revised fieldwork plan with an extended timeline will be developed and agreed upon by the fieldwork educator, the DFE, and the OTD student. In the event that an extension is not approved, a grade of Fail will be assigned to the OTD student for the Level II fieldwork placement.

If a student is assigned a failing grade for a Level II Fieldwork course (i.e., either OTD 675 or OTD 775), the course will need to be repeated to meet program requirements. Students are permitted to repeat one Level II Fieldwork course during the program.

- a. Failure to successfully complete a revised fieldwork plan (with or without a time extension), according to the requirements of the program will result in a failing grade in that affiliation and will qualify the student for dismissal from the program.
- b. Earning a failing grade in a second Level II Fieldwork course will result in dismissal from the program.

Fieldwork settings and the fieldwork educators who accept students for Level II Fieldwork are able to terminate a student from a fieldwork affiliation at any time during a fieldwork placement.

Refer to the Grading Policy, Academic Standards/Progression, Graduation Requirements, and Academic Probation and Dismissal information in the General Academic Policies and Procedures Section in the WNE College of Pharmacy and Health Sciences handbook.

LEVEL II FIELDWORK: FORMS

Standard AOTA forms that are used in Level II Fieldwork include:

- AOTA Student Evaluation of the Fieldwork Experience (SEFWE) (APPENDIX D)
- NEOTEC Site Specific Objectives (APPENDIX E)
- NEOTEC Fieldwork Data Form (APPENDIX G)

Fieldwork educators are responsible for completing the online Fieldwork Performance Evaluation of the Occupational Therapy Student (FWPE) tool (APPENDIX I) at mid-term and again at the conclusion of Level II Fieldwork. Student assessment of fieldwork performance will be calculated by the fieldwork educator followed by a discussion of the findings of the evaluation between the students and the fieldwork educator. Mid-term and final FWPEs are then accessed by the DFE using the Formstack repository.

Students are responsible for completing the AOTA Student Evaluation of the Fieldwork Experience

(SEFWE) form (APPENDIX D) upon completion of each 12-week affiliation and submitting the form to the DFE (C.1.12). Fieldwork grades will not be posted until the form has been submitted, which may result in a delay in subsequent fieldwork, coursework, or the doctoral experiential residency implementation. As part of program evaluation, information from the SEFWE (APPENDIX D) is used to assess the ability of current fieldwork sites to meet OTD program objectives. Future students will have access to the SEFWE (APPENDIX D) for information regarding fieldwork placements during the selection process.

LEVEL II FIELDWORK: OBJECTIVES

Level II Fieldwork Objectives have been developed to meet the curriculum goals of the OTD program (APPENDIX F). Other site-specific objectives may be developed that address service delivery and population/client variations. Typical student learning activities that are designed to meet fieldwork benchmarks may include but are not limited to:

- Chart reviews/summaries
- Occupational therapy client screening and evaluation
- Occupational therapy intervention planning
- Conducting occupational therapy interventions
- Writing discharge summaries
- Attendance and active participation in meetings
- Providing in-services to staff including article reviews
- Consultation
- Client, family, caregiver education and home program education
- Activity analysis and grading activity
- Adaptive equipment, assistive technology evaluation and training
- Interprofessional collaboration
- Professional presentations
- Performing skilled observation of clients in multiple contexts (home, other classrooms, other disciplines)

FIELDWORK REQUIREMENTS

Standard requirements which must remain current throughout the course of the program, and are mandatory for participation in Level I and Level II fieldwork include:

- Basic Life Support for Healthcare Professionals CPR Certification – renewal required every two years
- CastleBranch Background check – renewal required every two years
- Bloodborne Pathogens / OSHA Certification – renewal required every year
- Health Information for Health Insurance Portability and Accountability Act (HIPAA) certification – No renewal required
- All immunizations and vaccinations which are conditional to being admitted to the OTD Program and must be maintained throughout a student's enrollment in the OTD program

In addition to standard OTD program requirements, additional site-specific requirements may include but are not limited to, fingerprinting, site-run background checks, and drug testing. Failure to comply with site-specific requirements by the site deadline may result in a cancellation of the site affiliation. In the event that an affiliation is canceled due to student noncompliance with program or site-specific requirements, the program cannot guarantee a placement at an alternate site in the same fieldwork cycle.

RESPONSIBILITIES OF THE FIELDWORK EDUCATOR

The fieldwork educator is the designated professional who works in the program that is supporting the OTD student's experiential learning in Level II Fieldwork. Fieldwork educators facilitate the overall learning experience of the OTD student including providing an educational and clinical experience, as well as timely and productive feedback and evaluation of student performance. In some instances, the duties of the fieldwork educator may be divided among two different professionals, commonly known as the 2:1 model of Level II fieldwork supervision.

Responsibilities of the fieldwork educator include but are not limited to:

- Provide students with an appropriate orientation to the site;
- Communicate fieldwork expectations, objectives, and assignments, including requirements for successful completion of the fieldwork experience;
- Provide appropriate supervision of the student during the fieldwork experience as governed by the OT practice laws in that state;
- Document student performance and participation including completion of the Level I evaluation and the FWPE for Level II fieldwork;
- Provide ongoing and consistent feedback to the student regarding his/her performance and participation;
- Foster an environment supportive of student learning;
- Act as a professional role model;

- Communicate with the Director of Fieldwork/Experiential Education regarding student performance and report any issues that may impede the students' success during fieldwork;
- Maintain active licensure in the state in which he/she practices;
- Have a minimum of one year of professional experience in OT practice;
- Meet the state and AOTA supervisory laws and guidelines with regard to supervision;
- Submit required documentation and site-specific objectives in coordination with the DFE;
- Adhere to ethical practice guidelines as dictated in the AOTA Code of Ethics, and local, state, and professional standards of practice;
- Create an atmosphere conducive to learning;
- Facilitate maturation of the OTD student from novice observer to entry-level generalist in their respective practice setting on Level II fieldwork.

RESPONSIBILITIES OF THE FIELDWORK STUDENT

The student will:

- Actively participate in all aspects of the fieldwork experience;
- Provide professional introduction to fieldwork site as directed by the DFE
- Complete all required course work prior to and during the fieldwork experience;
- Arrange all transportation needs as required for their assigned fieldwork placement;
- Comply with all laws, policies, and procedures of the fieldwork site, the Doctor of Occupational Therapy Program, Western New England University, state licensure boards, and the American Occupational Therapy Association;
- Demonstrate the standards of professional behavior outlined in the student manual, including HIPAA and the AOTA Code of Ethics;
- Demonstrate respectful interaction and communication with clients, peers, fieldwork educators, supervisors, and other individuals who are part of the fieldwork experience;
- Follow the chain of command at the fieldwork site for any fieldwork related problems or issues. Refer to the *Fieldwork Issues* section for details;
- Fulfill all tasks and duties assigned by the fieldwork educator and the DFE within the specified timeframe;
- Utilize constructive feedback for personal and professional growth;
- Provide feedback regarding the fieldwork experience;
- Carry current health insurance, proof of completing health/immunization requirements of the program and fieldwork sites;
- Complete criminal background checks, fingerprinting, drug screening as required by fieldwork sites
- Inform DFE of any conflict of interests;
- Provide documentation of fieldwork requirements by deadlines indicated by the assigned site;

- Research fieldwork sites via available resources prior to beginning of fieldwork placement in order to familiarize oneself with the facility, the populations served, and other available information;
- Arrange for out of state housing and travel if fieldwork is not in the student's geographic area of residence;
- Complete the AOTA Student Evaluation of Fieldwork Experience (SEFWE) on completion of each 12- week affiliation (See APPENDIX D) and submit into the corresponding Kodiak Classroom;

Additional site-specific information may be requested by the site. Students are financially responsible for the costs of any required tests or procedures. Students are also responsible for any medical expense occurring during the fieldwork and doctoral experiential that is not covered by his or her insurance.

Students with conditions that may affect their ability to participate in fieldwork are strongly encouraged to discuss their concerns with WNE Student Accessibility Services as soon as possible in the planning process so that steps can be taken to ensure the safety and well-being of everyone involved.

LEVEL II FIELDWORK: INTRODUCTORY PACKET

Eight weeks prior to the start of the affiliation, the DFE will provide the fieldwork site via email with an informational packet pertaining to the student who has been assigned to that site including:

- Fieldwork Confirmation Letter that acknowledges student agreement to attend the assigned fieldwork. This form will be maintained in the student's fieldwork file;
- Attestation letter confirming student has met all general, medical, and site-specific requirements prior to starting Level II fieldwork, if requested by fieldwork site;
- AOTA Self-Assessment Tool for Fieldwork Educator Competency (See APPENDIX B);
- AOTA Student Evaluation of Fieldwork Experience (See APPENDIX D);
- NEOTEC Site Specific Objectives Checklist (See APPENDIX E);
- NEOTEC Fieldwork Data Form (See APPENDIX G);
- Completed student Personal Data Sheet
- Verification of any additional site-specific requirements as indicated in the Memorandum of
- Understanding with the fieldwork site;

LIVING ACCOMMODATIONS AND TRAVEL
EXPECTATIONS DURING LEVEL II FIELDWORK

During the assignment process for matching OTD students with Level II fieldwork opportunities, every effort will be made to minimize the amount of time that will be required to commute from residence to fieldwork location. However, students may be expected to have a commute to their Level II Fieldwork of up to 90 minutes. Additionally, all costs associated with housing, travel, and site requirements will be the responsibility of the student.

COMMUNICATION PROTOCOL FOR FIELDWORK ISSUES

Collaboration and communication between the DFE, fieldwork educator and the OTD student is expected throughout Level II fieldwork. Standard communication regarding non-urgent business should occur through email. Examples of non-urgent business include communication on fieldwork administration, requirements, and collaboration on paperwork. Urgent matters including issues with student performance, safety issues, and time-sensitive matters should be conducted via telephone communications. In the event of an emergency only, the DFE can be contacted via cell phone.

Regarding the chain of communication for fieldwork issues, OTD students are recommended to first attempt to address the issue with their respective fieldwork educator. If a mutually agreed-upon solution does not occur, then the supervisor of the fieldwork educator should be contacted. In situations that cannot be addressed on-site, the DFE should be contacted via telephone communications. If the DFE is unable to resolve the reported issue, then the Program Director of the OTD program should be contacted.

STUDENTS WITH DISABILITIES AND FIELDWORK EDUCATION

Students who believe they will require accommodations while on fieldwork are strongly encouraged to disclose their disability early in the academic program by contacting WNE Student Accessibility Services (<https://www1.wne.edu/student-accessibility-services/index.cfm>). Students will be required to submit appropriate documentation to receive specific accommodations. Student Accessibility Services will indicate the specific documentation that will be required; however, this documentation may include psychoeducational testing results, medical records, and educational records indicating a history of academic support services.

If a student will be seeking fieldwork accommodations, he/she should meet with the DFE prior to confirmation of fieldwork placement assignments. Neither WNE nor the OTD program will disclose information regarding a student's disability status to fieldwork/experiential sites without written consent from the student.

Fieldwork sites are required to provide reasonable accommodations; however, students must be mindful of the demands of any particular fieldwork site and whether the accommodations they are requesting are "reasonable" to achieve entry-level practice independence at the site. The student will want to work closely with the DFE and the WNE Student Disability Services Department to ensure that the setting and the accommodations are both appropriate and reasonable. If the student discloses his/her disability to representatives of the fieldwork setting, the representative is required to maintain confidentiality on medical/disability-related information with the following limited exceptions:

- The fieldwork educator may be notified of any necessary restrictions and/or accommodations
- First aid/safety personnel may be notified if the nature of the disability may require emergency treatment and/or response

EMPLOYMENT DURING FIELDWORK

Due to the academic rigor of the entry-level doctoral program, employment during Level II Fieldwork is not recommended or encouraged. Students should be aware that they may be required to use “after class” hours for special activities, fieldwork research, case preparation, and a variety of other tasks and/or events. In the event that a student elects employment in a non-professional occupational therapy-related capacity, he/she cannot use his/her program name badge or use “OTS” following his/her signature. In addition, the WNE liability insurance policy does not cover the student in this capacity.

COMPLIANCE

Students who refuse to comply with the program requirements as specified in the COPHS Student Handbook and the OT Student Handbook Supplement are ineligible to participate in curriculum-specific fieldwork/experiential learning activities, and thus may be dismissed from the program.

In addition to program requirements, students are also required to comply with any additional site-specific requirements prior to beginning fieldwork. Failure to comply with site-specific requirements by the site deadline imposed may result in a cancellation of the affiliation at this site. In the event that an affiliation is canceled due to student noncompliance with program or site-specific requirements, the OTD program cannot guarantee a placement at an alternate site in the same fieldwork cycle. Furthermore, the program cannot assume responsibility for delays in completion of the program or eligibility to sit for the NBCOT exam if the student fails to accept or complete a scheduled fieldwork experience, or if the fieldwork site cancels a scheduled placement.

INTERNATIONAL FIELDWORK EXPERIENCES

The opportunity to complete fieldwork outside of the United States is permitted under ACOTE standards of Occupational Therapy education. However, the WNE OTD program is aimed at providing OTD students with a knowledge base consistent with the United States-based National Board for the Certification in Occupational Therapy Licensure Examination as well as general occupational therapy practice within the United States. Therefore, international Level I and Level II fieldwork is currently not under consideration for OTD students.

LEVEL II FIELDWORK SCHEDULE AND ABSENCE POLICY

OTD students are required to complete a minimum of 24 weeks of full-time Level II Fieldwork once all prerequisite coursework has been successfully completed. During Level II Fieldwork placements, the work schedule for OTD students will be in alignment with the typical work schedule expectations for an OT staff member at the assigned placement, which may include attending fieldwork on weekends and/or holidays. In addition, fluctuations in the work schedule from week to week may occur depending on the needs of the fieldwork site.

OTD students must not exceed more than two excused absences during a 12-week rotation. Examples of excused absences may include bereavement, jury duty, or illness. The fieldwork educator and the DFE may require documentation for approval. Absences greater than two missed days must be made up at the discretion of the WNE OTD program and the fieldwork site.

HOLIDAYS AND SNOW DAYS

When WNE classes are canceled due to weather, Level I fieldwork students should not report to fieldwork unless explicitly instructed to do so through email or text message. During Level II fieldwork, all students are expected to make every reasonable effort to report to the fieldwork site for scheduled fieldwork hours unless instructed otherwise by the fieldwork educator or other site personnel. This policy applies to students attending Level II Fieldwork at local sites, even if WNE has canceled classes for the day. If travel to the facility is deemed unsafe, or if tardiness is unavoidable, the student should contact his or her fieldwork educator before the start of the scheduled hours to report the absence or delayed arrival. The student must also report such absences to the DFE via email.

IMMUNIZATION COMPLIANCE WITH RELIGIOUS AND PERSONAL BELIEFS

The faculty and staff in the entry-level OTD program at WNE will make every reasonable effort to support student beliefs and principles. In the event that an OTD student elects to defer receiving immunizations, vaccines or other medical requirements that are considered a standard operating procedure for occupational therapy practice, OTD students must consider that this decision could impact access to fieldwork sites and may delay progression through the OTD program at WNE. Potential delays in progression through the OTD curriculum and graduation can occur. This is due to the fact that the number of fieldwork sites not requiring immunizations is very limited as the potential exposure to communicable disease from close contact with clients is considered common in occupational therapy practice.

APPENDIX A

Fieldwork Preference Form

Name: _____

Date: _____

Hometown: _____

Additional geographical locations to be considered:

Preferred facilities or programs (please include name and address of program):

Rank practice setting in order of preference (1= most preferred & 7 = least preferred):

Acute Care:

School based/Pediatric:

Inpatient Rehab:

Outpatient:

Home health

Community based:

Mental Health:

Content Area that you are MOST confident:

Content Area that you are LEAST confident:

1. What pace of a work environment do you find you work best/are most comfortable in?

1

2

3

4

5

Fast Paced

Moderate Pace

Slow Pace

2. How much do you like to be challenged when you are learning something new?

1

2

3

4

5

Complex and
Challenging

Some level of
complexity

Minimally
challenging and
complex

3. Please indicate any particular facilities that should be avoided in considering your placement due to a potential conflict of interest (e.g., previous employment, relative working at site, previous internship, etc.).
4. What do you consider to be your interpersonal strengths and challenges?
5. How would you describe your learning style?
6. What feedback have you received from professors or fieldwork supervisors?
7. Is there any other information that you feel we should know about you when matching you to a fieldwork site?

APPENDIX B

THE AMERICAN OCCUPATIONAL THERAPY ASSOCIATION SELF-ASSESSMENT TOOL FOR FIELDWORK EDUCATOR COMPETENCY

Fieldwork education is a vital component in preparing students for entry-level occupational therapy practice. This voluntary self-assessment tool supports the development of skills necessary to be an effective fieldwork educator (FWE) whose role is to facilitate the progression from student to entry-level practitioner. This tool was designed to provide a structure for fieldwork educators to assess their own level of competence and to identify areas for further development and improvement of their skills. Competency as a fieldwork educator promotes the practitioner's pursuit of excellence in working with students and ensures the advancement of the profession.

PURPOSE

Both novice and experienced OTA and OT fieldwork educators can use this tool as a guide for self-reflection to target areas for professional growth. Proficiency as a fieldwork educator is an ongoing process of assessment, education, and practice. It is essential for fieldwork educators to continually work toward improving their proficiency in all competency areas as they supervise OTA/OT students. Use of this assessment tool is intended to be the foundation from which each fieldwork educator will create a professional growth plan with specific improvement strategies and measurable outcomes to advance development in this area of practice.

CONTENT

The self-assessment tool includes the following features:

- 1) Addresses fieldwork educator competencies in the areas of professional practice, education, supervision, evaluation, and administration.
- 2) Uses a numerical rating (Likert) scale from 1 (Low Proficiency) to 5 (High Proficiency) to aid in self-assessment.
- 3) Includes a "Comment Section" intended to be used by the fieldwork educator in identifying aspects of competency for self-improvement.
- 4) Results in a "Fieldwork Educator Professional Development Plan." Fieldwork educators can use the suggested format for recording a professional development plan of action. The suggested format or chart may be copied for additional space. Such a plan helps fieldwork educators meet the standards established for FWE s as stated in the Accreditation Council for Occupational Therapy Education (ACOTE®) Standards and Interpretive Guidelines (2006).
- 5) Explains terminology, which is based on the Practice Framework 2nd Edition.

WHO SHOULD USE THE TOOL

This self-assessment tool is designed to be used by OTA and OT fieldwork educators at all levels of expertise in supervising students. While the tool is primarily oriented toward OTA/OT practitioners who directly supervise OTA and/or OT Level II fieldwork, it can easily be applied to Level I fieldwork and to non-OT supervision

DIRECTIONS

Fieldwork educators should determine the relevance of each competency to the role of the OTA/OT in their setting. Some competency statements may not be applicable in their setting and/or in their state (refer to the appropriate OTA/OT role delineation documents). In addition, the “Self-Assessment Tool for Fieldwork Educator Competency” is to be used for professional development only. It is not intended to be used as a performance appraisal. However, the fieldwork educator may certainly include goals articulated in the “Fieldwork Educator Professional Development Plan” in their annual professional goals.

Self-Assessment Tool:

Circle the number that correlates with your level of competence for each item. The “Comments” section can be used to highlight strengths, areas that need improvement, etc.

Development Plan:

It is helpful to prioritize the competency areas that need improvement and to select only a few areas that can realistically be accomplished. Write goals for each of the selected areas and identify strategies to meet the goals at the same time as establishing a deadline for meeting the goals. OT practitioners are adept in assessing, planning, and implementing practical and meaningful continuous quality improvement plans. It is this attribute, plus a desire to support the growth of future practitioners, that motivates OTAs and OTs to seek methods for gaining and maintaining their competence as fieldwork educators. We hope this tool is helpful in guiding fieldwork educators on a journey of self-appraisal and professional development. It meets the immediate need of defining basic competencies of fieldwork educators. It is in this spirit that the "Self-Assessment Tool" was drafted and offered as a means for better serving the needs of individuals and the future of occupational therapy.

Originally developed in 1997 by the COE Fieldwork Issues Committee.

Revised in 2009 by the Commission on Education:

René Padilla, PhD, OTR/L, FAOTA, *Chairperson*

Andrea Billics, PhD, OTR/L

Judith Blum, MS, OTR/L

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Jennifer Coyne, COTA/L

Jyothi Gupta, PhD, OTR/L

Linda Musselman, PhD, OTR, FA

SELF-ASSESSMENT TOOL FOR FIELDWORK EDUCATOR COMPETENCY

A. PROFESSIONAL PRACTICE COMPETENCIES	KEY DEFINITION STATEMENT: <i>The fieldwork educator demonstrates competencies in professional knowledge, skills, and judgment in occupational therapy practice that supports the client's engagement in meaningful occupation</i>					
The fieldwork educator:	CIRCLE ONE					COMMENTS
	Low Proficient			High Proficient		
1. Uses a systematic approach to evaluation and intervention that is science-driven and focused on clients' occupational performance needs.	1	2	3	4	5	
2. Skillfully collects and analyzes clients' occupational profile and performance in order to develop and implement OT services.	1	2	3	4	5	
3. Considers context, activity demands, and client factors when determining feasibility and appropriateness of interventions.	1	2	3	4	5	
4. Understands clients' concerns, occupational performance issues, and safety factors for participation in intervention.	1	2	3	4	5	
5. Articulates the rationale and theoretical model, frame of reference and/or therapeutic approach for OT services.	1	2	3	4	5	
6. Incorporates evidence based research into occupational therapy practice.	1	2	3	4	5	
7. Collaborates with the OT/OTA to provide evaluation, interpretation of data, intervention planning, intervention, discharge planning, and documentation.	1	2	3	4	5	
8. Collaborates with individuals, colleagues, family/support system, and other staff or professionals with respect, sensitivity, and professional judgment.	1	2	3	4	5	
9. Works to establish a collaborative relationship that values the client perspective including diversity, values, beliefs, health, and well-being as defined by the client.	1	2	3	4	5	
10. Addresses psychosocial factors across the OT practice setting as a reflection of a client-centered approach.	1	2	3	4	5	
11. Effectively manages and prioritizes client-centered services (e.g., intervention, documentation, team meetings, etc.) that support occupation-based outcomes.	1	2	3	4	5	
12. Incorporates legal, ethical, and professional issues that influence practice (e.g., reimbursement, confidentiality, role delineation, etc.	1	2	3	4	5	
13. Articulates and implements OTA/OT role delineations as relevant to the practice setting.	1	2	3	4	5	
14. Adheres to professional standards of practice and code of ethics as identified by AOTA and state regulatory boards.	1	2	3	4	5	
15. Assumes responsibility for and pursues professional development to expand knowledge and skills (e.g., understands own strengths and limitations, etc.).	1	2	3	4	5	
16. Is knowledgeable regarding entry-level practice skills for the OT and OTA .	1	2	3	4	5	

B. EDUCATION COMPETENCIES	KEY DEFINITION STATEMENT: <i>The fieldwork educator facilitates the student's development of professional clinical reasoning and its application to entry-level practice. The fieldwork educator assumes responsibility for ensuring her or his own competence as a fieldwork educator.</i>					
The fieldwork educator:	CIRCLE ONE					COMMENTS
	Low Proficient			High Proficient		
1. Provides ongoing assessment of a student's individual learning needs based on review of academic curriculum design, OTA and OT roles, prior experiences, and current performance level.	1	2	3	4	5	
2. Collaboratively develops student and fieldwork learning contracts to support occupation-based fieldwork experience (develop outcome-based measurable learning objectives).	1	2	3	4	5	
3. Sequences learning experiences to grade progression toward entry-level practice.	1	2	3	4	5	
4. Facilitates student-directed learning within the parameters of the fieldwork environment.	1	2	3	4	5	
5. Maximizes opportunities for learning by using planned and unplanned experiences within the fieldwork environment.	1	2	3	4	5	
6. Uses a variety of instructional strategies to facilitate the learning process (e.g., role modeling, co-intervention, videotaping, etc.).	1	2	3	4	5	
7. Adapts approach to work effectively with all students, including those who have physical and/or psychosocial impairment(s).	1	2	3	4	5	
8. Demonstrates sensitivity to student learning style to adapt teaching approach for diverse student populations.	1	2	3	4	5	
9. Guides student integration of therapeutic concepts and skills (e.g., facilitates discussions to elicit clinical/professional reasoning, convert practice situations into learning experiences, and/or to process personal feelings/values that interface with practice).	1	2	3	4	5	
10. Reflects upon educator role as complimentary to OT practitioner role.	1	2	3	4	5	
11. Self-identifies and implements a Fieldwork Educator Professional Development Plan. (See page 8 for suggested plan.)	1	2	3	4	5	
12. Identifies resources to promote student and fieldwork educator professional development (e.g., academic program, student and supervisor mentors, AOTA, Commission on Education, Education Special Interest Section, workshops, in-services, etc.).	1	2	3	4	5	
13. Provides reference materials to promote student and fieldwork educator professional development and use of EBP (e.g., publications, texts, videos, internet, etc.).	1	2	3	4	5	
14. Uses evidence-based research to guide student performance and learning for effective teaching strategies.	1	2	3	4	5	

C. SUPERVISION COMPETENCIES	KEY DEFINITION STATEMENT: <i>The fieldwork educator facilitates student achievement of entry-level practice through a student-centered approach.</i>					
The fieldwork educator:	CIRCLE ONE					COMMENTS
	Low Proficient			High Proficient		
1. Uses current supervision models and theories to facilitation student performance and professional behavior	1	2	3	4	5	
2. Presents clear expectations of performance throughout the fieldwork experience, appropriate to entry level OT practice (e.g., student OTA/OT role delineation, Level I/II fieldwork, practice environment, etc.).	1	2	3	4	5	
3. Anticipates and prepares student for challenging situations.	1	2	3	4	5	
4. Provides activities to challenge student's optimal performance.	1	2	3	4	5	
5. Provides the student with prompt, direct, specific, and constructive feedback throughout the fieldwork experience.	1	2	3	4	5	
6. Uses a progression of supervisory approaches throughout the student learning cycle (adapts the amount and type of supervision, changes approach to support student learning, challenges student at current level of performance) to facilitate student performance.	1	2	3	4	5	
7. Uses a variety of strategies to provide communication and feedback to promote student professional development (verbal, non-verbal, group, direct, indirect).	1	2	3	4	5	
8. Is aware of his or her own personal style of supervision and is able to adapt the approach in response to student performance.	1	2	3	4	5	
9. Initiates interaction to resolve conflict and to raise issues of concern.	1	2	3	4	5	
10. Elicits and responds to student's feedback and concerns.	1	2	3	4	5	
11. Collaborates with the student and academic fieldwork coordinator to identify and modify learning environments when student experiences difficulty.	1	2	3	4	5	
12. Models appropriate professional behaviors when interacting with students, clients, and peers.	1	2	3	4	5	
13. Consults with other FW educators and sites to develop creative learning experiences for the student.	1	2	3	4	5	
14. Uses innovation within own fieldwork setting to enhance the student learning experience during fieldwork.	1	2	3	4	5	

D. EVALUATION COMPETENCIES	KEY DEFINITION STATEMENT: <i>The fieldwork educator evaluates student performance to achieve entry-level practice in the fieldwork setting.</i>					
The fieldwork educator:	CIRCLE ONE					COMMENTS
	Low Proficient			High Proficient		
1. Reviews the evaluation tool and expected entry-level expectations (e.g., behavioral objectives, weekly objectives, etc.) with student prior to mid-term and final.	1	2	3	4	5	
2. Assesses student according to performance standards based on objective information (e.g., direct observation, discussion with student, review of student's documentation, observation by others, etc.).	1	2	3	4	5	
3. Assesses student's performance based on appropriate OTA/OT entry-level roles of the fieldwork practice setting.	1	2	3	4	5	
4. Facilitates student self-reflection and self-assessment throughout the fieldwork and evaluation process.	1	2	3	4	5	
5. Uses an evaluation process to advise and guide the student regarding strengths and opportunities for growth based on site-specific objectives.	1	2	3	4	5	
6. Uses fieldwork evaluation tools to accurately measure student performance and provide feedback.	1	2	3	4	5	
7. Completes and distributes in a timely manner all evaluations regarding student performance, including but not limited to the midterm and final evaluation (e.g., AOTA Fieldwork Performance Evaluation, Fieldwork Experience Assessment Tool [FEAT], etc.).	1	2	3	4	5	
8. Guides the student in the use of the Fieldwork Performance Evaluation as a method of promoting continued professional growth and development.	1	2	3	4	5	
9. Documents student's fieldwork performance recognizing ethical and legal rights (e.g., due process, confidentiality, ADA, integrity).	1	2	3	4	5	

ADMINISTRATION COMPETENCIES	KEY DEFINITION STATEMENT: <i>The fieldwork educator develops and/or implements an organized fieldwork program in keeping with legal and professional standards and environmental factors (physical, social, and cultural).</i>					
The fieldwork educator:	CIRCLE ONE					COMMENTS
	Low Proficient				High Proficient	
1. Communicates and collaborates with academic programs to integrate the academic curriculum design during fieldwork.	1	2	3	4	5	
2. Implements a model FW program that supports the curriculum of the academic program.	1	2	3	4	5	
3. Seeks support from fieldwork site administration and staff to develop and implement the student fieldwork program.	1	2	3	4	5	
4. Designs and implements the fieldwork program in collaboration with the academic programs served and in accordance to ACOTE standards for Level I and Level II fieldwork (2008) (e.g., academic and fieldwork setting requirements, Standards of Practice, Code of Ethics, etc.).	1	2	3	4	5	
5. Ensures that the fieldwork program is sensitive to diversity and multi-cultural issues.	1	2	3	4	5	
6. Documents an organized, systematic fieldwork program (e.g., fieldwork manual, student expectations, weekly sequence of expectations, etc.).	1	2	3	4	5	
7. Schedules formal and informal meetings with the student to guide the fieldwork experience.	1	2	3	4	5	
8. Collaborates with the student to develop student learning objectives.						
9. Documents behavioral objectives to achieve fieldwork objectives and learning experiences appropriate for entry-level practice.	1	2	3	4	5	
10. Is knowledgeable in legal and health care policies that directly influence FW.	1	2	3	4	5	
11. Defines essential functions and roles of a fieldwork student, in compliance with legal and accreditation standards (e.g., ADA, Family Education Rights and Privacy Act, Joint Commission, fieldwork agreement, reimbursement mechanism, state regulations, etc.).	1	2	3	4	5	
12. Provides student work areas appropriate to fieldwork site (e.g., student safety, accessibility, supplies, etc.).	1	2	3	4	5	
13. Provides a complete orientation for student to fieldwork site (e.g., policies, procedures, student expectations, and responsibilities, etc.).	1	2	3	4	5	
14. Requires student compliance with the fieldwork site policies and procedures (HIPAA, OSHA regulations), mission, goals, philosophy, and safety standards.	1	2	3	4	5	
15. Submits required fieldwork documents to academic program in a timely manner to ensure current data is available (e.g., fieldwork evaluation, fieldwork agreements, NEOTEC fieldwork data form, etc.).	1	2	3	4	5	
16. Conducts ongoing fieldwork program evaluations and monitors changes in the program with student and staff input (e.g., Student Evaluation of Fieldwork Experience, Self-Assessment Tool for Fieldwork Competencies, etc.).	1	2	3	4	5	

FIELDWORK EDUCATOR PROFESSIONAL DEVELOPMENT PLAN

NAME: _____

DATE: _____

<p>Strengths:</p> <hr/> <hr/> <hr/> <p>Areas to Develop:</p> <hr/> <hr/> <hr/>		Independent Study	Academic Coursework	Workshops / Continuing Ed.	Student Feedback	Consult with Academic FW Coordinator	Presentations	Publications	Research Activities	Mentorship	Peer Review	Shared Supervision of Student	Target Date	Competed Date
		Competency Areas to Address	Goals											

1 AMERICAN OCCUPATIONAL THERAPY ASSOCIATION RESOURCE LIST

2 *Atler, K. (2003). Using the fieldwork performance forms: The complete guide.* Bethesda, MD:
3 American Occupational Therapy Association.

4 *Atler, K. & Wimmer, R. (2003). Online course—Using the Fieldwork Performance Evaluation*
5 *forms: An interactive approach.* Bethesda, MD: American Occupational Therapy Association.

6 Accreditation Council for Occupational Therapy Education (2009). *Standards and Interpretive*
7 *Guidelines.* Downloaded June 8, 2009 from

8 <http://www.aota.org/Educate/Accredit/StandardsReview/guide/42369.aspx>

9 American Occupational Therapy Association (2009). *Occupational therapy fieldwork education:*
10 *Value and purpose.* Bethesda, MD: American Occupational Therapy Association.

11 American Occupational Therapy Association (2009). *Specialized knowledge and skills of*
12 *occupational therapy educators of the future.* Bethesda, MD: American Occupational Therapy
13 Association.

14 American Occupational Therapy Association (2008). *Occupational therapy practice framework:*
15 *Domain and process* (2nd edition). Bethesda, MD: Author.

16 American Occupational Therapy Association (2008) *Guidelines for supervision, roles, and*
17 *responsibilities during the delivery of occupational therapy services.* Bethesda, MD: Author.

18 American Occupational Therapy Association (2008) *Recommendations for occupational therapy*
19 *fieldwork experiences.* Bethesda, MD: American Occupational Therapy Association.

20 American Occupational Therapy Association (2005). *Occupational therapy code of ethics.* Bethesda,
21 MD: Author

22 *Costa, D. (2004). Essential guide to occupational therapy fieldwork education: Resources for today's*
23 *educators and practitioners.* Bethesda, MD: American Occupational Therapy Association.

24 *Costa, D. (2007) Clinical supervision in occupational therapy: A guide for fieldwork and practice*
25 *Bethesda, MD: American Occupational Therapy Association.*

26 *Moyers, P.A. (2007). The guide to occupational therapy practice.* Bethesda, MD: American
27 Occupational Therapy Association.

APPENDIX C

HIPAA Guidelines for Fieldwork and Doctoral Experiential Education

The AOTA website is a resource for OT students, fieldwork educators and university faculty. This includes guidelines and strategies on how to maintain compliance with the Health Insurance Portability and Accountability Act (HIPAA) (“HIPAA Guidelines for Fieldwork,” n.d.).

Per HIPAA guidelines, students cannot report this information in fieldwork assignments such as case studies presentations:

- Name
- Location - includes anything smaller than a state, such as street address
- Dates - all, including date of birth, admission and discharge dates
- Telephone numbers
- Fax numbers
- Electronic e-mail addresses
- Social security numbers
- Medical record numbers
- Health plan beneficiary numbers
- Account numbers
- Certificate and/or license numbers
- Vehicle identification numbers and license plate numbers
- Device identifiers and their serial numbers
- Web Universal Resource Locators (URLs)
- Internet Protocol (IP) address numbers
- Biometric identifiers, including finger and voice prints
- Full face photographic images and any comparable images
- Any other unique identifying number, characteristic, or code.

For written reports, the following information **can** be shared:

- Age (age 90 and over must be aggregated to prevent the identification of older individuals)
- Race
- Ethnicity
- Marital Status
- Codes (a random code may be used to link cases, as long as the code does not contain, or be a derivative of, the person's social security

number, date of birth, phone/fax numbers, etc.)

Students, as well as therapists, often keep "working files" in their desk. This is still allowed under HIPAA guidelines. However, this information must be locked in a file cabinet when not in use, and must be shredded when no longer needed.

APPENDIX D

STUDENT EVALUATION OF THE FIELDWORK EXPERIENCE (SEFWE)

Purpose:

This evaluation serves as a tool for fieldwork sites, academic programs, and students. The main objectives of this evaluation are to:

- Enable the Level II fieldwork student who is completing a placement at the site to evaluate and provide feedback to the fieldwork educator[s] and fieldwork setting
- Enable academic programs, fieldwork sites, and fieldwork educators to benefit from student feedback in order to develop and refine their Level II fieldwork programs
- Provide objective information to students who are selecting sites for future Level II fieldwork

This form is designed to offer each program the opportunity to gather meaningful and useful information. Programs may adapt this form to suit their needs.

Instructions to the Student:

Complete the SEFWE before your final meeting with your fieldwork educator(s). Make a copy of the form for yourself. This form gets submitted to your fieldwork educator during or after you review your final fieldwork performance evaluation (FWPE). The SEFWE is signed by you and the fieldwork educator(s).

Instructions to the Fieldwork Educator(s):

Review the SEFWE with the student after the final Fieldwork Performance Evaluation (FWPE) has been reviewed and signed.

The SEFWE is signed by both the fieldwork educator(s) and the student.

Return both the FWPE and SEFWE promptly upon completion of the fieldwork to the academic fieldwork coordinator.

STUDENT EVALUATION OF THE FIELDWORK EXPERIENCE

Fieldwork Site: _____

Address: _____

Type of Fieldwork: _____

Placement Dates: from _____ to _____

Order of Placement: First Second Third Fourth

Student work schedule:

Hours required: _____ per week

Weekends required Evenings required

Flex/Alternate Schedules Describe: _____

Identify Access to Public Transportation: _____

Please write your e-mail address here if you don't mind future students contacting you to ask you about your experience at this site: _____

We have mutually shared and clarified this Student Evaluation of the Fieldwork

Experience report on _____
(date)

Student's Signature

FW Educator's Signature

Student's Name (Please Print)

FW Educator's Name and credentials (Please Print)

FW Educator's years of experience _____

ORIENTATION—WEEK 1

Indicate the adequacy of the orientation by checking “Yes” (Y) or “Needs Improvement” (I).

TOPIC	Adequate		Comment
	Y	I	
Site-specific fieldwork objectives			
Student supervision process			
Requirements/assignments for students			
Student schedule (daily/weekly/monthly)			
Agency/Department policies and procedures			
Documentation procedures			
Safety and Emergency Procedures			

CLIENT PROFILE

Check age groups worked with

List most commonly seen occupational performance issues in this setting

Age	
0–5 years old	
6–12 years old	
13–21 years old	
22–65 years old	
65+ years old	

Occupational Performance Issues

Describe the typical population: _____

OCCUPATIONAL THERAPY PROCESS

I. EVALUATION

List assessment tools used	Observed	Performed

II. INTERVENTION

List major therapeutic interventions frequently used and indicate whether each was provided as individual, group, or co-treatment, or as a consultation. List other professionals involved.

Types of Intervention	Individual	Group	Co-Tx	Consultation
Occupations: client-directed life activities that match/support/address identified goals				
Activities: meaningful to client, address performance skills and patterns to facilitate occupational engagement				
Preparatory methods: modalities, devices and techniques. These are provided to the client, no active engagement				
Preparatory tasks: actions that target specific client factors or performance skills. Requires client engagement				

Education: provides knowledge & enhances understanding about occupation, health and well-being to client to develop helpful behaviors, habits, routines				
Training: develops concrete skills for specific goal attainment. Targets client performance				
Advocacy: promotes occupational justice and empowers clients				

Identify theory(ies) that guided intervention: _____

III. OUTCOMES

Identify the types of outcomes measured as a result of OT intervention provided:

Type of outcome	yes	no	Provide example
Occupational Performance			
Prevention			
Health & Wellness			
Quality of Life			
Participation			
Role competence			
Well-being			
Occupational Justice			

**OTPF-III terminology

ASPECTS OF THE ENVIRONMENT

	Yes	No
The current Practice Framework was integrated into practice		
Evidence-based practice was integrated into OT intervention		
There were opportunities for OT/OTA collaboration		
There were opportunities to collaborate with other professionals		
There were opportunities to assist in the supervision of others—		

specify:		
There were opportunities to interact with other students		
There were opportunities to expand knowledge of community resources		
Student work area/supplies/equipment were adequate		

Additional educational opportunities provided with comments (specify): _____

DOCUMENTATION AND CASE LOAD

Documentation Format:

- Narrative SOAP Checklist Other: _____
 Hand-written documentation Electronic

If electronic, name format & program: _____

Time frame & frequency of documentation: _____

Ending student caseload expectation: _____ # of clients per week or day

Ending student productivity expectation: _____ % per day (direct care)

SUPERVISION

What was the primary model of supervision used? (check one)

- one fieldwork educator: one student
 one fieldwork educator: group of students
 two fieldwork educators: one student
 one fieldwork educator: two students
 distant supervision (primarily off-site)
 three or more fieldwork educators: one student (count person as fieldwork educator if supervision occurred at least weekly)

Frequency of meetings/types of meetings with fieldwork educator (value/frequency):

General comments on supervision: _____

SUMMARY of FIELDWORK EXPERIENCE

1 = Strongly disagree
 2 = Disagree
 3 = Neutral
 4 = Agree
 5 = Strongly agree

	Circle one				
Expectations of fieldwork experience were clearly defined	1	2	3	4	5
Expectations were challenging but not overwhelming	1	2	3	4	5
Experiences supported student's professional development	1	2	3	4	5

What particular qualities or personal performance skills should a student have to function successfully on this fieldwork placement?

What advice do you have for future students who wish to prepare for this placement?

Study the following evaluations:

Study the following intervention methods:

Read up on the following in advance:

Overall, what changes would you recommend in this Level II fieldwork experience?

Please feel free to add any further comments, descriptions, or information concerning your fieldwork at this center.

Would you recommend this fieldwork site to other students? Yes or No ____

Why or why not? _____

INSTRUCTIONS

One form must be completed for each fieldwork educator who provided supervision. You can detach this page and make more copies as needed.

Check the box that best describes your opinion of the fieldwork educator's efforts in each are

FIELDWORK EDUCATOR NAME:

FIELDWORK EDUCATOR YEARS OF EXPERIENCE: _____

1 = Strongly Disagree
 2 = Disagree
 3 = Neutral
 4 = Agree
 5 = Strongly agree

	1	2	3	4	5
Provided ongoing positive feedback in a timely manner					
Provided ongoing constructive feedback in a timely manner					
Reviewed written work in a timely manner					
Made specific suggestions to student to improve performance					
Provided clear performance expectations					
Sequenced learning experiences to grade progression					
Used a variety of instructional strategies					
Taught knowledge and skills to facilitate learning and challenge student					
Identified resources to promote student development					
Presented clear explanations					
Facilitated student's clinical reasoning					
Used a variety of supervisory approaches to facilitate student performance					
Elicited and responded to student feedback and concerns					
Adjusted responsibilities to facilitate student's growth					
Supervision changed as fieldwork progressed					
Provided a positive role model of professional behavior in practice					
Modeled and encouraged occupation-based practice					
Modeled and encouraged client-centered practice					
Modeled and encouraged evidence-based practice					
Modeled and encouraged interprofessional collaboration					
Modeled and encouraged intra-professional collaboration					

Comments: _____

APPENDIX E

NEOTEC Inc., Level II Fieldwork Site Specific Objectives Checklist for use with: The AOTA Fieldwork Performance Evaluation (for the Occupational Therapy Student)

Site:

Date:

Contact

Person: Phone

#: _____

Email: _____

Website: _____

Introduction

Thank you for supporting occupational therapy education. The purpose of this form is to ensure that the occupational therapy student coming to your program has a clear understanding of the expectations and learning objectives of OT practice in your fieldwork location. This form is a tool to help our program document the criteria and process for complying with all site requirements, maintaining site objectives and site data, and communicating this information to students prior to the start of the fieldwork experience.

Instructions

Please check any boxes below that apply to fieldwork in your practice. Once completed, our OT program will retain this document for future student fieldwork placements with your organization.

FUNDAMENTALS OF PRACTICE

FWPE item #1: Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations. Student:

- Adheres to AOTA Code of Ethics (Principles of Beneficence, Nonmaleficence, Autonomy, Justice, Veracity, and Fidelity)
- Adheres to all federal, state and facility regulations

FWPE item #2: Adheres to safety regulations and reports & documents incidents appropriately. The student is responsible understanding and/or completing:

- | | | |
|--|---|---|
| <input type="checkbox"/> Record review | <input type="checkbox"/> 1:1 for personal safety or suicide precautions | <input type="checkbox"/> Wheelchair locks, bedrails & call button placement |
| <input type="checkbox"/> Medication side effects | <input type="checkbox"/> Sharps count | <input type="checkbox"/> Vital signs |
| <input type="checkbox"/> Post-surgical | <input type="checkbox"/> Environmental factors (no clutter, spills, unsafe items, etc.) | <input type="checkbox"/> Trach & ventilator monitoring |
| <input type="checkbox"/> Infection control | <input type="checkbox"/> OSHA & Bloodborne Pathogens | <input type="checkbox"/> Fire, evacuation & lockdown |
| <input type="checkbox"/> Fall prevention | <input type="checkbox"/> IV, lines & tubes | <input type="checkbox"/> CPR certification |
| <input type="checkbox"/> Eating & Swallowing | <input type="checkbox"/> ER codes & protocols | <input type="checkbox"/> Communication of client change in status |
| <input type="checkbox"/> Food allergies | <input type="checkbox"/> Restraint reduction | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Functional ambulation and functional mobility) | <input type="checkbox"/> HIPAA, FERPA and confidentiality | |
| <input type="checkbox"/> Behavior system & privilege level (e.g. locked area & unit, on grounds) | | |

FWPE item #3: Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents. Student:

- Adheres to facility policies & procedures
- Completes thorough chart reviews and checks MD orders
- Consistently analyzes context for potential hazards based on client risk factors
- Anticipates and addresses client safety factors
- Provides appropriate supervision of client based on client status
- Accurately identifies ambulation needs and functional mobility status
- Uses safe transfer techniques and equipment according to protocols
- Determines wheelchair positioning needs (e.g., footrests, cushions, trays & supports, etc.)
- Correctly positions client (e.g., in chair & bed; at desk, for feeding, etc.)
- Provides supervision of client based on client status to ensure safety
- Demonstrates proper splinting techniques such as correct selection of type, correct selection of materials & making adjustments as needed
- Operates equipment according to facility protocols
- Attends to professional boundaries in therapeutic use of self-disclosure
- Effectively limit sets & redirects client(s)
- Establishes safe group climate (reinforce expectations, group rules or contract)
- Other:

BASIC TENANTS

FWPE items #4-6: Clearly, confidently, & accurately articulates to clients and other relevant parties: 1) the values, beliefs, and distinct perspective of the occupational therapy profession 2) the value of occupation as a method and desired outcome of occupational therapy & 3) the role of occupational therapy practitioners.

Student communicates via:

- Verbal communication
- Via written material (e.g., handout, article, sample job description, etc.)
- Other:

Student communicates about these 3 tenets with:

- | | | |
|--|--|---|
| <input type="checkbox"/> Client | <input type="checkbox"/> Aides and paraprofessionals | <input type="checkbox"/> Athletic trainer |
| <input type="checkbox"/> Families and support network | <input type="checkbox"/> Physicians | <input type="checkbox"/> Music therapy |
| <input type="checkbox"/> Occupational Therapy Assistant | <input type="checkbox"/> Nursing | <input type="checkbox"/> 3 rd party payers |
| <input type="checkbox"/> Physical Therapy and Physical Therapy Assistant | <input type="checkbox"/> Social Worker | <input type="checkbox"/> Regulatory bodies |
| <input type="checkbox"/> Speech Language Pathologist | <input type="checkbox"/> Psychologist | <input type="checkbox"/> General public (e.g. promotion materials, in-services) |
| <input type="checkbox"/> Teacher | <input type="checkbox"/> Rehab Technology Specialist | <input type="checkbox"/> Others: |
| | <input type="checkbox"/> Recreational Therapist | |

Student communicates about these 3 tenets in:

- Client intervention & education
- Meetings
- Documentation
- Correspondence
- In-services, brochures, bulletin boards, media announcements, etc.
- Other:

Student communicates the value of occupations using:

- Examples of occupation-based assessment tools
- Citations of literature and evidence base for use of occupation relative to person and context
- Terms & examples specific to person, organization, population (facility mission, level of care, service delivery)
- OTPF language
- Current AOTA official documents and fact sheets
- Other:

Student Communicates role of occupational therapy using:

- Current AOTA official documents
- Federal & state laws, practice acts governing evaluation and intervention
- State laws and practice acts
- Definition language appropriate for audience
- Other:

FWPE item # 7: Articulates clear & logical rationale for evaluation process. Student:

- Describes reasoning based on client, condition, context, frame of reference and evidence
- Discusses psychometric properties (validity & reliability) of assessment tool
- Other:

FWPE item #8: Obtains sufficient and necessary information from relevant resources such as client, families, significant others, service providers, & records prior to & during evaluation process. Student obtains this information via:

- Thorough record & chart review
- Client interview
- Observation of client occupational performance, performance skills (motor & praxis, emotional regulation, cognitive, communication & social, sensory-perceptual), and performance patterns
- Assessment instruments addressing client factors (including psychosocial factors), occupational performance, performance skills, and performance patterns (see assessment chart)
- Gathering input from family, significant others & service providers
- Occupational Profile addresses
 - Who is client?
 - Why seeking services, and what are the client's current concerns relative to engaging in occupations in daily life activities?
 - Priorities
 - Client problems and desired targeted outcomes related to occupational performance, regarding prevention, health and wellness, quality of life, participation, role competence, well-being, and occupational justice
 - Occupational history
 - What aspects of the context (environmental & personal) are seen as supportive or inhibitory to engagement
 - Client values, interests & needs
 - Client successes & barriers affecting desired outcomes?
 - What are the client's patterns of engagement in occupations and how have they changed over time?
- Other:

FWPE item #9: Selects relevant screening & assessment methods (see assessment chart). Student:

Selects assessment according to:

- Client's belief systems and underlying assumptions regarding desired occupational performance
- Psychosocial factors
- Client needs & goals
- Practitioner's theoretical model of practice
- Concerns about occupational performance and participation
- Evidence
- Practice context
- Funding sources
- Practitioner understanding of rationale and protocol of the psychometric properties of standardized measures including assessment validity & reliability
- Cultural relevance
- Other:

Selects assessment based on theories, models & frames of reference pertinent to setting such as:

- | | |
|---|---|
| <input type="checkbox"/> Person- Environment-Occupation (PEO) | <input type="checkbox"/> Occupational Adaptation |
| <input type="checkbox"/> Biomechanical | <input type="checkbox"/> Ecology of Human Performance |
| <input type="checkbox"/> Behavioral | <input type="checkbox"/> Rehabilitation |
| <input type="checkbox"/> Acquisitional | <input type="checkbox"/> Clinical Reasoning |
| <input type="checkbox"/> Psychodynamic | <input type="checkbox"/> Cognitive & Cognitive Disability |
| <input type="checkbox"/> Cognitive Behavioral | <input type="checkbox"/> Person-Environment-Occupational Performance (PEOP) |
| <input type="checkbox"/> Dialectical Behavioral Therapy (DBT) | <input type="checkbox"/> Canadian Model of Occupational Performance and Engagement (CMOP-E) |
| <input type="checkbox"/> Sensory Processing | <input type="checkbox"/> Transtheoretical Model of Change |
| <input type="checkbox"/> Developmental | <input type="checkbox"/> Kawa |
| <input type="checkbox"/> Motor Learning | <input type="checkbox"/> Education and Learning theories such as: |
| <input type="checkbox"/> Sensory Integrative | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Neurodevelopmental Treatment (NDT) | |
| <input type="checkbox"/> Functional Group Model | |
| <input type="checkbox"/> Model of Human Occupational (MOHO) | |

FWPE item #10: Determines occupational profile & performance through interview and other appropriate evaluation methods (see assessment chart for specific tools & competency expectations).

FWPE item # 11: Evaluates and analyzes client factors and contexts that support or inhibit occupational performance (see assessment chart for specific tools & competency expectations).

FWPE item #12: Administers standardized and non-standardized assessments and surveys accurately and efficiently to ensure findings are valid and reliable (see assessment chart for specific tools & competency expectations).

FWPE item #13: Modifies evaluation procedures based on client factors and contexts. Student modifies evaluation based on the following:

- | | |
|---|---|
| <input type="checkbox"/> Fatigue | <input type="checkbox"/> Cultural and societal beliefs, values, customs, expectations |
| <input type="checkbox"/> Psychological factors including anxiety, depressive symptoms, etc. | <input type="checkbox"/> Primary language |

- Respiratory and cardiac status
- Medical acuity
- Concerns re: safety (please specify):
- Inability to perform task
- Mental functions (higher level cognitive, attention, memory, impulsivity, etc.)
- Cognitive status
- Global mental functions (energy, consciousness, psychosocial, personality, etc.)
- Client willingness to participate
- Frustration tolerance
- Sensory functions (pain, visual, proprioceptive, hearing, etc.)
- Environmental factors (products and technology, natural environment and human made changes to the environment, attitudes, etc.)
- Other:

FWPE item #14: Interprets evaluation results to determine client's occupational performance, strengths, & challenges. Student uses information including:

- Standardized assessment results
- Information including client condition & diagnosis
- Subjective & objective impressions
- Verbal reports of others (team, family & caretaker, etc.)
- Observations of client's performance
- Client's stated values, beliefs & motivations
- Identified concerns & needs
- Other:

FWPE item #15: Synthesizes and documents the results of the evaluation process clearly, accurately, and concisely, using systematic methods to record the client's occupational performance. Student:

- Records observed performance in areas of occupation (ADL & IADL, Health management, Education, Work, Play, Leisure, Social Participation, Rest & Sleep) as per setting's policies, procedures & scope of practice
- Accurately reports standardized assessment data (raw scores & results) as applicable
- Formulates goals that are specific, measurable, realistic, attainable, time-limited
- Utilizes outcome measurement methods when available or per setting policies
- Other:

INTERVENTION

FWPE item #16: Student articulates a clear and logical rationale for the intervention process based on the evaluation results, contexts, theories, frames of reference, practice models, and evidence:

- Verbally in supervision sessions
- Via written assignments (e.g. journal, case study)
- Via sharing research articles and other evidence
- In rounds & team meetings
- Verbally in client sessions
- In client education materials
- In written documentation
- Via in-services
- Other:

FWPE item #17: Establishes an accurate and appropriate client-centered plan based on the evaluation results, contexts, theories, frames of reference, and/or practice models. Student:

- Recommends additional consultation and referrals
- Creates relevant and measurable goals in collaboration with the client and or family & caregivers
- Integrates information with client priorities to create plan relative to setting & scope of practice
- Incorporates client's present and future context(s) (personal, cultural, temporal, virtual, physical, social) in clinical reasoning & intervention planning
- Uses structured methods to review evidence (journals, case studies, consensus of experts)
- Creates realistic plan reflective of accurate understanding of client abilities and potential
- Sets goals consistent with client priorities, theory, frame of reference, evidence, & setting
- Incorporates client's cultural and spiritual preferences

Other:

FWPE item #18: Uses evidence from research and relevant resources to make informed intervention decisions. Student uses:

- | | |
|---|--|
| <input type="checkbox"/> Current research articles and findings | <input type="checkbox"/> Treatment protocols |
| <input type="checkbox"/> AOTA Practice guidelines | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Textbooks and other printed materials | |

FWPE item #19: Selects client-centered and occupation-based interventions that motivate and challenge the client to achieve established goals that support targeted outcomes. Student considers the clients':

- | | | |
|---|--|---|
| <input type="checkbox"/> Condition & status | <input type="checkbox"/> Current context & resources | <input type="checkbox"/> Psychosocial needs |
| <input type="checkbox"/> Progress | <input type="checkbox"/> Culture, beliefs & values | <input type="checkbox"/> Support network |
| <input type="checkbox"/> Stated interests | <input type="checkbox"/> Future context & resources | <input type="checkbox"/> Other: |

FWPE item #20: Student implements client-centered and occupation-based intervention plans addressing:

- | | | |
|---|--|---|
| <input type="checkbox"/> Role competence | <input type="checkbox"/> Education | <input type="checkbox"/> Occupational justice |
| <input type="checkbox"/> ADL | <input type="checkbox"/> Leisure | <input type="checkbox"/> Cultural preferences |
| <input type="checkbox"/> IADL | <input type="checkbox"/> Health & wellness | <input type="checkbox"/> Occupational performance |
| <input type="checkbox"/> Play | <input type="checkbox"/> Quality of life | <input type="checkbox"/> Prevention |
| <input type="checkbox"/> Work | <input type="checkbox"/> Self-advocacy | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Sleep & rest | <input type="checkbox"/> Sexuality | |
| <input type="checkbox"/> Social participation | <input type="checkbox"/> Health management | |

FWPE item #21: Chooses and, if needed, modifies intervention approaches to achieve client's desired outcomes, evaluation data and research evidence. Student uses the following approaches:

- | | |
|--|--|
| <input type="checkbox"/> Create & promote (health promotion) | <input type="checkbox"/> Establish & restore (remediation & restoration) |
| <input type="checkbox"/> Maintain | |
| <input type="checkbox"/> Modify (compensation & adaptation) | |
| <input type="checkbox"/> Prevent (disability prevention) | |
| <input type="checkbox"/> Other: | |

FWPE Item #22: Modifies task and/or environment to maximize the client's performance. Student adjusts:

- | | | |
|---|--|---|
| <input type="checkbox"/> Sequence of activity | <input type="checkbox"/> Physical demand | <input type="checkbox"/> Physical requirements |
| <input type="checkbox"/> Object use in activity | <input type="checkbox"/> Physical assistance provided | <input type="checkbox"/> Safety awareness demands |
| <input type="checkbox"/> Environmental setup | <input type="checkbox"/> Social demand (1:1 v. group, etc.) | <input type="checkbox"/> Use of assistive and/or adaptive devices |
| <input type="checkbox"/> Length, frequency, and/or timing of sessions | <input type="checkbox"/> Emotional & behavioral support provided | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Amount of sensory input | <input type="checkbox"/> Cognitive demand | |
| <input type="checkbox"/> Visual and/or verbal cues | | |

FWPE item #23: Modifies the intervention plan and determines the need for continuation or discontinuation of services based on the client's status. Student considers:

- | | |
|---|---|
| <input type="checkbox"/> Client expectations relative to desired occupations, role(s), & context including psychosocial factors | <input type="checkbox"/> Medical status and prognosis |
| <input type="checkbox"/> Progress toward desired outcomes | <input type="checkbox"/> Client's motivation |
| <input type="checkbox"/> Support network | <input type="checkbox"/> Facility and/or payor requirements |
| <input type="checkbox"/> Anticipated functional progress | <input type="checkbox"/> Other: |

FWPE item # 24: Documents client's response to services in a manner that demonstrates effectiveness of

interventions via:

- Progress reports with quantitative data (goal attainment scaling, excel charts & graphing, re-assessment, assessment score comparison and interpretation, and outcome measurement results)
- Narrative summary with qualitative descriptors according to problems identified & goals achieved
- Accurate identification of client progress
- Daily documentation according to site guidelines
- Verbal report
- Other:

MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES

FWPE item #25: Demonstrates through practice or discussion the ability to collaborate with and assign appropriate tasks to the occupational therapy assistant, occupational therapy aide, or others to whom responsibilities might be assigned, while remaining responsible for all aspects of treatment. Student:

- Describes or assigns duties commensurate to educational level, assessed competency, federal & state laws regulating use of supportive personnel
- Considers manageability of caseload, complexity of needs, type of setting, and safety when assigning duties
- Describes and provides type of supervision required (close, direct, line of sight)
- Provides reference to state guidelines governing performance of services
- Engages in tasks with OTA relative to job description and/or scope of practice as defined by state guidelines (e. g., soliciting contributions to evaluation process and/or delegating, implementing & adjusting intervention plan)
- Completes alternate assignment to meet objective (please describe or attach):
- Other:

FWPE Item #26: Demonstrates through practice or discussion an understanding of costs and funding systems related to occupational therapy services, such as federal, state, third party, and private payers. Student:

- Participates in or describes billing for OT services
- Manages inventory and/or ordering of supplies for OT services
- Assists with client procurement of adaptive equipment
- Discusses political issues & policy decisions that affect funding
- Outlines how services are regulated and funds allocated pertaining to local and & or federal laws such as IDEA, ADA, Medicare & Medicaid, etc.
- Describes agency billing & payment system (grant funding, types of insurance, private pay, cost- share, state & federal funding)
- Describes eligibility criteria for reimbursement and discharge
- Identifies possible resources available (grants, community partnerships, sources for donations, fundraising ideas, etc.)
- Demonstrates awareness of risk management and liability as part of costs and quality care
- Demonstrates awareness of budgetary implications when procuring & using supplies
- Meets documentation requirements for reimbursement or funding sources
- Other:

FWPE item #27: Demonstrates knowledge about the organization including:

- Mission and vision
- Accreditation status
- Licensing
- History
- Scope
- Specialty certifications
- Role of organization
- Other:

FWPE item #28: Meets productivity standards or volume of work expected of occupational therapy students. Student:

- Self-directs schedule management to meet workload & caseload
- Gathers necessary evaluation data within allotted amount of time
Specify:
 - Completes evaluation write-up with documentation co-signed & in chart & record within:
 - 8 hours 24 hours 1 week Other:
 - Completes progress note documentation within:
 - 8 hours 24 hours 1 week Other:
 - Conducts ___ (number) of evaluations:
 - per day per week per month Other:
 - Serves caseload commensurate with entry-level therapist:
 - ___ (number) of clients per day
 - ___ (number) of clients per week
 - ___ (number) of clients per month
 - ___ (number) of groups per day
 - ___ (number) of groups per week
 - ___ (number) of groups per month
- Meets expected productivity level: _____%
- Other:

COMMUNICATION

FWPE item #29: Communicates clearly and effectively, both verbally and nonverbally. Student uses:

- Language appropriate to the recipient of information
- Terminology and content aligned with the level of understanding of person with whom communicating
- Examples to illustrate meaning & intent
- Active listening strategies (restates & paraphrases) to ensure both parties have shared understanding of information & plan
- Multiple modes of communication (verbal, written, nonverbal)
- Appropriate eye contact
- Attention to physical boundaries & body space
- Attention to best practice in technology and communication (i.e. video-conferencing)
- Professional presentation & demeanor in facial expression, posture, grooming affect, & attire
- Translation services
 - via phone
 - via video
 - via written services
 - in person
- Consideration of cultural differences
- Provision of clear & concise instructions for intended recipient
- Provision of supporting materials as needed
- Adapting communication style or method in response to recipient comprehension and receptivity
- Other:

Student communicates with/to:

- Clients
- Families
- Caregivers
- Colleagues
- Service providers
- Administration
- The public
- Other:

FWPE item # 30: Student produces clear and accurate documentation:

- Per setting protocols & formats
- Using approved institutional terminology & abbreviations
- Using technology when available to review documentation (grammar, spelling)
- Using strategies such as proof reading, reading aloud, checking against template, asking colleague & peer to proofread if appropriate
- Conducive to being read by recipients of services & other disciplines
- Using language consistent with the current Occupational Therapy Practice Framework
- Using language appropriate for the intended audience
- Other:

PROFESSIONAL BEHAVIORS

FWPE item #31: Collaborates with fieldwork educator(s) to maximize the learning experience. Student:

- Asks fieldwork educator for both positive and constructive feedback
- Adjusts approach in response to feedback
- Consistently checks in to clarify expectations
- Shares information about learning style with fieldwork educator and asks for help as needed to adjust
- Utilizes structures in setting to support learning (e.g., student manual, reviews expectations, tracks own caseload & workload)
- Asserts need to schedule supervision meetings
- Discusses concerns & identifies possible avenues for changes or improvements
- Discusses &/or negotiates need for adjustments to supervisory relationship, performance expectations, caseload, & learning environment to improve quality of experience (e.g. reviews AOTA Fieldwork Experience Assessment Tool)
- Other:

FWPE item # 32: Takes responsibility for attaining professional competence by seeking out learning opportunities & interactions with fieldwork educator(s) & others. Student:

- Approaches fieldwork educator and other personnel with a list of questions, concerns & possible options for how to address them
- Takes initiative to meet with other members of team to understand their role & perspective
- Reviews testing materials & manuals on own prior to observing or administering
- Reviews and shares relevant resources
- Pilots new program ideas & improvements (e.g., assessment tools, outcome measures, groups, newforms or procedures etc.) when feasible & available
- Collaborates in research design or data collection with others (per IRB approval)
- Exercises good judgment when choosing to attend in-services or other continuing education opportunities (e.g. based on workload management, caseload focus, scope of practice)
- Other:

FWPE item #33: Responds constructively to feedback in a timely manner. Student:

- Engages in mutual feedback exchange (e.g., listen, clarify, acknowledge feedback and/or redirection provide examples, ask "How can I improve?"; discuss ways to make active changes, identify what would be helpful, discuss options)
- Demonstrates commitment to learning by identifying specific goals & actions to improve behavior & performance in collaboration with supervisor
- Processes feedback & seeks support from supervisor appropriate to context of supervisory relationship & learning

opportunity

- Utilizes tools to reflect on own performance or variables affecting performance (e.g., self-assessment on Fieldwork Performance Evaluation, journaling and collaboration with peers, AOTA Fieldwork Experience Assessment Tool)
- Takes initiative to contact academic program resource persons for support if needed
- Other:

FWPE item #34: Demonstrates consistent work behaviors. Student consistently demonstrates:

- Initiative to address workload management
- Punctuality
- Professional behaviors in both task & interpersonal interactions
- Demonstrate the ability to adapt to unanticipated changes (e.g., conflicts)
- Attention to site cleanliness, safety & maintenance of supplies as appropriate to role
- Proper preparation for all meetings & sessions
- Responsibility to address areas of personal & professional growth
- Adherence with site guidelines on professional appearance
- Proactive behavior by planning for & requesting appropriate supports or accommodations in manner consistent with federal law & site resources (e.g. open in communication, provides appropriate documentation, requests reasonable accommodation if indicated)
- Other:

FWPE item #35: Demonstrates effective time management. Student:

- Monitors, maintains & adapts schedule in accordance with fieldwork responsibilities
- Organizes agenda or materials in advance for meetings & sessions
- Conducts evaluation and intervention sessions within allotted time, inclusive of set-up & clean-up
- Arrives on time to work, meetings, & client sessions
- Completes documentation and projects in a timely manner
- Completes learning activities by due dates
- Other:

FWPE item #36: Manages relationships effectively through therapeutic use of self and adjusts approach to meet the needs of clients and others. Student:

- Communicates concerns in 1st person manner (e.g. "I statements")
- Demonstrates strong emotional intelligence when conveying point of view when conflict arises
- Compromises as needed when negotiating workload
- Demonstrates flexibility to support own learning or department mission (e.g. extra effort, stay late if needed)
- Demonstrates ongoing awareness of impact of own behavior on others
- Displays positive regard for others
- Demonstrates effective use of self-disclosure & therapeutic use of self to build rapport, establish relationships & motivate others (peers, colleagues & clients)
- Provides genuine encouragement to maximize client participation & performance
- Provides timely & specific feedback
- Sets limits to maintain safety & support positive behavior & performance improvement

FWPE item #37: Demonstrates respect for diversity factors of others. Student:

- Demonstrates awareness of own background and sensitivity to worldviews of others
- Refrains from imposing own beliefs & values on others
- Maintains clients' dignity

- Gathers information about client's cultural values, identity, and/or spiritual beliefs
- Incorporates clients' values & beliefs into therapeutic interactions & interventions
- Considers clients' resources, culture, and lifestyle when designing intervention plans & discharge planning
- Considers social determinants of health throughout the occupational therapy process
- Demonstrates tolerance for differences in others & willingness to work with all clients
- Other:

Other expectations not noted above:

Information Sharing Authorization – OT educational programs regionally share this information with each other to reduce the burden of asking fieldwork sites to provide the same data to multiple OT educational programs. If you **do not** wish to have the above information shared amongst other OT educational programs, please indicate your preference by checking the box below.

- I do not agree to authorize sharing of the above information with other OT educational programs.

Assessment List

Formal Assessment Tools	Expected to gain Proficiency	Expected to gain familiarity	Expected to gain awareness/observe
Allen Cognitive Level Screening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allen Diagnostic Modules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity Measure for Post-Acute Care (AM-PAC)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Research Arm Test (ARAT)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment of Motor & Perceptual Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beery Visual Motor Integration test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Behavior Rating Inventory of Executive Function -2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Box and Block	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bruininks-Oseretsky Test -2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canadian Occupational Performance Measure (COPM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Children's Assessment of Participation & Enjoyment/Preference for Activities of Children	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Children's Kitchen Task Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Children's Occupational Self Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cognistat			
Cognitive Assessment of Minnesota			
Coping Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disabilities of the Arm, Shoulder, and Hand (DASH)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dynamic Lowenstein Occupational Therapy Cognitive Assessment (D-LOTCA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dynamometer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Early Coping Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Figure of 8 measurement (hand)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fugl-Meyer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Functional Independence Measure:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gardner DVPT: Motor/Non-Motor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Goal-Oriented Assessment of Lifeskills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Goniometry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Harter Self Perception Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hawaii Early Learning Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jepson Hand Function Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kitchen Task Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kohlman Evaluation of Living Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manual Muscle Testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Michigan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Middlesex Elderly Assessment of Mental State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Miller Function and Participation Scales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mini Mental Status Exam (MMSE)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Moberg Pick Up Test:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Montreal Cognitive Assessment (MoCA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Modified Ashworth Scale (Tone)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Motor-Free Visual Perception Test (MVPT-3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nine Hole Peg Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Occupational Performance History Interview	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Occupational Self-Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Occupational Therapy Assessment of Performance and Support (OTAPS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Peabody Developmental Motor Scale:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pediatric Evaluation of Disability (PEDI)/PEDI-CAT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patient Health Questionnaire-2 (PHQ-2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Piers Harris Self Concept Scale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pinch Meter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Routine Task Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School Function Assessment (SFA)			
Self-Assessment of Occupational Functioning			
Semmes-Weinstein Monofilament:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sensory Processing Measure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sensory Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short Blessed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
St. Louis University Mental Status Examination (SLUMS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Skills Rating System	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timed Up and Go (TUG)			
Tinetti Balance Assessment			
Volumeter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WeeFIM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekly Calendar Planning Activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (list below):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

APPENDIX F

Level II Fieldwork Objectives

Week 1: Site Orientation/Time Management:

- ✓ Facility tour, review site student manual, AOTA fieldwork resources, documentation review;
- ✓ Completes site orientation regarding HIPAA/OSHA/safety;
- ✓ Learns fieldwork supervisor's daily routines;
- ✓ Orients to site-specific objectives including independent learning activities such as evidence-based article reviews, presentations, case studies, etc.;
- ✓ Introduction to scheduling, billing, coding, documentation, and data collection forms;
- ✓ Reviews confidential charts for a few clients on supervisor caseload;
- ✓ Completes treatment observations, write up and review with supervisor;
- ✓ Writes treatment plan, grade therapeutic activity, begins journals as required by site;
- ✓ Student begins to assist in therapy sessions as appropriate; and meets daily with supervisor (directive).

Week 2: Intervention/Evaluations Begins

- ✓ Reviews assignments, completes observations/chart reviews; Learns fieldwork supervisor's weekly routines;
- ✓ Records observations and partial administration of evaluations;
- ✓ Completes discharge summary/transfer of services forms, supervisor gives feedback;
- ✓ Reviews and assists daily documentation, billing, coding;
- ✓ Student develops, reviews and implements treatment plans for 1-3 clients; Student grades a therapeutic activity listing ways to modify for different skill level;
- ✓ Researches and summarizes two evidence-based journal articles relevant to site; Chart reviews, treatment observation(s) with responses; and
- ✓ Supervisor reviews student progress in daily meeting with supervisor (directive).

Week 3: Assume Responsibility for ¼ Caseload

- ✓ Reviews assignments from previous week;
- ✓ Completes evaluation(s) and corresponding documentation with supervisor as observer and providing feedback;
- ✓ Interprets evaluation results based on age/developmental skill level, including all relevant information regarding prospective discharge scenario;
- ✓ Increased completion and implementation of treatment plans, discharge summaries, and corresponding documentation.
- ✓ Supervisor reviews, offers suggestions;
- ✓ Student completes treatment analysis for supervisor;
- ✓ Develops a list of suggested home activities; and meets daily with supervisor (directive).

Week 4: Supervision moves to coaching style from directive style

- ✓ Supervisor will review student progress and assignments from previous week; Begins to plan week to week;
- ✓ Orients to specific client conditions;
- ✓ Increase caseload for treatment planning, sessions, evaluations/discharge, and corresponding documentation and billing;
- ✓ Completes treatment analysis;
- ✓ Writes up proposed summary and recommendations of observed evaluation;
- ✓ Develops relevant goals/objectives for client evaluation, supervisor provides feedback;
- ✓ Observes at least one other professional working with client;
- ✓ Student will add one new treatment tool and/or activity to therapeutic tools; and meets weekly and checks in “as needed” with supervisor.

Week 5: Student transitioning to primary therapist/leader

- ✓ Reviews assignments from previous week;
- ✓ Develops, reviews and implements treatment sessions for ½ therapist caseload with corresponding documentation and billing;
- ✓ Reviews client work samples, most recent assessment, progress notes, and develops goal/objectives;
- ✓ Develops treatment plans for five clients, supervisor provides feedback;
- ✓ Completes treatment analysis for one session, supervisor provides feedback;
- ✓ Completes an equipment justification letter/form;
- ✓ Develops intervention strategies with another professional working with client;
- ✓ Meets weekly and check in “as needed” with supervisor; and
- ✓ Complete Level II Fieldwork Midterm Feedback form and review with supervisors.

Week 6: Assume responsibility for ½ therapist caseload

- ✓ Reviews assignments from previous week;
- ✓ Develops and implements treatment sessions for ½ therapist caseload with corresponding documentation and billing;
- ✓ Presents to staff case study/ evidence-based article review, therapeutic treatment tools;
- ✓ Participates in interprofessional collaborative practice with more than one other professional in co-treating or co-leading, team planning demonstrating competency in values/ethics (IPEC, 2011);
- ✓ Meets weekly and checks in “as needed” with supervisor; and
- ✓ Complete midterm evaluation and discuss areas of strengths and areas for continued growth with student.
- ✓ Contacts the AFC coordinator as appropriate.

Week 7: Supervision moves from coaching style to supporting style

- ✓ Reviews assignments from previous week;
- ✓ Designs, implements treatment sessions and corresponding documentation;
- ✓ Types up client adaptation, accommodation and/or modifications for one client to be reviewed with staff;
- ✓ Grades one therapeutic activity listing ways to modify for different skill levels;
- ✓ Begins co-treating or group co-leading each day, as appropriate;
- ✓ Participates in interprofessional collaborative practice with more than one other professional in co-treating or co-leading, team planning developing competency in roles/responsibility (IPEC, 2011); and
- ✓ Meets weekly and checks in “as needed” with supervisor.

Week 8: Caseload increasing, increasing focus on interprofessional collaborative practice

- ✓ Review assignments from previous week;
- ✓ Student will present modifications to appropriate staff with supervisor present;
- ✓ Designs and implements treatment and completes corresponding documentation from $\frac{3}{4}$ supervisor’s caseload;
- ✓ Complete treatment analysis for one session;
- ✓ Participates in interprofessional collaborative practice with more than one other professional in co-treating or co-leading, team planning developing competency in interprofessional communication (IPEC, 2011); and
- ✓ Meets weekly and checks in “as needed” with supervisor, review overall student progress.

Week 9: Increasing autonomy

- ✓ Reviews assignments from previous week;
- ✓ Designs and implements treatment and completes corresponding documentation from $\frac{3}{4}$ supervisor’s caseload;
- ✓ Completes $\frac{1}{2}$ supervisor’s caseload evaluations/re-evaluations/discharge summaries from supervisor caseload;
- ✓ Develops treatment plans for supervisors’ full caseload each day;
- ✓ Completes treatment analysis form for one session;
- ✓ Identifies and begin work on final project;
- ✓ Participates in interprofessional collaborative practice with more than one other professional in co-treating or co-leading, team planning developing competency in teams and teamwork (IPEC, 2011); and
- ✓ Meets weekly and checks in “as needed” with supervisor.

Week 10: Assume responsibility for all clients on caseload

- ✓ Supervisor reviews student progress with student;
- ✓ Designs/implements treatment and evaluation sessions for supervisor’s full caseload and corresponding documentation;
- ✓ Supervision moves to delegating style from supporting styles;
- ✓ Works on final project;

- ✓ Participates in interprofessional collaborative practice; and meets weekly and checks in “as needed” with supervisor.

Week 11: Continues responsibility for full caseload

- ✓ Reviews assignments from previous week;
- ✓ Implements OT interventions/evaluations as appropriate for full supervisor’s full caseload and discuss feedback with supervisor;
- ✓ Sets up/implement consultation time with a staff member;
- ✓ Implements a group treatment session on therapist’s caseload;
- ✓ Participates in interprofessional collaborative practice;
- ✓ Works on final project;
- ✓ Meets weekly and checks in “as needed” with supervisor; and
- ✓ Student completes AOTA Student Evaluation of the Fieldwork Experience (SEFWE).

Week 12 (Final Week): Continues full caseload, final project, final evaluation

- ✓ Reviews assignments from previous week;
- ✓ Implements treatment sessions for full caseload and discuss feedback with supervisor;
- ✓ Presents final project;
- ✓ Participates in interprofessional collaborative practice;
- ✓ Student discusses results of SEWE with fieldwork supervisors, provide original to site;
- ✓ Supervisors complete FINAL EVALUATION on student’s performance and discusses results with the student; provide copy to student; original copy to FW coordinator; and
- ✓ Site FW coordinator will mail the Performance Evaluation Form and the Student Evaluation of the Fieldwork Experience to the Academic Fieldwork Coordinator.

References

Interprofessional Educational Collaborative Expert Panel. (2011). *Core competencies for interprofessional collaborative practice: Report of an expert panel*. Washington, DC: Interprofessional Education Collaborative. Retrieved from <http://www.aacn.nche.edu/education-resources/ipecreport.pdf>

Tufts University. (2014). *Department of Occupational Therapy; Fieldwork policies & procedures*. Retrieved from <http://www.aota.org/~media/Corporate/Files/EducationCareers/Educators/Fieldwork/Supervisor/Samples/Tufts-Policies-Procedures.pdf>

APPENDIX G

Fieldwork Data Form

NEW ENGLAND OCCUPATIONAL THERAPY EDUCATION COUNCIL INC., (NEOTEC)
Adapted from AOTA Commission on Education and Education Special Interest Section Fieldwork
Subsection fieldwork data form: AOTA, 2008

Thank you for your participation in the fieldwork education process. This NEOTEC form helps maximize efficiency by using a standard format that can be shared among the NEOTEC academic programs. It is designed to accompany the NEOTEC Site Specific Objectives form.

The purpose of the Fieldwork Data Form is to:

- Facilitate communication between fieldwork sites, academic programs, and students.
- Meet accreditation standards for Accreditation Council for Occupational Therapy (ACOTE).
- Ensure students have access to information to help prepare for fieldwork placements.

We appreciate your dedication to student learning.

Thank you

Please complete and return to:

Name:

Phone:

Email:

Please call or email if you have questions.

NEOTEC FIELDWORK DATA FORM

Date: _____ State: _____ Multiple Locations, please attach list.
Name of Facility: _____
Address: _____ City: _____ Zip Code: _____

Title of Parent Corporation (if different from facility name): _____

Address (if different from facility): _____

Street: _____ **City:** _____ **State:** _____ **Zip:** _____

Level One Fieldwork Coordinator

Contact Person: _____
Phone: _____
Credentials: _____
E-mail: _____

Level Two Fieldwork Coordinator

Contact Person: _____
Phone: _____
Credentials: _____
E-mail: _____

Director

Contact name: _____
Phone: _____
Credentials: _____
E-mail: _____
Website: _____

Placement Sequence Preferences

No Preference
2nd Placement Only
Full time
Part Time
OTR only
OTA only

OT Fieldwork Practice Settings (ACOTE Form A #s noted)

- | | | |
|---|---|---|
| <input type="checkbox"/> In-Patient Acute 1.1 | <input type="checkbox"/> Peds Community 2.1 | <input type="checkbox"/> Early Intervention 3.1 |
| <input type="checkbox"/> In-Patient Rehab 1.2 | <input type="checkbox"/> Behavioral Health Community 2.2 | <input type="checkbox"/> School 3.2 |
| <input type="checkbox"/> SNF/ Sub-Acute/ Acute Long-Term Care 1.3 | <input type="checkbox"/> Older Adult Community Living 2.3 | |
| <input type="checkbox"/> General Rehab Outpatient 1.4 | <input type="checkbox"/> Older Adult Day Program 2.4 | |
| <input type="checkbox"/> Outpatient Hands 1.5 | <input type="checkbox"/> Outpatient/hand private practice 2.5 | |
| <input type="checkbox"/> Pediatric Hospital/Unit 1.6 | <input type="checkbox"/> Adult Day Program for DD 2.6 | |
| <input type="checkbox"/> Pediatric Hospital Outpatient 1.7 | <input type="checkbox"/> Home Health 2.7 | |
| <input type="checkbox"/> In-Patient Psych 1.8 | <input type="checkbox"/> Peds Outpatient Clinic 2.8 | |

Facility Size – # of beds: _____
Population Age Range: _____

Staff Composition

- | | |
|---|---|
| <input type="checkbox"/> OTR/OTA | <input type="checkbox"/> Physicians |
| <input type="checkbox"/> Aides | <input type="checkbox"/> Nursing |
| <input type="checkbox"/> PT/PTA | <input type="checkbox"/> Social Workers |
| <input type="checkbox"/> SLP | <input type="checkbox"/> Case Managers |
| <input type="checkbox"/> Teachers | <input type="checkbox"/> Physicians |
| <input type="checkbox"/> Counselors/Psychiatrists | <input type="checkbox"/> Nursing |
| <input type="checkbox"/> Therapeutic Rec (CTRS) | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> BCBA/behaviorist | |

Site Requirements for students (check all that apply)

Primary Contact for Onboarding:

Vaccines/Medical Requirements:

- | | | | | |
|-------------------------------|--|-------------------------------------|--------------------------------------|-----------------------------------|
| <input type="checkbox"/> HepB | <input type="checkbox"/> Physical Check Up | <input type="checkbox"/> TB/Mantoux | <input type="checkbox"/> Chest x-ray | <input type="checkbox"/> Tetanus |
| <input type="checkbox"/> MMR | <input type="checkbox"/> Varicella titer | <input type="checkbox"/> 2 step PPD | <input type="checkbox"/> Influenza | <input type="checkbox"/> COVID-19 |

Type of Background Check:

- | | | |
|--|--|---|
| <input type="checkbox"/> Medicare / Medicaid Fraud Check | <input type="checkbox"/> Child Protection/Abuse Check | <input type="checkbox"/> Drug Screening |
| <input type="checkbox"/> Prof. Liability Ins. | <input type="checkbox"/> Sexual Offense Record Inquiry | Number of Panels: |
| <input type="checkbox"/> Fingerprinting | <input type="checkbox"/> | |

Certifications:

- | | | | |
|---|------------------------------|---|--|
| <input type="checkbox"/> First Aid | <input type="checkbox"/> BLS | <input type="checkbox"/> OSHA Bloodborne Pathogen | <input type="checkbox"/> CPR (Specify type): |
| <input type="checkbox"/> Infection Control Training | <input type="checkbox"/> AED | <input type="checkbox"/> HIPAA Training | |
| <input type="checkbox"/> Health Provider | | | |

Other:

- Site established student orientation program/procedure (please describe):
- Own transportation
- Additional Comments:

Students will participate in (check all that apply)

Direct service	Indirect Services	Other Approaches
<input type="checkbox"/> One-to-one	<input type="checkbox"/> In-service training	
<input type="checkbox"/> Concurrent	<input type="checkbox"/> Presenting	
<input type="checkbox"/> Co-treat	<input type="checkbox"/> Attending	
<input type="checkbox"/> Small groups (s)	<input type="checkbox"/> Consultation	
<input type="checkbox"/> Large group (s)	<input type="checkbox"/> Meetings (team, department, family)	
<input type="checkbox"/> Telehealth	<input type="checkbox"/> Billing	
<input type="checkbox"/> Client/Caregiver education	<input type="checkbox"/> Documentation	
<input type="checkbox"/> Discharge planning		
<input type="checkbox"/> Evaluation/Screening		

Administrative

Target Caseload/Productivity	Documentation	Parking
Productivity per day:	EMR platform (type):	Free <input type="checkbox"/>
Productivity per week:	Handwritten notes	Paid <input type="checkbox"/>
# Groups per day:	Checklist	<input type="checkbox"/>
	SOAP notes	Shuttle from offsite (yes <input type="checkbox"/> / no <input type="checkbox"/>)
		Student must have own vehicle (yes <input type="checkbox"/> no <input type="checkbox"/>)

Work Schedule	Dress Code	Supervision of other personnel
Hours Required:	Please describe:	Please describe:
Weekends Required:		
Evenings Required:		
Flex/Alternate Schedules:		
Part-time:		

Student Assignments and Activities

- | | |
|---|---|
| <input type="checkbox"/> Research | <input type="checkbox"/> Fieldwork project |
| <input type="checkbox"/> Literature review | <input type="checkbox"/> Off-site learning experiences |
| <input type="checkbox"/> Attending in-services/grand rounds | <input type="checkbox"/> Observation of other units/disciplines |
| <input type="checkbox"/> Case study | <input type="checkbox"/> Other assignments (please list): |
| <input type="checkbox"/> Provide in-services | |
| <input type="checkbox"/> Program development | |

Supervision Process

- Frequency of formal supervision meetings: Daily / Weekly
Frequency of informal supervision meetings: Daily / Weekly
Supervision Model: 1:1 / 1 therapist:2 students / 2 therapists:1 student / group / other:
Is student learning style considered? yes / no
Are supervision meetings documented? yes / no

Student Reflection Methods

- Journaling
- Processing verbally
- Student self-assessment & self-appraisal
- Written Activity Analysis
- Reflective questions
- Written submission of intervention plans and rationale
- Role playing & simulation
- Video feedback

- Other:

Fieldwork Educator Preparation Tools

- Facility's Student manual
- Facility Training in supervision
- AOTA Certificate in Fieldwork Education Program
- Mentorship opportunities (e.g., in 1:1 or Group Format)
- Other:
- Use of online resources such as:
 - AOTA <https://www.aota.org/education/fieldwork>
 - NEOTEC: www.neotecouncil.org
 - State Associations
 - Individual Academic Programs

SUPPLEMENTAL INFORMATION ~ please attach any of the following if you have them available or if they have changed

- Information on programs and services offered
- Student Manual
- Job description for entry-level occupational therapy personnel
- Mission statement
- Site specific weekly student expectations
- Facility Policies & Procedures (e.g., HIPAA)

Thank you 😊



Level I Student Evaluation of Fieldwork Experience

Please check:

Level IA (Year one Fall) Level IB (Year one Spring)
 Level IC (Year one Summer) Level ID (Year two Fall) Level IE (Year two Spring)

Name: _____

Site(s): _____

Site Supervisor: _____

Orientation

Indicate our view of the orientation process by checking the corresponding rating below:

Rating scale: S – satisfactory NI – needs improvement

Overall Level I Fieldwork Experience	Adequate		Organized		Timely		NA
	S	NI	S	NI	S	NI	
Student supervision process							
Requirements and assignments for students							
Overview of physical facilities							
Services provided by the agency							
Role of other team members							

Comments:

Professional Development

Indicate the extent to which this experience helped you determine your level of professional development by circling the corresponding rating below:

Rating scale: 1 – not at all; 2 – uncertain; 3 – helpful; 4 – very helpful

Application of knowledge	1	2	3	4
Initiative	1	2	3	4
Communication with Staff	1	2	3	4
Communication with Clients	1	2	3	4
Professional Appearance/Presentation	1	2	3	4
Professional Growth	1	2	3	4

Comments:

Reflection

Rate each item below:

Rating scale: 1 – very poor; 2 – poor; 3 – fair; 4 – good; 5 - excellent

Overall Level I Fieldwork Experience	1	2	3	4	5
Environment supported my learning	1	2	3	4	5
Supervision/staff met your needs as a Level 1 student	1	2	3	4	5
Observational experiences	1	2	3	4	5
Hands-on experiences	1	2	3	4	5

Comments:

Summary

Rate each item below:

Rating scale: 1 – strongly disagree; 2 – disagree; 3 – no opinion; 4 – agree; 5 – strongly agree

Expectations of fieldwork experience were clearly defined	1	2	3	4	5
Expectations were challenging but not overwhelming	1	2	3	4	5
Experiences supported student's professional development	1	2	3	4	5
Experiences matched student's expectations	1	2	3	4	5

Comments:

Theory, Frames of Reference, Models of Practice

Indicate the frequency of theory, models, or frames of reference used:

	Never	Rarely	Occasionally	Frequently
Model of Human Occupation				
Occupational Adaptation				
Ecology of Human Performance				
Person-Environment-Occupation Model				
Biomechanical Frame of Reference				
Rehabilitation Frame of Reference				
Neurodevelopmental Theory				
Sensory Integration				
Behaviorism				

Cognitive Theory				
Cognitive Disability Frame of Reference				
Motor Learning Frame of Reference				

- a. How has this experience helped to prepare you for future fieldwork? (Level 1's and Level II)
- b. Would you recommend this fieldwork site to future students? Briefly explain why or why not.
- c. Any additional comments?

Student _____ Date _____

Fieldwork Performance Evaluation (FWPE) for the Occupational Therapy Student (Revised in 2020)

FUNDAMENTALS OF PRACTICE	
1	Adheres to the American Occupational Therapy Association’s Code of Ethics and all federal, state, and facility regulations. Examples: Medicare, Medicaid, client privacy, social media, human subject research
2	Adheres to safety regulations and reports/documents incidents appropriately. Examples: fire safety, OSHA regulations, body substance precautions, emergency procedures
3	Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents. Examples: body mechanics, medical safety, equipment safety, client-specific precautions, contraindications, community safety
BASIC TENETS	
4	Articulates the values, beliefs, and distinct perspective of the occupational therapy profession to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public
5	Articulates the value of occupation as a method and desired outcome of occupational therapy to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public
6	Articulates the role of occupational therapy practitioners to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public
SCREENING AND EVALUATION	
7	Articulates a clear and logical rationale for the evaluation process based on client information, contexts, theories, frames of reference, and/or practice models.
8	Obtains sufficient and necessary information from relevant sources throughout the evaluation process. Examples: record or chart review, client, family, caregivers, service providers

9	<p>Selects relevant screening and assessment tools based on various factors. Examples: Psychosocial factors, client priorities, needs, and concerns about occupational performance and participation, theoretical support, evidence, practice context, funding sources, cultural relevance</p>
10	<p>Determines the client's occupational profile and occupational performance through interview and other appropriate evaluation methods.</p> <p>Occupational profile: Summary of the client's occupational history and experiences, patterns of daily living, interests, values, and needs</p>
11	<p>Evaluates and analyzes client factors and contexts that support or hinder occupational performance.</p> <p>Client factors: Specific capacities, characteristics, or beliefs that reside within the person and that influence performance in occupations. Client factors include values, beliefs, and spirituality; body functions (includes psychological functions); and body structures.</p> <p>Contexts: Variety of interrelated conditions within and surrounding the client that influence performance, including cultural, personal, physical, social, temporal, and virtual contexts.</p> <p>Includes the consideration of all client centered components including psychosocial factors</p>
12	<p>Administers standardized and non-standardized assessments and surveys accurately and efficiently to ensure findings are valid and reliable. Examples: follows assessment protocols, adheres to time guidelines</p>
13	<p>Modifies evaluation procedures based on client factors and contexts. Examples: uses a quiet space, breaks up evaluation into smaller parts, provides multisensory instructions</p>
14	<p>Interprets evaluation results to determine the client's occupational performance strengths and challenges.</p>
15	<p>Synthesizes and documents the results of the evaluation process clearly, accurately, and concisely, using systematic methods to record the client's occupational performance.</p>

INTERVENTION

16	<p>Articulates a clear and logical rationale for the intervention process based on the evaluation results, contexts, theories, frames of reference, practice models, and evidence.</p>
17	<p>Establishes an accurate and appropriate client-centered plan based on the evaluation results, contexts, theories, frames of reference, and/or practice models. Examples: creates relevant and measurable goals in collaboration with the client and/or family/caregivers; recommends additional consultation and referrals</p>
18	<p>Uses evidence from research and relevant resources to make informed intervention decisions.</p>
19	<p>Selects client-centered and occupation-based interventions that motivate and challenge the client to achieve established goals that support targeted outcomes.</p> <p>Includes the consideration of all client centered components including psychosocial factors</p>

20	Implements client-centered and occupation-based intervention plans. Includes the consideration of all client centered components including psychosocial factors
21	Chooses and, if needed, modifies intervention approach to achieve established goals that support targeted outcomes. Examples: prevention, restoration, maintenance, promotion
22	Modifies task and/or environment to maximize the client's performance. Examples: upgrades/downgrades task; arranges client's workspace for optimal performance
23	Modifies the intervention plan and determines the need for continuation or discontinuation of services based on the client's status.
24	Documents the client's response to services in a manner that demonstrates the effectiveness of interventions.
25	
MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES	
26	Demonstrates through practice or discussion an understanding of costs and funding systems related to occupational therapy services, such as federal, state, third party, and private payers. Examples: billing for OT services, inventory and ordering of supplies for OT services, and options for client procurement of adaptive equipment
27	Demonstrates knowledge about the organization. Examples: mission and vision, accreditation status, licensing, specialty certifications
28	Meets productivity standards or volume of work expected of occupational therapy students.
COMMUNICATION AND PROFESSIONAL BEHAVIORS	
29	Communicates clearly and effectively, both verbally and nonverbally. Examples: clients, families, caregivers, colleagues, service providers, administration, the public
30	Produces clear and accurate documentation. Examples: legibility, spelling, punctuation, grammar, adherence to electronic health documentation requirements
31	Collaborates with fieldwork educator(s) to maximize the learning experience. Examples: initiates communication, asks for feedback about performance, identifies own strengths and challenges
32	Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with fieldwork educator(s) and others.
33	Responds constructively to feedback in a timely manner.
34	Demonstrates consistent and acceptable work behaviors. Examples: punctuality, initiative, preparedness, flexibility, dependability, professional appearance
35	Demonstrates effective time management. Examples: plans ahead, adheres to schedules, completes work in expected timeframe

36	Manages relationships effectively through therapeutic use of self and adjusts approach to meet the needs of clients and others.
37	Demonstrates respect for diversity factors of others. Examples: culture, socioeconomic status, beliefs, identity

Fieldwork Performance Evaluation (FWPE) Rating Scoring Guide (Revised in 2020)

Rating Scale

- 4- Exemplary performance
- 3- Proficient performance
- 2- Emerging performance
- 1- Unsatisfactory performance

Rating scale definitions

Exemplary performance	Demonstrates satisfactory competence in specific skills consistently; demonstrates substantial breadth and depth in understanding and/or skillful application of fundamental knowledge and skills.
------------------------------	--

Proficient performance	Demonstrates satisfactory competence in specific skills; demonstrates adequate understanding and/or application of fundamental knowledge and skills.
-------------------------------	--

Emerging performance	Demonstrates limited competence in specific skills (inconsistencies may be evident); demonstrates limited understanding and/or application of fundamental knowledge and skills (displays some gaps and/or inaccuracies).
-----------------------------	--

Unsatisfactory performance

Fails to demonstrate competence in specific skills; performs in an inappropriate manner; demonstrates inadequate understanding and/or application of fundamental knowledge and skills; (demonstrates significant gaps and/or inaccuracies).

FWPE for OTS Scoring:

- All items included must be scored to receive a Pass on the FWPE for OTS
- A sum score of 111 or higher will be required to receive a Pass on the FWPE for OTS
- A score of 3 or higher on the items
 - # 1 (Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations),
 - # 2 (Adheres to safety regulations and reports/documents incidents appropriately), and
 - # 3 (Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents) will all be required to receive a Pass on the FWPE for OTS
- Scores of 1 on any of the items is not allowed to receive a Pass on the FWPE for OTS

FWPE for OTAS Scoring:

- All items must be scored to receive for a Pass on the FWPE for OTAS
- A sum score of 91 or higher will be required to receive a Pass on the FWPE for OTAS
- A score of 3 or higher on the items
 - # 1 (Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations),
 - # 2 (Adheres to safety regulations and reports/documents incidents appropriately), and
 - # 3 (Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents) will all be required to receive a Pass on the FWPE for OTAS
- Scores of 1 on any of the items is not allowed to receive a Pass on the FWPE for OTAS

APPENDIX J

WNE OTD program Fieldwork Success Plan

Student name:	
FW Educator:	
FW Site:	
Date:	
Start/end Dates	

Areas in which the student is doing well:	
Areas in which problems have been identified (relate these to site specific learning objectives)	

Objective # 1	
Content Area	
Learning Goal	
Strategies to meet goal	1.
Student action step	1.
FW Educator action step	1.
Resources	
Target Date	

Objective # 2

Content Area	
Learning Goal	
Strategies to meet goal	1.
Student action step	1.
FW Educator action step	1.
Resources	
Target Date	

Objective # 3

Content Area	
Learning Goal	
Strategies to meet goal	1.
Student action step	1.
FW Educator action step	1.
Resources to meet goal	
Target Date	

Objective # 4

Content Area	
Learning Goal	

Strategies to meet goal	1.
Student action step	1.
FW Educator action step	1.
Resources to meet goal	
Target Date	

All parties acknowledge that inability to complete all objectives by the target date may result in a failure of this fieldwork placement.

Student Signature	
FWE Signature	
WNE Signature	
Is an extension beyond 12 weeks possible if recommended ?	YES / NO