Fieldwork Leadership

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Responsibilities:
• Manages and advises students for all Level I and Level II experiences
• Manages Fieldwork site selection and contracts
• Advises and consults with fieldwork site educators/supervisors
• Instructs and supervises the FW Seminars
• Responsible for management of any FW issues and communication

Crystal Allen
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Responsibilities
• Communicates with students about general fieldwork information for Level I and Level I experiences
• Manages Level I paperwork, assists with the lottery, and the scheduling of experiences
• Maintains fieldwork database, fieldwork email site, One45, and all records related to fieldwork.
• Assists the Academic Fieldwork Coordinator with contract renewals and processing
• Responsible for the Fieldwork files.
Introduction to Fieldwork

Augusta University (AU) Department of Occupational Therapy (OT) fieldwork goals are to provide practice based learning experiences that allow for

- Application of knowledge in meaningful occupations across the lifespan
- Development of an understanding of the needs of clients and family members in providing evidence based care
- Opportunities to develop competencies required for a generalist OT.
- Expose the student to a variety of practice settings, documentation and reimbursement systems, and application of the profession’s theoretical tenets and frames of reference
- Mentorship of the development of personal leadership, advocacy, and cultural competence characteristics
- Development of a strong personal code of ethics and professional development responsibilities

What is Fieldwork?

The American Occupational Therapy Association (AOTA) defines fieldwork as practice based learning experiences that develop the students’ integration of classroom knowledge and laboratory skills. The profession uses the term fieldwork instead of internships or clinical rotations as the (OT) profession provides service in diverse sites outside of traditional hospital or medical model settings. OTs provide intervention services or practice in various community settings, rehabilitation centers, out-patient settings, school systems, private practice, long term care centers, in work and industrial settings, and in private homes.

Fieldwork experiences are designed to encompass a range of OT services. These experiences allow the student to try out concepts learned in the classroom or the laboratory. Each fieldwork experience is designed to progressively build on previous skills and knowledge. Augusta University (AU) OT curriculum design provides fieldwork experiences during each semester of the Master of Health Science (MHS) in OT program. The AU OT’s curriculum design and learning activities include supportive experiential learning experiences that progress the students’ level of knowledge, skills, and values for entry level competence. The Accreditation Council for Occupational Therapy Education (ACOTE, 2011) specifies fieldwork requirements for all students. The requirements are divided into two major classifications: Level I and Level II fieldwork experiences. The integration of Level I and Level II experiences can be symbolized as stepping stones toward competency.
Fieldwork: The Relationship to the Curriculum

OT Curriculum Model:
Developing Life Long Professional Competence

The AU Department of OT's Curriculum Design provides fieldwork experiences and field laboratory experiences across the curriculum. The field laboratory experiences are not substituted for the required Level I experiences. Fieldwork is offered throughout the curriculum and is an essential thread of the curriculum design to develop competent entry level therapists and an OT graduate that successfully assumes leadership, advocacy, and life-long learning responsibilities.

Fieldwork Supervision Guidelines For Fieldwork Educators

Fieldwork Educators Manual, 7/2016 SJ
One of the most frequently asked questions regarding fieldwork revolves around the provision of supervision for students. There is no definite answer as each student, each site, each client, and each student: fieldwork educator relationship is vastly different. Below are many resources to reference to determine the appropriate level of supervision for fieldwork. Overall, Level II fieldwork should progress from direct forms of supervision to less direct as appropriate for the setting, severity of the client’s condition and the ability of the student. If this progression is not occurring the fieldwork educator should contact the Academic Fieldwork Coordinator to discuss student learning goals, objectives and other tools to facilitate student growth.

In addition to the following information, resources, and references, fieldwork educators must check their own state licensure laws regarding supervision of OT students. Third party payer sources may also have requirements regarding reimbursement for services provide by students.

The Accreditation Council for Occupational Therapy Education (ACOTE) Standards and Guidelines, 2011 describes Fieldwork Education as a crucial part of professional preparation and is best integrated as a component of the curriculum design. Fieldwork experiences are 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 supervision of a qualified OT practitioner serving as a role mode (Standard C 1.0, p. 33).

**General Fieldwork Guidelines**

- ACOTE requires the Department of Occupational Therapy to document the criteria and process for selecting the fieldwork sites (ACOTE Standard C.1.2).
- The fieldwork program should reflect the sequence and scope of the curriculum, and should be designed in collaboration with the faculty to ensure that fieldwork experiences strengthen ties between didactic and fieldwork education (ACOTE C.1.1)
- Each fieldwork site selected by the Department of Occupational Therapy must be equipped to meet the curriculum goals, provide educational experiences applicable to the academic program, and have fieldwork educators that are able to effectively meet the learning needs of the students.
- The Academic Fieldwork Coordinator is responsible for fostering the links between the fieldwork site and the didactic aspects of the curriculum. The Academic Fieldwork Coordinator will communicate the Department of Occupational Therapy’s curriculum to fieldwork educators, and is responsible for maintaining the fieldwork contracts and site date for all Level I and Level II fieldwork placements (ACOTE Standard).
- Collaboration between the academic and fieldwork educators is required for establishing fieldwork objectives. This process includes the identification of site requirements, and communication regarding the student(s)’ progress and performance during fieldwork.
• At least one fieldwork experience focuses on psychological and social factors that influence engagement in occupation (ACOTE Standard C.1.7)
• The Department of Occupational Therapy has a policy to ensure student compliance with the fieldwork site’s health requirements prior to fieldwork placement (ACOTE Standard C.1.2)
• It is important to ensure the number of fieldwork educators to student(s) allows for proper supervision and the ability to frequently assess the student(s) progress in achieving the stated fieldwork objectives (ACOTE Standard.1.4).
• All fieldwork sites must have an active contract or memorandum of understanding. The Department of Occupational Therapy’s contracts must be renewed every three years. All contracts must be signed by AU and the fieldwork site’s authorizing authority. Electronic contracts are now acceptable (ACOTE Standard C.1.6)

**Level I Guidelines**
ACOTE describes the goal of Level I experiences is to introduce students to the fieldwork experience, to apply knowledge to practice, and to develop understanding of the needs of clients (ACOTE Standards, 2011)

• Level I fieldwork is integral to the program’s curriculum design and includes experiences designed to enrich didactic coursework through directed observation and participation in selected aspects of the occupational therapy process (ACOTE Standard C.1.8).
• The Department of Occupational Therapy will ensure that qualified personnel supervise Level I fieldwork (ACOTE Standard C.1.9).
• All Level I experiences are documented and do not replace the Level II requirements in any manner. Student experiences are documented, including mechanisms for formal evaluation of student performance (ACOTE Standard C.1.10).

**Level II Guidelines**
ACOTE describes the goal of Level II experiences is to develop competent, entry level, generalist occupational therapists. Level II fieldwork must be integral to the program’s curriculum design and include in-depth experience in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation and research, administration, and management of occupational therapy services. It is recommended that the student be exposed to a variety of clients across the life span and to a variety of settings (2011).

• All Level II experiences must be designed to promote the student’s clinical reasoning and reflective practice. These experiences should allow for the integration of values and beliefs that enable ethical practice, allow for the development of professionalism and competence in roles and responsibilities (ACOTE Standard C1.11).
• All Level II experiences must be consistent with the Department of Occupational Therapy’s curriculum design and emphasize engagement in occupation based experiences that are evidence based, client and family centered, and culturally diverse. The Fieldwork experience should allow for assessment and intervention of
performance contexts, roles, and values including psychosocial factors influencing meaning and relevancy to the client.

- Level II Fieldwork placements should occur in traditional and/or emerging settings which are consistent with the curriculum design (ACOTE Standard C1.12)
- Psychosocial factors influencing engagement in occupation must be understood and integrated for the development of client-centered, meaningful, occupation-based outcomes (ACOTE Standard C1.12)
- The Department of Occupational Therapy’s fieldwork is designed to allow the students to fully participate in two Level II experiences for a minimum of 12 weeks for each of two Level II rotations. At times, a student may be permitted to complete 24 weeks of Level II in one facility if there are more than one practice areas within the setting. Level II experiences will not be completed in more than 4 settings (ACOTE Standard C1.12)
- Level II fieldwork is a minimum of 24 weeks of full time fieldwork. This may be completed part time as long as it is at least 50% FTE and is usual and customary personnel policy for that setting (ACOTE Standard C1.13)
- All Fieldwork Level II supervisors must hold a current license or be a credentialed Occupational Therapist with a minimum of one year of practice experience subsequent to initial certification. All fieldwork supervisors must be adequately prepared to serve as a fieldwork supervisor (ACOTE Standard C1.14)
- The Department of Occupational Therapy will require the following mechanism for evaluation of effective supervision: completion of the AOTA Student Evaluation of Fieldwork Experience (SEFWE) by the specified timelines (ACOTE Standard C1.15)
- Student performance is evaluated at midterm (six weeks) and at the completion of the rotation (week 12) by the Fieldwork Educator(s) using the AOTA Fieldwork Performance Evaluation of the Occupational Therapy Student form (ACOTE Standard C1.18)

**Responsibilities & Qualifications of the Fieldwork Educator**

- **Protection of the Consumer:**
  It is the fieldwork educator’s role to protect the consumers of OT services at all times. The fieldwork educator will provide the appropriate level of supervision to facilitate the student’s growth and development and to meet the client’s needs. The supervisor will provide appropriate learning experiences for the student and role model the professional values, ethics, and skills for a professional OT.

- **Fieldwork Educator’s Credentials:**
  The Department of Occupational Therapy does not place Level II students in any facility that does not have a qualified OTR/L educator with at least one year of practice experience.

- **Completion of the Required Evaluation:**
  All evaluations must be completed within specified timelines. Midterm occurs at the 6 week interval and the final evaluation occurs at the end of the 12 week experience. The Department of Occupational Therapy uses the AOTA Fieldwork Performance Evaluation for the Occupational Therapy Student Evaluation form. The evaluation forms will be provided in paper and electronic format.
• **International Fieldwork:**
  All international fieldwork experiences must be supervised by an OT that has
  graduated from a World Federation of Occupational Therapy approved program and
  has a minimum of 3 years’ experience in practice. This fieldwork experience will not
  exceed 12 weeks. The Department of Occupational Therapy considers the
  international experience a special elective fieldwork and is an additional experience
  to the two required Level II rotations.

**Additional Readings for Fieldwork Supervision**

educator competency (SAFECOM). Retrieved from

American Occupational Therapy Association (2009). Guidelines for supervision, roles,
and responsibilities during the delivery of occupational therapy services. Retrieved from

Provided by Students in Fieldwork Level II Settings. Retrieved from
https://webcache.googleusercontent.com/search?q=cache:3zMvpVIp0soJ:https://www.aota.org//media/Corporate/Files/EducationCareers/Educators/Fieldwork/StuSuprvsn/Practice%2520Advisory%2520Services%2520provided%2520by%2520students%2520in%2520Level%2520II%2520final.pdf+&cd=1&hl=en&ct=clnk&gl=us

American Occupational Therapy Association (2009). Recommendations for
/media/corporate/files/educationcareers/educators/fieldwork/levelii/coe%20guidelines%20for%20occupational%20therapy%20fieldwork%20experience%20-%20level%20ii--final.pdf


Commission on Education. (2009). Recommendations for occupational therapy


Commission on Practice (2010). Practice Advisory: Services Provided by Students in Fieldwork Level II Settings. Retrieved from https://webcache.googleusercontent.com/search?q=cache:3zMvpVIp0soJ:https://www.aota.org//media/Corporate/Files/EducationCareers/Educators/Fieldwork/StuSuprvsn/Practice%2520Advisory%2520Services%2520provided%2520by%2520students%2520in%2520FW%2520Level%2520II%2520final.pdf+&cd=1&hl=en&ct=clnk&gl=us


**Fieldwork Books**


**Essential Elements of Fieldwork Site Selection**

**Compatibility with the AU Department of OT Curriculum Design**

Many of the ACOTE Fieldwork Standards address the compatibility of the fieldwork site with the academic educational program’s curriculum design. The following addresses key elements that are minimum requirements for fieldwork site selection. Sites are encouraged to use this form to self-evaluate the strengths of their student’s program.

Does Your Site Match AU Department of Occupational Therapy’s Curriculum Design? Do you Offer:

- Occupation based evaluations and interventions that are linked to current professional evidence?
- Effective interdisciplinary professional teams dedicated to client and family centered care?
- Exposure to culturally competent intervention methods to enhance respect for diverse populations?
- Use of professional evidence to design and implement current and effective services and outcomes?

**DEVELOPING YOUR FIELDWORK OBJECTIVES**

The Academic Fieldwork Coordinator will work with the site to develop learning experiences that meet the minimum criteria in terms of learning objectives, learning experiences, expectations, etc. Appendix C offers sample FW objectives that are compatible with the Department of Occupational Therapy’s curriculum design that may be helpful in designing appropriate fieldwork site objectives and learning activities. If a fieldwork site cannot meet the established compatibility criteria it would not be in the learner’s or the fieldwork site’s best interest to place a student in this setting.

**FIELDWORK PROFESSIONAL DEVELOPMENT AND CONTINUING EDUCATION UNITS**
AU OT program offers CE events on a regular basis that will assist a facility to be fully compliant with ACOTE’s fieldwork criteria for a quality Level II experience. AU considers fieldwork support a professional responsibility to assist facilities to meet the stated criteria.

THE FIELDWORK CONTRACTUAL PROCESS
ACOTE requires that fieldwork contracts or a memorandum of understanding be updated every 5 years. However, AU, School of Allied Health Sciences and the Department of Occupational Therapy require all contracts be updated every three years. The AU renewal process can take up to 3-4 months therefore the Academic Fieldwork Coordinator and Fieldwork Staff will initiate the contract renewal process at the 6 month timeline to ensure completion of the contract prior to the fieldwork lottery selection process. Electronic copies of the contract process are acceptable.

THE FIELDWORK DATA FORM
In order for students to be placed in a facility, the fieldwork site must have an updated Fieldwork Data Form on file in the site folder. These fieldwork data forms allow the Department of Occupational Therapy to ensure that the facility continues to have qualified supervisors and that the philosophy of the fieldwork site remains compatible with the Department’s curriculum design. The compatibility with the curriculum protects the clients, students, facility, and AU. Fieldwork educators are referred to Appendix D: Fieldwork Data Form. In busy healthcare systems, this form needs to be updated at least every two years, as staffing and philosophies change.

FIELDWORK LEARNING OBJECTIVES
Level I: Appendix E refers to the Fieldwork Level I Courses and the related learning objectives and evaluation forms. The Department of Occupational Therapy develops the Level I Learning Objectives for the fieldwork experiences throughout the curriculum. These objectives provide a progression of knowledge and skills.

Level II: Appendix C provides sample Level II fieldwork objectives. Level II experiences guide the student toward entry level competence. The Department of Occupational Therapy will need a completed copy of each fieldwork sites’ Level II fieldwork objectives and learning assignments. These may be provided with the submission of the Fieldwork Data Sheet.

ROLES OF A FIELDWORK EDUCATOR AND ACADEMIC FIELDWORK COORDINATOR
The Contract:
The Fieldwork Educator will work with the Academic Fieldwork Coordinator to ensure the contract is valid, an updated Fieldwork Data Form is on file, learning objectives compatible with the Department’s curriculum design are established, and learning activities to meet the objectives are designed. The Academic Fieldwork Coordinator is also responsible to ensure the appropriate level of supervision is provided to the student. The Fieldwork Data Form is submitted at least every two years. The Fieldwork Educator works directly with the Academic Fieldwork Coordinator to ensure the fieldwork contract is updated every three years (ACOTE Standard and AU SAHS Clinical Contracts Policy).
Quality of the Fieldwork Experiences:
The Fieldwork Educator will ensure the quality of the fieldwork experiences, adherence to all Standards, and submit the paperwork regarding student performances within specified timelines. The Fieldwork Educator must ensure that the site is prepared to offer the OT student a quality experience that reflects the sequence, depth, focus, and scope of content of the AU OT curriculum design.

Communications:
The Academic Fieldwork Coordinator will work closely with the Fieldwork Educator and the student(s) regarding any conflicts, concerns, or performance issues. Working with the AU Academic Fieldwork Coordinator ensures the setting is able to meet the curriculum goals and provide appropriate educational experiences to meet the learning needs of the students.

Effective Partnership with AU:
Collaboration with the Academic Fieldwork Coordinator ensures a full understanding of the AU OT curriculum, effective collaborative communication, maintenance of fieldwork contracts, and update site data prior to fieldwork placements (ACOTE Standard B.10.4). Collaboration with the Academic Fieldwork Coordinator in the development of site specific fieldwork objectives, identification of site requirements, and communicating with the student and Fieldwork Educator about the student’s progress and performance during fieldwork is essential.

Student Requirements:
The Fieldwork Educator specifies all student requirements prior to placement. This may include: background checks, drug screening, completing of HIPPA training & orientation, as well as other health requirements and site specific documents.

Adequate Supervision:
The Fieldwork Educator/Coordinator notifies the Department of Occupational Therapy if the ratio of fieldwork educators to student numbers is not sufficient for a quality fieldwork experience and could compromise attainment of the specified learning objectives. The Fieldwork Educator ensures the quality of the supervisory experience including qualifications of the Fieldwork Educator(s) and the student’s feedback and mentorship throughout the experience. The Fieldwork Educator designs quality fieldwork experiences and learning activities to ensure the development of the student’s professionalism and competence. The facility and the Fieldwork Educator ensure qualified supervision by a credentialed/licensed OT that has a minimum of 1 year experience.

Student Evaluations:
The Fieldwork Educator provides timely documentation of the student’s performances and ensures notification of any difficulties or issues to the Academic Fieldwork Coordinator. The Educator will also submit the required evaluations to the Department
of Occupational Therapy within specified timelines. The Educator will communicate and implement an evaluation mechanism that enhances supervision within the respective facility.

**Student Experiences:**
The fieldwork experiences foster client centered, meaningful, occupation based outcomes that are considerate of performance factors including cultural diversity, psychosocial, and socioeconomic factors (ACOTE Standard, B.10.15). The Fieldwork Educator will provide the Department of Occupational Therapy with a documented plan for provision of OT services and supervision by a currently licensed or credentialed OT with at least one year of professional experience for Level II student experiences. The Academic Fieldwork Coordinator and the Fieldwork Educator ensure that a qualified supervisor is available, via a variety of methods, to the student during all working hours.

**Ethical and Quality Professional Role Models:**
The Fieldwork Educator ensures the setting and its respective personnel role model appropriate OT scope of practice within AOTA’s Standards of Practice, the Role Delineation for *Occupational Therapists and Occupational Therapy Assistants, and the AOTA Code of Ethics.*

**The Fieldwork Education Experience**

**FIELDWORK ORIENTATION & OBJECTIVES**
1. *Student Orientation:* Serving as a fieldwork educator can offer an exciting challenge for professional development.
2. Communication of expectations is the essential first step of successful supervision.
3. Sites are encouraged to develop a Student Orientation process and training protocol.

**Fieldwork Educator’s Resources:**
AOTA’s web site has numerous resources for fieldwork development and supervision [http://www.aota.org/Educate/EdRes/Fieldwork/Supervisor/41770/41771.aspx](http://www.aota.org/Educate/EdRes/Fieldwork/Supervisor/41770/41771.aspx). AOTA’s web site also provides pdf copies of fieldwork forms, as well as valuable resources for both Fieldwork Educators and Academic Fieldwork Coordinators. The ACOTE Standards are accessible on the web site to delineate accreditation expectations for fieldwork sites.

**A Self-Assessment Tool for the Fieldwork Educator:**
This tool is for Fieldwork Educators and Supervisors to evaluate personal knowledge and skills related to competency in professional practice, education, supervision, evaluation, and administration. The assessment tool is cited as a good professional
development mechanism. AOTA also offers a web-based on-line course to enhance quality fieldwork experiences.

Using Fieldwork Performance Evaluation Forms: An Interactive Approach: The goal of the AOTA course is to introduce the standard fieldwork tool used to evaluate student performance. Needed supervisor skills include:

1. **Mentorship:** Mentorship input for constructive communication skills, interpersonal skills, resolving conflict, and providing clear, concise explanations are essential.
2. **Coaching:** The ability to coach the student and give timely feedback to develop the student’s knowledge and skills is important. The ability to recognize that every student is unique and students are not able to clone the fieldwork supervisor’s behaviors. Each learner should be encouraged to develop leadership and advocacy skills.
3. **Fostering Student Professionalism:** The goal would be to develop the student’s professionalism by setting an excellent example and encouraging the student to enhance their therapeutic use of self through reflective practice. Fieldwork Educators serve as role models and mentors of ethical practice, respect for everyone, and appreciation of diversity.
4. **Feedback Sessions:** Scheduling weekly meetings with the student is imperative to discuss progress and allow time for questions. The meetings should include feedback as to what went well and provide constructive input on any needed areas of improvement. The feedback shapes the student’s professional growth and development. Provide timelines and expectations directly at first and then allow the student to gain independence in these areas. A fieldwork educator is not expected to know everything, only to have the ability to guide the pathway to the answers (Glassman, S., 2006).

Fieldwork Site Manual: Each fieldwork site should develop a fieldwork orientation notebook or manual that includes the following information:

- **The Mission and Purpose** of your facility.
- **The site’s fieldwork learning objectives** that are linked to the ACOTE Standards and AU Department of Occupational Therapy key curriculum design concepts. The Department of Occupational Therapy has developed sample Level II objectives to guide its fieldwork placement sites in developing site specific objectives that strive to fulfill AOTA Excellence in Fieldwork Criteria. The Department of Occupational Therapy’s curriculum design promotes the following key concepts:
  1. Evidence based practice critical reasoning to guide occupation based interventions, methods, adaptations, technologies, and orthoses.
  2. Participation in effective interdisciplinary team approaches.
  3. Exposure to diverse cultures and populations.
  4. Promotion of client and family centered care for assessment, goal setting, intervention, and discharge planning.
  5. Development of effective teaching and learning for quality discharge education and client reintegration to the community or discharge environment.
6. Ability to appropriately supervise aides or assistants and participate as an effective member of an interdisciplinary team.
7. Use of assistive technology, adaptive equipment and orthoses to enhance participation in meaningful occupations.

NOTE: Refer to Appendix C for sample Level II Fieldwork Objectives to assist in completing the site specific fieldwork objectives. The AU OT program is available to help complete this process and required component.

**THE ACADEMIC FIELDWORK COORDINATOR**
The Representative Assembly in 2005 charged the President of AOTA to develop an ad hoc committee to make recommendations for developing resources for fieldwork educators and to develop a vision for OT fieldwork excellence. Fieldwork has been described as the "primary driver in transforming practice as we approach the centennial year 2017" Costa, 2007. Fieldwork is the essential link to develop future OT practitioners.
The OT profession has placed significant importance on evidence based practice. This focus needs to extend to the fieldwork site with a collaborative research agenda being developed between the educational programs and practitioners. This model will develop practice scholars. The profession is mobilizing a Decade of Fieldwork to activate the Centennial Vision by developing processes and resources for fieldwork preparation and supervision competence.

*Four foundational values of fieldwork are needed to accomplish this initiative:*
1. An evidence-based approach to the development of fieldwork resources and expectations.
2. Collaboration and integration between practice settings and academia.
3. A commitment to a lifelong learning journey of discovery.
4. A commitment to excellence through recognizing attainment and achievement.

*This process advocates for the following key development areas:*
1. Apply current evidence to practice according to role expectations.
2. Demonstrate occupation based approaches to practice.
3. Contribute to the scholarship of practice.
4. Commitment to the ongoing education of OT students.
5. Engagement in reflective practice as a mechanism for personal and professional growth.
6. Recognize and respond to the development of role-emerging practice settings (Costa, 2007).

**STRATEGIES FOR EFFECTIVE SUPERVISION**
*FWPE: Fieldwork Performance Evaluation of the Occupational Therapy Student*
Within your facility, describe week by week expectations related to learning experiences, responsibilities, caseload expectations, documentation and billing, participation in team
meetings or care planning. Documentation of these expectations guide a successful fieldwork experience for clients, the facility and for the student. These efforts allow for the student to realize the expectations and work toward accomplishment. The supervisor is expected to evaluate the student using the FWPE at the middle of the Level II rotation (6 weeks) and then again at the end of the 12 week experience. These evaluations may be completed on One45 or by paper within the specified timeline. The Department of Occupational Therapy will send out electronic reminders that the evaluation is due. The Fieldwork Educator and the Student will receive these reminders.

AOTA offers a continuing education program, Fieldwork Educators Certificate Program to enhance the fieldwork supervision process. More information, including upcoming training sessions can be found at http://www.aota.org/Education-Careers/Fieldwork/Workshop.aspx

COMMUNICATION STRATEGIES BETWEEN THE PRACTICE SETTING AND THE ACADEMIC SETTING
The Academic Fieldwork Coordinator should be contacted for any difficulties concerning the student. Fieldwork Educators should be assured that the student has been prepared for practice experiences from an academic standpoint. These educational efforts include documentation and billing. The student does need the hands on experiences, the opportunity to develop the application of complex reasoning, and the ability to gain confidence and independence. Fieldwork Educators should feel free to call or email the Academic Fieldwork Coordinator for guidance or to communicate any questions or issues that arise. Fieldwork education is a partnership between the fieldwork site and AU Department of Occupational Therapy. Partnerships require communication and collaboration.

THE STUDENT’S ASSESSMENT OF THE EXPERIENCE
Student’s Evaluation of the Fieldwork Experience (SEFWE): The Student will evaluate the supervisor and the experience at the end of the fieldwork rotation (12 weeks). The evaluation will be signed by the student and the Fieldwork Educator or checked as shared on the One45 electronic evaluation system. The student’s evaluation will describe the strengths of the experience and any suggestions for improvement. The student’s evaluation will also provide feedback to the AU Department of Occupational Therapy as to academic readiness of the student for the fieldwork experience and expectations of the site.

Student assessment or feedback sessions should involve weekly meetings. The Fieldwork Educators should describe what is going well and provide constructive feedback for targeted areas of improvement. Fieldwork Educators should coach the students to accept feedback and to embrace strategies for improvement. Offering resources to guide the student’s learning and eventual success is necessary. The fieldwork rotation is a learning process. Feedback and coaching are essential elements to successfully obtain professional outcomes and ensure entry level competencies.
AU is Going Green
One45 is an electronic software system used by the AU that allows for posting of all learning experiences as well as providing all fieldwork evaluation forms. It contains the FOSTER requirements, student profiles, facility information and the AOTA Fieldwork Evaluation Forms. Fieldwork Educators and students are asked to complete the evaluations within One45. The amount of paper, ink cartridges, and mailing will significantly protect valued environmental resources. The students will be able to print out a paper version of the evaluation if you are unable to complete the electronic version; however we strongly encourage you to join us in the conservation process by using One45. Students or the Fieldwork Assistant will be able to guide you through the process.
Thank you for considering this request.

Student Information
The following section of the manual is the Student Fieldwork Manual. This is available for the site, and fieldwork educator, to determine the information which has been provided to the student(s) prior to fieldwork.

Student Information: Level I Fieldwork
The goal of Level I experiences is to introduce the OT student to the fieldwork experience, to apply knowledge to practice, and to develop understanding of clients (ACOTE Standards, 2006). The AOTA Standards describe the goal of Level I Fieldwork "to introduce students to the fieldwork experience, and develop a basic comfort level with an understanding of the needs of clients." Level I Fieldwork is not intended to develop independent performance, but to "include experiences designed to enrich didactic coursework through directed observation and participation in selected aspects of the occupational therapy process." Level I Fieldwork experiences allow OT students supervised practical client experiences that are integrated throughout the curriculum.

The AU OT program will ensure that students are supervised by qualified personnel during each Level I experience. Level I supervisors may include, but are not limited to, currently licensed OT and OTAs, psychologists, physician assistants, teachers, social workers, nurses and other appropriate health care professionals. Students should contact the AFWC immediately if they have any questions or concerns about the ability of their assigned supervisor to provide Level I FW education.

Beginning the first semester of the MHSOT program, fieldwork experiences provide real life exposure to the concepts learned in class and laboratory sessions. These experiences are typically in 1 week segments and multiple rotations occur some semesters. No Level I experience can be substituted as a Level II experience. The Level I fieldwork experiences are scheduled as follows.
<table>
<thead>
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<th>Course Title</th>
<th>Description</th>
<th>Semester/Year</th>
<th>Credits</th>
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<td>OTHP 6000</td>
<td>OT Process Fieldwork</td>
<td>Fall/Year 1</td>
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<tr>
<td>OTHP 6001</td>
<td>Mental Health Fieldwork</td>
<td>Spring/Year 1</td>
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<td>OTHP 6002</td>
<td>Community Practice Fieldwork: Camp TBI</td>
<td>Summer/ Year 1</td>
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<td>Geriatric Fieldwork</td>
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<td>OTHP 6003</td>
<td>Adult Fieldwork</td>
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Your professional rotations are scheduled ahead of time by the department, often a full year in advance. These dates are not flexible because of your class schedule and deadlines for grades to be turned in to the registrar. If you are planning family vacations, weddings, or other events you will need to work around the dates provided OR submit a Special Consideration Form prior to the Fieldwork Lottery. Adjustment to fieldwork dates will NOT be made after confirmation has been secured.

**Level I Fieldwork Eligibility**

Students must exhibit the professional characteristics and abilities to assume full responsibility for client care in order to be cleared for fieldwork eligibility. Students must be able to fully attend to the clients' needs at all time. If the student is experiencing personal or health issues that interfere with this level of professional focus, the student will be removed from the fieldwork site until such time that it is clear the student’s primary focus is quality care delivery. Clearance to resume the fieldwork experience requires the permission of the Chair of the Department of OT and the Academic Fieldwork Coordinator. Clearance to return to Fieldwork may be required from a physician along with the student re-signing the Technical Standards attesting to their ability to return to the curriculum.

Students must also be in good professional standing to attend fieldwork experiences. Students must receive at least a ~65% on the First Clinical Experience FW Professional Behavior Checklist in order to attend the next level one fieldwork. Also, for the first fieldwork experience, students must be in good professional standing with faculty and staff in order to attend the first level one fieldwork. Thereafter the student must receive at least a ~70% on the FW Professional Behavior Checklist in order to attend subsequent level one fieldworks. If a student does not obtain the required percentage, the student may not be able to attend fieldwork at the designated time and will be required to remediate professional sessions with faculty and their advisor. After
obtainment of the needed points, the student may attend fieldwork, possibly noting an off-track status or missed fieldwork experience. Fieldwork will be completed as available during times open to sites and not during regular class times. This may mean attending weekend or holiday fieldwork opportunities. It may also result in a loss of a level one fieldwork experience.

**Level I Fieldwork Selection Process**

The department utilizes a lottery system for the selection of all fieldwork sites. Prior to the lottery, students should familiarize themselves with the potential sites by reviewing each site folder in the main office. Students should consider sites based on their own personal learning needs and the educational opportunities at each particular site. Over the course of the program (6 one-week FW and 2 twelve-week FW), students should select a variety of sites including inpatient acute care, outpatient, home health, community/schools, and rehab. Choices should not be made based on geographical location. Because of the limited availability of quality FW sites, there is no guarantee that students will be able to complete either fieldwork in the CSRA or near their home. Therefore, students should be prepared to complete FW in geographic locations other than Georgia to enrich their learning opportunities. Any special consideration request forms must be turned in 2 full weeks prior to FW lottery in order for the committee to review the request. NO LATE REQUESTS WILL BE REVIEWED.

Students may not select sites where they have existing personal relationships, have volunteered, have work agreements, or have previously worked without prior approval of the AFC. Students may not select sites where a family member is employed. Students who select these sites without prior disclosure will have the fieldwork cancelled.

A master list of sites which have agreed to take students will be posted on the office door a minimum of one week prior to the scheduled lottery. Students are responsible for researching each site prior to the lottery date so that they may make an informed decision during the lottery selection. Students who have not reviewed files may request to sit out from the lottery and select from the remaining available sites. Students who are absent from the lottery, regardless of reason, will select from the list of remaining available sites. Following the lottery site selection the AFC and Fieldwork Assistant will provide each site with the student name and FW dates. Once confirmation is received from the site, there is no changing of FW sites unless a special request form has been submitted and approved. Acceptable reasons for requesting a change include illness of family member or dependent care needs. Unacceptable reasons include pets, change in relationship status, student changing their mind about the site, site location or site’s work hours and will not be approved. Students must select sites off of the master list for all Level I fieldwork experiences.

**Level I Fieldwork Attendance Policy**

Fieldwork Educators Manual, 7/2016 SJ
Level I Fieldwork at AU is usually completed during one week assignments. Students are expected to complete 40 hours during the week. Some sites, such as community placements and schools, may have different time requirements and must be pre-approved by the Academic Fieldwork Coordinator. If the required number of hours are not met, the student will receive a failing grade. It is the student’s responsibility to ensure that the time commitment has been met. Any time missed during Level I FW must be made up before a final grade will be assigned.

Students are expected to work the hours of their supervisor. The only exception is if the student will be observing other disciplines during the day. Students may not negotiate to come in later or leaving earlier than scheduled as this will prevent the completion of the required number of hours.

### Level I Fieldwork Requirements

#### Site Specific Requirements
Students are responsible for meeting all the specific requirements of their fieldwork site. These requirements may include, but are not limited to, CPR and First Aid, criminal background checks, immunizations, and drug testing. Some sites may require proof of health insurance. **Students who do not meet the specific requirements for their site will not be allowed to attend fieldwork and will receive a failing grade.** Students who arrive at fieldwork without having met the requirements will be asked to leave and assigned a failing grade.

Students are responsible for all costs related to fieldwork, including transportation and housing at each fieldwork experience. Failure to prepare for these expenses is not an acceptable excuse for changing a scheduled fieldwork.

Students who do not pass the site’s drug test procedure will not be permitted to attend FW as scheduled resulting in an incomplete grade and inability to progress in the curriculum. Students who do not pass a second FW drug test will be referred to the Student Progression Committee. Students should anticipate prescription medication that results in false positives during routine drug testing.

#### Assignments and Expectations
Each level I experience is linked to a curriculum theme in the OT program. Students are given assignments to complete during the fieldwork experience. It is the student’s responsibility to communicate the specific assignment needs to the fieldwork supervisor. In the event that the student is unable to meet the requirements of an assignment, the student should communicate this to the course faculty to develop an alternative assignment.

#### Fieldwork Grading
Grading Rubrics will be distributed during each fieldwork seminar prior to Level I experiences. Fieldwork supervisors will be asked to complete scoring forms related to the students’ performance during the fieldwork experience and professional behaviors. Students will be asked to complete an evaluation of the site. Both evaluations must be
received by the Academic Fieldwork Coordinator in order for a final course grade to be given. It is the student's responsibility to get the documents to the AFWC.

**Professional Attire**

Students are to wear professionally attire at all fieldwork rotations. This typically includes full length pants, colored shirt, and flat closed-toe shoes. Sandals and flip flops are not permitted in healthcare environments. Sites have the right to request that students follow a specific dress code, which may include khaki pants, polo shirts, scrubs, or similar attire. Sites have the ability to request a student be removed for violation of dress code.

Tank tops, strapless tops, bare midriffs, exposed undergarments, unnaturally colored hair, facial jewelry and exposed tattoos are not acceptable in the professional environment. Infection control policies do not permit artificial nails. You may wish to limit jewelry, especially dangle earrings, bracelets and necklaces to prevent them from being pulled or broken!

Students must wear their AU badge at all times as their primary credential. Students are expected to adhere to all policies and procedures at the FW site. Although we have grown to rely on our phones for time, in the clinic you will need a watch with a second hand (Cell phone are **NOT** permitted on fieldwork).

**Cancellations**

At times, events may occur at the fieldwork site that makes it necessary to cancel the rotation. These situations make it necessary to find an alternative site to ensure the appropriate learning experiences and supervision. As each situation is unique, the Academic Fieldwork Coordinator and Fieldwork Assistant will work with the student to seek out the most appropriate alternative and re-assignment.

When fieldwork is cancelled due to a student illness, student being off track, or other student related issues, the FW staff will work to find the student another appropriate placement, however, there is no guarantee that the re-assignment will be at the same facility.

**Accommodations for Students with Disabilities**

Section 504 of the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990 requires AU to provide reasonable accommodations for documented disabilities. Students are referred to the AU Students with Disabilities policies as well as the Department of OT’s Policies in the Student Handbook. Reasonable accommodations are determined by AU Student Life Director. Students must act proactively with the
Academic Fieldwork Coordinator regarding reasonable accommodations during the fieldwork selection process.

Confidentiality
All AU students are required to complete the AU Information Protection and Portability Act (HIPAA) certification training. A copy of the HIPAA compliance certificate will be placed in the student folder. This training certificate will be shared with all fieldwork sites requiring proof of HIPAA training. Students must adhere to any additional facility specific policies and procedures related to client protected information including appropriate sharing of information with families, etc.

Students will adhere to the utmost confidentiality of all documentation and verbal communications. HIPAA fines and punishments apply to students as well. Students are to be especially sensitive to not talk about clients in public places, elevators, dining facilities, etc.

All documentation is to be maintained in a secure place at all times within the facilities policy and procedures. Computerized documentation must be secured and protected at all times. Students are not to remove any client health protected information from the facility at any time. Client records are the property of the facility. They should be protected at all times and must not be left in open areas.

Professional Liability Insurance
Liability insurance is required by every fieldwork site. Full time students are covered under AU’ S College of Allied Health Sciences Professional Liability Insurance. Documentation of liability insurance is provided to each fieldwork facility prior to sending a student. Students are also provided copies of liability at their fieldwork seminar. If for any reason you are not a full time student, you are to contact the Academic Fieldwork Coordinator immediately for provision of Professional Liability insurance.

Fieldwork Safety
Students must adhere to all of the following safety and compliance issues:

Practice safety precautions in all client care activities including but not limiting to the use of universal precautions, safe body mechanics and ergonomics in all client handling procedures and the use of a gait belt in all transfers.

Be aware of any potential situation that could jeopardize safety in all client intervention practices. Ask for assistance if safety could be compromised. Report any unsafe situation or any client or personal incident/accident to your fieldwork supervisor immediately. If any incident occurs you will need to report the issue to your supervision and document the incident within facility policies. Do not wait until the next day.

HIPAA Guidelines for Fieldwork
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.


Student Information:  
Level II Fieldwork Experiences

ACOTE’s 2006 Standards describes the purpose of Level II experiences… 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 occupation and research, administration, and management of occupational therapy services (ACOTE Standards, 2006).

Augusta University’s Master of Health Science in OT program supports the ACOTE purpose and Standards. At AU, the Level II experiences include a minimum of two 12 week full time experiences for comprehensive exposure to a variety of clients and learning experiences. Students are placed in settings to foster diverse experience for preparation of a generalist. All AU OT students must complete at least one Level II FW in a physical disabilities setting. Optional elective fieldwork experiences are also possible in a setting with a specific client population of the student’s choice.

For Level II experiences, the Department of OT ensures that students are supervised by a currently licensed or credentialed OT with a minimum of 1 year of practice experience and provides documentation to the Department of OT outlining adequate preparation to serve as a fieldwork educator (ACOTE Standard, C1.14).

Fieldwork Educators may be engaged by the fieldwork site or by the Augusta University

AU Department of OT provides a Center for OT Education to adequately prepare fieldwork educators for success. Student evaluation of the fieldwork experience provides the department with feedback to evaluate the effectiveness of supervision. (ACOTE Standard C1.15).

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Description</th>
<th>Semester/Year</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTHP 7009</td>
<td>Level II Fieldwork A</td>
<td>12 weeks. Approx dates are 2/2 – 4/24/2015</td>
<td>9 credits</td>
</tr>
<tr>
<td>OTHP 7010</td>
<td>Level II Fieldwork B</td>
<td>12 weeks. Approx dates are 5/11-7/31/2015</td>
<td>9 credits</td>
</tr>
<tr>
<td>OTHP 7011</td>
<td>Optional Level II Fieldwork Specialty</td>
<td>TBA</td>
<td></td>
</tr>
</tbody>
</table>

Your professional rotations are scheduled ahead of time by the department, often a full year in advance. These dates are not flexible because of deadlines to the registrar for grades and graduation. If you are planning family vacations, weddings, or other events you will need to work around the dates provided OR submit a Special Consideration Form prior to the Fieldwork Lottery. Adjustment to fieldwork dates will **NOT** be made after confirmation has been secured.

**Level II Fieldwork Eligibility**

Students must be in good academic standing to attend fieldwork experiences, including having no incomplete grades. Students who have not completed all pre-requisite academic coursework will not be permitted to attend Level II FW except in unusual circumstances with the permission of the AFC and the Chair. All fieldwork experiences
must be successfully completed within 24 months of completing the didactic course work.

Students must exhibit the professional characteristics and abilities to assume full responsibility for client care in order to be cleared for fieldwork eligibility. Students must be able to fully attend to the clients’ needs at all time. If the student is experiencing personal or health issues that interfere with this level of professional focus, the student will be removed from the fieldwork site until such time that it is clear the student’s primary focus is quality care delivery. Clearance to resume the fieldwork experience requires the permission of the Chair of the Department of OT and the Academic Fieldwork Coordinator. Clearance to return to Fieldwork may be required from a physician along with the student re-signing the Technical Standards attesting to their ability to successfully complete the curriculum.

Students must also be in good professional standing to attend fieldwork experiences. This requires receiving a minimum score of 65-70% on the FW Professional Behavior Checklist completed while on previous level one fieldworks; in addition, students must score a 70%-80% on the Classroom Professional Behavior Checklist throughout the length of the program, as assessed by faculty and staff throughout the curriculum. If a student does not obtain this score, they will have to complete remediation coursework surrounding professionalism, as well other sessions as needed and deemed by faculty. After completion of remediation, the student may then be considered for fieldwork placement. Note this may result in an off-track status, delaying graduation from this program. If a student is unable to satisfactorily receive 70% on the Classroom Professional Behavior Assessment Form after remediation, the student may be suspended or dismissed from the program. Students with consistently unsatisfactory professional behavior scores may be referred to the Departmental Review Body for consideration of suspension or dismissal from the program, based on the severity of the issue.

**Level II Fieldwork Selection Process**

The department utilizes a lottery system and Faculty/Staff Recommendation for the selection of all fieldwork sites. Prior to the lottery, students should familiarize themselves with the potential sites by reviewing each site folder in the main office. The ACFW will also give a list of confirmed sites for the students to select sites from; all sites will be utilized. Students should consider sites based on their own personal learning needs and the educational opportunities at each particular site. Over the course of the program (6 one-week FW and 2 twelve-week FW), students should select a variety of sites including inpatient acute care, outpatient, home health, community/schools, and rehab. Choices should not be made based on geographical location. Because of the limited availability of quality FW sites, there is no guarantee that students will be able to complete either fieldwork in the CSRA or near their home. Therefore, students should be prepared to complete FW in geographic locations other than Georgia to enrich their learning opportunities. Any special consideration request forms must be turned in 2 full
weeks prior to FW lottery in order for the committee to review the request. NO LATE REQUESTS WILL BE REVIEWED.

Students may not select sites where they have existing personal relationships, have volunteered, have work agreements, or have previously worked without prior approval of the AFC. Students may not select sites which employs a family member. Students who select these sites without prior disclosure will have the fieldwork cancelled.

Students must review FW folders in the front office in order to develop their Potential Site Sheet. The AFC or Fieldwork Assistant will notify students of the deadline to submit Site Sheets. Sheets turned in after the deadline will be considered after the lottery process has been completed. Based on lottery numbers, the AFC and Fieldwork Assistant will select sites off of the student’s site sheet. Any site listed on the student site sheet is considered a viable FW option and will be considered during the selection process; however, according to the Faculty/Staff Fieldwork Recommendation process, the AFC may also place students off their site sheet. Following the site selection, the AFC and Fieldwork Assistant will work to secure confirmation of the site for the specified FW. Once confirmation is received, there is no changing of FW sites unless a special request form is submitted and approved. Acceptable reasons for requesting a change include illness of family member or dependent care needs. Unacceptable reasons include pets, change in relationship status, student changing their mind about the site, site location, site’s work hours, or cost to attend the site. Students who do not accept the site selected from their site sheet may select an alternate FW (off the list given by the AFC) after all fieldwork assignments have been confirmed; or the student may choose to complete FW during an alternate semester placing the student off track.

Level II Fieldwork Attendance Policy

Level II Fieldwork is required to be 24 weeks of full-time experience based on ACOTE standards. This is typically divided into two 12 week Level II experiences. In order to fulfill this requirement, students are expected to attend each FW for 12 full work weeks. Thus, there is no allowance for vacation or personal time off. Absences for family emergencies or personal illness may be taken for up to two days. Any time missed after two days, including illness, emergency, or holidays, must be made up either by weekend hours or extending the student’s FW dates. If the FW site has a more stringent attendance requirement, then the student must follow the site’s policy. The AFC must be notified of absences prior to the date, except in the case of an emergency. The AFC will not approve any unexcused days off and will require all missed time, even if approved by the site, to be made up either on weekends or through the extension of the FW dates.

Level II students are expected to follow their supervisors work schedule. This may include 8 hr/day weeks, 10 hour/day for four days, and/or weekend coverage. This time is not negotiable.
Level II Fieldwork Requirements

Site Specific Requirements
Students are responsible for meeting all the specific requirements of their fieldwork site. These requirements may include, but are not limited to, CPR and First Aid, criminal background checks, immunizations, and drug testing. Some sites may require proof of health insurance. **Students who do not meet the specific requirements for their site will not be allowed to attend fieldwork and will receive a failing grade.** Students who arrive at fieldwork without having met the requirements will be asked to leave and assigned a failing grade.

Students are responsible for all costs related to fieldwork. Including transportation and housing at each fieldwork experience. Failure to prepare for these expenses is not an acceptable excuse for changing a scheduled fieldwork.

Students who do not pass the site’s drug test procedure will not be permitted to attend FW as scheduled resulting in an incomplete grade and inability to progress in the curriculum. Students who do not pass a second FW drug test will be referred to the Student Progression Committee. Students should anticipate prescription medication that results in false positives during routine drug testing.

Assignments and Expectations
Sites are encouraged to have a student manual, student expectations, and site specific objectives for fieldwork. Students are expected to meet the expectations of the site including work behaviors, professionalism, and clinical performance. Some sites may require student projects and/or student assignments which only enhance the student learning experience.

When a student is not meeting the site specific fieldwork objectives, or the sites expectations, the student or the site may contact the Academic Fieldwork Coordinator. The AFC will work to resolve the issue in the best interest of both parties. These are handled on a case by case basis based on the unique situation and parties involved. Resolution may include learning contracts outlining specific objectives, or the extension of the fieldwork dates. Occasionally, this may result in the removal of the student from the site. Students will be given one opportunity to repeat a level II fieldwork. Those who are not successful during a second level II will be recommended for dismissal. Students removed due to professional behavior issues will be assigned a failing grade and referred to the departmental progression committee. Based on the severity of the professional behavior issue, the committee may recommend probation, suspension, or dismissal from the program.

Fieldwork Grading
The Fieldwork Performance Evaluation (FWPE) is the standard instrument used by OT programs to assess performance during level II FW. Students should review the FWPE prior to attending level II to familiarize themselves with the scoring instrument. A minimum score of 90 is required to be passing at midterm and a final score of 122+ is required for passing each FW experience. Students who are not passing at midterm will
need to have a learning contract developed between the student, the site, and the AFC. Students must pass all safety items in order to pass the FW, regardless of scores in other areas. Midterm FWPE scores and the final FWPE document must be returned to the department.

The student, while on Level Two Fieldworks, will be assessed using the FW Professional Behavior Checklist and/or Assessment at midterm and final. If the student falls below the required point score at any point, the fieldwork coordinator has the right to pull the student from fieldwork resulting in a failing FW score, an off track status, and/or delaying graduation. Students removed from fieldwork due to professional behavior issues may be referred to the Departmental Review Body for consideration of suspension or dismissal from the program, based on the severity of the issue. Remediation may occur and is established on a case-by-case basis.

**Student Withdrawals**
A withdraw may occur at the site’s request, at the student’s request, or at the request of the AFC. Withdraws from a Level II fieldwork will be considered a fail, unless approval from the AFC and the Chair. Students have one opportunity to repeat Level II fieldwork experience. Students who are not successful on two level II fieldwork experiences will be recommended for dismissal from the program.

**Professional Attire**
Students are to wear professionally attire at all fieldwork rotations. This typically includes full length pants, collared shirt, and flat closed-toe shoes. Sandals and flip flops are not permitted in healthcare environments. Sites have the right to request that students follow a specific dress code, which may include khaki pants, polo shirts, scrubs, or similar attire. Sites have the ability to request a student be removed for violation of dress code.

Tank tops, strapless tops, bare midriffs, exposed undergarments, unnaturally colored hair, facial jewelry and exposed tattoos are not acceptable in the professional environment. Infection control policies do not permit artificial nails. You may wish to limit jewelry, especially dangling earrings, necklaces and bracelets, so they do not get pulled and broken!

Students must wear their AU badge at all times as their primary credential. Students are expected to adhere to all policies and procedures at the FW site. Although we have grown to rely on our phones for time, in the clinic you will need a watch with a second hand (Cell phone are NOT permitted on fieldwork).

**Cancellations**
At times, events may occur at the fieldwork site that makes it necessary to cancel the rotation. These situations make it necessary to find an alternative site to ensure the appropriate learning experiences and supervision. As each situation is unique, the
Academic Fieldwork Coordinator and Fieldwork Assistant will work with the student to seek out the most appropriate alternative and re-assignment.

When fieldwork is cancelled due to a student illness, student being off track, or other student related issues, the FW staff will work to find the student another appropriate placement, however, there is no guarantee that the re-assignment will be at the same facility.

**Accommodations for Students with Disabilities**

Section 504 of the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990 requires AU to provide reasonable accommodations for documented disabilities. Students are referred to the AU Students with Disabilities policies as well as the Department of OT’s Policies in the Student Handbook. Reasonable accommodations are determined by AU Student Life Director. Students must act proactively with the Academic Fieldwork Coordinator regarding reasonable accommodations during the fieldwork selection process.

**Confidentiality**

All AU students are required to complete the AU Information Protection and Portability Act (HIPAA) certification training. A copy of the HIPAA compliance certificate will be placed in the student folder. This training certificate will be shared with all fieldwork sites requiring proof of HIPAA training. Students must adhere to any additional facility specific policies and procedures related to client protected information including appropriate sharing of information with families, etc.

Students will adhere to the utmost confidentiality of all documentation and verbal communications. HIPAA fines and punishments apply to students as well. Students are to be especially sensitive to not talk about clients in public places, elevators, dining facilities, etc.

All documentation is to be maintained in a secure place at all times within the facilities policy and procedures. Computerized documentation must be secured and protected at all times. Students are not to remove any client health protected information from the facility at any time. Client records are the property of the facility. They should be protected at all times and must not be left in open areas.

**Professional Liability Insurance**

Liability insurance is required by every fieldwork site. Full time students are covered under AU’ S College of Allied Health Sciences Professional Liability Insurance. Documentation of liability insurance is provided to each fieldwork facility prior to sending a student. Students are also provided copies of liability at their fieldwork seminar. If for
any reason you are not a full time student, you are to contact the Academic Fieldwork Coordinator immediately for provision of Professional Liability insurance.

**Fieldwork Safety**
Students must adhere to all of the following safety and compliance issues:

Practice safety precautions in all client care activities including but not limiting to the use of universal precautions, safe body mechanics and ergonomics in all client handling procedures and the use of a gait belt in all transfers.

Be aware of any potential situation that could jeopardize safety in all client intervention practices. Ask for assistance if safety could be compromised.

Report any unsafe situation or any client or personal incident/accident to your fieldwork supervisor immediately. If any incident occurs you will need to report the issue to your supervision and document the incident within facility policies. Do not wait until the next day.

**HIPAA Guidelines for Fieldwork**
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. Retrieved from http://www.aota.org/education-careers/fieldwork/supervisor/hipaa.aspx on June 23, 2016.
References


American Occupational Therapy Association (2000). Guidelines for an occupational therapy fieldwork experience Level I and Level II. Bethesda, MD: Author


Appendices

Appendix A: Additional Resources

The following resources will help the OT student to prepare for a successful fieldwork experience:

The Occupational Therapy Practice Framework: Domain and Process (AOTA, 2002).

Standards of Practice for Occupational Therapy (AOTA, 2010)

Scope of Practice (AOTA, 2009).

The Occupational Therapy Code of Ethics (AOTA, 2010)

Guidelines for Documentation of Occupational Therapy (AOTA, 2008).

Standards for Continuing Competence (AOTA, 2010).

Guidelines for Supervision, Roles, and Responsibilities During the Delivery of Occupational Therapy Services (AOTA, 2009)

Fieldwork Level II and Occupational Therapy Students: A Position Paper (2012)

Occupational Therapy Fieldwork Education: Value and Purpose (2009).

Answers to your Fieldwork Questions (AOTA)

The Level II Fieldwork Survival Guide (AOTA, 2006)
I. Definition and Purpose

The AOTA Standards describe the goal of Level I Fieldwork "to introduce students to the fieldwork experience, and develop a basic comfort level with an understanding of the needs of clients." Level I Fieldwork is not intended to develop independent performance, but to "include experiences designed to enrich didactic coursework through directed observation and participation in selected aspects of the occupational therapy process."

Services may be provided to a variety of populations through a variety of settings. Experiences may include those directly related to occupational therapy, as well as other situations to enhance an understanding of the developmental stages, tasks, and roles of individuals throughout the life span. Day care centers, schools, neighborhood centers, hospice, homeless shelters, community mental health centers, and therapeutic activity or work centers are among the many possible sites. Level I Fieldwork may also include services management and administrative experiences in occupational therapy settings, community agencies, or environmental analysis experiences. Populations may include disabled or well populations; age-specific or diagnosis-specific clients.

Qualified personnel for supervision of Level I Fieldwork may include, but are not limited to, academic or fieldwork educators, occupational therapy practitioners initially certified nationally, psychologists, physician assistants, teachers, social workers, nurses, physical therapists, social workers, etc. The supervisors must be knowledgeable about occupational therapy and cognizant of the goals and objectives of the Level I Fieldwork experience.

II. Objectives

Objectives of Level I Fieldwork may vary significantly from one academic institution to another. These variations occur as a result of differences in individual academic institutional missions, programmatic philosophical base, curriculum design and resources, etc. As a result, the individual academic institutions should provide information regarding the specific didactic relationship and should provide objectives for the experience. Fieldwork educators should determine if the resources of their facilities are adequate to meet the objectives of the educational institution, and then apply the objectives to the fieldwork setting.
Fieldwork objectives should reflect role delineation between professional and technical level students as specified by The Guide to OT Practice, AJOT, Vol.53, No.3. In the event a facility provides Level I Fieldwork experiences to both levels of students, separate objectives and learning experiences should be utilized, as developed by the academic program faculty. Students should be evaluated using these objectives.

In instances where students will have a prolonged/consecutive fieldwork experience in the same facility, the objectives should also reflect a sequential orientation and move from concrete to conceptual or from simple to more complex learning activities. In the event that the student will rotate through a variety of settings it is recommended that a master list of objectives be developed that demonstrate a developmental learning continuum and indicate which objectives/learning experiences have been provided in previous experiences.

Schedule design of Level I Fieldwork will depend on the type of setting and the curriculum of the academic institution. Options include, but are not limited to, full days for one-half a term, full days in alternating weeks for one term, half days for one term, or one week.

**Academic Institution**

- Identify course content areas to be enhanced by Level I Fieldwork experiences.
- Develop general goals that clearly reflect the purpose of the experience and level of performance to be achieved.
- Assure that objectives reflect the appropriate role of an OT or OTA student.
- Sequence the objectives from concrete to conceptual or from simple to increasing complexity.
- Identify facilities that may be able to provide the necessary learning experiences.
- Share the objectives with the fieldwork educators and ask them to identify those objectives that could be met in their facility.
- Discuss and coordinate fieldwork administration issues, such as scheduling, workload, report deadlines, etc.
- Collaborate with fieldwork educators to clearly identify the skill levels necessary for successful completion of Level I Fieldwork experience.
- Develop an evaluation form and protocol.

**Fieldwork Education Center**

- Evaluate administrative aspects of the program to determine the feasibility of providing education experiences of high quality while maintaining the effectiveness of services. Some considerations are: providing the necessary supervision, scheduling learning experiences, and staff attitudes toward.
- Review objectives and learning experiences with academic representatives to assure that they address the Level I Fieldwork objectives of the program.
• Review the evaluation form and associated protocols and seek any necessary clarification prior to its implementation.
• Review the Level I Fieldwork objectives and the evaluation form to determine if the learning experiences can be provided at your fieldwork agency and if they are compatible with the philosophy of the program.
• In collaboration with the academic program faculty, identify, and design, if possible, specific learning activities which will meet Level I objectives.
• Those agencies providing fieldwork for both the professional and technical level student should have different learning experiences designed to clearly reflect role delineation.

AOTA Commission on Education (COE) and Fieldwork Issues Committee (FWIC)
Amended and Approved by FWIC 11/99 and COE 12/99
COE Guidelines for an Occupational Therapy Fieldwork Experience - Level II


History and Purpose:
The intent of this document is to describe the desired characteristics of a fieldwork placement for occupational therapy and occupational therapy assistant students in Level II Fieldwork Education. It is not intended to be interpreted as a standard of performance or requirement of a program, rather as a reference or as instructional materials. It is for internal use by members of the AOTA. This document was originally prepared by the Loma Linda Fieldwork Council at the request of the Commission on Education and approved by the Commission on Education on April 15, 1985. The document was revised by the AOTA Fieldwork Issues Committee in 1992, and is now again revised by COE in June, 2000.

Definition:
The ACOTE/AOTA Standards (1998) describe Level II Fieldwork as...a crucial part of professional preparation...The goal of Level II Fieldwork is to develop competent, entry-level, generalist occupational therapists and occupational therapy assistants. The fieldwork experience is to provide students with the opportunity to integrate academic knowledge with the application of skills in a practice setting. (AOTA, 1999a & b; AOTA, 1996)

1. The fieldwork agency should have currently participated in a review process as established by the appropriate body, such as Joint Commission on Accreditation of Health Care Organizations, the Commission on Accreditation of Rehabilitation Facilities or a state regulatory board. In lieu of this review body there should be a review by the

2. The fieldwork agency should have a stated philosophy regarding service delivery. A philosophy of the fieldwork agency is a statement of the foundation or principles underlying its operation. This statement should serve as a guide for the delivery of service for individuals and groups, the degree of emphasis on research, and the commitment to education.

3. There should be regular professional conferences to evaluate patient/client programming regarding intervention needs.
In situations where there is little possibility for professional conference due to the nature of the fieldwork placement, the occupational therapist may independently establish intervention plans and goals when providing consultation, evaluation and treatment services.

4. There should be occupational therapy representation in planning programs and formulating policies which would affect occupational therapy services or involvement.
Occupational therapy representation may be through participation in program-related conferences, quality review processes, or in groups in which planning and policy-making may be carried out.

5. The administrators and staff of the fieldwork placement should understand the philosophy and principles of the occupational therapy fieldwork education program and should accept the responsibility for making it an integral part of their function.

Since the occupational therapy fieldwork education experience exists within the philosophy and policies of the fieldwork agency, it is essential that the administration and staff accept and support the program.

6. The fieldwork agency recognizes that the primary objective of the fieldwork experience is to benefit the student's education.

The educational value of the student fieldwork experience should be of primary importance, and the placement should not be used to extend services offered by the fieldwork agency.

7. Opportunities for continuing education and professional development of the occupational therapy staff and students should be supported.

    A. Attendance at workshops, institutes, conferences, courses and professional meetings should be encouraged.
    
    B. Financial support should be given for professional development whenever feasible with the budget of the fieldwork agency.
    
    C. In-service education programs should be developed and made available.
    
    D. Fieldwork students should be encouraged to participate in continuing education and be provided time to do so, when content is relevant to the fieldwork experience.

8. Occupational therapy staff members should participate actively in occupational therapy associations and in occupational therapy educational programs, whenever possible.

    Occupational therapists and occupational therapy assistants as role models should be actively involved with national and state occupational therapy associations.
    
    Occupational therapists and occupational therapy assistants should be involved with the occupational therapy educational programs from which they accept students on an ongoing basis. Such involvement may include education council meetings, on-site visits, correspondence, telephone calls, etc.

9. The fieldwork placement shall meet all existing local, state, and/or federal safety and health requirements and should provide adequate and efficient working conditions.

    Space for client-related consultation, preparation, writing, in-service education and research activities by occupational therapists, practitioners and students should be provided.
10. There must be adequate financial resources to support the fieldwork placement with adequate staff, equipment, and supplies.

11. Client records should be available to the staff and students for intervention planning and practice, educational and research purposes.

12. The occupational therapy philosophy regarding practice and education programs should be stated in writing. The written objectives of the program should reflect the specific contribution occupational therapy makes to the overall agency and program. The philosophy of the occupational therapy services should be written and should include the following: purpose; responsibility to society, profession, staff, and service recipients; degree of commitment to service recipients, education and research; and attitude toward future growth. The objectives should be based on the concepts, beliefs, and values established in the philosophy.

13. The occupational therapist and occupational therapy practitioner should comply with state regulations governing referrals from qualified physicians and from others seeking service in the medical, educational and broader human services community. Occupational therapy staff should collaborate with duly licensed physicians in those instances where medical management is active, indicated or required.

14. Fieldwork educators responsible for educating Level II Fieldwork occupational therapy students shall meet state regulations governing practice and have as a minimum 1 year of practice experience, subsequent to initial certification by NBCOT as an occupational therapist.

15. Fieldwork educators responsible for educating Level II Fieldwork occupational therapy assistant students shall meet state regulations governing practice and have as a minimum 1 year of practice experience, subsequent to initial certification by NBCOT as an occupational therapist or an occupational therapy assistant.

16. The fieldwork agency's communication system ensures accountability in service provision and documentation.

   A. There should be regular procedures for communication among all fieldwork educators and students.

   B. Adequate records and reports should be maintained in accordance with AOTA standards and legal requirements.

   C. Records should be maintained to provide sufficient data for quality improvement. Records may include administrative, service and other data. Administrative reports would include such information as numbers of persons serviced, attendance records, schedules and budgets. Service
records should include such information as referral data, client
assessments, intervention plan progress notes and discharge summaries.

17. The fieldwork educator and student should have access to current professional
information, publications, texts, and Internet resources related to occupational
therapy and pertinent topics related to populations and systems being served.
18. The fieldwork experience shall meet requirements in accordance with the
Standards for an Accredited Educational Program for the Occupational Therapist
and/or the Standards for an Accredited Educational Program for the
Occupational Therapy Assistant."
19. The educational program and the fieldwork placement should work
collaboratively to develop objectives in which the aims are compatible with those
of the educational program. The objectives should be reviewed at least annually.
These objectives should be clearly defined for the student and continually
evaluated to determine the effectiveness of the educational experience.
The fieldwork experience should be an extension of the educational program into
the clinical or community setting. The objectives should reflect both the
curriculum design of the educational program and the model of service delivery
of the fieldwork setting.
20. Adequate staff to provide occupational therapy services and educational services
should be maintained with supervisory and administrative responsibilities clearly
defined.

   A. The ratio of fieldwork educators considered adequate to carry out a
fieldwork experience is dependent upon the complexity of the services and
the ability to ensure proper supervision and frequent assessment in
achieving fieldwork objectives.

   B. Administrative and staff responsibilities should be clearly defined.

21. The fieldwork educator should carry out an organized procedure of orientation to
the agency, services, and the fieldwork experience.
22. The fieldwork placements should provide the student with experience with
various groups across the life span, persons with various psychosocial and
physical performance challenges, and various service delivery models reflective
of current practice in the profession.
Within the required total of 16 weeks for the occupational therapy assistant
student and 24 weeks for the occupational therapy student, there should be
exposure to a variety of traditional and emerging settings and a variety of client
ages and conditions.
23. The fieldwork educator shall provide ongoing supervision of the student.

   A. The student should be supervised in all aspects of his/her fieldwork
experience by adequate supervisory staff who should have full knowledge
of and responsibility for all aspects of the program being carried out by the
student under her or his guidance and protection.
The fieldwork educator should have full knowledge of the student's assigned workload and responsibilities and how they are being handled and should be available to the setting and to the needs of the student.

B. Ongoing supervision should be provided daily and/or weekly as an essential part of the fieldwork program. It should be flexible in accordance with the interests, needs and abilities of the student. Supervision should begin with more direct supervision and gradually decrease to less direct supervision as the student demonstrates competence with respect to the setting and client's condition and needs.

C. The ratio of fieldwork educators to students shall be such as to ensure proper supervision and frequent assessment in achieving fieldwork objectives.

D. In a setting where there is no occupational therapy practitioner on site, ACOTE/AOTA Standards requires a minimum of 6 hours of supervision per week by an occupational therapy practitioner. This should include direct observation of client/student interaction, role modeling, meetings with the student, review of student paperwork, consultation and communication regarding the learning experience. The fieldwork educator may work with students in groups, but should be aware of the individual student needs and respond accordingly. In addition, a designated on-site professional person should be available for communication throughout the experience. A documented plan for provision of occupational therapy services in accordance with state regulations and in coordination with the educational program should be in place. This fieldwork shall not exceed 12 weeks for the occupational therapy student or 8 weeks for the occupational therapy assistant student.

24. Level II fieldwork shall be required and designed to promote clinical reasoning and reflective practice, to transmit the values and beliefs that enable the application of ethics related to the profession, to communicate and model professionalism as a developmental process and a career responsibility, and to develop and expand a repertoire of occupational therapy assessments and interventions related to human occupation and performance. Level II fieldwork experience should include in-depth experience in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation.

25. The student shall have the opportunity to develop increased knowledge, attitudes, and skills in administration, research and professional relationships. Suggested ways to implement this guideline, for example, are actual supervision of support staff, volunteers, or Level I Fieldwork students in certain tasks or work assignments; involvement in research projects; and attendance at administrative meetings.

26. The student shall be evaluated and be kept informed on an ongoing basis of her/his performance status.
A. The AOTA Fieldwork Evaluation (FWE) should be used as a rating tool. The student should be formally evaluated using this form when the fieldwork experience is completed. Performance should be reviewed by the fieldwork educator and the student at both midterm and end of the fieldwork experience. Other structured forms of feedback that promote educator/student communication on the student's progress may also be used on an ongoing basis.

B. The fieldwork experience should be evaluated by the student, using the AOTA Student Evaluation for Fieldwork Experience (SEFWE) form, and should be reviewed by the fieldwork educator and the student at the conclusion of the fieldwork experience. Other structured forms of feedback that promote educator/student communication on the learning experience may also be used on an ongoing basis.

C. If the student's performance is not satisfactory at mid-term or at any point in the fieldwork experience, both the student and academic institution must be notified immediately and documentation concerning the student's progress and outcomes of interventions should be maintained.

References:


*AOTA Commission on Education and Fieldwork Issues Committee (FWIC) Amended and Approved by FWIC June 2000 and COE August 2000*
Practice Advisory: Services Provided by Students in Fieldwork Level II Settings

Level II fieldwork students may provide occupational therapy services under the supervision of a qualified occupational therapist or occupational therapy assistant in compliance with state and federal regulations. When adhering to the principles stated below, along with other regulatory and payer requirements, AOTA considers that students at this level of education are providing skilled occupational therapy intervention.

General Principles:

a. Supervision of occupational therapy and occupational therapy assistant students in Fieldwork Level II settings should ensure protection of consumers and provide opportunities for appropriate role modeling of occupational therapy practice.

b. To ensure safe and effective occupational therapy services, it is the responsibility of the supervising occupational therapist and occupational therapy assistant to recognize when supervision is needed and ensure that supervision supports the student’s current and developing levels of competence with the occupational therapy process.

c. In all cases the occupational therapist is ultimately responsible for all aspects of occupational therapy service delivery and is accountable for the safety and effectiveness of the occupational therapy service delivery process. This would include provision of services provided by an occupational therapy assistant student under the supervision of an occupational therapy assistant (see Addendum 1).

d. Initially, supervision should be in line of sight and gradually decrease to less direct supervision as is appropriate depending on the (ACOTE, 2007a.; b. & c.):
   • Competence and confidence of the student,
   • Complexity of client needs,
   • Number and diversity of clients,
   • Role of occupational therapy and related services, 
   • Type of practice setting, 
   • Requirements of the practice setting, and
   • Other regulatory requirements.

In settings where occupational therapy practitioners\(^1\) are employed:

- Occupational therapy students should be supervised by an occupational therapist.
- Occupational therapy assistant students should be supervised by an occupational therapist or occupational therapy assistant in partnership with an occupational therapist.

In settings where occupational therapy practitioners are not employed:

- Students should be supervised by another professional familiar with the role of occupational therapy in collaboration with an occupational therapy practitioner.

\(^1\) When the term *occupational therapy practitioner* is used in this document, it refers to both occupational therapists and occupational therapy assistants (AOTA, 2006).
References:


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September, 2010.

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Addendum 1:

Supervision Requirements and Responsibilities for Occupational Therapy Assistant Students During the Delivery of Occupational Therapy Services.

The American Occupational Therapy Association (AOTA) asserts that occupational therapy assistants can provide supervision to occupational therapy assistant students completing level II fieldwork experiences. The following recommendations have been developed to ensure the delivery of safe and effective occupation therapy services and appropriate supervisory requirements:

- ACOTE Standards (ACOTE, 2007,c) indicate that an occupational therapy assistant with a minimum of 1-year professional experience is qualified to be the fieldwork educator in order to teach and assess the skills of the occupational therapy assistant student.

And,

- The purpose of the level II fieldwork experience is to provide the student with the opportunity to enact the occupational therapy skills that they have been taught during the didactic portion of their occupational therapy assistant training program.

And,

- The occupational therapy assistant is equipped to role model the skills and behaviors of their level of practice while interacting with the occupational therapy assistant student in the clinic setting.

And,

- The occupational therapy assistant possesses skills and knowledge of practice fundamentals that include: professional behaviors, interpersonal skills, safety, ethics, documentation, occupational therapists/occupational therapy assistant collaborative relationship, implementing a treatment plan, and delegated assessments.

And,

- The licensure laws governing the practice of occupational therapy of many states allow the occupational therapy assistant to supervise the occupational therapy assistant student as a fieldwork educator.

And,

- In all cases the occupational therapist is ultimately responsible for all aspects of occupational therapy service delivery and is accountable for the safety and effectiveness of the occupational therapy service delivery process. This would include provision of services provided by an occupational therapy assistant student under the supervision of an occupational therapy assistant.

And,

- The level of supervision including the need for “line of sight” should be at the discretion of the occupational therapist and occupational therapy assistant consulting together to determine the student’s competence, needs of the client, setting, and other variables delineated above.

And,

- Co-signatures of the supervising occupational therapy assistant and/or occupational therapist on documentation indicates that the occupational therapy assistant student is provided with the appropriate level of supervision and is deemed competent to perform documented therapeutic intervention.
And,

- When a student provides skilled occupational therapy services under the supervision of a qualified practitioner, those services are billed as services provided by the supervising licensed occupational therapy practitioner.

And,

- An occupational therapist would offer the occupational therapy assistant student the opportunity to observe the process of client evaluation, development, and modification of a treatment plan, and specific interventions that are within the scope of practice for an occupational therapist, or in which an occupational therapist has specialty training. These additional learning opportunities are beneficial but may not be representative of entry level occupational therapy assistant practice.

Therefore,

- An occupational therapy assistant, under the appropriate supervision of an occupational therapist, and in accordance with applicable state and federal regulations, who has a minimum of 1-year clinical experience and who has demonstrated competence as a practitioner and a fieldwork educator should be allowed to supervise an occupational therapy assistant student during level II fieldwork.

APPENDIX B: COMPONENTS OF CREATING A FIELDWORK MANUAL

Facility Vision

Facility Purpose

Facility Values

Level I Learning Objectives: (Refer to MCG Department of OT’s Level I Objectives in Appendix E)

Level II Learning Objectives: (Refer to MCG Department of OT’s Level II Objectives in Appendix C)

Student Expectations (Caseload by week, responsibilities, schedule, etc.)

SAMPLE FORM: CASELOAD/RESPONSIBILITIES BY WEEK

Student Fieldwork Guidelines
All students will complete the following:

Week One: Orientation
A. Tour facility
B. Review available supplies and equipment for treatment sessions.
C. Review student manual-objectives, expectations, assignments, and due dates.
D. Review facility safety procedures.
E. Review facility policies & procedures notebook.
F. Schedule orientation time with other team members.
G. Observe patient treatment with fieldwork supervisor, and co-treat at least one patient by the end of the week.

Week Two: Clinical Experience Begins
A. Co-treat entire caseload with supervisor.
B. Plan and implement treatment for a minimum of one patient; attempt documentation of session.
C. Create session treatment plan with outlined activities, purposes, and timelines for a minimum of one session, to be reviewed by supervisor prior to implementing treatment.
D. Observe other team members in providing treatment.
E. Review facility evaluations and assessments that are available for use.
F. Attend team conferences.

Week Three: Assignments
A. Begin designing or creating a project that will be presented to facility members in week 10.
B. Assume patient responsibilities for a minimum of three patients, including development of detailed treatment plan for session implementation to be reviewed by supervisor prior to implementing treatment sessions.
C. Assist with session and evaluation documentation.
D. Begin presenting patient information and dialoguing with team members on patients assigned.

Week Four & Five:
A. Continue with treatment session plan development for all patients on caseload, to be reviewed by supervisor prior to implementing session.
B. Assume patient responsibilities for a minimum of three to five patients.
C. Complete documentation for sessions; assist with evaluation documentation.
**Week Six: Midterm**
A. Assume full caseload of patients.
B. Continue to develop treatment plans for patient sessions, to assist self in organization.
C. Complete all documentation for sessions.
D. Complete a minimum of one evaluation and write-up independently.
E. Go over midterm evaluation with fieldwork supervisor.

**Week Seven-Nine:**
A. Continue with full caseload of patient care.
B. Independently communicate with parents on patient progress and new concerns.
C. Independently complete documentation.

**Week Ten:**
A. Complete project.
B. Present project to Occupational Therapy department.
C. Continue with full caseload of patient care.

**Week Eleven:**
A. Begin to wrap-up case load responsibilities.

**Week Twelve:**
A. Complete Student Evaluation of Fieldwork Experience to present to site.
B. Participate in final AOTA fieldwork evaluation of the occupational therapist.
C. Go over final evaluation with fieldwork supervisor.

**Completion of Facility Orientation**
- Emergency Codes
- Evacuation Policies
- Introduction to Key Facility Staff
- Work Schedules and Time
- Tour of Facility
- Overview of Surrounding Community and Resources
- Client Population Characteristics
- Documentation Guidelines and Requirements
- Responding to Referral Orders
- Client Screening Procedures and Related Documentation
- Assessments
- Outcome Benchmarks
- Goal Writing Expectations and Samples
- Intervention Plans
- Supervision of Aides and/or Assistants
- Client Scheduling and Collaboration with Other Disciplines
- Client and Caregiver Education Planning
- Discharge Preparation and Documentation
- Reimbursement Systems and Expectations
- Supervision Requirements and Meetings (it is suggested you meet formally at least one time a week).
- Telephone, paging and intercom use
- Care Plan Meeting Schedules & Responsibilities
- Copies of HIPAA and Student Insurances
Sample Weekly Meeting Form

- Fieldwork Progress
- Case Load Strengths
- Case Load Considerations
- Professional Behavior Coaching Input
- Goals for Next Week (Student and Supervisor)

SAMPLE:  Department of Occupational Therapy
Student/Supervisor Weekly Review

Student Name: ___________________________  Date: ____________
Week #: ___________________________  Supervisor Name: ___________________________

STRENGTHS:
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

AREAS TO IMPROVE:
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

PLAN FOR IMPROVEMENT:
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

GOALS/ASSIGNMENTS FOR NEXT WEEK:
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

Supervisor Signature ___________________________  Student Signature ___________________________
APPENDIX C: SAMPLE LEVEL II FIELDWORK OBJECTIVES

Orientation to the Facility
Within 1 week, the OTS will complete safety and emergency procedures training for the NAME OF FACILITY.

Within 1 week, the OTS will demonstrate knowledge of documentation and billing requirement. [sample documentation are provided during orientation].

Screening
Within 1 week, the student will successfully screen clients appropriate for OT services and seek out the order within facility policies and procedures.

By the end of week 1, the student will identify strengths and areas of improvements to share with the supervising OT.

Assessment
By week 2, the student will have completed # of assessments by appropriately selecting standard and non-standard assessments to determine the client’s needs.

By week 2, the student will administer standard and non-standard client assessments and accurate determine needs based on the collected data.

By week 2, the student will interpret assessment findings and with the client and family develop appropriate goals and an intervention plan to address the established needs.

By week 2, the client and the OTS will develop appropriate occupation based goals suitable to address the client’s needs and meet reimbursement requirements.

By the end of week 2, the OTS will professionally respond to constructive feedback provided by the supervising FW Educator(s).

Intervention
By week 2, the OTS will be formulating occupation based goals and interventions that are client centered and relevant to address the established needs.

By week 2, the OTS should be sharing the evidence that guides their intervention decisions.

By week 3, the OTS should be responsible for the care of (# of clients).

By week 4, the student will successfully demonstrate the following skills: LIST PERTINENT SKILLS FOR YOUR FACILITY. Remember the importance of client centered, occupation based interventions, cultural competence, and professional leadership, supervision of OTAs and aides if appropriate in your facility.

Meetings
By week ____, the student will present their findings and advocate for the client and family in an interdisciplinary care plan meeting.

By week ____, the student will demonstrate appropriate responses among diverse populations.

By week ____, the OTS will demonstrate advocacy of their client’s needs upon d/c of OT services.

By week ____, the OTS will develop appropriate d/c education plans that are appropriate for the d/c environment and the abilities of the client and their respective families.

By week 6, the student will be passing midterm and collaborate with the supervising OTR on a professional development plan to enhance knowledge, skills, and attitudes for the latter half of the FW II experience.

By week 6, the student will have completed all FOSTER documentation required by the MCG.

AOTA also has sample Level II Fieldwork Objectives on its web site and MCG Department of Occupational Therapy recommends reviewing these.
Fieldwork Performance Evaluation Form

For The Occupational Therapy Student

FIELDCOLLNAME
NAME: (LAST) (FIRST) (MIDDLE)

FIELDWORK SETTING:

NAME OF ORGANIZATION/FACILITY

ADDRESS: (STREET OR PO BOX)

CITY \ STATE \ ZIP

TYPE OF FIELDWORK

ORDER OF PLACEMENT: 1 2 3 4 OUT OF 1 2 3 4

FROM \ TO

NUMBER OF HOURS COMPLETED

FINAL SCORE

PASS: NO PASS:

SUMMARY COMMENTS:

(ADDRESSES STUDENT'S CLINICAL COMPETENCE)

SIGNATURES:

I HAVE READ THIS REPORT.

SIGNATURE OF STUDENT

NUMBER OF PERSONS CONTRIBUTING TO THIS REPORT

SIGNATURE OF RATER #1

PRINT NAME/REEDNTIALS/POSITION

SIGNATURE OF RATER #2 (IF APPLICABLE)

PRINT NAME/REEDNTIALS/POSITION

Appendix D: AOTA Fieldwork Performance Evaluation Form
Fieldwork Performance Evaluation
For The Occupational Therapy Student

This evaluation is a revision of the 1987 American Occupational Therapy Association, Inc. Fieldwork Evaluation Form for the Occupational Therapist and was produced by a committee of the Commission on Education.

PURPOSE

The primary purpose of the Fieldwork Performance Evaluation for the Occupational Therapy Student is to measure entry-level competence of the occupational therapy student. The evaluation is designed to differentiate the competent student from the incompetent student and is not designed to differentiate levels above entry level competence. For further clarification on entry-level competency refer to the Standards of Practice for Occupational Therapy (1).

The evaluation is designed to measure the performance of the occupational therapy process and was not designed to measure the specific occupational therapy tasks in isolation. This evaluation reflects the 1998 Accreditation Council for Occupational Therapy Education Standards (2) and the National Board for Certification in Occupational Therapy, Inc. Practice Analysis results (3). In addition, this evaluation allows students to evaluate their own strengths and challenges in relation to their performance as an occupational therapist.

USE OF THE FIELDWORK PERFORMANCE EVALUATION FOR THE OCCUPATIONAL THERAPY STUDENT

The Fieldwork Performance Evaluation is intended to provide the student with an accurate assessment of his/her competence for entry-level practice. Both the student and fieldwork educator should recognize that growth occurs over time. The midterm and final evaluation scores will reflect development of student competency and growth. In order to effectively use this evaluation to assess student competence, site-specific objectives need to be developed. Utilize this evaluation as a framework to assist in ensuring that all key performance areas are reflected in the site-specific objectives.

Using this evaluation at midterm and final, it is suggested that the student complete a self-evaluation of his/her own performance. During the midterm review process, the student and fieldwork educator should collaboratively develop a plan, which would enable the student to achieve entry-level competence by the end of the fieldwork experience. This plan should include specific objectives and enabling activities to be used by the student and fieldwork educator in order to achieve the desired competence.

The Fieldwork Educator must contact the Academic Fieldwork Coordinator when: 1) a student exhibits unsatisfactory behavior in a substantial number of tasks or 2) a student's potential for achieving entry-level competence by the end of the affiliation is in question.

DIRECTIONS FOR RATING STUDENT PERFORMANCE

- There are 42 performance items.
- Every item must be scored, using the one to four point rating scale (see below).
- The rating scales should be carefully studied prior to using this evaluation. Definitions of the scales are given at the top of each page.
- Circle the number that corresponds to the description that best describes the student's performance.
- The ratings for the Ethics and Safety items must be scored at 3 or above on the final evaluation for the student to pass the fieldwork experience. If the ratings are below 3, continue to complete the Fieldwork Performance Evaluation to provide feedback to the student on her/his performance.
- Record midterm and final ratings on the Performance Rating Summary Sheet.
- Compare overall midterm and final score to the scale below.

OVERALL MIDTERM SCORE

Satisfactory Performance ........................ 90 and above
Unsatisfactory Performance ................. 89 and below

OVERALL FINAL SCORE

Pass ............................................. 122 points and above
No Pass ........................................ 121 points and below

RATING SCALE FOR STUDENT PERFORMANCE

4 - Exceeds Standards: Performance is highly skilled and self-initiated. This rating is rarely given and would represent the top 5% of all the students you have supervised.

3 - Meets Standards: Performance is consistent with entry-level practice. This rating is infrequently given at midterm and is a strong rating at final.

2 - Needs Improvement: Performance is progressing but still needs improvement for entry-level practice. This is a realistic rating of progress at midterm, and some ratings of 2 may be reasonable at the final.

1 - Unsatisfactory: Performance is below standards and requires development for entry-level practice. This rating is given when there is a concern about performance.
I. FUNDAMENTALS OF PRACTICE:

All items in this area must be scored at a 83 or above on the final evaluation in order to pass fieldwork.

1. Adheres to ethics: Adheres consistently to the American Occupational Therapy Association Code of Ethics (4) and site's policies and procedures including when relevant, those related to human subject research.
   
   Midterm 1 2 3 4
   Final 1 2 3 4

2. Adheres to safety regulations: Adheres consistently to safety regulations. Anticipates potentially hazardous situations and takes steps to prevent accidents.
   
   Midterm 1 2 3 4
   Final 1 2 3 4

3. Uses judgment in safety: Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.
   
   Midterm 1 2 3 4
   Final 1 2 3 4

Comments on strengths and areas for improvement:

• Midterm

• Final

II. BASIC TENETS:

4. Clearly and confidently articulates the values and beliefs of the occupational therapy profession to clients, families, significant others, colleagues, service providers, and the public.
   
   Midterm 1 2 3 4
   Final 1 2 3 4

5. Clearly, confidently, and accurately articulates the value of occupation as a method and desired outcome of occupational therapy to clients, families, significant others, colleagues, service providers, and the public.
   
   Midterm 1 2 3 4
   Final 1 2 3 4

6. Clearly, confidently, and accurately communicates the roles of the occupational therapist and occupational therapy assistant to clients, families, significant others, colleagues, service providers, and the public.
   
   Midterm 1 2 3 4
   Final 1 2 3 4

7. Collaborates with client, family, and significant others throughout the occupational therapy process.
   
   Midterm 1 2 3 4
   Final 1 2 3 4

Comments on strengths and areas for improvement:

• Midterm

• Final
III. EVALUATION AND SCREENING:

8. Articulates a clear and logical rationale for the evaluation process.
   Midterm 1 2 3 4
   Final 1 2 3 4

9. Selects relevant screening and assessment methods while considering such factors as client's priorities, context(s), theories, and evidence-based practice.
   Midterm 1 2 3 4
   Final 1 2 3 4

10. Determines client's occupational profile and performance through appropriate evaluation methods.
    Midterm 1 2 3 4
    Final 1 2 3 4

11. Assesses client factors and context(s) that support or hinder occupational performance.
    Midterm 1 2 3 4
    Final 1 2 3 4

12. Obtains sufficient and necessary information from relevant resources such as client, families, significant others, service providers, and records prior to and during the evaluation process.
    Midterm 1 2 3 4
    Final 1 2 3 4

13. Administers assessments in a uniform manner to ensure findings are valid and reliable.
    Midterm 1 2 3 4
    Final 1 2 3 4

14. Adjusts/ modifies the assessment procedures based on client's needs, behaviors, and culture.
    Midterm 1 2 3 4
    Final 1 2 3 4

15. Interprets evaluation results to determine client's occupational performance strengths and challenges.
    Midterm 1 2 3 4
    Final 1 2 3 4

16. Establishes an accurate and appropriate plan based on the evaluation results, through integrating multiple factors such as client's priorities, context(s), theories, and evidence-based practice.
    Midterm 1 2 3 4
    Final 1 2 3 4

17. Documents the results of the evaluation process that demonstrates objective measurement of client's occupational performance.
    Midterm 1 2 3 4
    Final 1 2 3 4

Comments on strengths and areas for improvement:

- Midterm

- Final

IV. INTERVENTION:

18. Articulates a clear and logical rationale for the intervention process.
    Midterm 1 2 3 4
    Final 1 2 3 4

19. Utilizes evidence from published research and relevant resources to make informed intervention decisions.
    Midterm 1 2 3 4
    Final 1 2 3 4
20. **Chooses occupations** that motivate and challenge clients.
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

21. **Selects relevant occupations** to facilitate clients meeting established goals.
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

22. **Implements intervention plans** that are client-centered.
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

23. **Implements intervention plans** that are occupation-based.
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

24. **Modifies task approach, occupations, and the environment** to maximize client performance.
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

25. **Updates, modifies, or terminates the intervention plan** based upon careful monitoring of the client's status.
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

26. **Documents client's response to services** in a manner that demonstrates the efficacy of interventions.
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

**Comments on strengths and areas for improvement:**

- **Midterm**

- **Final**

---

**V. MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES:**

27. Demonstrates through practice or discussion the ability to assign appropriate responsibilities to the occupational therapy assistant and occupational therapy aides.
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

28. Demonstrates through practice or discussion the ability to actively collaborate with the occupational therapy assistant.
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

29. Demonstrates understanding of the costs and funding related to occupational therapy services at this site.
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

30. Accomplishes organizational goals by establishing priorities, developing strategies, and meeting deadlines.
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

31. Produces the volume of work required in the expected time frame.
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

**Comments on strengths and areas for improvement:**

- **Midterm**

- **Final**
VI. COMMUNICATION:

32. Clearly and effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public.

   Midterm 1 2 3 4
   Final 1 2 3 4

33. Produces clear and accurate documentation according to site requirements.

   Midterm 1 2 3 4
   Final 1 2 3 4

34. All written communication is legible, using proper spelling, punctuation, and grammar.

   Midterm 1 2 3 4
   Final 1 2 3 4

35. Uses language appropriate to the recipient of the information, including but not limited to funding agencies and regulatory agencies.

   Midterm 1 2 3 4
   Final 1 2 3 4

Comments on strengths and areas for improvement:

* Midterm

* Final

VII. PROFESSIONAL BEHAVIORS:

36. Collaborates with supervisor(s) to maximize the learning experience.

   Midterm 1 2 3 4
   Final 1 2 3 4

37. Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisor(s) and others.

   Midterm 1 2 3 4
   Final 1 2 3 4

38. Responds constructively to feedback.

   Midterm 1 2 3 4
   Final 1 2 3 4

39. Demonstrates consistent work behaviors including initiative, preparedness, dependability, and work site maintenance.

   Midterm 1 2 3 4
   Final 1 2 3 4

40. Demonstrates effective time management.

   Midterm 1 2 3 4
   Final 1 2 3 4

41. Demonstrates positive interpersonal skills including but not limited to cooperation, flexibility, tact, and empathy.

   Midterm 1 2 3 4
   Final 1 2 3 4

42. Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices.

   Midterm 1 2 3 4
   Final 1 2 3 4

Comments on strengths and areas for improvement:

* Midterm

* Final
REFERENCES


GLOSSARY

Client Factors: Those factors that reside within the client and that may affect performance in areas of occupation. Client factors include body functions and body structures • body functions (a client factor, including physical, cognitive, psychosocial aspects)—the physiological function of body systems (including psychological functions) (WHO, 2001, p. 10) • body structures (anatomical parts of the body such as organs, limbs, and their components that support body function) (WHO, 2001, p. 10) (Occupational therapy practice framework: Domain and process. American Journal of Occupational Therapy, 56, 606–639.) (5)

Code of Ethics: refer to www.aota.org/general/coe.asp

Collaborate: To work together with a mutual sharing of thoughts and ideas. (ACOTE Glossary)

Competency: adequate skills and abilities to practice as an entry level occupational therapist or occupational therapy assistant

Context: refers to a variety of interrelated conditions within and surrounding the client that influence performance. Contexts include cultural, physical, social, personal, spiritual, temporal and virtual. (Occupational therapy practice framework: Domain and process. American Journal of Occupational Therapy, 56, 606–639.) (5)

Efficacy: having the desired influence or outcome (from Neistadt and Crepeau, Eds. Willard & Spackman’s Occupational Therapy, 9th edition, 1998)

Entry-level practice: refer to www.aota.org/members/area2/docs/sectorb.pdf

Evidence-based Practice: "conscientious, explicit and judicious use of current best evidence in making decisions about the care of individual patients. The practice of evidence-based [health care] means integrating individual clinical expertise with the best available external clinical evidence from systematic research". (Sackett and colleagues, Evidence-based medicine: How to practice and teach EBM, 1997, p.2) (from the Mary Law article "Evidence-Based Practice: What Can It Mean for PET?—found online at www.aota.org)

Occupation: Groups of activities and tasks of everyday life, named, organized and given value and meaning by individuals and a culture; occupation is everything people do to occupy themselves, including looking after themselves (self-care), enjoying life (leisure), and contributing to the social and economic fabric of their communities (productivity); the domain of concern and the therapeutic medium of occupational therapy. (Townsend, editor, 1997, Enabling Occupation: An Occupational Therapy Perspective, p.181)

Occupational Performance: The result of a dynamic, interwoven relationship between persons, environment and occupation over a person's lifespan; the ability to choose, organize, and satisfactorily perform meaningful occupations that are culturally defined and age appropriate for looking after oneself, enjoying life, and contributing to the social and economic fabric of a community. (Townsend, editor, 1997, Enabling Occupation: An Occupational Therapy Perspective, p.181)

Occupational Profile: a profile that describes the client's occupational history, patterns of daily living, interests, values and needs. (Occupational therapy practice framework: Domain and process. American Journal of Occupational Therapy, 56, 606–639.) (5)

Spiritual: (a context)—the fundamental orientation of a person's life; that which inspires and motivates that individual. (Occupational therapy practice framework: Domain and process. American Journal of Occupational Therapy, 56, 606–639.) (5)

Theory: "an organized way of thinking about given phenomena. In occupational therapy the phenomenon of concern is occupational endeavor. Theory attempts to (1) define and explain the relationships between concepts or ideas related to the phenomenon of interest, (2) explain how these relationships can predict behavior or events, and (3) suggest ways that the phenomenon can be changed or controlled. Occupational therapy theory is concerned with four major concepts related to occupational endeavor: person, environment, health, and occupation." (Neistadt and Crepeau, Eds. Willard & Spackman’s Occupational Therapy, 9th edition, 1998, p.521)

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Appendix E: Student Evaluation of the Fieldwork Experience (SEFWE)

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 supervisor 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;
- Ensure that all aspects of the fieldwork program reflect the sequence, depth, focus, and scope of content of the curriculum design;
- Provide objective information to students who are selecting sites for future Level II fieldwork; and
- Provide a means of evaluation to ensure that fieldwork is performed in settings that provide educational experiences applicable to the academic program.

This form is designed to offer each program the opportunity to gather meaningful and useful information. Sections outlined with thick black double borders are designed to be customized by your program as needed. Pages involving evaluation of individual fieldwork educators have been positioned at the end of the form to allow academic programs to easily remove these pages before making them available for student review, if they choose to do so.
STUDENT EVALUATION OF THE FIELDWORK EXPERIENCE (SEFWE)

Instructions to the Student:
Complete this STUDENT EVALUATION OF THE FIELDWORK EXPERIENCE (SEFWE) form before your final meeting with your fieldwork supervisor(s). It is imperative that you review the form with your supervisor and that both parties sign on page 1. Copy the form so that a copy remains at the site and a copy is forwarded to your Academic Fieldwork Coordinator at your educational program. This information may be reviewed by future students as well. The evaluation of the student (FWPE) should be reviewed first, followed by the student’s evaluation of the fieldwork experience (SEFWE), allowing the student to be honest and constructive.

Fieldwork Site _____________________________________   Site Code ________

Address _______________________________________________________________________________________

Placement Dates: from _________________________ to _______________________

Order of Placement: [ ] First [ ] Second [ ] Third [ ] Fourth

Living Accommodations: (include type, cost, location, condition)

Public transportation in the area:

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:

_______________________________________      _________________________________________
Student’s Signature                        FW Educator’s Signature

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

_______________________________________      _________________________________________
Student’s Name (Please Print)                        FW Educator’s Name and credentials (Please Print)

Fieldwork Educators Manual, 7/2016 SJ
**ORIENTATION**

Indicate your view of the orientation by checking "Satisfactory" (S) or "Needs Improvement" (I) regarding the three factors of adequacy, organization, and timeliness.

<table>
<thead>
<tr>
<th>TOPIC</th>
<th>Adequate</th>
<th>Organized</th>
<th>Timely</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Site-specific fieldwork objectives</td>
<td>S</td>
<td></td>
<td></td>
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<tr>
<td>2. Student supervision process</td>
<td>S</td>
<td></td>
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<tr>
<td>3. Requirements/assignments for students</td>
<td>S</td>
<td></td>
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<tr>
<td>4. Student schedule (daily/weekly/monthly)</td>
<td>S</td>
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<td>5. Staff introductions</td>
<td>S</td>
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<tr>
<td>6. Overview of physical facilities</td>
<td>S</td>
<td></td>
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<tr>
<td>7. Agency/Department mission</td>
<td>S</td>
<td></td>
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<tr>
<td>8. Overview of organizational structure</td>
<td>S</td>
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<tr>
<td>9. Services provided by the agency</td>
<td>S</td>
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<tr>
<td>10. Agency/Department policies and procedures</td>
<td>S</td>
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<tr>
<td>11. Role of other team members</td>
<td>S</td>
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<tr>
<td>12. Documentation procedures</td>
<td>S</td>
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<tr>
<td>13. Safety and emergency procedures</td>
<td>S</td>
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<tr>
<td>14. Confidentiality/HIPAA</td>
<td>S</td>
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<tr>
<td>15. OSHA—Standard precautions</td>
<td>S</td>
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<tr>
<td>16. Community resources for service recipients</td>
<td>S</td>
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<tr>
<td>17. Department model of practice</td>
<td>S</td>
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<tr>
<td>18. Role of occupational therapy services</td>
<td>S</td>
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<tr>
<td>19. Methods for evaluating OT services</td>
<td>S</td>
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<tr>
<td>20. Other</td>
<td>S</td>
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</tr>
</tbody>
</table>

Comments or suggestions regarding your orientation to this fieldwork placement:

____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

**CASELOAD**

List approximate number of each age Category in your caseload.

<table>
<thead>
<tr>
<th>Age</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>0–3 years old</td>
<td></td>
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<tr>
<td>3–5 years old</td>
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<tr>
<td>6–12 years old</td>
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<tr>
<td>13–21 years old</td>
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<tr>
<td>22–65 years old</td>
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<tr>
<td>&gt; 65 years old</td>
<td></td>
</tr>
</tbody>
</table>

List approximate number of each primary condition/problem/diagnosis in your caseload.

<table>
<thead>
<tr>
<th>Condition/Problem</th>
<th>Number</th>
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<tbody>
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</tbody>
</table>
## OCCUPATIONAL THERAPY PROCESS

Indicate the approximate number of screenings/evaluations you did; also indicate their value to your learning experience by circling the appropriate number with #1 being least valuable and #5 being the most valuable.

<table>
<thead>
<tr>
<th></th>
<th>REQUIRED</th>
<th>HOW MANY</th>
<th>EDUCATIONAL VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Client/patient screening</td>
<td>Yes</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
</tbody>
</table>
| 2. Client/patient evaluations  
(Use specific names of evaluations) | | 1 2 3 4 5 |  |
|                  | Yes | 1 2 3 4 5 |  |
|                  | Yes | 1 2 3 4 5 |  |
|                  | Yes | 1 2 3 4 5 |  |
|                  | Yes | 1 2 3 4 5 |  |
| 3. Written treatment/care plans | Yes | 1 2 3 4 5 |  |
| 4. Discharge summary | Yes | 1 2 3 4 5 |  |
List major therapeutic interventions frequently used and indicate whether it was provided in group, individually, Co-Treatment, or consultation. List other professionals involved.

<table>
<thead>
<tr>
<th>Therapeutic Interventions</th>
<th>Individual</th>
<th>Group</th>
<th>Co-Tx</th>
<th>Consultation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupation-based activity, i.e., play, shopping, ADL, IADL, work, school activities, etc. (within client's own context with his or her goals)</td>
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<tr>
<td>1.</td>
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<td>2.</td>
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<td>4.</td>
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<tr>
<td>Purposeful activity (therapeutic context leading to occupation)</td>
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<tr>
<td>1.</td>
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<tr>
<td>Preparatory methods, i.e., sensory, PAMs, splinting, exercise, etc. (preparation for occupation-based activity)</td>
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<tr>
<td>1.</td>
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<td>4.</td>
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</tbody>
</table>
## THEORY—FRAMES OF REFERENCE—MODELS OF PRACTICE

Indicate frequency of theory/frames of reference used

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Never</th>
<th>Rarely</th>
<th>Occasionally</th>
<th>Frequently</th>
</tr>
</thead>
<tbody>
<tr>
<td>Model of Human Occupation</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Occupational Adaptation</td>
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<tr>
<td>Ecology of Human Performance</td>
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<tr>
<td>Person–Environment–Occupation Model</td>
<td></td>
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<td></td>
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<tr>
<td>Biomechanical Frame of Reference</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rehabilitation Frame of Reference</td>
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<tr>
<td>Neurodevelopmental Theory</td>
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<tr>
<td>Sensory Integration</td>
<td></td>
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<tr>
<td>Behaviorism</td>
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<tr>
<td>Cognitive Theory</td>
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<tr>
<td>Cognitive Disability Frame of Reference</td>
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<tr>
<td>Motor Learning Frame of Reference</td>
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<tr>
<td>Other (list)</td>
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</tbody>
</table>

## FIELDWORK ASSIGNMENTS

List the types of assignments required of you at this placement (check all that apply), and indicate their educational value (1 = not valuable ------- 5 = very valuable)

<table>
<thead>
<tr>
<th>Assignment</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case study applying the Practice Framework</td>
<td></td>
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<td>N/A</td>
</tr>
<tr>
<td>Evidence-based practice presentation: Topic:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td>Revision of site-specific fieldwork objectives</td>
<td></td>
<td></td>
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<td>N/A</td>
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<tr>
<td>Program development: Topic:</td>
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<td>N/A</td>
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<tr>
<td>In-service/presentation: Topic:</td>
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<td></td>
<td>N/A</td>
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<tr>
<td>Research: Topic:</td>
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<td>N/A</td>
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<td>Other (list)</td>
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</tbody>
</table>
ASPECTS OF THE ENVIRONMENT

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff and administration demonstrated cultural sensitivity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Practice Framework was integrated into practice</td>
<td></td>
<td></td>
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<tr>
<td>Student work area/supplies/equipment were adequate</td>
<td></td>
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<tr>
<td>Opportunities to collaborate with and/or supervise OTs, OTAs, and/or aides</td>
<td></td>
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<tr>
<td>Opportunities to network with other professionals</td>
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<tr>
<td>Opportunities to interact with other OT students</td>
<td></td>
<td></td>
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<tr>
<td>Opportunities to interact with students from other disciplines</td>
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<tr>
<td>Staff used a team approach to care</td>
<td></td>
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<tr>
<td>Opportunities to observe role modeling of therapeutic relationships</td>
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<tr>
<td>Opportunities to expand knowledge of community resources</td>
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<tr>
<td>Opportunities to participate in research</td>
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<tr>
<td>Additional educational opportunities (specify):</td>
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</tbody>
</table>

How would you describe the pace of this setting? (circle one) Slow Med Fast

Types of documentation used in this setting:

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

List fieldwork educators who participated in your learning experience.

<table>
<thead>
<tr>
<th>Name</th>
<th>Credentials</th>
<th>Frequency</th>
<th>Individual</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
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<tr>
<td>5.</td>
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</tbody>
</table>
ACADEMIC PREPARATION

Rate the relevance and adequacy of your academic coursework relative to the needs of THIS fieldwork placement, circling the appropriate number. (Note: may attach own course number)

<table>
<thead>
<tr>
<th>Course</th>
<th>Adequacy for Placement</th>
<th>Relevance for Placement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Low 1 2 3 4 5</td>
<td>Low 1 2 3 4 5</td>
</tr>
<tr>
<td>Anatomy and Kinesiology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Neurodevelopment</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Human development</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Evaluation</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Intervention planning</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Interventions (individual, group, activities, methods)</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Theory</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Documentation skills</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Leadership</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Professional behavior and communication</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Therapeutic use of self</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Level I fieldwork</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Program development</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
</tbody>
</table>

What were the strongest aspects of your academic program relevant to preparing you for THIS Level II fieldwork experience? Indicate your top 5.

<table>
<thead>
<tr>
<th>Informatics</th>
<th>Occupation</th>
<th>A &amp; K</th>
<th>Foundations</th>
<th>Level I FW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pathology</td>
<td>Neuro</td>
<td>Admin</td>
<td>Theory</td>
<td>Peds Course</td>
</tr>
<tr>
<td>Assistive Tech.</td>
<td>Research courses</td>
<td>Prog. design/eval</td>
<td>Consult/collab</td>
<td>Adult Models</td>
</tr>
<tr>
<td>Interventions</td>
<td>Evaluations</td>
<td>Adapting Env</td>
<td>Adult Eval &amp; Interv</td>
<td>Cont. Pract.</td>
</tr>
<tr>
<td>Social Roles</td>
<td>Framework</td>
<td>P – E - OP</td>
<td>Other:</td>
<td></td>
</tr>
</tbody>
</table>

What changes would you recommend in your academic program relative to the needs of THIS Level II fieldwork experience?

________________________________________________________

________________________________________________________
SUMMARY

<table>
<thead>
<tr>
<th>Expectations of fieldwork experience were clearly defined</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expectations were challenging but not overwhelming</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiences supported student's professional development</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiences matched student's expectations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What particular qualities or personal performance skills do you feel that a student should 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.

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

_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

General comments on supervision: ________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

AOTA SEFWE Task Force, June 2006
Appendix F: Fieldwork Experience Assessment Tool