



**Master of
Occupational Therapy**

**FIELDWORK:
STUDENT
HANDBOOK**

Fieldwork Handbook for OT students
in the Professional Phase

Revised Summer 2023

2023

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SECTION 1: FIELDWORK EDUCATION OVERVIEW

The Saint Francis University (SFU) Master of Occupational Therapy (MOT) Fieldwork (FW) Program follows the Mission, Philosophy and Policies of the University and the SFU MOT program (please see the SFU MOT Professional Phase Handbook). Our Philosophy states that the best learning environments challenge students to develop their sensorimotor, cognitive, psychosocial, and spiritual dimensions as a context for gaining empathy for the consumers they will serve. Like the consumers they will interact with, occupational therapy students learn and grow best by doing. Therefore, ample experiential opportunities to put knowledge and concepts into action produce the best learning outcomes.

The 2018 Standards for an Accredited Educational Program for the Occupational Therapist adopted by the Accreditation Council for Occupational Therapy Education of the American Occupational Therapy Association indicates *that Fieldwork education is a crucial part of professional preparation and is best integrated as a component of the curriculum design. The fieldwork experience is designed to promote clinical reasoning and reflective practice, transmit the values and beliefs that enable ethical practice, and develop professionalism and competence in career responsibilities. Fieldwork experiences should be implemented and evaluated for their effectiveness by the educational institution. The experience should provide the student with the opportunity to carry out professional responsibilities under the supervision of qualified personnel serving as a role model. The academic fieldwork coordinator is responsible for the program's compliance with fieldwork education requirements. (C.1.0).*

Occupational Therapy Education separates fieldwork education into two components, Level I and Level II Fieldwork Experiences. The three SFU MOT Level I Fieldwork Experiences (Level IA, Level IB, and Level IC) take place during Summer I, Fall I, and Spring I of the first year of professional phase. Level I fieldwork aims *to introduce students to the fieldwork experience, apply knowledge to practice, and develop a basic comfort level with and understanding of clients' needs. Level I fieldwork should include experiences designed to enrich didactic coursework through direct observation and participation in the occupational therapy process (C.1.9).*

The two SFU MOT Level II Fieldwork Experiences (Level IIA and Level IIB) take place during Fall II and Spring II of professional phase. *The goal of Level II fieldwork is to develop competent, entry-level, generalist occupational therapists. Level II fieldwork must be integral to the program's curriculum design and must include an in-depth experience in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation and research, administration, and management of occupational therapy services (C.1.1).* It is recommended that the student be exposed to a variety of clients across the lifespan and to a variety of settings.

All Fieldwork Experiences follow the SFU MOT professional phase curriculum design. The Level I Fieldwork Experiences emphasize recall, reproduction, skills, and concepts of occupational therapy knowledge. The Level II Fieldwork Experiences emphasize critical thinking and extended thinking integration and synthesis. *The fieldwork program ensures that fieldwork objectives for all experiences include a psychosocial objective (C.1.3).*

Section 1A: Fieldwork Team – Roles and Responsibilities

The Fieldwork Education team is comprised of the Academic Fieldwork Coordinator (AFWC), Adjunct Faculty, the Fieldwork Coordinator Assistant, the site, the Clinical Fieldwork Coordinator (CFWC) the Fieldwork Educator (FWEd), and the student. The roles and responsibilities of each team member is as follows:

◆ **Academic Fieldwork Coordinator:**

The AFWC is a licensed occupational therapist who is specifically responsible for the program's compliance with the fieldwork requirements of Standards Section C.1.0 (A.2.4.).

1. Oversees all Saint Francis University Fieldwork Related Program Standards, Objectives, Coursework, and Student Requirements.
2. Ensures all fieldwork related ACOTE C standards are implemented and met, including content, processes, data collection, and maintenance of all documentation. (C.1.1)
3. Initiates, develops, and ensures completion of the Memorandum of Understanding (MOU)/Affiliation Agreement with new and existing sites (C.1.2., C.1.4.).
4. Ensures all site paperwork is up to date prior to Level I and Level II Fieldwork experiences.
5. Establishes and maintains the necessary communication between the fieldwork site and Saint Francis University.
6. Serves as a resource to the fieldwork educator, site, and student to ensure the behavioral objectives reflect the nature of the fieldwork.
7. Maintains and ensures the students have current information on each fieldwork placement within the fieldwork management platform.
8. Communicates and coordinates medical clinics with student health and students to ensure health information is up to date and meets requirements of Saint Francis University and the fieldwork site.
9. Coordinates all required trainings and clearances with students, including but not limited to the required American Heart Association CPR training and background clearances.
10. Orients all students to the purpose and to the procedures of fieldwork education.
11. Advises students regarding fieldwork placement planning.
12. Assigns all eligible students to fieldwork experiences, including the Level IA, Level IB, Level IC Fieldwork experiences and the Level IIA and Level IIAB 12-week Fieldwork experiences.
13. Reassigns students to other fieldwork experiences as deemed necessary.
14. Ensures all students have access to all site requirements and onboarding procedures necessary for all fieldwork experiences.
15. Provides information to the fieldwork site per requirements prior to the SFU MOT student's arrival.
16. Verifies that the fieldwork experiences promote clinical reasoning and reflective practice, transmits the values and beliefs that enable ethical practice, and develops professionalism and competence in career responsibilities.
17. Confirms that the FWEd meets the standards for serving as a FWEd and has a valid occupational therapy license before fieldwork experiences begin (C.1.3.).
18. Communicates with students while they attend fieldwork through Canvas coursework, email, phone calls, and online meetings as needed.
19. Ensures students receive proper assessment and supervision during the fieldwork experience.
20. Serves as a liaison between the SFU MOT program and fieldwork sites throughout the students' fieldwork experiences. Provides assistance in teaching strategies, sharing of resources and

information regarding continuing education opportunities, and performing online and/or on-site visits.

21. Enters all fieldwork course work grades and final fieldwork evaluation scores.
22. Responsible for recording fieldwork metrics for the program's annual report.
23. Completes scholarly activity and serves the university and the surrounding communities.
24. Collaborates with the student and the fieldwork site to facilitate formal accommodations.
25. Responsible for developing learning contracts and/or remediation course work to assist with student fieldwork related concerns.
26. Manages the Fieldwork budget to ensure financial responsibility

◆ **Adjunct Faculty:**

The adjunct faculty assigned to support the Level I fieldwork education program is an occupational therapist whose responsibilities may include but are not limited to:

1. Oversees and manages the Level IA, Level IB, and Level IC Fieldwork experiences.
2. Ensures the Level I Fieldwork experiences meet the Saint Francis University Fieldwork Related Program Standards, Objectives, Coursework, and Student requirements.
3. Initiates, develops, and ensures completion of the Memorandum of Understanding(MOU)/Affiliation Agreement with the Level I fieldwork sites.
4. Obtains Level I Fieldwork sites for all experiences.
5. Ensures the site and Fieldwork educator are aware of the SFU MOT Curriculum design, fieldwork objectives, and their ability to support the Fieldwork Experience
6. Communicates with each site to ensure compliance with all site requirements
7. Ensures all students have access to all site requirements and onboarding procedures necessary for Level I fieldwork experiences.
8. Acts as the point of contact for student/site during Level I FW experience
9. Completes all FW grading and follow up
10. Assists with all facets of the Level I Fieldwork process, collaborates with the AFWC and Fieldwork Coordinator

◆ **Fieldwork Coordinator I Assistant:**

The FW Coordinator I Assistant is a SFU MOT program team member assigned to support the AFWC and Adjunct Faculty member in all Fieldwork related assignments. Tasks may include but are not limited to:

1. Responsible for managing all fieldwork files, ensuring all site files include an MOU/AA, Behavioral Objectives, AOTA Fieldwork Data form, Student Evaluation of the Fieldwork Experience (SEFWE), and any pertinent site requirements or paperwork.
2. Assists in ensuring the completion of the MOU/AA with new and existing sites.
3. Prepares and sends the student packet and information to the fieldwork site and student prior to the start of the Level I and Level II fieldwork experiences.
4. Assists in communicating with student health and students to ensure health information is up to date and meets requirements of Saint Francis University and the fieldwork site.
5. Assists with coordinating all required trainings and clearances with students, including but not limited to the required American Heart Association CPR training and background clearances.
6. Prepares site information for the Level I Fieldwork lottery and assists in the Level I and Level II lotteries.
7. Ensures all students have access to all site information on the fieldwork management platform.
8. Prepares and sends the PDU certificates at the end of each fieldwork to the FWEd.
9. Communicates with students through Canvas coursework and email as needed.

10. Gathers the fieldwork metrics for the program's annual report.
11. Assists in fieldwork budget responsibilities.
12. Attends and assists in fieldwork meetings.
13. Assists in all fieldwork awards and graduation requirements.
14. Performs other duties as assigned and in collaboration with the AFWC and the Adjunct Faculty.

◆ **Clinical Fieldwork Coordinator (CFWC):**

Is the manager of the fieldwork program at the facility/agency. The CFWC coordinates the processing of fieldwork related documents and procedures including contracts, fieldwork data form, site objectives, student manuals and orientation, and assignment of fieldwork supervisors. The CFWC provides agency oversight of all fieldwork-related activities to ensure that supervision provides protection of consumers and facilitates development of the fieldwork student/clinician in collaboration with the fieldwork supervisor and AFWC.

◆ **Fieldwork Educator:**

Is an individual who is responsible for the students learning and application during the fieldwork experience. This individual is, typically, a clinician, who works collaboratively with the program and is informed of the curriculum and fieldwork program design. This individual supports the fieldwork experience, serves as a role model, and holds the requisite qualifications to provide the student with the opportunity to carry out professional responsibilities during the experiential portion of their education (ACOTE, 2018). The Fieldwork educator's direct supervision is recognized as professional development activity by the National Board for Certification in Occupational Therapy (NBCOT).

- ▶ The **Level I Fieldwork Educator** introduces the students to the application of knowledge to practice and assists in developing an understanding of the client's needs. The Level I FWEd can be, but is not limited to, a currently licensed or otherwise regulated occupational therapist or occupational therapy assistant, psychologist, physician assistant, teacher, social worker, physician, speech language pathologists, nurse, and/or physical therapist (C.1.8).
- ▶ The **Level II Fieldwork Educator** assists the student to develop a competent, entry-level, generalist occupational therapist. The FWEd is a currently licensed or otherwise regulated occupational therapist with a minimum of one year full-time (or its equivalent) of practice experience as a licensed or otherwise regulated occupational therapist prior to the onset of the Level II Fieldwork. The FWEd must be adequately prepared and may be engaged by the fieldwork site or by the educational program (C.1.11.). The safety and qualified care for the clients/patients of the site is the utmost importance and takes precedence over supervision of fieldwork students. The FWEd responsibilities are included but not limited to:

1. Direct day-to-day supervision of the fieldwork student.
2. Provide orientation and departmental policies and procedures to the fieldwork student.
3. Direct instruction and guidance in the occupational therapy process used within the fieldwork site.
4. Assign clients and caseloads to the student.
5. Supervise the students provision of occupational therapy services including documentation, billing, and team/caregiver meetings.
6. Assessment of the students skills and knowledge and relaying this information during regular performance review meetings, the mid-term evaluation, and final evaluation.
7. Identify the required final score on the Fieldwork Performance Evaluation to determine entry-level competence and passing of the Level II Fieldwork Experience.
8. Communicate the student's progress and evaluation results to the student and AFWC, at midterm, final, and at any time concerns regarding the student's progress towards objectives arises.

9. Foster clinical reasoning and reflective practice, transmits the values and beliefs that enable ethical practice, and develops professionalism and competence in career responsibilities (C.1.0.).
10. Ensure that supervision is direct and then decreases to less direct as appropriate for the setting, the client's, and the ability of the student to support progression towards entry-level competence.

◆ **Student:**

The students are responsible for compliance with University and Fieldwork Site requirements. They must collaborate with the AFWC to ensure all requirements are met. The student responsibilities include but are not limited to:

1. Addressing emails, announcements, and Canvas site, daily.
2. Completing and uploading paperwork and clearances for fieldwork experiences as instructed by the AFWC.
3. Completing all medical requirements and uploading information to the student health portal in a timely manner. (*see Appendix for Student Health Medical Requirements*)
4. Contacting the assigned Fieldwork site/FWEd for the Level I and Level II Fieldwork experiences four weeks prior to start date to confirm dates, time, and location.
5. Ensure all site-specific requirements are met prior to the first day of Level I and Level II Fieldwork Experiences.
6. Comply with all SFU MOT Program and site policies and procedures.
7. Comply with provisions of Health Insurance Portability and Accountability Act of 1996 (HIPAA)
8. Updating accommodations required for the Level I and Level II fieldwork through the Center for Academic Success.
9. Be able to show proof of medical results/vaccinations/immunizations, CPR certification, Onboarding documents/certifications, Clearances, Medical Insurance, and site-specific documents prior to and on the first day of fieldwork.
10. Promptly notifying the FWEd and AFWC of any absences (See the section regarding Attendance Policy).
11. Conducting self in a professional manner.
12. Completing all Fieldwork related duties and assignments prescribed by the FWEd or AFWC within the specified timeframe (refer to fieldwork assignment log and Canvas for coursework requirements).
13. Participating in the midterm review and final fieldwork evaluation.
14. Receives, reflects, and acts on constructive feedback from the FWEd.
15. Communicating with the FWEd and/or AFWC if any concerns arise during the Fieldwork experience.
16. Completing the Student Evaluation of the Fieldwork Experience and the Student Evaluation of the Fieldwork Educator.
17. Communicating with the AFWC if any concerns or issues arise. The AFWC may determine if a meeting between the student, FWEd, and AFWC is warranted to assist with recommendations for resolution.

Section 1B: Level I and Level II FW Progression & Requirements

Prior to Summer I
Attend the overview of the Level I Fieldwork Experience, Requirements, and Lottery
Begin the Medical and Background clearance Requirement - (see Appendix C for requirements and prices)
Begin onboarding for Level IA Fieldwork Experiences

Summer I: OT 413 Level IA Fieldwork
Attend an overview of the Occupational Therapy Program Student Fieldwork Manual and complete knowledge check
Become CPR Certified through the American Heart Association – Set up through the SFU MOT Department for the beginning of Summer I
Complete the Mandated Reporter Training – per faculty instruction
Provide proof of Medical Insurance
Provide proof of PA Background Clearance
Provide proof of FBI Fingerprinting Clearance
Provide proof of Child Abuse Clearance
Upload all Medical Information to your student health portal and receive clearance from student health (see Appendix C)
Complete all required assignments on the Syllabi and upload to Canvas, Including AOTA Personal Data Form and Resume, Level I Student Clinical Agreement, Student Evaluation of Fieldwork Experience (SEFWE) (<i>all Level I forms can be found in Appendix A</i>)
Achieve a passing grade ($\geq 36/50$) on each Level I Fieldwork evaluation
Fall 1: OT 513 Level IB Fieldwork
Provide proof of receiving an annual Influenza Vaccination – Flu season begins August 1 st must be completed by October 1st
Complete all site onboarding requirements
Complete all required assignments on the syllabi and upload to Canvas - Including AOTA Personal Data Form and Resume, Level I Student Clinical Agreement, Student Evaluation of Fieldwork Experience (SEFWE)
Complete Urine drug screening (10 panel or otherwise specified) per Level IB site requirements
Achieve a passing grade ($\geq 36/50$) on each Level I Fieldwork evaluation
Spring I: OT 522 Level IC Fieldwork
Complete all required assignments on the syllabi and upload to Canvas - Including AOTA Personal Data Form and Resume, Student Evaluation of Fieldwork Experience (SEFWE)
Complete Urine drug screening (10 panel or otherwise specified) per Level IC site requirements
In April of Spring I : Begin Annual Medical and Background clearance Requirements – including PA Background check, FBI Clearance, and Child Abuse Clearance
Achieve a passing grade ($\geq 36/50$) on each Level I Fieldwork evaluation
Summer II: OT 603 Advanced Fieldwork Prep
Upload all Medical information to your student health portal and receive clearance from student health (see Appendix C)
Complete all required assignments on the syllabi and upload to Canvas, Including AOTA Personal Data Form and Resume, Level IIA Student Clinical Agreement, Student Evaluation of Fieldwork Experience (SEFWE) (<i>all Level II forms can be found in Appendix B</i>)
Complete all site onboarding requirements
Complete Urine drug screening (10 panel or otherwise specified) per Level IIA site requirements
Fall II: OT 605 Level IIA Fieldwork
Provide proof of receiving an annual Influenza Vaccination – Flu season begins August 1 st and must be completed by October 1 st .
Complete all required assignments on the syllabi and upload to Canvas, Including AOTA Personal Data Form and Resume, Level I Student Clinical Agreement, Student Evaluation of Fieldwork Experience (SEFWE)
Complete Urine drug screening (10 panel or otherwise specified) per Level IIA site requirements
Achieve a 74 or higher at midterm on the AOTA Fieldwork Performance Evaluation (FWPE)

Achieve a 111 or higher - AND - achieve a three or above on questions 1, 2, and 3 on the Fieldwork Performance Evaluation at Final.
Complete all Level IIB site onboarding requirements
Spring II: OT 607 Level IIB Fieldwork
Complete all required assignments on the syllabi and upload to Canvas
Achieve a 74 or higher at midterm on the AOTA Fieldwork Performance Evaluation (FWPE)
Achieve a 111 or higher - AND - achieve a three or above on questions 1, 2, and 3 on the Fieldwork Performance Evaluation at Final.

Section 1C: General Fieldwork Policies

Dress Code:

The student is required to abide by the dress code of the facility in which they are completing their fieldwork experience. Saint Francis University accepts the fieldwork sites' dress code policies. Saint Francis University expects the students to present themselves in a professional and courteous manner.

Throughout the fieldwork experience, the students must always display the Saint Francis University name tag or hospital ID badge at chest level or above, unless otherwise stated by the facility. The student must be neatly groomed and wear clean casual/professional attire, no dresses or skirts are permitted. The clothing must be correctly sized, wrinkle free, and in good repair. The student will not wear t-shirts with or without slogans, sleeveless shirts (unless covered by a jacket), tank tops, halter tops, shirts not covering the abdominal region or lower back area (when bending over), sweatshirts, jeans, sweatpants, leggings, shorts, hats, high-heeled shoes, or open-toes shoes.

Jewelry and other accessories must be conservative and not interfere with the performance of job duties or pose a safety hazard. No jewelry is to dangle into the client care space or hang over the client in the delivery of care. Visible body piercings, including tongue, eyebrows, and nose, are not permitted. Tattoos must be completely covered by clothing or other means.

Excellent personal hygiene is expected of all, including keeping hair, facial hair, and nails well groomed. Perfume and cologne are not permitted. Nail designs and colors must be moderate. Extremes in hairstyle and color are not acceptable. When caring for clients, hair must be pulled away from the face and not hang into the client's care area. Hosiery or socks are to be worn at all times. Use of chewing tobacco or gum is not permitted at any time in the presence of clients, visitors, physicians, guests, or while on the telephone. Footwear for clinical areas must be appropriate for the work area, clean sneakers may be acceptable; however, clarify this with the fieldwork site prior to your fieldwork experience.

Smoking:

The student must comply with the smoking policy of the fieldwork setting.

Cell Phone:

The student shall not use a cell phone or the facility's telephone for personal use while on fieldwork. Texting is always prohibited while on fieldwork. It is suggested cell phones be kept in the student's locker or car during fieldwork.

Absenteeism:

Each fieldwork site may have an established absenteeism policy. Saint Francis University accepts the site's fieldwork policy as its own. If the fieldwork site does **not** have an absenteeism policy, the following guidelines are followed:

- ◆ **Level I fieldwork** - the student is **not permitted** to miss a day of Level I fieldwork. If an extenuating circumstance occurs, (i.e., traveler's advisory for local highways), the student must notify the Fieldwork Educator (FWEd) and the Academic Fieldwork Coordinator (AFWC) immediately. If the student does miss a day(s) of fieldwork, the student must reschedule the missed time.
- ◆ **Level II fieldwork** - the student is **not permitted** to miss a day of Level II Fieldwork. **No vacation time** will be allotted during the Level II Fieldwork experience. If an extenuating circumstance or absence due to sickness does occur, the student must notify the FWEd and the AFWC immediately. The student must notify the AFWC via email. The student must call the FWEd and speak directly to the FWEd, a voicemail or a message left with another therapist is not allowed. If a student does accrue an absence during the fieldwork experience, due to an extenuating circumstance or sickness, the days must be made up and must be rescheduled prior to the end of the FW. These days may be made up over weekends or added to the original end date. You must notify the AFWC once make-up days are scheduled.

Holidays:

During the fieldwork the student must follow the holiday schedule established by that site and *NOT* the holiday schedule of Saint Francis University.

Late Assignments:

Assignments are expected to be turned in on time. An assignment is considered late when not turned in by the date and time specified. If an assignment is not received by the date and time specified, the student will receive 0 POINTS for that assignment and professionalism points will be taken off. If there is an extenuating circumstance for a missed assignment, the student must contact the AFWC, via email within 24 hours of assignment deadline for reconsideration. If handed in, the student will have 2.5 points subtracted from the final grade for each day it was late. The AFWC, along with the OT faculty, will reserve the right to grant or deny acceptance of a late assignment. If granted, the student may be allowed to earn up to the lowest "C" on the assignment or have 2.5 points subtracted from the final grade for each day it was late.

Social Networking:

Even with strong privacy settings, it is important to avoid posts or photos on Facebook about your FW experience. Name(s) of FWEd, comments, criticism about sites, or information about what is happening at sites are not appropriate on Facebook, Twitter, or other public social network sites. If you have any posts even questionable, remove them immediately.

Do not ask your FWEd to "friend" you while on fieldwork; this puts everyone in an awkward position with personal information. It is a HIPAA violation if you mention enough information about a client that the client is identified. The consequences for violations are severe. For more information go to:

<http://www.aota.org/Educate/EdRes/Fieldwork/Supervisor/HIPAA/39884.aspx>.

Consider what you post on any social networking site. Many potential employers go to these sites and often determine if they are interested in having you as an employee. Consider Googling your name to discover what is in cyberspace others can see. Use official SFU e-mail address for all professional correspondence needed via e-mail for all fieldwork related issues. Please refer to the Social Network Policy of the Professional Phase handbook for additional social networking policies.

Certificate Of Liability Insurance:

Saint Francis University purchases and carries a certificate of liability insurance on each occupational therapy student through Arthur J. Gallagher Risk Management Services, Inc. in the amount of \$1,000,000 per occurrence and \$3,000,000 aggregate. This coverage allows the student to participate in Level I and Level II fieldwork. SFU will provide verification of liability insurance to the fieldwork site each time a student is placed at Level I or Level II fieldwork. A copy of the certificate of liability is kept on file in the occupational therapy office. Some fieldwork sites may require additional liability insurance, if so, Saint Francis University will obtain a certificate of insurance for the required amount for that specific site.

Other Forms and Paperwork:

The student is responsible for confirming all forms are complete and turned in, according to the assignment dates. This include, but are not limited to:

- ✓ AOTA Personal Data Form
- ✓ Resume
- ✓ Child Abuse Clearance
- ✓ Criminal Background Clearance
- ✓ FBI Fingerprinting Clearance
- ✓ Medical Insurance card
- ✓ American Heart Association CPR certification card
- ✓ COVID Vaccination Card/Medical/Religious Exemption
- ✓ Flu Vaccination Card
- ✓ Level I or Level II Student Clinical Agreement
- ✓ Fieldwork Site Onboarding/Application, if applicable
- ✓ and other forms as requested

Once the student is placed at a fieldwork site or receives notification of placement, it is the student's responsibility to review the facility's AOTA Fieldwork Data Form, Behavioral Objectives, the MOU/AA, and complete all necessary site-specific prerequisites (i.e., urine drug screening, site specific on-line training sessions, vaccination requirements etc.)

The AFWC or Administrative Coordinator will send the site the student's AOTA Personal Data Sheet, Resume, Child Abuse Clearance, Criminal Background Clearance, FBI Fingerprinting, Medical Insurance card, CPR certification card, Behavioral Objectives, SFU Curriculum Design, Level I or Level II Performance Evaluation, and other pertinent paperwork.

The student is responsible for overseeing the proper forms are completed, and clearances received prior to fieldwork. If prerequisites are *NOT* completed, that student is not permitted to begin fieldwork.

Request for Level I or Level II Fieldwork Termination:

Level I or Level II Fieldwork Experience may be terminated for various reasons and are based on the individual's situation and situations that are beyond the student's control. This is decided by the AFWC, student, site, and SFU MOT faculty. The student will be required to produce a formal request for the fieldwork termination and send it to the Department Chair and AFWC. These situations may include but are not limited to:

- ◆ Extended illness of the student or family member the student cares for
- ◆ Personal or Family Hardship
- ◆ Natural Disaster
- ◆ FWEd is no longer available, and the site does not have a replacement
- ◆ Facility closing unexpectedly

The above situations result in a CN grade for that experience. A new fieldwork experience will be sought out. This may delay graduation.

SECTION 2: LEVEL I FIELDWORK OVERVIEW

The SFU MOT student is required to successfully complete three Level I experiences in Summer I, Fall I, and Spring I semesters. These experiences are developed by the SFU MOT fieldwork program and faculty as a component of the curriculum design. *They include directed observation and guided participation in the application of foundational didactic learning within various settings, populations, age ranges, and various physical/psychosocial diagnoses and includes mechanisms for formal evaluation of student performance. There are clearly documented student learning objectives expected of the Level I fieldwork (C.1.9).* Level I fieldwork also provides the opportunity for developing professional behaviors. Supervision during the Level I Fieldwork experiences can be provided by but are not limited to, currently licensed, or otherwise regulated occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, physicians, speech language pathologists, nurses, and physical therapists (C.1.8.). Each level I fieldwork has specific objectives and assignments which are reviewed with the student and fieldwork site prior to starting the rotation. Level I fieldwork is not substituted by any part of level II fieldwork (C.1.10).

Level I fieldwork may be met through one or more of the following instructional methods:

- ◆ Simulated environments
 - ◆ Standardized patients
 - ◆ Faculty practice
 - ◆ Faculty-led site visits
 - ◆ Supervision by a fieldwork educator in a practice environment
-
- ◆ **Summer I: OT 413: Level IA Fieldwork Experience:**
OT 413: Level IA Fieldwork Experience occurs after Summer 1 on-campus coursework. It involves established and continually developed partnerships with summer camps throughout Pennsylvania and surrounding communities. These camps serve various age ranges, populations, and physical/psychosocial diagnoses. It follows the curriculum design as the pre-professional phase curriculum includes the requirement of a minor in psychology, as well as the Summer I course - OT 410/L: Introduction to Psychosocial Occupational Therapy/Lab. This fieldwork is designed to *address psychological and social factors influencing engagement in occupation (C.1.7.)* and includes a psychosocial objective (C.1.3.). The requirement is a week-long, overnight camp, a two-week-day camp, or approved experience deemed equal in rigor per ACOTE Standards. The dates can occur anytime in July and run through the first week in August.
 - ◆ **Fall I: OT 513 Level IB Fieldwork Experience:**
The *Level IB Fieldwork Experience* occurs in the Fall I semester of the professional phase, typically the Monday after the Thanksgiving holiday (this is subject to change upon AFWC and site discretion). This experience involves established and developing partnerships with sites throughout the Saint Francis University surrounding communities (within a 60-minute drive). These experiences occur in a variety of settings with a variety of age ranges, populations, and diagnoses to ensure diversity and following of the SFU MOT curriculum design (C.1.1.) and includes a psychosocial objective (C.1.3.). This 5-day, full-time, experience involves direct observation and participation in selected aspects of the occupational therapy process. The requirement is a 5-day, full-time experience.
 - ◆ **Spring I: OT 522 Level IC Fieldwork Experience:**
The *Level IC Fieldwork Experience* occurs in the Spring I semester of the professional phase (5 days on site and 3 days of On-campus Fieldwork Experiential Learning). (Dates are determined as per the SFU Academic Calendar and site availability). This experience involves established and developing partnerships with sites throughout Saint Francis University surrounding communities (within a 60-

minute drive). These experiences occur in a variety of settings with a variety of age ranges, populations, and diagnoses to ensure diversity and following of the SFU MOT curriculum design (C.1.1.). This 5-day, full-time, experience involves direct observation and participation in selected aspects of the occupational therapy process. The three days on-campus Fieldwork Experiential Learning experience involves simulated case-studies where students will execute the occupational therapy process in a variety of settings. The requirement is a 5-day, full-time experience, and a 3-day on-campus experience.

- ◆ ***Alternative – Spring 1: OT 522 Level IC HUGS (Helping Underprivileged by Giving our Service) Fieldwork Experience*** is an alternative Level IC Fieldwork experience that occurs over the University’s scheduled weeklong Spring Break. These experiences occur in a variety of settings with a variety of age ranges, populations, and diagnoses to ensure diversity and following of the SFU MOT curriculum design (C.1.1.). These experiences may include providing care in rural clinics and working with children in a special needs school. The SFU MOT program works with the SFU Office of Study Away to coordinate this experience. The SFU student is supervised by either MOT faculty or an SFU MOT alumni. Saint Francis University does not have resources to assist students with travel/housing costs associated with fieldwork. Obtaining these resources is the responsibility of the student. The requirement is a 7-day experience and a 3-day, on-campus experience.

The student must complete a Clinical Agreement before beginning Level I FW (*see Appendix A*)

Section 2A: Level I Placement Process

The following steps outline the process of placing students in Level I fieldwork experiences:

- Step 1: Affiliated sites are contacted, and Level I sites are requested at the beginning of each semester to request Level I fieldwork slots. During the semester prior to Summer I, the students are oriented to the fieldwork policies and experiences. The student chooses the Summer I Level IA fieldwork experience during the semester prior to the start of Summer I. For fieldwork experiences in Fall I & Spring I, the student chooses fieldwork sites in the mid-semester.
- Step 2: A lottery system is utilized to ensure a fair selection process for fieldwork sites. The students’ names are put in alphabetical order into the list organizer on random.org. Once randomized, each student is assigned their number for the lottery. The number assigned to each student is the order they will choose their Fieldwork site.
- Step 3: The student randomly assigned #1 is first to select a facility for that Level I fieldwork experience. The randomly assigned #2 student selects second, and so on. This process continues until all students are placed. The list of available fieldwork sites is posted on Canvas prior to the selection process for the students to research the site via the fieldwork site folder and site website.
- Step 4: Some sites require an interview before the fieldwork experience. If a site requires an interview, the student makes these arrangements directly after placement. Final placement is contingent on the interview outcome. If the site does not choose the student to complete fieldwork at their site after the interview process, that student chooses another site from the remaining list of fieldwork sites. If two or more students are required to choose from the facility list, after a “failed” interview, the student’s lottery number is used.

Step 5: Exchange Opportunity: A student can exchange fieldwork sites. The student may exchange their site from the remaining sites on the board AFTER all the students are placed. All exchanges must be completed by 4:00 p.m. that same day.

Step 6: Once placed it is the student’s responsibility to ensure all the site-specific requirements are met (i.e., drug testing, site-specific training, vaccinations, etc.).

Note: If the student does not attend the scheduled fieldwork placement meeting or contact the AFWC, the student’s name shall be placed at the bottom of the list. If the student informs the AFWC, prior to the placement meeting they cannot attend due to an extenuating circumstance, that student needs to formulate a list and rank the Level I fieldwork choices and give it to the AFWC prior to selection day. Students with special needs must submit the appropriate paperwork to the AFWC four weeks prior to fieldwork.

Section 2B: Level I FW Behavioral Objectives & FW Evaluation

The SFU MOT program Level I fieldwork objectives were adopted from a study conducted at University of Wisconsin-Madison. The **Ten Generic Abilities* are characteristics or behaviors that are explicitly part of the profession’s core of knowledge and technical skills required for success in the profession.

The students and faculty review the objectives at the beginning of the professional phase coursework which are in Appendix A of the SFU MOT Fieldwork Handbook. These objectives are also housed in the Level IA Fieldwork Canvas course and discussed during the fieldwork preparation lecture prior to fieldwork (C.1.2). The student is formally evaluated by the FWE while on Level I FW using these agreed-upon Generic Abilities (C.1.3). The student’s fieldwork educator will complete and review the Level I Fieldwork evaluation with the student on the last day, or next to the last day of fieldwork. The Fieldwork Educator and the student will both sign the Level I evaluation, confirming the interview was conducted. The student must obtain a copy of the evaluation and upload it to Canvas.

To successfully pass Level I fieldwork, the student must achieve an overall total score of 36 points and above on the Level I Fieldwork Evaluation.

If the student did not receive an overall total score of 36, the student did *NOT* successfully pass Level I fieldwork. Refer to the SFU MOT Professional Phase Progression and Retention Policy for further detail.

*Generic Abilities	*Objectives, the student will:
1. Commitment to Learning	Demonstrate the ability to self-assess, self-correct and self-direct; to identify needs and sources of learning; and to continually seek new knowledge and understanding.
2. Interpersonal Skills	Interact effectively with clients, families, colleagues, other health care professionals and the community. Deals effectively with cultural and ethical diversity issues.
3. Communication skills	Demonstrate the ability to communicate effectively, verbally and in writing, for varied audiences and purposes.
4. Effective Use of Time	Demonstrate the ability to obtain the maximum benefit from a minimum investment of time and resources.
5. Use of Constructive Feedback	Demonstrate the ability to identify sources, seeks out feedback, and effectively uses the feedback for improving personal interaction.

6. Problem-Solving	Demonstrate the ability to recognize and define problems, analyze data, develop & implement solutions and evaluate outcomes.
7. Professionalism	Exhibit appropriate professional conduct and appearance to represent the profession effectively.
8. Responsibility	Fulfill commitments and will be accountable for actions and outcomes.
9. Critical Thinking	Demonstrate the ability to question logically: to identify, generate and evaluate elements of logical argument; to recognize and differentiate facts, illusion, assumptions, and hidden assumptions; and to distinguish the relevant from the irrelevant.
10. Stress Management	Demonstrate the ability to identify sources of stress and to develop effective coping behaviors.

Developed by the Physical Therapy Program, University of Wisconsin-Madison, May, W., et al. *Journal of Physical Therapy Education*. 9:1, Spring 1995.

Section 2C: Level I Student Evaluation of the FW Experience (SEFWE)

The student completes the Student Evaluation of Fieldwork Experience (SEFWE) after each Level I fieldwork experience. This evaluation serves as a tool to evaluate the educational experience, to strengthen the ties between didactic and fieldwork education, to ensure that the fieldwork sites meet the curriculum design, objectives, goals, and to meet the learning needs of the students. This evaluation is also used as a *mechanism for evaluating the effectiveness of fieldwork supervision (C.1.15)*. (For a copy of the Level I SEFWE see Appendix A)

Section 2D: Clearance Policy

The student is required to pay for and complete their child abuse clearance, criminal background check, and FBI Fingerprinting clearances prior to beginning Level IA fieldwork. **The student is required to renew these clearances prior to Level II A Fieldwork.** Some fieldwork sites will require you to complete these clearances again (at your expense) within a certain time frame of beginning your fieldwork. You will be given directions prior to Level IA fieldwork in order to obtain these clearances. The timing of certain Level IA fieldwork sites (camps) may require you to complete these clearances prior to the start of the Professional Phase. (For a complete breakdown of Fieldwork costs see Appendix C)

SECTION 3: LEVEL II FIELDWORK OVERVIEW

The SFU MOT Student is required to successfully complete two 12-week, full time Level II Fieldwork Experiences, in Fall II and Spring II semesters. Through the Level II fieldwork experiences, students learn to apply theoretical and scientific principles learned in the didactic portion of the academic program, address actual client needs, and develop a professional identity as an occupational therapy practitioner within an interdisciplinary context (AOTA, 2012). Level II fieldwork takes place in traditional and/or emerging settings consistent with the curriculum design. The Level II fieldwork experience requires *a minimum of 24 weeks full time. This may be completed on a part-time basis as defined by the fieldwork placement in accordance with the fieldwork site's usual and customary personnel policies, as long as it is at least 50% of a full-time equivalent (FTE) at that site.* Level II fieldwork can be completed in a minimum of one setting if it is reflective of more than one practice area, or in a maximum of four different settings (C.1.10).

If a student is interested in completing a Level II fieldwork outside of the United States, he/she must be in good academic standing for the duration of their OT coursework and will additionally (but not limited to) meet the following requirements: provide a written, detailed description of desire and interest in pursuing international fieldwork, formal meeting with OT Faculty, and approval from OT Faculty.

The AFWC will ensure students *attending a Level II fieldwork outside the United States are supervised by an occupational therapist who graduated from a program approved by the World Federation of Occupational Therapists (WFOT) and has one year of practice experience prior to the onset of Level II Fieldwork* (C.1.16).

◆ **Fall II: OT 605 Level IIA Fieldwork Experience:**

The **Level IIA Fieldwork Experience** occurs in the Fall II semester of the professional phase. This course is the first of two 12-week Level II fieldwork learning experiences. This course assists in the development of competent, entry-level, generalist occupational therapists. The student will be exposed to a variety of clients across the lifespan and to a variety of settings. The experience promotes the student's clinical reasoning, reflective and ethical practice, and develops professionalism and competence within professional occupational therapy practice. The dates are tentatively scheduled for mid-August through the beginning of November for 12 weeks. Dates are dependent upon site availability and can begin earlier or later. **Prerequisite:** Successful completion of Summer II coursework and a passing score on the *advanced clinical competency*.

◆ **Spring II: OT 607 Level IIB Fieldwork Experience:**

The **Level IIB Fieldwork Experience** occurs in the Spring II semester of the professional phase. This course is the second of two 12-week Level II fieldwork learning experiences. It assists in the development of competent, entry-level, generalist occupational therapists. The student will be exposed to a variety of clients across the lifespan and to a variety of settings. The experience promotes the student's clinical reasoning, reflective and ethical practice, and develops professionalism and competence within professional occupational therapy practice. The dates are tentatively scheduled for January through March for 12 weeks. Dates are dependent upon site availability and can begin earlier or later. **Prerequisite:** Successful completion of coursework in Fall II.

The student must complete the Level II Student Clinical Agreement prior to Level II FW (*see Appendix B*)

Section 3A: Level II FW Placement Process

The following steps outline the process of placing students in Level II Fieldwork:

- Step 1: During Fall I, the student completes the Level II Fieldwork Placement Form (Appendix B). This form lists four facilities the student would like to complete Level IIA & Level IIB fieldwork during Fall II and Spring II. The sites selected do NOT have to be a site that Saint Francis University has an established MOU/AA.
- If a student chooses one site to complete a six (6) month Level II experience, that site must be reflective of more than one practice area. The student's fieldwork list must expose them to a variety of clients across the life span and to a variety of settings.
- Students are only permitted to complete a specialty FW (i.e., pediatrics, hands) during Spring II. If a student wishes to complete a specialty FW during Fall II the request must be communicated with the AFWC, including justification for the request. The request is discussed at the department staff meeting.
- Step 2: A Level II fieldwork placement lottery drawing is conducted via a randomizer. A lottery system is utilized to ensure a fair selection process for fieldwork sites. The students names are put in alphabetical order into the list organizer on random.org. Once randomized, each student is assigned their number for the lottery pick.
- The goal is to place the student in Fieldwork IIA first; however, if the site listed on the student's form does not have availability in the fall but does have availability in the spring that student is placed in Fieldwork IIB before Fieldwork IIA.
- Step 3: The AFWC contacts the FW sites and if needed a MOU/AA is established. If a mutual agreement is established, the AFWC requests a slot for Level II fieldwork placement and confirms the site reflects SFU's sequence and scope of content in the curriculum design. The AFWC will also ensure the student will have an OT mentor that has a current OT license and has at least one year of occupational therapy experience.
- Step 4: Some sites require a student interview before FW placement. If the site requires an interview, the student arranges for that interview at least two months prior to the FW experience, if not sooner depending upon the site requirements. Final placement at the facility is contingent on the interview outcome.
- Step 5: After the interview, the student is required to contact the AFWC. The AFWC follows up with the FW site regarding the interview outcome. At that time, the final plans are made to have the student complete Level II experience at that site or arrangements are made for the student to complete Level II FW at another site.

Note: If the student does not attend the scheduled lottery drawing meeting and does not meet with the AFWC or a faculty member prior to the meeting, that student will receive the last number. Before final placements are made, the AFWC and the OT faculty will collaborate to verify a “facility to student” match. The student will only be placed at a site where the AFWC and faculty feel is the best learning environment.

Also, prior to the Level IIA and Level IIB fieldworks the student is required to contact the AFWC to ensure the FWEd has at least 1 year of full-time practice experience, has a current OT license in that state, uses client-centered treatment interventions, and will have weekly formal and informal meetings with the student. The AFWC will also monitor this supervision through the student’s Canvas postings, telephone calls, emails, zoom meetings, and site visits.

Section 3B: Level II FW Behavioral Objectives

As required by the American Occupational Therapy Association and Saint Francis University the fieldwork sites must *document a plan to assure collaboration between academic and fieldwork representatives. The plan shall include agreed upon fieldwork objectives that are documented and made known to the student.* The 37 Behavioral Objectives are reflective of the AOTA Level II fieldwork evaluation and are reviewed with each fieldwork site prior to establishing an AA/MOU. The AFWC will collaborate with fieldwork educators to review, maintain, and develop site specific behavioral objectives, under each of the following categories. The Level II fieldwork behavioral objectives and assessment measures demonstrate promotion of clinical reasoning and reflective practice, as well as demonstration of promotion of ethical practice and professionalism (C.1.2 and C.1.3).

The Fieldwork Behavioral Objectives are listed below. Prior to the student’s fieldwork, these objectives will be reviewed, and a copy included in the student’s fieldwork packet. These objectives can be found in Appendix B of the Fieldwork Student Handbook. These behavioral objectives will also be verbally outlined with the student during fieldwork preparation lecture prior to each fieldwork. Furthermore, the student and FWEd will be required to review the site-specific behavioral objectives together prior to the beginning of fieldwork and sign a Clinical Agreement form. The student will be responsible for submitting the behavioral objectives acknowledgement form and behavioral objectives to the AFWC via Canvas.

LEVEL II FIELDWORK OBJECTIVES:

Fundamentals of Practice:

- *Adheres to the American Occupational Therapy Association’s Code of Ethics and all federal, state, and facility regulations. Examples: Medicare, Medicaid, client privacy, social media, human subject research*
- *Adheres to safety regulations and reports/documents incidents appropriately. Examples: fire safety, OSHA regulations, body substance precautions, emergency procedures*
- *Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents. Examples: body mechanics, medical safety, equipment safety, client-specific precautions, contraindications, community safety*

Basic Tenets:

- *Articulates the values, beliefs, and distinct perspective of the occupational therapy profession to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public*
- *Articulates the value of occupation as a method and desired outcome of occupational therapy to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public*

- *Articulates the role of occupational therapy practitioners to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public*

Screening and Evaluation:

- *Articulates a clear and logical rationale for the evaluation process based on client information, contexts, theories, frames of reference, and/or practice models.*
- *Obtains sufficient and necessary information from relevant sources throughout the evaluation process. Examples: record or chart review, client, family, caregivers, service providers*
- *Selects relevant screening and assessment tools based on various factors. Examples: Psychosocial factors, client priorities, needs, and concerns about occupational performance and participation, theoretical support, evidence, practice context, funding sources, cultural relevance*
- *Determines the client's occupational profile and occupational performance through interview and other appropriate evaluation methods. Occupational profile: Summary of the client's occupational history and experiences, patterns of daily living, interests, values, and needs.
Occupational performance: Act of doing and accomplishing a selected action (performance skill), activity, or occupation that results from the dynamic transaction among the client, the context, and the activity. Improving or enabling skills and patterns in occupational performance leads to engagement in occupations or activities.*
- *Evaluates and analyzes client factors and contexts that support or hinder occupational performance.
Client factors: Specific capacities, characteristics, or beliefs that reside within the person and that influence performance in occupations. Client factors include values, beliefs, and spirituality; body functions (includes psychological functions); and body structures.
Contexts: Variety of interrelated conditions within and surrounding the client that influence performance, including cultural, personal, physical, social, temporal, and virtual contexts.
Includes the consideration of all client-centered components including psychosocial factors*
- *Administers standardized and non-standardized assessments and surveys accurately and efficiently to ensure findings are valid and reliable. Examples: follows assessment protocols, adheres to time guidelines*
- *Modifies evaluation procedures based on client factors and contexts. Examples: uses a quiet space, breaks up evaluation into smaller parts, provides multisensory instructions*
- *Interprets evaluation results to determine the client's occupational performance strengths and challenges.*
- *Synthesizes and documents the results of the evaluation process clearly, accurately, and concisely, using systematic methods to record the client's occupational performance.*

Interventions:

- *Articulates a clear and logical rationale for the intervention process based on the evaluation results, contexts, theories, frames of reference, practice models, and evidence.*
- *Establishes an accurate and appropriate client-centered plan based on the evaluation results, contexts, theories, frames of reference, and/or practice models. Examples: creates relevant and measurable goals in collaboration with the client and/or family/caregivers; recommends additional consultation and referrals*
- *Uses evidence from research and relevant resources to make informed intervention decisions.*
- *Selects client-centered and occupation-based interventions that motivate and challenge the client to achieve established goals that support targeted outcomes. Includes the consideration of all client-centered components including psychosocial factors*
- *Implements client-centered and occupation-based intervention plans.
Includes the consideration of all client-centered components including psychosocial factors*
- *Chooses and, if needed, modifies intervention approach to achieve established goals that support targeted outcomes. Examples: prevention, restoration, maintenance, promotion*
- *Modifies task and/or environment to maximize the client's performance. Examples: upgrades/downgrades task; arranges client's workspace for optimal performance*
- *Modifies the intervention plan and determines the need for continuation or discontinuation of services based on the client's status.*
- *Documents the client's response to services in a manner that demonstrates the effectiveness of interventions.*

Management of Occupational Therapy Services:

- *Demonstrates through practice or discussion the ability to collaborate with and assign appropriate tasks to the occupational therapy assistant, occupational therapy aide, or others to whom responsibilities might be assigned, while remaining responsible for all aspects of treatment. Examples: paraprofessionals, nurses' aides, volunteers*
- *Demonstrates through practice or discussion an understanding of costs and funding systems related to occupational therapy services, such as federal, state, third party, and private payers. Examples: billing for OT services, inventory, and ordering of supplies for OT services, and options for client procurement of adaptive equipment*
- *Demonstrates knowledge about the organization. Examples: mission and vision, accreditation status, licensing, specialty certifications*
- *Meets productivity standards or volume of work expected of occupational therapy students.*

Communication and Professional Behaviors:

- *Communicates clearly and effectively, both verbally and nonverbally. Examples: clients, families, caregivers, colleagues, service providers, administration, the public*
- *Produces clear and accurate documentation. Examples: legibility, spelling, punctuation, grammar, adherence to electronic health documentation requirements*
- *Collaborates with fieldwork educator(s) to maximize the learning experience. Examples: initiates communication, asks for feedback about performance, identifies own strengths and challenges*
- *Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with fieldwork educator(s) and others.*
- *Responds constructively to feedback in a timely manner.*
- *Demonstrates consistent and acceptable work behaviors. Examples: punctuality, initiative, preparedness, flexibility, dependability, professional appearance*
- *Demonstrates effective time management. Examples: plans ahead, adheres to schedules, completes work in expected timeframe*
- *Manages relationships effectively through therapeutic use of self and adjusts approach to meet the needs of clients and others.*
- *Demonstrates respect for diversity factors of others. Examples: culture, socioeconomic status, beliefs, identity*

Section 3C: Level II FW AOTA FW Performance Evaluation

The AOTA Fieldwork Performance Evaluation for the Occupational Therapy student will be used as the formal evaluation of student performance while on Level II FW (C.1.15). *The Level II fieldwork 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 of Education.*

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 of Occupational Therapy which can be referenced: American Occupational Therapy Association (AOTA), (2015). Standards of practice for occupational therapy. American Journal of Occupational Therapy (AJOT), 69, (3).

The evaluation was designed to measure the performance of the occupational therapy process and was not designed to measure the specific occupational therapy tasks in isolation. The evaluation was revised in 2020 and reflects the 2018 Accreditation Council for Occupational Therapy Education Standards and the National Board for Certification in Occupational Therapy, Inc. Practice Analysis results. Refer to the reference resource information found on the actual fieldwork evaluation found within this handbook. In addition, the evaluation allows students to evaluate their own strengths and challenges in relation to their performance as an occupational therapist.

There are a total of thirty-seven items within the fieldwork evaluation and based on the Level II Behavioral Objectives. The fieldwork grade will be recorded in the Department of Occupational Therapy grading form as a Pass or Fail. At Midterm there is no pass or fail status. At midterm, if the MOT SFU student receives a 73 or lower on the AOTA Fieldwork Performance Evaluation, the student must contact the SFU AFWCC immediately to set up a meeting to discuss and formulate a learning contract (See Appendix B) to ensure successful completion of the Fieldwork experience.

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. If these issues arise, the FWEd and students must contact the AFWC immediately so that a site visit/virtual meeting can be scheduled, and an action plan / learning contract developed. The Learning Contract Template form can be found on the pages following the AOTA's Fieldwork Performance Evaluation for the Occupational Therapy Student.

Overall FINAL Score

To successfully pass the Level II fieldwork experience, the student must meet the following criteria:

- ◆ At Final, achieve a minimum total score of 111 points
- ◆ At Final, Receive a 3 or above on questions #1, #2, and #3 of the Level II Fieldwork Evaluation

If the student receives a total score of 110 points or below and/or receives a 2 or below on questions #1, #2, and #3, that student did not successfully pass the Level II fieldwork experience. Refer to the MOT Progression and Retention Policy and the OT Performance Review Committee for details.

The AOTA's Fieldwork Performance Evaluation for the Occupational Therapy Student is now sent via Formstack to the Fieldwork Educator via the AFWC. Please contact the AFWC for a link to the AOTA Fieldwork Performance Evaluation.

Level II Fieldwork Remediation Request

If the Level II Fieldwork student fails to pass the experience based on the sites scoring of the AOTA FWPE or otherwise noted concerns. The student will receive a failing grade and will follow the following remediation request.

The student must:

- ◆ Initiate a request for an Occupational Therapy Performance Review Committee (OTPRC) meeting.
- ◆ The student must submit a letter to the SFU MOT Department Chair and the Academic Fieldwork Coordinator outlining the reasons for the OTPRC and the request for remediation to the Level II Fieldwork Coursework. (Please see the OTPRC process in the handbook).
- ◆ If granted the remediation, the student must participate in a Level II Fieldwork Remediation course that outlines a mutually agreed-upon plan between the student and the instructor to remediate the deficient skills as outlined in the AOTA FWPE, Learning Contract, and collaboration with the student and Fieldwork Educator.
- ◆ The student and instructor must agree to and sign off on this plan. The student's responsibility will be to ensure that ALL work is completed by the due date.
- ◆ The student understands that the Level II Fieldwork Remediation course may include additional credits and costs incurred as determined by the SFU MOT Department Chair and student needs.

- ◆ Once the student completes and passes all remediation coursework, they will participate in an Advanced Competency (as outlined in Summer II coursework).
- ◆ If the student passes the Advanced Competency, they will be granted a 12-week Level II Fieldwork experience as per graduation requirements. The fieldwork experience will be within a 45-minute drive from the Saint Francis University campus.
- ◆ The student will complete all required Level II Fieldwork Assignments with additional meetings and requirements determined by the remediation instructor.
- ◆ The student must achieve a 74 or higher on the AOTA FWPE at midterm to continue with the experience. The student must achieve a 111 or higher on the AOTA FWPE at the final and a three or higher on questions 1, 2, and 3 to pass the Level II Fieldwork experience.
- ◆ The student must submit a request for a 'CN' grade as per university policy.
- ◆ NOTE: The request for the OTPRC and 'CN' grade must be completed prior to submission of final grades to the Registrar's Office.
- ◆ The student's earned grade will be issued upon completion of the Level II Fieldwork Remediation Course and Level II Fieldwork completion. Assignments not completed by the due date as shown on the contract will result in a grade of 'F' for the course.
- ◆ If the student fails to successfully complete the Level II Fieldwork Remediation Course, Advanced Competency, and/or the Level II Fieldwork Experience, the student will be required to immediately step out of the OT program for 1 year. All University financial implications apply in this situation (refer to University policy for withdrawal policies).

Level II Fieldwork Learning Contract

The learning contract template is used for the occupational therapy student who has been identified by the Fieldwork Educator to 1) exhibit unsatisfactory behavior in a substantial number of tasks or 2) the student's potential for achieving entry-level competence by the end of the affiliation is in question. The form is completed with input from the FWEd, the student, and the AFWC. If the MOT SFU student receives a 73 or lower on the AOTA Fieldwork Performance Evaluation at midterm, the AFWC, FWEd, and student will discuss and formulate a learning contract (See Appendix B) to ensure successful completion of the Fieldwork experience. *(The Learning Contract template can be found in Appendix B)*

Use of the Fieldwork Performance Evaluation for the OT Student

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. *(The Performance Evaluation for the OT Student can be found in Appendix B)*

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 2018 Accreditation Council for Occupational Therapy Education Standards and the National Board for Certification in Occupational Therapy, Inc. Practice Analysis results. In addition, this evaluation allows students to evaluate their own strengths and challenges in relation to their performance as an occupational therapy practitioner. 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 the development of student competency and growth.** In order to effectively use this evaluation to assess student competence, site specific objectives need to be developed. Use 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, the student will 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 enable 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 Thirty-Seven performance items. Every item must be scored using the one-to-four-point rating scale, 4- Exemplary performance 3- Proficient performance 2- Emerging performance 1- Unsatisfactory performance. The rating scales should be carefully studied prior to using this evaluation.

Rating scale definitions:

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

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

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

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

The fieldwork educator must circle the number that corresponds to the description that best describes the student's performance. Note, the rating 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.

Section 3D: Level II FW – AOTA Student Evaluation of the FW Experience & Student Evaluation of the FW Educator (SEFWE & SEFWEd)

The Level II AOTA SEFWE and SEFWEd evaluations serve as a tool for the fieldwork site, the SFU MOT program, and the 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 regarding the fieldwork site

- Enable the Level II fieldwork student who is completing a placement at the site to evaluate and provide feedback regarding the fieldwork educator
- Enable academic programs, fieldwork sites, and fieldwork educators to benefit from student feedback in order to develop and refine fieldwork
- Ensure all aspects of the fieldwork reflect the sequence and scope of content in the curriculum design (C.1.1.)
- Provide information to students selecting sites for future Level II fieldwork
- 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.

The Level II SEFWE and SEFWEd are to be completed via Formstack after the fieldwork experience is completed. *This is another mechanism the AFWC uses to ensure fieldwork and supervision effectiveness (C.1.0., C.1.15.).* The evaluation will only be used internally.

The Student Evaluation of the Fieldwork Experience (SEFWE) Form can be found in Appendix B

SECTION 4: HEALTH REQUIREMENTS FOR FIELDWORK

To meet the health requirements, HIPAA guidelines, and fieldwork site requests, OT students' medical records are kept secure in Saint Francis University's MyHealth@School.

1. All health requirements **MUST** be up to date prior to fieldwork. The student is responsible for obtaining medical records and ensuring the results are in SFU Student Health Center. This procedure will ensure student records and data are stored in a secure location. The student is not permitted to begin fieldwork unless cleared by Student Health; therefore, it is imperative Student Health receives the following:
 - **Annual physical exam**
 - **Annual intradermal 2 step PPD** (tuberculosis test). If positive, a chest x-ray is required for fieldwork clearance.
 - Tetanus immunization within the past 5 years, unless otherwise specified by your physician.
 - Basic immunization record (polio, measles, mumps, rubella)
 - Evidence of the Hepatitis B vaccination series or letter of declination
 - Rubeola (measles), mumps, rubella, varicella, and Hepatitis B titers.
 - COVID- 19 Vaccination Status
 - Annual Flu Vaccination prior to October 1st
2. If a student does not have the above health requirements completed and up to date prior fieldwork, they will not be permitted to participate in fieldwork.
3. Student health records are maintained and secured in the Saint Francis University MyHealth@School. Each year, the student must sign a Release of Confidential Information Form obtained from MyHealth@School.
4. The student is responsible for taking the required health records to fieldwork.
5. The student may be required to undergo a drug screening prior to the start of Level I and/or Level II fieldwork. MyHealth@School recognizes there will be an occasional positive test. For this reason, a Drug Screening Policy has been devised. This policy ensures the student receives appropriate care and ensures the fieldwork sites receive safe and effective students. Refer to the Drug Screening Policy in the Professional Phase Handbook.

All Medical requirements and forms can be found in Appendix C

SECTION 5: CRITERIA & PROCESS for SELECTING FW SITES

During the AFWC initial conversation with the student placement coordinator at the potential affiliating site and prior to establishing the MOU/AA., the AFWC Fieldwork Coordinator confirms the experience will provide the student with the opportunity to carry out professional responsibilities under supervision of a qualified occupational therapy practitioner serving as a role model (C.1.0.), reflects the sequence and scope of content in the curriculum design, (C.1.1.) and ensures the ratio of fieldwork educators to students enables proper supervision and the ability to provide frequent assessment of student progress in achieving stated fieldwork objectives (C.1.4).

Upon Level I or Level II Fieldwork confirmation, the university's curriculum and program design, fieldwork evaluation, and fieldwork objectives are discussed with the site student coordinator or the FWEd. The AFWC also collaborates with the FWEd to establish new fieldwork objectives. The AFWC confirms that the Level I and Level II Fieldwork Educators are qualified and adequately prepared to meet the learning needs of the student, as stated in the 2018 ACOTE standards. The AFWC requests or reviews the current AOTA Fieldwork Data Form for Level II Fieldwork Experiences.

The AFWC performs annual program evaluations as another mechanism to *ensure fieldwork experiences are implemented and effective* (C.1.0). The AFWC monitors Student Evaluation Fieldwork Experience (SEFWE) forms, the student fieldwork assignments, performs site visits, and maintains communication via email, virtual meetings, or phone calls with students and fieldwork educators during fieldwork.

The Department of Occupational Therapy allows students to request Level II Fieldwork sites. This process *ensures the fieldwork agreements are sufficient in scope and number to allow completion of graduation requirements in a timely manner in accordance with the policy adopted by the program as required by Standard A.4.7* (C.1.5). Note, if the student requests a site to complete fieldwork, the AFWC verifies the site reflects the sequence and scope of content of Saint Francis University Department of Occupational Therapy curriculum design prior to placement.

If a student is placed at a *new* fieldwork site, during the AFWC initial contact with the site, copies of the AOTA Fieldwork Data form and site-specific behavioral objectives will be obtained. If a MOU/AA is established with this site but copies of these documents are not available, the student will be required to develop these forms together with the fieldwork educator. Students are required to complete and sign a Student Clinical Agreement prior to each fieldwork experience; *this agreement is another mechanism of communicating the site-specific fieldwork information to the student* (C.1.2).

SECTION 6: FIELDWORK SUPERVISION

During Level I and Level II fieldworks, *the AFWC verifies the ratio of fieldwork educators to students to enable proper supervision and the ability to provide frequent assessment of student progress in achieving stated fieldwork objectives (C.1.4)*. A 1:1 ratio of fieldwork educators to students is generally the case. In some settings, the ratio is greater than 1:1 depending upon the population served, the fieldwork educator's experiences, and the student's capabilities. These fieldwork experiences are negotiated on an individual basis and must be mutually accepted. The AFWC closely monitors the amount of supervision received, the opportunities for students to receive feedback, and the overall effectiveness of the experience. The AFWC contacts each site, during the student's fieldwork experience, regarding the student's progress and performance. The AFWC also communicates with the students during Fieldwork. Students are highly encouraged to contact AFWC at the first sign of any concern with fieldwork placement and/or supervision. Changes in ratios are implemented as needed.

The AFWC encourages the student to meet formally with the fieldwork educator to obtain strengths, areas of need, and goals to accomplish the following week. If the student reports any issue about supervision, feedback, excreta at any time during fieldwork, the AFWC immediately contacts the FWEd, inquiring about the student fieldwork performance, and depending upon the feedback may schedule a site visit. The site visit is scheduled to ensure *appropriate role modeling of occupational therapy practice*; to confirm the education the student is receiving promotes clinical reasoning and reflective practice to enable ethical practice, sound judgment and competence to meet the requirements of an entry-level therapist, generalist occupational therapist.

ACOTE standards states Level II fieldwork experiences may be completed *in a setting where no occupational therapy services exist, however, a documented plan for provision of occupational therapy services and supervision by a currently licensed or otherwise regulated occupational therapist will be developed for the provision of occupational therapy services with at least 3 years of full-time or its equivalent of professional experience. Supervision must include a minimum of 8 hours per week of direct supervision each week of the fieldwork experience. An occupational therapy supervisor must be available, via a variety of contact measures, to the student during all working hours. An on-site supervisor designee of another profession must be assigned while the occupational therapy supervisor is off site (C.1.14)*.

The AFWC ensures *supervision provides protection of consumers and opportunities for appropriate role modeling of occupational therapy practice. Initially, supervision should be direct and then decreased to less direct supervision as appropriate for the setting, the severity of the client's condition, and the ability of the students (C.1.13)*.

The AFWC at Saint Francis University oversees a student who completes fieldwork at a site where no occupational therapist is employed and receives adequate occupational therapy supervision at that Level II fieldwork site. Before the student is placed in a fieldwork where there is no occupational therapist, a written supervision plan, including objectives, will be formulated. A copy of the plan will be placed in the facility file. Supervision may include, but is not limited to, Saint Francis University paying an occupational therapist a stipend for providing the supervision to the student. If adequate supervision cannot be provided, the student will not be placed at that site.

To formally evaluate the effectiveness of fieldwork education, the AFWC *confirms the student is supervised by a currently licensed or otherwise regulated occupational therapist who has a minimum of 1 year full-time (or its equivalent) of practice experience* subsequent to initial certification and who is adequately prepared to serve as

a fieldwork educator. The supervising therapist may be engaged by the fieldwork site or by the educational program (C.1.11).

During fieldwork, the AFWC maintains frequent communication with the student and the fieldwork educator to confirm the student is meeting the fieldwork objectives. The AFWC attempts to communicate with the FWEd via the method preferred by the FWEd (this information is gathered by the student prior to or on the first few days of fieldwork and is shared with the AFWC via a Canvas posting). A site visit is typically scheduled when a student is placed at a site not previously visited. The AFWC attempts to schedule a site visit (one if not two) during the student's fieldwork experience. This visit *ensures supervision provides protection of consumers and opportunities for appropriate role modeling of occupational therapy practice* (C.1.4.).

Student educational experience and the *effectiveness of supervision* is formally measured using the American Occupational Therapy Association's SEFWE and SEFWEd (C.1.15). *Initially, supervision should be direct and then decrease to less direct supervision as is appropriate for the setting, the severity of the client's condition, and the ability of the student* (C.1.13). The Fieldwork Performance Evaluation for the Occupational Therapy Student, the student's Fieldwork Educator (FWEd) completes mid-way through the fieldwork experience, is one means to assist the FWEd in determining the amount of supervision the student needs.

The AFWC contacts each site and confirms a mid-term is completed. If the student is not meeting the mid-term requirements a site visit is scheduled and an action plan is developed between the student, the fieldwork educator, and the AFWC.

Please see Appendix E – G for Student and FWEd resources to enhance supervision and communication.

SECTION 7: AOTA FIELDWORK DATA FORM

The primary purpose of the AOTA Fieldwork Data Form is to summarize information regarding the program at a fieldwork site. Occupational therapy (OT) and occupational therapy assistant (OTA) students will find valuable information describing the characteristics of the fieldwork setting; the client population; commonly used assessments; interventions; and expectations and opportunities for students. The Fieldwork Data Form has been developed to reflect the *Occupational Therapy Practice Framework: Domain and Process, 3rd Edition* (American Occupational Therapy Association [AOTA], 2014) terminology and best practice in occupational therapy to promote quality fieldwork experiences. The data gathering processes used in completion of this form entails a collaborative effort that facilitates communication between OT and OTA academic programs, students, and fieldwork educators. This form may be completed by the combined efforts of the fieldwork educator, the OT or OTA student assigned to the site for fieldwork, and/or the Academic Fieldwork Coordinator (AFWC) from the program. Fieldwork sites are encouraged to update the form annually and provide a copy to the educational program(s) where they have a current memorandum of understanding (MOU).

The secondary purpose of the Fieldwork Data Form is to document the connection between the curriculum design of a given OT or OTA educational program with its fieldwork component. The AFWC will use the data entered on the form to document fieldwork related to the Accreditation Council for Occupational Therapy (ACOTE) Standards (ACOTE, 2012). The standards are outlined in Section C of the 2018 ACOTE standards and are denoted on the form. Educational programs can revise the form to suit the needs of their respective fieldwork programs.

The Fieldwork Data Form was developed through the joint efforts of the Commission on Education (COE) and the Education Special Interest Section (EDSIS) Fieldwork Subsection with input from many dedicated AFWCs and fieldwork educators.

The AOTA Fieldwork Data Form can be found in Appendix D

SECTION 8: FW EXPERIENCE & the SFU MOT CURRICULUM DESIGN

The AFWC ensures fieldwork education is integrated as a component of the curriculum design and that the Fieldwork sites provide experiences that are consistent with the curriculum design and goals. The AFWC completes site visits, establishes a Memorandum of Understanding (MOU)/Affiliation Agreements (AA), reviews AOTA Fieldwork Data Forms, reviews Student Evaluations of the Fieldwork Experience (SEFWE) and communicates Saint Francis University's curriculum design and objectives with sites. The AFWC also contacts the fieldwork site to ensure the facility will offer the student the knowledge, skills, and attitudes to practice competently and ethically as an entry-level occupational therapist.

Reviewing the MOU/AA, the AOTA site specific fieldwork data forms, and/or site-specific behavioral objectives, the AFWC confirms *the fieldwork program reflects the sequence and scope of content in the curriculum design*. As well as student assignments linking the coursework and SFU curricular design to the fieldwork experience. Formally during staff meetings and informally throughout each semester the AFWC and faculty discuss fieldwork experiences to *ensure that the fieldwork experiences in traditional, nontraditional, and emerging settings strengthen the ties between didactic and fieldwork education (C.1.1)*.

The fieldwork site's MOU/AA, AOTA fieldwork data forms, and site-specific behavioral objectives provide the AFWC with the information needed *to ensure site requirements are being met (C.1.2)*. These site-specific forms are made available to the students in an electronic format. Students are informed of the location of these files during the fieldwork preparation coursework and placement process.

SECTION 9: MEMORANDUM OF UNDERSTANDING (MOU) / AFFILIATION AGREEMENT (AA)

The Memorandum of Understanding (MOU) /Affiliation Agreement (AA) serves many capacities. The document outlines the responsibilities of the university, responsibilities of the fieldwork site, and agreements between the university and the fieldwork site. The Memorandum of Understanding/Affiliation Agreement must be in place prior to a student completing a fieldwork at that particular site.

Each time a student is placed at a particular site the evidence of a valid MOU/AA is in effect and signed by both parties at the time the student is completing a Level I or Level II fieldwork experience (C.1.6). If there is not an MOU/AA, the AFWC will establish one with the site before the student is placed. Responsibilities of Saint Francis University and each fieldwork site are clearly documented in the MOU/AA. (C.1.6).

When a MOU/AA is established with a multi-site service, the policy of the site regarding whom the MOU/AA needs established is implemented. There is always at least one MOU/AA established prior to the student completing fieldwork if not two.

The student shall **NOT** contact the potential fieldwork site to set up the MOU/AA, request fieldwork placement, or to request fieldwork information. The student is only allowed to contact the site after permission is granted via the AFWC or after the AFWC has successfully placed the student at that site for fieldwork.

Copy of SFU Affiliation Agreement can be found in Appendix H

2018 Accreditation Council for Occupational Therapy Education (ACOTE®) Standards and Interpretive Guide

**2018 Accreditation Council for Occupational Therapy Education (ACOTE®) Standards and Interpretive Guide (effective July 31, 2020)
December 2019 Interpretive Guide Version**



2018-ACOTE-Standards (1).pdf

Please use the link to the left for more information

Appendix A: Level I FW Forms

AOTA PERSONAL DATA SHEET
Saint Francis University
Department of Occupational Therapy



PERSONAL INFORMATION

Name:

Permanent Address:

Cell #:

Name, address, and phone number of person to be notified in case of accident or illness:

EDUCATION INFORMATION

Expected degree:

- Baccalaureate Degree of Science in Health Science, anticipated date of graduation -
- Master of Occupational Therapy Degree, anticipated date of graduation -

Prior degrees obtained:

Foreign language:

Read / Spoken -

CPR Certification expiration date:

HEALTH INFORMATION

Name of health insurance company:

Group #:

Subscriber #:

PREVIOUS VOLUNTEER EXPERIENCE (list in order of most recent)

PERSONAL PROFILE

1. Strengths:
2. Areas of growth:
3. Special skills or interests:
4. Describe you preferred learning style:
5. Describe you preferred style of supervision:
6. Will you need housing during your affiliation?
7. Will you have your own transportation during your affiliation?
8. *(Optional)* Do you require any reasonable accommodations (as defined by ADA) to complete your fieldwork?
 Yes___ No___. If yes, were there any reasonable accommodations that you successfully used in your academic coursework that you would like to continue during fieldwork? If so, list them. To promote your successful accommodation, it should be discussed and documented before each fieldwork experience.

FIELDWORK EXPERIENCE SCHEDULE

Level I Experience	Site	Type of FW	Length of FW
Level IA _____ <i>(insert month/ year)</i>		Psychosocial	
Level IB _____ <i>(insert month/ year)</i>			

Level IC _____ <i>(insert month/ year)</i>			
Level II Experience	Site	Type of FW	Length of FW
Level II A _____ <i>(insert month/ year)</i>			
Level II B _____ <i>(insert month/ year)</i>			

ADDITIONAL INFORMATION

- CPR Certification, expiration date:
- Child Abuse Clearance – Date:
- Criminal Background Clearance – Date:
- HIPAA Training: **Summer** _____
- Universal Precautions Training: **Summer** _____
- Safety Training: **Summer** _____
- Good Standings with Saint Francis University:

**Level I Student Clinical Agreement For
Level IA, IB, & IC Fieldwork** (each signed separately)

I, _____, agree to honor my commitment to participate in the Level I program of supervised fieldwork as an occupational therapy student of Saint Francis University at _____ commencing on _____ and continuing through _____, or otherwise dictated by the SFU faculty.

Before fieldwork and directly after I am placed, I will review the facility-specific information. I will complete the necessary prerequisites to ensure a successful placement.

I agree to be responsible for:

1. Respecting the confidentiality of information regarding clients and the client records per HIPAA and with the fieldwork site's policies and procedures.
2. Complying with the fieldwork program's professional standards, Saint Francis University, and the AOTA Code of Ethics. If I do not know or understand these standards, it will be my responsibility to learn them and raise any questions for discussion.
3. Attending fieldwork each day and on time for the duration of the fieldwork experience. **Time off is not allowed.** If an extenuating circumstance does occur, the fieldwork educator and academic fieldwork coordinator must be notified immediately. Missed time must be rescheduled and made up.
4. Adherence to the policies and procedures of the facility and Fieldwork policies of Saint Francis University
5. Arranging for my transportation, meals, and housing when not provided by the facility
6. Staying current with an annual physical examination, immunizations, and other medical requirements
7. Providing the facility evidence of a physical examination and other routine medical tests and immunizations requested by the facility. Understanding that the Student Health Office at Saint Francis University has the authority to release confidential health records to the OT department at Saint Francis University and to the fieldwork sites
8. Obtaining the necessary clearances prior to the start of fieldwork. I understand that the OT department has permission to release the results from the child abuse, criminal, and FBI clearances.
9. Securing adequate medical insurance coverage for the duration of my fieldwork
10. Providing the necessary and appropriate uniform when requested. I will adhere to the dress code of Saint Francis University and my fieldwork facility. I will always wear my name tag/identification.
11. Obtaining prior written approval from the facility and Saint Francis University before publishing any written material relating to the fieldwork experience
12. Reviewing the fieldwork site folder to identify whether the site I selected requires a urine drug screening. If it does, I will obtain the screening within the requirement of the site.

Student's Signature

Date

Saint Francis University
Department of Occupational Therapy
Level I
Fieldwork Objectives

The American Occupational therapy Association states that *a Level I fieldwork shall be integral to the program's curriculum design and include experiences designed to enrich didactic course work through directed observation and participation in selected aspect of the occupational therapy process. The focus of these experiences is not intended to be independent performance. Supervised Level I fieldwork with qualified personnel, includes, but is not limited to, initially certified nationally occupational therapy practitioners, psychologists, physician's assistant, teachers, social workers, nurses, and physical therapists. The goal of Level I fieldwork is to introduce students to the fieldwork experience, develop a basic comfort level with and understanding of the needs of the clients.*

At Saint Francis University, the student will be required to complete *three* Level I fieldwork experiences. The fieldwork experiences are incorporated into OT 401, OT 402, and OT 403.

Level I
Fieldwork Objectives

The Level I fieldwork objectives adopted by the Occupational Therapy Program at Saint Francis University were resulted from a study conducted at University of Wisconsin-Madison. The **Ten Generic Abilities* are characteristics or behaviors that are explicitly part of the profession's core of knowledge and technical skill required for the success in the profession.

***Generic Abilities**

***Objectives**

- | | |
|---------------------------|--|
| 1. Commitment to Learning | The student will demonstrate the ability to self-assess, self-correct, and self-direct; to identify needs and sources of learning; and to continually seek new knowledge and understanding. |
| 2. Interpersonal Skills | The student will interact effectively with patients, families, colleagues, other health care professional, and the community. Deals effectively with cultural and ethnical diversity issues. |
| 3. Communication skills | The student will demonstrate the ability to communicate effectively, verbally and in writing, for varied audiences and purposes. |

- | | |
|--|---|
| 4. Effective Use of Time and Resources | The student will demonstrate the ability to obtain the maximum benefit from a minimum investment of time and resources. |
| 5. Use of Constructive Feedback | The student will demonstrate the ability to identify sources of and seek out feedback and to effectively use and provide feedback for improving personal interaction. |
| 6. Problem-Solving | The student will demonstrate the ability to recognize and define problems, analyze data, develop and implement solutions, and evaluate outcomes. |
| 7. Professionalism | The student will exhibit appropriate professional conduct and appearance in order to represent the profession effectively. |
| 8. Responsibility | The student will fulfill commitments and will be accountable for actions and outcomes. |
| 9. Critical Thinking | The student will demonstrate the ability to question logically: to identify, generate, and evaluate elements of logical argument; to recognize and differentiate facts, illusion, assumptions, and hidden assumptions; and to distinguish the relevant from the irrelevant. |
| 10. Stress Management | The student will demonstrate the ability to identify sources of stress and to develop effective coping behaviors. |

*Developed by the Physical Therapy Program, University of Wisconsin-Madison May et al. Journal of Physical Therapy Education. 9:1, Spring 1995

Level I Fieldwork Objectives Grading System

1. Commitment to Learning

Rating	Point System	Criteria
Excellent	5.0	Consistently demonstrates the ability to self-assess, self-correct, and self-direct. Consistently identifies needs and reports three external sources of learning (Internet, SFU library, outside library, interviews, etc.). Continually seeks new knowledge and understanding.
Good	4.1	Requires minimal supervision and encouragement to identify self needs and identifies two sources of learning in order to obtain new knowledge and understanding.
Fair	3.6	Requires moderate supervision and encouragement to identify self needs and identifies one source of learning in order to obtain new knowledge and understanding.
Poor	3.1	Requires continual encouragement, direction and supervision to identify self needs and sources of learning in order to obtain new knowledge and understanding.

2. Interpersonal Skills

Rating	Point System	Criteria
Excellent	5.0	Consistently interacts effectively with clients, families, colleagues, other health care professionals, and community. Deals effectively with cultural and ethical diversity issues.
Good	4.1	80% of the time interacts effectively and deals effectively with the above stated areas.
Fair	3.6	70 % on the time interacts effectively and deals effectively with the above stated areas.
Poor	3.1	Does not interact effectively with clients, families, colleagues, other health care professionals, and / or the community. Does not deal effectively with cultural and / or ethical diversity issues.

3. Communication Skills

Rating	Point System	Criteria
Excellent	5.0	Consistently communicates effectively, verbally and in writing for varied audiences and purposes. This includes, but is not limited to, documentation; tone of voice; body language; clear and concise instructions; communication skills during team conferences, client and family interaction.
Good	4.1	80% of the time it is observed and /or reported that communication skills are performed effectively.
Fair	3.6	70% of the time it is observed and /or reported that communication skills are performed effectively.

Poor	3.1	Does not communicate effectively, verbally and in writing for varied audiences and purposes.
4. Effective Use of Time and Resources		
Rating	Point System	Criteria
Excellent	5.0	Consistently demonstrates the ability to utilize time and resources in the most scholarly manner (during down time engages in research, performs interviews, observe techniques, and/or performs departmental tasks).
Good	4.1	80% of the time effectively utilizes time and resources.
Fair	3.6	70% of the time effectively utilizes time and resources.
Poor	3.1	Does not effectively use time and resources.
5. Use of Constructive Feedback		
Rating	Point System	Criteria
Excellent	5.0	Consistently demonstrates the ability to identify sources of, seeks out, and accepts feedback for improving personal interaction. In regards to performance, accepting constructive feedback in a mature manner does not internalize or become defensive.
Good	4.1	Occasionally becomes defense, internalizes constructive criticism, but learns from the experience.
Fair	3.6	Frequently becomes defense and internalizes constructive criticism, but may learn from the experience.
Poor	3.1	Reacts negatively, becomes defense and takes constructive criticism personally at all times.
6. Problem-Solving		
Rating	Point System	Criteria
Excellent	5.0	Consistently demonstrates the ability to recognize and define problems, analyze data, develop and implement solutions, and evaluate outcomes.
Good	4.1	80% of the time, is able to identify problems, analyze data, develop and implement solutions, and / or evaluate outcomes.
Fair	3.6	70% of the time, is able to identify problems, analyze data, develop and implement solutions, and / or evaluate outcomes
Poor	3.1	Cannot recognize and identify problems, analyze data, develop and implement solutions, and / or evaluate outcomes.
7. Professionalism		
Rating	Point System	Criteria

Excellent	5.0	Consistently exhibits appropriate professional conduct and appearance in order to represent the profession effectively. Follows the dress code of the facility.
Good	4.1	80% of the time, exhibits appropriate professional conduct appearance in order to represent the profession effectively and follows the dress code of the facility.
Fair	3.6	70% of the time, exhibits appropriate professional conduct appearance in order to represent the profession effectively and does not follow the dress code of the facility.
Poor	3.1	Does not present self in a professional manner and / or does not follow the dress code of the facility.

8. Responsibility

Rating	Point System	Criteria
Excellent	5.0	Consistently fulfills commitments and is accountable for actions and outcomes.
Good	4.1	80 % of the time demonstrated the ability to fulfill commitments and be accountable for actions and outcomes.
Fair	3.6	70% of the time demonstrated the ability to fulfill commitments and be accountable for actions and outcomes.
Poor	3.1	Does not fulfill commitments and is not accountable for actions and outcomes.

9. Critical Thinking

Rating	Point System	Criteria
Excellent	5.0	Consistently demonstrates the ability to question logically: to identify, generate, and evaluate elements of logical arguments; to recognize and differentiate facts, illusions, assumptions, and hidden assumptions; and to distinguish the relevant from the irrelevant.
Good	4.1	80% of the time demonstrates the ability to question logically: to identify, generate, and evaluate elements of logical arguments; to recognize and differentiate facts, illusions, assumptions, and hidden assumptions; and to distinguish the relevant from the irrelevant.
Fair	3.6	70% of the time demonstrates the ability to question logically: to identify, generate, and evaluate elements of logical arguments; to recognize and differentiate facts, illusions, assumptions, and hidden assumptions; and to distinguish the relevant from the irrelevant.
Poor	3.1	Does not demonstrate the ability to question logically: to identify, generate, and evaluate elements of logical arguments; to recognize and differentiate facts, illusions, assumptions, and

		hidden assumptions; and to distinguish the relevant from the irrelevant.
10. Stress Management		
Rating	Point System	Criteria
Excellent	5.0	Constantly demonstrates the ability to recognize stressful situations and develop effective coping strategies to ensure professional behaviors.
Good	4.1	80% of the time demonstrates the ability to recognize stressful situations and develop effective coping strategies to ensure professional behaviors.
Fair	3.6	70% of the time demonstrates the ability to recognize stressful situations and develop effective coping strategies to ensure professional behaviors.
Poor	3.1	Does not display the ability to identify sources of stress and cannot develop effective coping behaviors.

LEVEL I FIELDWORK EVALUATION

Student Name:

Fieldwork Educator(s):

Fieldwork Site:

Professional Behaviors	Excellent	Good	Fair	Poor	N/A	Comments
Points	5.0	4.1	3.6	3.1		
1. Commitment to Learning Demonstrates the ability to self-assess, self-correct, and self-direct; to identify needs and sources of learning; and to continually seek new knowledge and understanding.	4	3	2	1	N/A	
2. Interpersonal Skills Interacts effectively with clients, families, colleagues, other health care professionals, and the community. Deals effectively with cultural and ethical diversity issues.	4	3	2	1	N/A	
3. Communication skills Demonstrates the ability to communicate effectively, verbally and in writing, for varied audiences and purposes	4	3	2	1	N/A	
4. Effective Use of Time and Resources Demonstrates the ability to obtain the maximum benefit from a minimum investment of time and resources.	4	3	2	1	N/A	
5. Use of Constructive Feedback Demonstrates the ability to identify sources of and seek out feedback and to effectively use and provide feedback for improving personal interaction.	4	3	2	1	N/A	
6. Problem-Solving Demonstrates the ability to recognize and define problems, analyze data, develop and implement solutions, and evaluate outcomes.	4	3	2	1	N/A	

7. Professionalism Exhibits appropriate professional conduct and appearance in order to represent the profession effectively.	4	3	2	1	N/A	
8. Responsibility Fulfills commitments and will be accountable for actions and outcomes.	4	3	2	1	N/A	
9. Critical Thinking Demonstrates the ability to question logically: to identify, generate, and evaluate elements of logical argument; to recognize and differentiate facts, illusions, assumptions, and hidden assumptions; and to distinguish the relevant from the irrelevant.	4	3	2	1	N/A	
10. Stress Management Demonstrates the ability to identify sources of stress and to develop effective coping behaviors.	4	3	2	1	N/A	

I have appraised the student and have conducted an interview.

Fieldwork Educators Signature: _____

The student's signature confirms that an interview was conducted, but does not necessarily mean that student agrees or disagrees with this evaluation.

Student's Signature: _____

The *Ten Generic Abilities* were identified through a study conducted at UW-Madison in 1991-92.

LEVEL I STUDENT EVALUATION OF FIELDWORK EXPERIENCE (SEFWE) FORM

Facility/Site:

Address:

Setting:

Attire:

Site-specific prerequisites:

1. Describe your fieldwork experience:
2. What were some of the site expectations & student responsibilities?
3. What aspects of the experience did you find most meaningful / least meaningful?
4. What suggestions do you have for improving the experience?
5. Did you feel prepared for this experience? If not, what could have been done to prepare you to the fullest for this experience?
6. Did you feel adequately supervised during this Level I FW; yes, not, and explain?
7. Outline, at least three areas, what you like to share with other OT students planning to attend this fieldwork experience.
8. Would you recommend this fieldwork site to another student? Why?
9. Should SFU continue to place students at this facility for fieldwork experiences, why/why not?
10. Additional comments you would like to share not addressed above?

Appendix B: Level II FW Forms

Level II Fieldwork Placement Form

Student: _____ SFU Email: _____
Home Address: _____
Cell #: _____ Home Telephone number: _____

Indicate four sites you would like placed for **Level II** FW. You will be placed in Level II FW using a lottery system. You are NOT permitted to contact any fieldwork site and ask if they take OT students or if they will take you as a student. You are not allowed to complete a FW rotation at a facility where a family member is employed. This may influence the objectivity of the experience. You are responsible for transportation and living arrangements. You are not to live with your fieldwork educator. You may not list all specialty settings (Outpatient Hands, Pediatrics) and should include at least one fieldwork option in an inpatient setting (skilled nursing facility, inpatient rehab, sub-acute rehab). Some specialty settings will only accept students for their 2nd Level II Fieldwork experience. The AFWC and OT Faculty collaboration will determine the appropriateness of fieldwork placement in specialty areas. Once placed, you will not be permitted to change your fieldwork.

****If you are requesting a FW site away from your home address, please indicate your connection to that area and a potential plan for housing. Several sites out of the region have asked questions regarding a student's particular interest in completing FW in that area (family resides there, have friends there, interested in relocating to that area after graduation...).**

1. Facility Name & Setting(s): _____
Address: _____
Telephone#: _____

2. Facility Name & Setting(s): _____
Address: _____
Telephone#: _____

3. Facility Name & Setting(s): _____
Address: _____
Telephone#: _____

4. Facility Name & Setting(s): _____
Address: _____
Telephone#: _____

These sites may be unable to accommodate you for a Level II Fieldwork experience. In that event, the AFWC will attempt to place you in a preferred/appropriate setting within a reasonable distance (60 miles) of your available housing. Please list your setting preferences and geographical areas in which you have housing or are willing to complete fieldwork.

Setting Preferences:

Geographical Preferences (include city and zip code):

Student's Signature/ Date

LEVEL II STUDENT CLINICAL AGREEMENT FOR
Level II A and Level II B *(each signed separately)*

I, (student's name), agree to honor my commitment to professionally participate in a fieldwork program as an occupational therapy student of Saint Francis University at (facility name) beginning on (start date of FW) and ending on (end date of FW).

Prior to my fieldwork I will review the facility site specific information and complete all necessary prerequisites. At least one month prior to my Level II fieldwork, I will contact my fieldwork site and make final arrangements.

I agree to be responsible for:

1. Respecting the confidentiality of information regarding clients in accordance with HIPAA and with the fieldwork site's policies and procedures
2. Complying with the professional standards set up by the clinical program, Saint Francis University, and the AOTA Code of Ethics. If I do not know or understand these standards, it will be my responsibility to learn them and to raise any items in question for discussion
3. Attending fieldwork every day. If an extenuating circumstance or absence due to sickness does occur, I will notify the FWE and the AFWC immediately. I understand that the day(s) must be made up prior to the end of the FW.
4. Adhering to the policies and procedures of the facility
5. Arranging for my own transportation, meals, and housing when not provided by the facility
6. Proving the fieldwork site with evidence of an annual physical examination, 2-step PPD, immunizations, titers, and other medical tests, as requested. I also understand that the Student Health Office at Saint Francis University has the authority to release my confidential health records to the OT Department at Saint Francis University to view and to send to my fieldwork site
7. Wearing the fieldwork site's uniform (i.e., lab coat, scrubs). If no dress code is required, I will adhere to the Saint Francis University dress code. I will always wear my name tag / identification
8. Obtaining the necessary clearances required for fieldwork. I also understand that the OT department has permission to release the results from the child abuse, criminal, and FBI clearances to the fieldwork site.
9. Obtaining prior written approval from the facility and Saint Francis University before publishing any written material relating to the fieldwork experience
10. Reviewing the fieldwork site data form to identify whether a drug screening is required. If one is required, I will obtain the proper panel of screening and have it done in the requested time
11. Completing all the required assignments on the syllabi and upload them to Canvas

Student Signature

Date

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

Site: _____ Phone #: _____
Date: _____ Email: _____
Contact Person: _____ Website: _____

Introduction

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

Instructions

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

FUNDAMENTALS OF PRACTICE

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

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

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

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

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

- | | |
|---|--|
| <input type="checkbox"/> Adheres to facility policies & procedures | <input type="checkbox"/> Provides appropriate supervision of client based on client status |
| <input type="checkbox"/> Completes thorough chart reviews and checks MD orders | <input type="checkbox"/> Accurately identifies ambulation needs and functional mobility status |
| <input type="checkbox"/> Consistently analyzes context for potential hazards based on client risk factors | <input type="checkbox"/> Uses safe transfer techniques and equipment according to protocols |
| <input type="checkbox"/> Anticipates and addresses client safety factors | |

- Determines wheelchair positioning needs (e.g., footrests, cushions, trays & supports, etc.)
- Correctly positions client (e.g., in chair & bed; at desk, for feeding, etc.)
- Provides supervision of client based on client status to ensure safety
- Demonstrates proper splinting techniques such as correct selection of type, correct selection of materials & making adjustments as needed

- Operates equipment according to facility protocols
- Attends to professional boundaries in therapeutic use of self-disclosure
- Effectively limit sets & redirects client(s)
- Establishes safe group climate (reinforce expectations, group rules or contract)
- Other:

BASIC TENANTS

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

Student communicates via:

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

Student communicates about these 3 tenets with:

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

Student communicates about these 3 tenets in:

- | | |
|--|---|
| <input type="checkbox"/> Client intervention & education | <input type="checkbox"/> In-services, brochures, bulletin boards, media announcements, etc. |
| <input type="checkbox"/> Meetings | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Documentation | |
| <input type="checkbox"/> Correspondence | |

Student communicates the value of occupations using:

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

Student Communicates role of occupational therapy using:

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

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

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

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

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

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

Selects assessment according to:

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

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

- | | |
|---|---|
| <input type="checkbox"/> Person- Environment-Occupation (PEO) | <input type="checkbox"/> Acquisitional |
| <input type="checkbox"/> Biomechanical | <input type="checkbox"/> Psychodynamic |
| <input type="checkbox"/> Behavioral | <input type="checkbox"/> Cognitive Behavioral |

- Dialectical Behavioral Therapy (DBT)
- Sensory Processing
- Developmental
- Motor Learning
- Sensory Integrative
- Neurodevelopmental Treatment (NDT)
- Functional Group Model
- Model of Human Occupational (MOHO)
- Occupational Adaptation
- Ecology of Human Performance
- Rehabilitation

- Clinical Reasoning
- Cognitive & Cognitive Disability
- Person-Environment-Occupational Performance (PEOP)
- Canadian Model of Occupational Performance and Engagement (CMOP-E)
- Transtheoretical Model of Change
- Kawa
- Education and Learning theories such as:
- Other:

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

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

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

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

- | | |
|---|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> Fatigue <input type="checkbox"/> Psychological factors including anxiety, depressive symptoms, etc. <input type="checkbox"/> Cultural and societal beliefs, values, customs, expectations <input type="checkbox"/> Primary language <input type="checkbox"/> Respiratory and cardiac status <input type="checkbox"/> Medical acuity <input type="checkbox"/> Concerns re: safety (please specify): <input type="checkbox"/> Inability to perform task <input type="checkbox"/> Mental functions (higher level cognitive, attention, memory, impulsivity, etc.) | <ul style="list-style-type: none"> <input type="checkbox"/> Cognitive status <input type="checkbox"/> Global mental functions (energy, consciousness, psychosocial, personality, etc.) <input type="checkbox"/> Client willingness to participate <input type="checkbox"/> Frustration tolerance <input type="checkbox"/> Sensory functions (pain, visual, proprioceptive, hearing, etc.) <input type="checkbox"/> Environmental factors (products and technology, natural environment and human made changes to the environment, attitudes, etc.) <input type="checkbox"/> Other: |
|---|---|

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

- | | |
|--|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> Standardized assessment results <input type="checkbox"/> Information including client condition & diagnosis <input type="checkbox"/> Subjective & objective impressions <input type="checkbox"/> Verbal reports of others (team, family & caretaker, etc.) | <ul style="list-style-type: none"> <input type="checkbox"/> Observations of client's performance <input type="checkbox"/> Client's stated values, beliefs & motivations <input type="checkbox"/> Identified concerns & needs <input type="checkbox"/> Other: |
|--|--|

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

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

INTERVENTION

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

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

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

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

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

- Current research articles and findings
- Treatment protocols
- AOTA Practice guidelines
- Other:
- Textbooks and other printed materials

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

- Condition& status
- Current context & resources
- Psychosocial needs
- Progress
- Culture, beliefs & values
- Support network
- Stated interests
- Future context & resources
- Other:

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

- Role competence
- Education
- Occupational justice
- ADL
- Leisure
- Cultural preferences
- IADL
- Health& wellness
- Occupational performance
- Play
- Quality of life
- Prevention
- Work
- Self-advocacy
- Other:
- Sleep& rest
- Sexuality
- Social participation
- Health management

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

- Create & promote (health promotion)
- Prevent (disability prevention)
- Establish & restore (remediation & restoration)
- Other:
- Maintain
- Modify (compensation & adaptation)

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

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

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

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

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

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

MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES

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

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

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

- Participates in or describes billing for OT services
- Manages inventory and/or ordering of supplies for OT services
- Assists with client procurement of adaptive equipment
- Discusses political issues& policy decisions that affect funding

- Outlines how services are regulated and funds allocated pertaining to local and & or federal laws such as IDEA, ADA, Medicare& Medicaid, etc.
- Describes agency billing& payment system (grant funding, types of insurance, private pay, cost- share, state& federal funding)
- Describes eligibility criteria for reimbursement and discharge
- Identifies possible resources available (grants, community partnerships, sources for donations, fundraising ideas, etc.)
- Demonstrates awareness of risk management and liability as part of costs and quality care
- Demonstrates awareness of budgetary implications when procuring& using supplies
- Meets documentation requirements for reimbursement or funding sources
- Other:

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

- | | |
|---|---|
| <input type="checkbox"/> Mission and vision | <input type="checkbox"/> Scope |
| <input type="checkbox"/> Accreditation status | <input type="checkbox"/> Specialty certifications |
| <input type="checkbox"/> Licensing | <input type="checkbox"/> Role of organization |
| <input type="checkbox"/> History | <input type="checkbox"/> Other: |

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

- Self-directs schedule management to meet workload & caseload
- Gathers necessary evaluation data within allotted amount of time
Specify:
 - Completes evaluation write-up with documentation co-signed & in chart & record within:

<input type="checkbox"/> 8 hours	<input type="checkbox"/> 24 hours	<input type="checkbox"/> 1 week	<input type="checkbox"/> Other:
----------------------------------	-----------------------------------	---------------------------------	---------------------------------
 - Completes progress note documentation within:

<input type="checkbox"/> 8 hours	<input type="checkbox"/> 24 hours	<input type="checkbox"/> 1 week	<input type="checkbox"/> Other:
----------------------------------	-----------------------------------	---------------------------------	---------------------------------
 - Conducts _____ (number) of evaluations:

<input type="checkbox"/> per day	<input type="checkbox"/> per week	<input type="checkbox"/> per month	<input type="checkbox"/> Other:
----------------------------------	-----------------------------------	------------------------------------	---------------------------------
 - Serves caseload commensurate with entry-level therapist:
 - _____ (number) of clients per day
 - _____ (number) of clients per week
 - _____ (number) of clients per month
 - _____ (number) of groups per day
 - _____ (number) of groups per week
 - _____ (number) of groups per month
- Meets expected productivity level: _____%
- Other:

COMMUNICATION

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

- Language appropriate to the recipient of information
- Terminology and content aligned with the level of understanding of person with whom communicating
- Examples to illustrate meaning& intent
- Active listening strategies (restates& paraphrases) to ensure both parties have shared understanding of information & plan
- Multiple modes of communication (verbal, written, nonverbal)
- Appropriate eye contact

- Attention to physical boundaries& body space
- Attention to best practice in technology and communication (i.e. video-conferencing)
- Professional presentation& demeanor in facial expression, posture, grooming affect, & attire
- Translation services
 - via phone
 - via video
 - via written services
 - in person
- Consideration of cultural differences
- Provision of clear & concise instructions for intended recipient
- Provision of supporting materials as needed
- Adapting communication style or method in response to recipient comprehension and receptivity
- Other:

Student communicates with/to:

- | | | |
|-------------------------------------|--|-------------------------------------|
| <input type="checkbox"/> Clients | <input type="checkbox"/> Colleagues | <input type="checkbox"/> The public |
| <input type="checkbox"/> Families | <input type="checkbox"/> Service providers | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Caregivers | <input type="checkbox"/> Administration | |

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

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

PROFESSIONAL BEHAVIORS

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

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

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

- Approaches fieldwork educator and other personnel with a list of questions, concerns & possible options for how to address them
- Takes initiative to meet with other members of team to understand their role & perspective

- Reviews testing materials & manuals on own prior to observing or administering
- Reviews and shares relevant resources
- Pilots new program ideas & improvements (e.g., assessment tools, outcome measures, groups, new forms or procedures etc.) when feasible & available
- Collaborates in research design or data collection with others (per IRB approval)
- Exercises good judgment when choosing to attend in-services or other continuing education opportunities (e.g. based on workload management, caseload focus, scope of practice)
- Other:

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

- Engages in mutual feedback exchange (e.g., listen, clarify, acknowledge feedback and/or redirection provide examples, ask "How can I improve?"; discuss ways to make active changes, identify what would be helpful, discuss options)
- Demonstrates commitment to learning by identifying specific goals & actions to improve behavior & performance in collaboration with supervisor
- Processes feedback & seeks support from supervisor appropriate to context of supervisory relationship & learning opportunity
- Utilizes tools to reflect on own performance or variables affecting performance (e.g., self-assessment on Fieldwork Performance Evaluation, journaling and collaboration with peers, AOTA Fieldwork Experience Assessment Tool)
- Takes initiative to contact academic program resource persons for support if needed
- Other:

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

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

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

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

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

- Communicates concerns in 1st person manner (e.g. "I statements")
- Demonstrates strong emotional intelligence when conveying point of view when conflict arises
- Compromises as needed when negotiating workload
- Demonstrates flexibility to support own learning or department mission (e.g. extra effort, stay late if needed)

- Demonstrates ongoing awareness of impact of own behavior on others
- Displays positive regard for others
- Demonstrates effective use of self-disclosure & therapeutic use of self to build rapport, establish relationships & motivate others (peers, colleagues & clients)
- Provides genuine encouragement to maximize client participation & performance
- Provides timely & specific feedback
- Sets limits to maintain safety & support positive behavior & performance improvement

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

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

Other expectations not noted above:

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

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

Assessment List

Formal Assessment Tools	Expected to Gain Proficiency	Expected to Gain Familiarity	Expected to Gain Awareness/Observe
Allen Cognitive Level Screening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allen Diagnostic Modules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity Measure for Post-Acute Care (AM-PAC)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Research Arm Test (ARAT)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment of Motor & Perceptual Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beery Visual Motor Integration Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Behavior Rating Inventory of Executive Function-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Box and Block	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bruininks-Oseretsky Test -2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canadian Occupational Performance Measure (COPM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Children's Assessment of Participation & Enjoyment/Preference for Activities of Children	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Children's Kitchen Task Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Children's Occupational Self-Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cognistat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cognitive Assessment of Minnesota	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coping Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disabilities of the Arm, Shoulder, and Hand (DASH)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dynamic Lowenstein Occupational Therapy Cognitive Assessment (D-LOTCA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dynamometer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Early Coping Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Figure of 8 Measurement (hand)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fugl-Meyer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Functional Independence Measure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gardner DVPT: Motor/Non-Motor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Goal-Oriented Assessment of Life Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Goniometry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Harter Self Perception Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hawaii Early Learning Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jepson Hand Function Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kitchen Task Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kohlman Evaluation of Living Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manual Muscle Testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Michigan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Middlesex Elderly Assessment of Mental State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Miller Function and Participation Scales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mini Mental Status Exam (MMSE)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Moberg Pick Up Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Montreal Cognitive Assessment (MoCA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Modified Ashworth Scale (Tone)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Motor-Free Visual Perception Test (MVPT-3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nine Hole Peg Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Occupational Performance History Interview	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Occupational Self-Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Occupational Therapy Assessment of Performance and Support (OTAPS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Peabody Developmental Motor Scale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pediatric Evaluation of Disability (PEDI)/PEDI-CAT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patient Health Questionnaire-2 (PHQ-2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Piers Harris Self Concept Scale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pinch Meter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Routine Task	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School Function Assessment (SFA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self-Assessment of Occupational Functioning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Semmes-Weinstein Monofilament	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sensory Processing Measure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sensory Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short Blessed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
St. Louis University Mental Status Examination (SLUMS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Social Skills Rating System	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timed Up and Go (TUG)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tinetti Balance Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volumeter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WeeFIM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekly Calendar Planning Activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (list below)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

FUNDAMENTALS OF PRACTICE	
1	<p>Adheres to the American Occupational Therapy Association’s Code of Ethics and all federal, state, and facility regulations. Examples: Medicare, Medicaid, client privacy, social media, human subject research</p>
2	<p>Adheres to safety regulations and reports/documents incidents appropriately. Examples: fire safety, OSHA regulations, body substance precautions, emergency procedures</p>
3	<p>Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents. Examples: body mechanics, medical safety, equipment safety, client-specific precautions, contraindications, community safety</p>
BASIC TENETS	
4	<p>Articulates the values, beliefs, and distinct perspective of the occupational therapy profession to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public</p>
5	<p>Articulates the value of occupation as a method and desired outcome of occupational therapy to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public</p>
6	<p>Articulates the role of occupational therapy practitioners to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public</p>
SCREENING AND EVALUATION	
7	<p>Articulates a clear and logical rationale for the evaluation process based on client information, contexts, theories, frames of reference, and/or practice models.</p>
8	<p>Obtains sufficient and necessary information from relevant sources throughout the evaluation process. Examples: record or chart review, client, family, caregivers, service providers</p>
9	<p>Selects relevant screening and assessment tools based on various factors. Examples: Psychosocial factors, client priorities, needs, and concerns about occupational performance and participation, theoretical support, evidence, practice context, funding sources, cultural relevance</p>
10	<p>Determines the client’s occupational profile and occupational performance through interview and other appropriate evaluation methods.</p> <p>Occupational profile: Summary of the client’s occupational history and experiences, patterns of daily living, interests, values, and needs.</p> <p>Occupational performance: Act of doing and accomplishing a selected action (performance skill), activity, or occupation that results from the dynamic transaction among the client, the context, and the</p>

	activity. Improving or enabling skills and patterns in occupational performance leads to engagement in occupations or activities.
11	<p>Evaluates and analyzes client factors and contexts that support or hinder occupational performance.</p> <p>Client factors: Specific capacities, characteristics, or beliefs that reside within the person and that influence performance in occupations. Client factors include values, beliefs, and spirituality; body functions (includes psychological functions); and body structures.</p> <p>Contexts: Variety of interrelated conditions within and surrounding the client that influence performance, including cultural, personal, physical, social, temporal, and virtual contexts.</p> <p>Includes the consideration of all client-centered components including psychosocial factors.</p>
12	<p>Administers standardized and non-standardized assessments and surveys accurately and efficiently to ensure findings are valid and reliable.</p> <p>Examples: follows assessment protocols, adheres to time guidelines</p>
13	<p>Modifies evaluation procedures based on client factors and contexts.</p> <p>Examples: uses a quiet space, breaks up evaluation into smaller parts, provides multisensory instructions</p>
14	<p>Interprets evaluation results to determine the client's occupational performance strengths and challenges.</p>
15	<p>Synthesizes and documents the results of the evaluation process clearly, accurately, and concisely, using systematic methods to record the client's occupational performance.</p>
INTERVENTION	
16	<p>Articulates a clear and logical rationale for the intervention process based on the evaluation results, contexts, theories, frames or reference, practice models, and evidence.</p>
17	<p>Establishes an accurate and appropriate client-centered plan based on the evaluation results, contexts, theories, frames of reference, and/or practice models.</p> <p>Examples: creates relevant and measurable goals in collaboration with the client and/or family/caregivers; recommends additional consultation and referrals</p>
18	<p>Uses evidence from research and relevant resources to make informed intervention decisions.</p>
19	<p>Selects client-centered and occupational-based interventions that motivate and challenge the client to achieve established goals that support targeted outcomes.</p> <p>Includes the consideration of all client-centered components including psychosocial factors</p>
20	<p>Implements client-centered and occupation-based intervention plans.</p> <p>Includes the consideration of all client-centered components including psychosocial factors</p>
21	<p>Chooses and, if needed, modifies intervention approach to achieve established goals that support targeted outcomes.</p> <p>Examples: prevention, restoration, maintenance, promotion</p>
22	<p>Modifies task and/or environment to maximize the client's performance.</p> <p>Examples: upgrades/downgrades task; arranges client's workspace for optimal performance</p>

23	Modifies the intervention plan and determines the need for continuation or discontinuation of services based on the client's status.
24	Documents the client's response to services in a manner that demonstrates the effectiveness of interventions.
MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES	
25	Demonstrates through practice or discussion the ability to collaborate with and assign appropriate tasks to the occupational therapy assistant, occupational therapy aide, or others to whom responsibilities might be assigned, while remaining responsible for all aspects of treatment. Examples: paraprofessionals, nurses' aides, volunteers
26	Demonstrates through practice or discussion an understanding of costs and funding systems related to occupational therapy services, such as federal, state, third party and private payers. Examples: billing for OT services, inventory, and ordering of supplies for OT services, and options for client procurement of adaptive equipment
27	Demonstrates knowledge about the organization. Examples: mission and vision, accreditation status, licensing, specialty certifications
28	Meets productivity standards or volume of work expected of occupational therapy students.
COMMUNICATION AND PROFESSIONAL BEHAVIORS	
29	Communicates clearly and effectively, both verbally and nonverbally. Examples: clients, families, caregivers, colleagues, service providers, administration, the public
30	Produces clear and accurate documentation. Examples: legibility, spelling, punctuation, grammar, adherence to electronic health documentation requirement
31	Collaborates with fieldwork educator(s) to maximize the learning experience. Examples: initiates communication, asks for feedback about performance, identifies own strengths and challenges
32	Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with fieldwork educator(s) and others.
33	Responds constructively to feedback in a timely manner.
34	Demonstrates consistent and acceptable work behaviors. Examples: punctuality, initiative, preparedness, flexibility, dependability, professional appearance
35	Demonstrates effective time management. Examples: plans ahead, adheres to schedules, completes work in expected timeframe
36	Manages relationships effectively through therapeutic use of self and adjusts approach to meet the needs of clients and others.
37	Demonstrates respect for diversity factors of others. Examples: culture, socioeconomic status, beliefs identity

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

Rating Scale

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

Rating scale definitions

Exemplary performance	Demonstrates satisfactory competence in specific skills consistently; demonstrates substantial breadth and depth in understanding and/or skillful application of fundamental knowledge and skills.
Proficient performance	Demonstrates satisfactory competence in specific skills; demonstrates adequate understanding and/or application of fundamental knowledge and skills.
Emerging performance	Demonstrates limited competence in specific skills (inconsistencies may be evident); demonstrates limited understanding and/or application of fundamental knowledge and skills (displays some gaps and/or inaccuracies).
Unsatisfactory performance	Fails to demonstrate competence in specific skills; performs in an inappropriate manner; demonstrates inadequate understanding and/or application of fundamental knowledge and skills; (demonstrates significant gaps and/or inaccuracies).

FWPE for OTS Scoring:

- All items included must be scored to receive a Pass on the FWPE for OTS
- A sum score of 111 or higher will be required to receive a Pass on the FWPE for OTS
- A score of 3 or higher on the items
 - # 1 (Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations)
 - # 2 (Adheres to safety regulations and reports/documents incidents appropriately), and ©2020 by the American Occupational Therapy Association. This material may be copied and distributed for personal or educational uses without written consent. For all other uses, contact copyright@aota.org.
 - # 3 (Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents) will all be required to receive a Pass on the FWPE for OTS
- Scores of 1 on any of the items is not allowed to receive a Pass on the FWPE for OTS

FWPE for OTAS Scoring:

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

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6. Overview of physical facilities							
7. Agency/Department mission							
8. Overview of organizational structure							
9. Services provided by the agency							
10. Agency/Department policies and procedures							
11. Role of other team members							
12. Documentation procedures							
13. Safety and emergency procedures							
14. Confidentiality/HIPAA							
15. OSHA—Standard precautions							
16. Community resources for service recipients							
17. Department model of practice							
18. Role of occupational therapy services							
19. Methods for evaluating OT services							
20. Other							

Comments or suggestions regarding your orientation to this fieldwork placement:

CASELOAD

List approximate number of each age category in your caseload.

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

Age	Number
0–3 years old	
3–5 years old	
6–12 years old	
13–21 years old	
22–65 years old	
> 65 years old	

Condition/Problem	Number

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.

	REQUIRED		HOW MANY	EDUCATIONAL VALUE				
	Yes	No		1	2	3	4	5
1. Client/patient screening								

2. Client/patient evaluations <i>(Use specific names of evaluations)</i>					
				1	2 3 4 5
				1	2 3 4 5
				1	2 3 4 5
				1	2 3 4 5
3. Written treatment/care plans				1	2 3 4 5
4. Discharge summary				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.

Therapeutic Interventions	Individual	Group	Co-Tx	Consultation
Occupation-based activity, i.e., play, shopping, ADL, IADL, work, school activities, etc. (within client's own context with his or her goals)				
1.				
2.				
3.				
4.				
Purposeful activity (therapeutic context leading to occupation)				
1.				
2.				
3.				
4.				
Preparatory methods, i.e., sensory, PAMs, splinting, exercise, etc. (preparation for occupation-based activity)				
1.				
2.				
3.				
4.				

THEORY—FRAMES OF REFERENCE—MODELS OF PRACTICE

Indicate frequency of theory/frames of reference used

	Never	Rarely	Occasionally	Frequently
Model of Human Occupation				
Occupational Adaptation				

Ecology of Human Performance				
Person–Environment–Occupation Model				
Biomechanical Frame of Reference				
Rehabilitation Frame of Reference				
Neurodevelopmental Theory				
Sensory Integration				
Behaviorism				
Cognitive Theory				
Cognitive Disability Frame of Reference				
Motor Learning Frame of Reference				
Other (list)				

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)

Case study applying the Practice Framework	1	2	3	4	5	N/A
Evidence-based practice presentation:	1	2	3	4	5	N/A
Topic:						
Revision of site-specific fieldwork objectives	1	2	3	4	5	N/A
Program development	1	2	3	4	5	N/A
Topic:						
In-service/presentation	1	2	3	4	5	N/A
Topic:						
Research	1	2	3	4	5	N/A
Topic:						
Other (list)	1	2	3	4	5	

ASPECTS OF THE ENVIRONMENT

1 = Rarely 2 = Occasionally 3 = Frequently 4 = Consistent

	1	2	3	4
Staff and administration demonstrated cultural sensitivity				
The Practice Framework was integrated into practice				
Student work area/supplies/equipment were adequate				
Opportunities to collaborate with and/or supervise OTs, OTAs, and/or aides				
Opportunities to network with other professionals				

Opportunities to interact with other OT students				
Opportunities to interact with students from other disciplines				
Staff used a team approach to care				
Opportunities to observe role modeling of therapeutic relationships				
Opportunities to expand knowledge of community resources				
Opportunities to participate in research				
Additional educational opportunities (<i>specify</i>):				
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.

Name	Credentials	Frequency	Individual	Group
1.				
2.				
3.				
4.				
5.				

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)

	Adequacy for Placement					Relevance for Placement				
	Low					High				
Anatomy and Kinesiology	1	2	3	4	5	1	2	3	4	5
Neurodevelopment	1	2	3	4	5	1	2	3	4	5
Human development	1	2	3	4	5	1	2	3	4	5

Evaluation	1	2	3	4	5	1	2	3	4	5
Intervention planning	1	2	3	4	5	1	2	3	4	5
Interventions (individual, group, activities, methods)	1	2	3	4	5	1	2	3	4	5
Theory	1	2	3	4	5	1	2	3	4	5
Documentation skills	1	2	3	4	5	1	2	3	4	5
Leadership	1	2	3	4	5	1	2	3	4	5
Professional behavior and communication	1	2	3	4	5	1	2	3	4	5
Therapeutic use of self	1	2	3	4	5	1	2	3	4	5
Level I fieldwork	1	2	3	4	5	1	2	3	4	5
Program development	1	2	3	4	5	1	2	3	4	5

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

<input type="checkbox"/> Informatics	<input type="checkbox"/> Occ. as Life Org	<input type="checkbox"/> A & K	<input type="checkbox"/> Foundations	<input type="checkbox"/> Level I FW
<input type="checkbox"/> Pathology	<input type="checkbox"/> Neuro	<input type="checkbox"/> Administration	<input type="checkbox"/> Theory	<input type="checkbox"/> Peds electives
<input type="checkbox"/> Env. Competence	<input type="checkbox"/> Research courses	<input type="checkbox"/> Prog design/eval	<input type="checkbox"/> Consult/collab	<input type="checkbox"/> Older adult elect.
<input type="checkbox"/> Interventions	<input type="checkbox"/> Evaluations	<input type="checkbox"/> Adapting Env	<input type="checkbox"/> Human comp.	<input type="checkbox"/> Community elect.
<input type="checkbox"/> Social Roles	<input type="checkbox"/> History	<input type="checkbox"/> Occupational Sci	<input type="checkbox"/> Other:	

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

SUMMARY

1 = Strongly disagree 2 = Disagree 3 = No Opinion 4 = Agree 5 = Strongly agree					
	1	2	3	4	5
Expectations of fieldwork experience were clearly defined					
Expectations were challenging but not overwhelming					
Experiences supported student's professional development					
Experiences matched student's expectations					

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.

Indicate the number that seems descriptive of each fieldwork educator.
Please make a copy of this page for each individual.

FIELDWORK EDUCATOR NAME: _____

FIELDWORK EDUCATOR YEARS OF EXPERIENCE: _____

1 = Strongly Disagree				
2 = Disagree				
3 = No opinion				
4 = Agree				
5 = Strongly agree				
1	2	3	4	5

Provided ongoing positive feedback in a timely manner					
Provided ongoing constructive feedback in a timely manner					
Reviewed written work in a timely manner					
Made specific suggestions to student to improve performance					
Provided clear performance expectations					
Sequenced learning experiences to grade progression					
Used a variety of instructional strategies					
Taught knowledge and skills to facilitate learning and challenge student					
Identified resources to promote student development					
Presented clear explanations					
Facilitated student's clinical reasoning					
Used a variety of supervisory approaches to facilitate student performance					

Elicited and responded to student feedback and concerns					
Adjusted responsibilities to facilitate student's growth					
Supervision changed as fieldwork progressed					
Provided a positive role model of professional behavior in practice					
Modeled and encouraged occupation-based practice					
Modeled and encouraged client-centered practice					
Modeled and encouraged evidence-based practice					

Frequency of meetings/types of meetings with supervisor (value/frequency):

General comments on supervision:

AOTA SEFWE Task Force, June 2006

LEARNING CONTRACT

Level II Fieldwork

Student Name:

Site:

Overall Goal:

EXAMPLE	Midterm Score	SITE SPECIFIC Goals to be met by Final	Feedback (week 8)	Feedback (week 10)	FINAL
1. Adheres to ethics	3	On Target	On Target	On Target	See Fieldwork Performance Evaluation
31. Produces work in expected time frame	2	Student will manage a full caseload of 6 patients/clients including daily notes weekly notes, and discharge summaries.	2 Student is able to successfully manage a caseload of 5 clients but needs to work on . . .	3 Student is able to successfully manage a caseload of 6 clients but . . .	

Section and Criteria	Midterm Score ()	SITE SPECIFIC Goals to be met by ()	Feedback by ()	Feedback by ()	Feedback Week_____		
Section I. Fundamentals of Practice:							

1. Adheres to ethics							
2. Adheres to safety regulations							
3. Ensures safety of self and others							
Section II. Basic Tenets of Occupational Therapy:							
4. Articulates values and beliefs							
5. Articulate value of occupation							
6. Articulate the role of the OT							
Section III. Screening and Evaluation:							
7. Articulates clear rationale for evaluation							
8. Obtains sufficient and necessary information							

9. Selects relevant screening and assessment tools							
10. Determines occupational profile and occupational performance							
11. Evaluates and analyzes client factors and contexts							
12. Administers standardized and non-standardized assessments and surveys accurately and efficiently							
13. Modifies evaluation procedures							
14. Interprets evaluation results							
15. Synthesizes and documents the results of the evaluation process							
Section IV. Intervention:							

16. Articulates clear and logical rationale for Intervention process							
17. Establishes accurate and appropriate client-centered plan							
18. Uses evidence from research and relevant resources							
19. Selects client-centered and occupation- based interventions that motivate and challenge							
20. Implements client-centered and occupation-based intervention plans							
21. Chooses and modifies intervention approach to achieve established goals							
22. Modifies task and/or environment to maximize client performance							
23. Modifies intervention plan and determines need for continuation or discontinuation of services							

24. Documents client's response to services							
Section V. Management of Occupational Therapy Services:							
25. Demonstrates through practice or discussion ability to collaborate with and assign tasks to OT aide or others							
26. Demonstrates through practice or discussion an understanding of costs and funding systems							
27. Demonstrates knowledge about the organization							
28. Meets productivity standards							
Section VI. Communication and Professional Behaviors:							
29. Communicates clearly and effectively							
30. Produces clear and accurate documentation							

<i>31. Collaborates with FWE(s) to maximize the learning experience</i>							
<i>32. Takes responsibility for attaining professional competence</i>							
<i>33. Responds constructively to feedback in a timely manner</i>							
<i>34. Demonstrates consistent and acceptable work behaviors</i>							
<i>35. Demonstrates effective time management</i>							
<i>36. Manages relationships effectively</i>							
<i>37. Demonstrates respect for diversity</i>							
TOTAL							

Student's signature: _____

Date: _____

Fieldwork Educators signature: _____

Date: _____

Academic Fieldwork Educators signature: _____

Date: _____

Appendix C: Medical Requirements & Forms



AUTHORIZATION FOR RELEASE OF PROTECTED HEALTH INFORMATION

I authorize MyHealthSaintFrancis to release information from the record of:
(Name of Facility/Person)

Patient Name		Birth Date	Last 4 digits SSN	
<u>Saint Francis University Department of Occupational Therapy</u>		<u> </u>	<u>014-472-3899</u>	<u>014-472-3950</u>
Facility/Person to Receive Records		Phone	FAX	
Mailing address of facility or person to whom records are to be released:				
<u>117 Evergreen Drive</u>		<u>Loretto</u>	<u>PA</u>	<u>15940</u>
Street		City	State	Zip Code

- A. Records are requested for the purpose of: Continuing Care/Medical Facility Legal Personal Use Insurance
(Please check one): Other: Clinical Notation Note: Purpose is not required for patient access.
- B. Disclosure Format: Paper CD FAX (Providers Only) Other: _____
Method Received: US Mail In-Person Pickup FAX (Providers Only) (fax number): _____
 Email: _____ Direct Address: _____
- C. Parts 1 and 2 below must be completed to properly identify the records to be released.

1. Type of records to be released and date(s) of service (check all that apply):

Inpatient - Dates: _____ Emergency Dept- Dates: _____ Physician Office/Clinic

Same Day Surgery -- Dates: _____ Outpatient - Dates: _____ Other _____

2. Specific information to be released (check all that apply): * For Radiology Images, please contact location where test was performed

<input checked="" type="checkbox"/> Abstract (H&P, Consult, Test Results, Discharge Summary)	<input type="checkbox"/> Allergies	<input type="checkbox"/> Emergency Department Report	<input type="checkbox"/> Operative Report	<input type="checkbox"/> Problem List
<input type="checkbox"/> Consultation Report	<input checked="" type="checkbox"/> History & Physical Exam	<input type="checkbox"/> Pathology Report	<input type="checkbox"/> Pathology Report	<input type="checkbox"/> Procedure List
<input type="checkbox"/> Diagnostic Tests (cardiology studies, ECHO, EEG, EMG, pulmonary function, audiology)	<input checked="" type="checkbox"/> Laboratory Report/Test	<input type="checkbox"/> Physician Office/Clinic	<input type="checkbox"/> Physician Orders	<input type="checkbox"/> Psych Evaluation
<input type="checkbox"/> Discharge Instructions	<input checked="" type="checkbox"/> Medication Administration Records	<input type="checkbox"/> Physician Progress Notes	<input type="checkbox"/> Radiology Report*	<input type="checkbox"/> Rehabilitation Records
<input type="checkbox"/> Discharge Summary	<input type="checkbox"/> Nurses Notes			
<input type="checkbox"/> EKG Report				
<input type="checkbox"/> Other, specify: _____				

HIV-related information contained in the parts of the records indicated above will be released through this authorization unless otherwise indicated. Do not release

A CHECK MARK IS REQUIRED TO release information from a licensed mental health facility, licensed drug and alcohol facility

Drug/Alcohol Mental Health (Psychiatric)

I understand that this Authorization is effective for a period of 90 days from the date of signature, unless otherwise specified below. No time frame may exceed one year from the date of signature. I understand that I have the right to revoke this authorization at any time by sending a written request to the entity/person I authorized above to release the information. See side two of this form for additional patient rights and responsibilities. If applicable, specify other expiration date/event here: one full year

Date of Signature	Signature of Patient (14 years of age or older) may authorize release of inpatient & outpatient mental health information from a licensed facility. A minor can authorize release of Drug & Alcohol treatment information from a licensed facility.	Date of Signature	Signature of Authorized Representative
			Appropriate paperwork required:
			<input type="checkbox"/> Parent or Legal Guardian (copy of guardianship order attached)
			<input type="checkbox"/> Power of Attorney (copy attached)
			<input type="checkbox"/> Next of Kin of Deceased (copy of death certificate attached)
			<input type="checkbox"/> Executor of Estate (letter of administration or testamentary attached)

ORAL AUTHORIZATION (for persons physically unable to sign)
NOT Applicable to HIV related information or Drug & Alcohol Treatment information
I witness that the patient understood the nature of this release and freely gave their oral authorization. (two witnesses are required)

Date	Witness #1	Date	Witness #2
_____	_____	_____	_____



AUTHORIZATION FOR RELEASE OF PROTECTED HEALTH INFORMATION

Additional Patient Rights and Responsibilities

Please be aware that health care facilities are authorized by Pennsylvania State law to charge for reproduction of medical records and that charges may be associated with this request. Requestors may be notified in advance of the amount due for the request and records will be sent upon receipt of payment.

- A disclosure statement, as required by law, will accompany all records released.
- Release of my records will be for the purpose stated on this form. Only those items checked off or listed will be released.
- Although applicable law may prohibit re-disclosure of these records, I understand that it is possible that the facility/person that receives the records may re-disclose the information, therefore (1) UPMC and its staff/employees have no responsibility or liability as a result of a redisclosure and (2) such information would no longer be protected by the Privacy Rule.
- My decision to revoke the Authorization does not apply to any release of my records that may have taken place prior to the date of my revocation of the Authorization.
- My decision to revoke the Authorization may result in my insurance company not being able to pay for my medical care and I understand that I may be responsible for payment of the claim. To revoke your Authorization, please send your request in writing to the facility listed on the front of this form.
- UPMC will not condition treatment, payment, enrollment or eligibility of benefits on whether I sign this authorization.
- In accordance with 4 Pa Code 255.5 (b), Drug & Alcohol treatment information to be released to judges, probation or parole officers, insurance company, health or hospital plan or government officials shall be restricted to the following: 1) Whether the client is or is not in treatment, 2) The prognosis of the client, 3) The nature of the program, 4) A brief description of the progress of the client, 5) A short statement as to whether the client has relapsed into drug or alcohol abuse and the frequency of such relapse.
- By signing this authorization, the patient/requestor acknowledges and understands the risk associated with the communication of emails between UPMC and the recipient and consent as outlined herein, as well as other instructions that UPMC may impose to communicate via email.
- I am entitled to a copy of this completed Authorization form.

Saint Francis University Department of Occupational Therapy Professional Student Medical Clearance Requirements

The following items are **required** for medical clearance for each student to begin their clinical rotation. Please review your Student Health Portal to ensure the following requirements have been completed. If these requirements are not completed through the MyHealth Saint Francis clinic on campus, **students are responsible** to upload documentation of completion of these items to your Student Health Portal by the date required by your academic department.

IMMUNIZATIONS:

- Polio
**If no documentation, must complete titer*
- Hepatitis B series
- MMR series
- Varicella
**2 dose series, or date of diagnosis from medical record*
- Tdap
**Must have booster within 10 years of beginning clinical*
- Seasonal Influenza Vaccine
**Flu begins in August – due before October 1st*
- Covid Vaccine
- Traditional students should have their immunization records on file already and do not need to resubmit.
- Transfer students must ensure the following immunizations are submitted by the end of the first week of classes.

TITERS:

- Rubeola (Measles)
- Rubella
- Mumps
- Varicella
- Hepatitis B (Surface antibody)

v Clinic

Date: 3/1/2023

Time: 9:00 am – 12:00 pm

**Your instructor will notify you of your clinic time.*

Location: MyHealth Saint Francis Clinic

***** If a student's titer comes back negative (meaning they no longer carry immunity), they will be required to receive the appropriate booster(s) in the timeframe indicated by student health. The student will receive an email from student health providing instructions in this situation.**

URINE DRUG SCREEN: Student will be notified as to time and location by their department/instructor.

2-Step Intradermal PPDs: *Required yearly*

- Schedule an appointment at a time that is convenient for you at the MyHealth Saint Francis clinic using this link - MyHealth@School-Saint Francis -Online Scheduling.
- 1st and 2nd step PPD intradermal injections are completed Monday – Wednesday from 8:00 am – 3:00 pm to allow for PPD read to be completed in the clinic 48 to 72 hours after injection.

PHYSICAL EXAM: *Required yearly*

- May have completed at MyHealth Saint Francis clinic. Please use the link to schedule appointment – these are completed on an individual basis. MyHealth@School-Saint Francis -Online Scheduling
- May also be completed by private physician. Request a paper copy of exam to submit to clinical site if required. Upload a copy of completed physical to the Student Health Portal.

RELEASE OF PERSONAL HEALTH INFORMATION FORM: *Required yearly*

- Document only allowing personal health information to be shared for one full year. **The student is responsible for uploading this form to their student health portal on a yearly basis.**

TOTAL COST BREAKDOWN FOR FIELDWORKS

Level I Fieldwork

REQUIREMENT	COMPLETED	COST*
Titers: <ul style="list-style-type: none"> ◆ Hepatitis B ◆ Measles ◆ Mumps ◆ Rubella ◆ Varicella ◆ Hepatitis C 	Titers Clinic occurs in early March, before Spring Break (<i>prior to the start of Summer I</i>)	\$25 \$25 \$25 \$25 \$25 \$30
Clearances: yearly <ul style="list-style-type: none"> ◆ Child Abuse ◆ FBI Fingerprinting ◆ Criminal Record 	Student applies for these April of 3 rd year	\$13 \$22.60 \$22
CPR Training	Training session occurs first week of Summer I - (covered for two years)	\$17.50
Clinical ID	Student goes to University Police for this at the start of fall semester	\$10
Physical – yearly	Student to schedule –Due: April of 3 rd year	Free
2-step PPD - yearly	Student to schedule? Due: April of 3 rd year	\$30
N-95 Fit Test	Student to schedule? Due: Spring of 3 rd year	\$40
Flu Vaccine - yearly	Student to schedule – must be done between Aug. 1 & Oct. 1 each year	Not available at the UPMC MyHealth SFU Clinic; must go elsewhere
Drug Screen (<i>if required by FW site</i>)	Will be scheduled by AFWC prior to start of Level I FW	\$45
TOTAL COST:		\$345.10

*All medical requirement costs listed are those from the UPMC MyHealth SFU Clinic; costs may vary if you go somewhere else.

Level II Fieldwork:

REQUIREMENT	COMPLETED	COST*
Clearances: yearly <ul style="list-style-type: none"> ◆ Child Abuse ◆ FBI Fingerprinting ◆ Criminal Record 	Students apply for these April of 4 th year.	\$13 \$22.60 \$22
Physical – yearly	April of 4 th year	FREE
2-step PPD - yearly	April of 4 th year	\$30
Flu Vaccine - yearly	Student to schedule – must be done between Aug. 1 & Oct. 1 each year	Not available at the UPMC MyHealth SFU Clinic; must go elsewhere
Drug Screen (<i>if required by FW site</i>)	Will be scheduled by AFWC prior to start of Level II FW	\$45
TOTAL COST:		\$287.60

*All medical requirement costs listed are those from the UPMC MyHealth SFU Clinic; costs may vary if you go somewhere else.

The following vaccinations are required to begin fieldwork. If you do not have them completed, they can be completed at UPMC MyHealth SFU clinic for the listed price

REQUIREMENT	COST
Polio (<i>If no documentation, must complete titer</i>)	Not available at the UPMC MyHealth SFU Clinic; must go to elsewhere
Hepatitis B series	\$75/dose
MMR series	\$90/dose
Varicella (<i>2 dose series, or date of diagnosis from medical record</i>)	\$150/dose
Tdap (<i>Must have booster within 10 years of beginning clinical</i>)	\$60/dose
COVID-19	Not available at the UPMC MyHealth SFU Clinic; must go elsewhere
COVID-19 Booster (<i>if required by FW site</i>)	Not available at the UPMC MyHealth SFU Clinic; must go elsewhere

Appendix D: AOTA Fieldwork Data Form

AOTA Fieldwork Data Form

Date:

Name of Facility:

Address: Street:

City:

State:

Zip:

FW I			FW II		
Contact Person:		Credentials:	Contact Person:		Credentials:
Phone:	Email:		Phone:	Email:	

Director:	Initiation Source:	Corporate Status:	Preferred Sequence of FW: <small>ACOTE Standards B.10.6</small>
Phone:	<input type="checkbox"/> FW Office	<input type="checkbox"/> For Profit	<input type="checkbox"/> Any
Fax:	<input type="checkbox"/> FW Site	<input type="checkbox"/> Nonprofit	<input type="checkbox"/> Second/Third only; First must be in:
Website address:	<input type="checkbox"/> Student	<input type="checkbox"/> State Gov't	<input type="checkbox"/> Full-time only <input type="checkbox"/> Part-time option
		<input type="checkbox"/> Federal Gov't	<input type="checkbox"/> Prefer full-time

OT Fieldwork Practice Settings:				
Hospital-based settings	Community-based settings	School-based settings	Age Groups:	Number of Staff:
<input type="checkbox"/> Inpatient Acute	<input type="checkbox"/> Pediatric Community	<input type="checkbox"/> Early Intervention	<input type="checkbox"/> 0–5	OTRs:
<input type="checkbox"/> Inpatient Rehab	<input type="checkbox"/> Behavioral Health Community	<input type="checkbox"/> School	<input type="checkbox"/> 6–12	OTAs/COTAs:
<input type="checkbox"/> SNF/Sub-Acute/Acute Long-Term Care	<input type="checkbox"/> Older Adult Community Living	Other area(s)	<input type="checkbox"/> 13–21	Aides:
<input type="checkbox"/> General Rehab Outpatient	<input type="checkbox"/> Older Adult Day Program		<input type="checkbox"/> 22–64	PT:
<input type="checkbox"/> Outpatient Hands	<input type="checkbox"/> Outpatient/hand private practice	Please specify:	<input type="checkbox"/> 65+	Speech:
<input type="checkbox"/> Pediatric Hospital/Unit	<input type="checkbox"/> Adult Day Program for DD			Resource Teacher:
<input type="checkbox"/> Pediatric Hospital Outpatient	<input type="checkbox"/> Home Health			Counselor/Psychologist:
<input type="checkbox"/> Inpatient Psychiatric	<input type="checkbox"/> Pediatric Outpatient Clinic			Other:

Student Prerequisites (check all that apply) <small>ACOTE Standard C.1.2</small>		Health requirements:	
<input type="checkbox"/> CPR	<input type="checkbox"/> First aid	<input type="checkbox"/> HepB	<input type="checkbox"/> Physical Check up
<input type="checkbox"/> Medicare/Medicaid fraud check	<input type="checkbox"/> Infection control training	<input type="checkbox"/> MMR	<input type="checkbox"/> Varicella
<input type="checkbox"/> Criminal background check	<input type="checkbox"/> HIPAA training	<input type="checkbox"/> Tetanus	<input type="checkbox"/> Influenza
<input type="checkbox"/> Child protection/abuse check	<input type="checkbox"/> Prof. liability ins.	<input type="checkbox"/> Chest x-ray	Please list any other requirements:
<input type="checkbox"/> Adult abuse check	<input type="checkbox"/> Own transportation	<input type="checkbox"/> Drug screening	
<input type="checkbox"/> Fingerprinting	<input type="checkbox"/> Interview	<input type="checkbox"/> TB/Mantoux	

Please list how students should prepare for a FW II placement such as doing readings, learning specific evaluations and interventions used in your setting: ACOTE Standards C.1.2, C.1.11

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Student work schedule and outside study expected:	Other	Describe level of structure for student?	Describe level of supervisory support for student?
Schedule hrs/week/day:	Room provided <input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> High	<input type="checkbox"/> High
Do students work weekends? <input type="checkbox"/> yes <input type="checkbox"/> no	Meals <input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> Moderate	<input type="checkbox"/> Moderate
Do students work evenings? <input type="checkbox"/> yes <input type="checkbox"/> no	Stipend amount:	<input type="checkbox"/> Low	<input type="checkbox"/> Low
Describe the FW environment/atmosphere for student learning:			
Describe available public transportation:			

Types of OT interventions addressed in this setting (check all that apply):

Occupations: Client-directed occupations that match and support identified participation level goals (check all that apply):		
<i>ACOTE Standards C.1.8, C.1.11, C.1.12</i>		
<p>Activities of Daily Living (ADL)</p> <input type="checkbox"/> Bathing/showering <input type="checkbox"/> Toileting and toilet hygiene <input type="checkbox"/> Dressing <input type="checkbox"/> Swallowing/eating <input type="checkbox"/> Feeding <input type="checkbox"/> Functional mobility <input type="checkbox"/> Personal device care <input type="checkbox"/> Personal hygiene and grooming <input type="checkbox"/> Sexual activity	<p>Instrumental Activities of Daily Living (IADL)</p> <input type="checkbox"/> Care of others/pets <input type="checkbox"/> Care of pets <input type="checkbox"/> Child rearing <input type="checkbox"/> Communication management <input type="checkbox"/> Driving and community mobility <input type="checkbox"/> Financial management <input type="checkbox"/> Health management and maintenance <input type="checkbox"/> Home establishment and management <input type="checkbox"/> Meal preparation and clean up <input type="checkbox"/> Religious / spiritual activities and expression <input type="checkbox"/> Safety and emergency maintenance <input type="checkbox"/> Shopping	<p>Education</p> <input type="checkbox"/> Formal education participation <input type="checkbox"/> Informal personal education needs or interests exploration <input type="checkbox"/> Informal personal education participation
<p>Rest and Sleep</p> <input type="checkbox"/> Rest <input type="checkbox"/> Sleep preparation <input type="checkbox"/> Sleep participation	<p>Leisure</p> <input type="checkbox"/> Leisure exploration <input type="checkbox"/> Leisure participation	<p>Work</p> <input type="checkbox"/> Employment interests and pursuits <input type="checkbox"/> Employment seeking and acquisition <input type="checkbox"/> Job performance <input type="checkbox"/> Retirement preparation and adjustment <input type="checkbox"/> Volunteer exploration <input type="checkbox"/> Volunteer participation
<p>Play</p> <input type="checkbox"/> Play exploration <input type="checkbox"/> Play participation		<p>Social Participation</p> <input type="checkbox"/> Community <input type="checkbox"/> Family <input type="checkbox"/> Peer/friend

Activities: Designed and selected to support the development of skills, performance patterns, roles, habits, and routines that enhance occupational engagement

- Practicing an activity
- Simulation of activity
- Role play

Examples:

Preparatory Methods and Tasks: Methods, adaptations and techniques that prepare the client for occupational performance

- Preparatory tasks
- Exercises
- Physical agent modalities
- Splinting
- Assistive technology
- Wheelchair mobility

Examples:

Education: describe

Training: describe

Advocacy: describe

Group Interventions: describe

Method of Intervention

Direct Services/Caseload for entry-level OT

- One-to-one:
- Small group(s):
- Large group:

Discharge/Outcomes of Clients (% clients)

- Home
- Another medical facility
- Home health

Outcomes of Intervention

- Occupational performance improvement and/or enhancement
- Health and Wellness
- Prevention
- Quality of life
- Role competence
- Participation

OT Intervention Approaches

- Create, promote health/habits
- Establish, restore, remediate
- Maintain
- Modify, facilitate compensation, adaptation
- Prevent disability

Theory/Frames of Reference/Models of Practice

- Acquisitional
- Biomechanical
- Cognitive/Behavioral
- Coping
- Developmental
- Ecology of Human Performance
- Model of Human Occupation (MOHO)
- Occupational Adaptation
- Occupational Performance
- Person-Environment-Occupation (PEO)
- Person-Environment-Occupational Performance (PEOP)
- Psychosocial
- Rehabilitation frames of reference
- Sensory Integration
- Other (please list):

Please list the most common screenings and evaluations used in your setting:

Identify safety precautions important at your FW site

- Medications
- Postsurgical (list procedures)
- Contact guard for ambulation
- Fall risk
- Other (describe):
- Swallowing/choking risks
- Behavioral system/ privilege level (locked areas, grounds)
- Sharps count
- 1 to 1 safety/suicide precautions

Performance skills, patterns, contexts and client factors addressed in this setting (check all that apply): *ACOTE Standard C. 1.12*

<p>Performance Skills:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Motor skills <input type="checkbox"/> Process skills <input type="checkbox"/> Social interaction skills <p>Performance Patterns:</p> <p>Person:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Habits <input type="checkbox"/> Routines <input type="checkbox"/> Rituals <input type="checkbox"/> Roles <p>Group or Population:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Habits <input type="checkbox"/> Routines <input type="checkbox"/> Rituals <input type="checkbox"/> Roles 	<p>Client Factors:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Values <input type="checkbox"/> Beliefs <input type="checkbox"/> Spirituality <input type="checkbox"/> Mental functions (affective, cognitive, perceptual) <input type="checkbox"/> Sensory functions <input type="checkbox"/> Neuromusculoskeletal and movement-related functions <input type="checkbox"/> Muscle functions <input type="checkbox"/> Movement functions <input type="checkbox"/> Cardiovascular, hematological, immunological, and respiratory system functions <input type="checkbox"/> Voice and speech functions; digestive, metabolic, and endocrine system functions; <input type="checkbox"/> Skin and related-structure functions 	<p>Context(s):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Cultural <input type="checkbox"/> Personal <input type="checkbox"/> Temporal <input type="checkbox"/> Virtual <p>Environment:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Physical <input type="checkbox"/> Social
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Most common services priorities (check all that apply):

<input type="checkbox"/> Direct service	<input type="checkbox"/> Meetings (team, department, family)	<input type="checkbox"/> Consultation	<input type="checkbox"/> Billing
<input type="checkbox"/> Discharge planning	<input type="checkbox"/> Client education	<input type="checkbox"/> In-service training	<input type="checkbox"/> Documentation
<input type="checkbox"/> Evaluation	<input type="checkbox"/> Intervention		

<p>Target caseload/productivity for fieldwork students:</p> <p>Productivity (%) per 40-hour work week:</p> <p>Caseload expectation at end of FW:</p> <p>Productivity (%) per 8-hour day:</p> <p>Number groups per day expected at end of FW:</p>	<p>Documentation: Frequency/Format (briefly describe) :</p> <ul style="list-style-type: none"> <input type="checkbox"/> Handwritten documentation: <input type="checkbox"/> Computerized medical records: <p>Time frame requirements to complete documentation:</p>
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<p>Administrative/Management Duties or Responsibilities of the OT/OTA Student:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Schedule own clients <input type="checkbox"/> Supervision of others (Level I students, aides, OTA, volunteers) <input type="checkbox"/> Budgeting <input type="checkbox"/> Procuring supplies (shopping for cooking groups, client/intervention-related items) <input type="checkbox"/> Participating in supply or environmental maintenance <input type="checkbox"/> Other: 	<p>Student Assignments. Students will be expected to successfully complete:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Research/EBP/Literature review <input type="checkbox"/> In-service <input type="checkbox"/> Case study <input type="checkbox"/> In-service participation/grand rounds <input type="checkbox"/> Fieldwork project (describe): <input type="checkbox"/> Field visits/rotations to other areas of service <input type="checkbox"/> Observation of other units/disciplines <input type="checkbox"/> Other assignments (please list):
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Optional Data Collection:

The questions included in this section may be used by academic programs to demonstrate compliance with the Accreditation Council for Occupational Therapy Education (ACOTE) Standards documentation for fieldwork.

1. Please identify any external review agencies that accredit / recognize this FW setting and year of accreditation/ recognition. Examples: JCAHO, CARF, Department of Health, etc. .

Agency for External Review: (name)

Year of most recent review:

Summary of outcomes of OT Department review:

Agency for External Review: (name)

Year of most recent review:

Summary of outcomes of OT Department review:

Agency for External Review: (name)

Year of most recent review:

Summary of outcomes of OT Department review:

2. Describe the fieldwork site agency stated mission or purpose (can be attached).
3. OT Curriculum Design Integrated with Fieldwork Site (insert key OT academic curricular themes here) *ACOTE Standards C.1.2, C.1.3,C.1.7, C.1.8, C.1.11,C.1.12*
 - a. How are occupation-based needs evaluated and addressed in your OT program??
 - b. Describe how you seek to include client-centered OT practice. How do clients participate in goal setting and intervention activities?
 - c. Describe how psychosocial factors influence engagement in occupational therapy services.
 - d. Describe how you address clients' community-based needs in your setting.
4. How do you incorporate evidence-based practice into interventions and decision making? Are FW students encouraged to provide evidence for their practice? *ACOTE Standards C.1.3, C.1.11*
5. Please describe the FW Program and how students fit into the program. Describe the progression of student supervision from novice to entry-level practitioner using direct supervision, co-treatment, and monitoring, as well as regular formal and informal supervisory meetings. Describe the fieldwork objectives, weekly fieldwork expectations, and record keeping of supervisory sessions conducted with student. Please mail a copy of the FW student objectives, weekly expectations for the Level II FW placement, dress code, and copy of an entry-level job description with essential job functions to the AFWC. *ACOTE Standards C.1.1, C.1.2, C.1.3, C.1.4, C.1.8, C.1.9*
6. Please describe the background of supervisors by attaching a list of practitioners who are FW educators including their academic program, degree, years of experience since initial certification, and years of experience supervising students) *ACOTE Standards C.1.9, C.1.14, C.1.17, C.1.19*
7. Describe the training provided for OT staff for effective supervision of students (check all that apply). *ACOTE Standards C.1.9, C.1.15, C.1.16*
 - Supervisory models
 - Training on use of FW assessment tools (such as the AOTA Fieldwork Performance Evaluation–FWPE, the Student Evaluation of Fieldwork

Experience—SEFW, and the Fieldwork Experience Assessment Tool—FEAT)

Clinical reasoning

Reflective practice

Comments:

8. Please describe the process for record keeping of supervisory sessions with a student, the student orientation process to the agency, OT services, and the fieldwork experience. *ACOTE Standards C.1.2, C.1.3, C.1.10*

Supervisory Patterns—Description (respond to all that apply)

1:1 Supervision model:

Multiple students supervised by one supervisor:

Collaborative supervision model:

Multiple supervisors share supervision of one student; number of supervisors per student:

Non-OT supervisors:

9. Describe funding and reimbursement sources and their impact on student supervision.

Status/Tracking Information Sent to Facility:

Date:

ACOTE Standard C.1.6

Which documentation does the fieldwork site need?

Fieldwork Agreement/Contract?

OR

Memorandum of Understanding (MOU)?

Which FW Agreement will be used?: OT Academic Program Fieldwork Agreement Fieldwork Site Agreement/ Contract

Title of parent corporation (if different from facility name):

Type of business organization (Corporation, partnership, sole proprietor, etc.):

State of incorporation:

Fieldwork site agreement negotiator:

Phone:

Email:

Address (if different from facility):

Street:

City:

State:

Zip:

Name of student:

Potential start date for fieldwork:

Any notation or changes that you want to include in the initial contact letter:

Information Status *ACOTE Standards C.1.1, C.1.2, C.1.3, C.1.8,*

New general facility letter sent:

Level I Information Packet sent:

Level II Information Packet sent:

Mail contract with intro letter (sent):

Confirmation sent:

Model behavioral objectives:

Week-by-week outline:

Other information:

Database entry:

Facility information:

Student fieldwork information:

Make facility folder:

Print facility sheet:

Revised 8/1/2017

Appendix E: Communication / Education Log

COMMUNICATION / OT EDUCATION LOG

Saint Francis University
Department of Occupational Therapy

Student: _____ Dates of Fieldwork Sites: _____

Date of Interaction with Occupational Therapist	Type of Supervision (i.e. phone call, email, face-to-face, fax, video conferencing)	Hours/Minutes of Supervision	Content of Interaction	Initials

Appendix F: Fieldwork Experience Assessment Tool

FEAT (FIELDWORK EXPERIENCE ASSESSMENT TOOL)

FEAT - 1

MID-TERM

FIELDWORK EXPERIENCE ASSESSMENT TOOL (FEAT)

Student's name:	Supervisor(s) names:	
Facility name:		
Type of fieldwork experience (setting, population, level):	Date:	Week #:

Context:

The Fieldwork Experience Assessment Tool (FEAT) is the result of an American Occupational Therapy Foundation qualitative study completed by six occupational therapy programs across the United States and Puerto Rico. Data was collected from fieldwork students and fieldwork educators. In their interviews, students and fieldwork educators described fieldwork education in terms of a dynamic triad of interaction among the environment, the fieldwork educator and the student. Interviewees indicated that a positive educational experience occurred when a balance existed among these three key components.

Purpose:

The FEAT identifies essential characteristics of the three key components. By providing a framework to explore the fieldwork experience, the FEAT can help students and fieldwork educators consider how to promote the best possible learning experience.

The purpose of the FEAT is to contribute to student and fieldwork educator discussions, so that reflection and problem solving can occur to enhance the fieldwork experience. The tool is designed to both assess the balance of the three key components, and to facilitate discussion about student and fieldwork educator behaviors and attitudes, and environmental resources and challenges. By mutually identifying issues present during fieldwork, the fieldwork educator and student can use the FEAT as a tool to promote dialogue and foster the identification of strategies to facilitate the just-right challenge. The FEAT may be used early in fieldwork as a tool to promote dialogue, or at any time throughout fieldwork as the need for problem solving emerges.

Directions:

In the Assessment Section, the FEAT is organized according to the three key components: environment, fieldwork educator, and student. Under each component, essential characteristics and examples are listed. These examples are not all-inclusive; new descriptors may be added to individualize the tool for different settings. The fieldwork educator and student, either individually or together, should complete the FEAT by describing each component using the continuum provided at the top of each section (limited → just right challenge → excessive).

Following the assessment portion of the FEAT, questions are provided to guide student and fieldwork educator discussion and problem solving. Collaboratively reflect upon the student and fieldwork educator descriptions on the FEAT to identify

commonalities and differences between the two perspectives, and identify patterns across the key components. Based on these discussions, develop strategies for a more balanced fieldwork experience. Consider environmental experiences and resources; fieldwork educator attitudes, behaviors and professional attributes; and/or student attitudes and behaviors that could enhance the experience. The examples listed within each section are intended to guide discussion between the fieldwork educator and student in an effort to create a successful fieldwork experience. Additional elements may be identified and included according to the nature of the setting or the fieldwork process.

Use of the FEAT at the end of the fieldwork experience is different than at midterm. At the end of the fieldwork the FEAT is completed exclusively by the student to provide "student-to-student" feedback based upon what characteristics the ideal student in this setting should possess to make the most of this fieldwork experience. This final FEAT is sent directly to CSU by the student.

FEAT - 2

A. Assessment Section

ENVIRONMENT	
I. VARIETY OF EXPERIENCES	Descriptions (Limited ↔ Just right challenge ↔ Excessive)
<p>A. Patients/Clients/Diagnoses</p> <ul style="list-style-type: none"> -Different diagnoses -Range of abilities for given diagnosis (complexity, function-dysfunction) -Diversity of clients, including socioeconomic & lifestyle 	
<p>B. Therapy approaches</p> <ul style="list-style-type: none"> -Engage in the entire therapy process (evaluation, planning, intervention, documentation) -Learn about different roles of therapist (direct service, consultation, education and administration) -Use variety of activities with clients -Observe and use different frames of reference/theoretical approaches -Use occupation vs. exercise 	
<p>C. Setting characteristics</p> <ul style="list-style-type: none"> -Pace (setting demands; caseload quantity) -Delivery system 	

II. RESOURCES	Descriptions (Limited ↔ Just right challenge ↔ Excessive)
A. OT Staff -See others' strengths and styles -Have multiple role models, resources and support	
B. Professional Staff -Observe and hear a different perspective on clients -See/experience co-treatments and team work to get whole person perspective -Have others to share ideas and frustrations	
C. OT Students -Able to compare observations & experiences -Exchange ideas	
FIELDWORK EDUCATOR	
I. ATTITUDE	Descriptions (Limited ↔ Just right challenge ↔ Excessive)
A. Likes Teaching/Supervising Students -Devote time, invests in students -Enjoy mental workout, student enthusiasm	
B. Available/Accessible -Take time	

FEAT - 3

FIELDWORK EDUCATOR (continued)	
C. Supportive -Patient -Positive and caring -Encourages questions -Encourages development of individual style	

<p>D. Open</p> <ul style="list-style-type: none"> -Accepting -Alternative methods -To student requests -Communication 	
<p>E. Mutual Respect</p>	
<p>II. TEACHING STRATEGIES</p>	<p>Descriptions (Limited \leftrightarrow Just right challenge \leftrightarrow Excessive)</p>
<p>A. Structure</p> <ul style="list-style-type: none"> -Organize information (set learning objectives, regular meetings) -Introduce treatment (dialogue, observation, treatment, dialogue) -Base structure on student need -Identify strategies for adjusting to treatment environment 	
<p>B. Graded Learning</p> <ul style="list-style-type: none"> -Expose to practice (observe, model) -Challenge student gradually (reduce direction, probing questions, independence) -Base approach on student learning style -Individualize based on student's needs -Promote independence (trial & error) 	
<p>C. Feedback/ Processing</p> <ul style="list-style-type: none"> -Timely, confirming -Positive & constructive (balance) -Guide thinking -Promote clinical reasoning 	
<p>D. Teaching</p> <ul style="list-style-type: none"> -Share resources and knowledge 	
<p>E. Team Skills</p>	

-Include student as part of team	
III. PROFESSIONAL ATTRIBUTES	Descriptions (Limited ↔ Just right challenge ↔ Excessive)
A. Role Model -Set good example -Enthusiasm for OT -Real person -Lifelong learning	

FEAT - 4

B. Teacher -Able to share resources and knowledge	
FIELDWORK STUDENT	
I. ATTITUDE	Descriptions (Limited ↔ Just right challenge ↔ Excessive)
A. Responsible for Learning -Active learner (ask questions, consult) -Prepare (review, read and research materials) -Self-direct (show initiative, is assertive) -Learns from mistakes (self-correct and grow)	
B. Open/Flexible -Sensitive to diversity (non-judgmental) -Responsive to client/consumer needs -Flexible in thinking (make adjustments, try alternate approaches)	
C. Confident -Comfort in knowledge and abilities -Comfort with making and learning from mistakes (take risks, branch out) -Comfort with independent practice (take responsibility)	

-Comfort in receiving feedback	
D. Responsive to Supervision -Receptive to feedback (open-minded, accept criticism) -Open communication (two-way)	
II. LEARNING BEHAVIORS	Descriptions (Limited ↔ Just right challenge ↔ Excessive)
A. Independent -Have and use knowledge and skills -Assume responsibility of OT without needing direction -Incorporate feedback into behavioral changes -Use "down time" productively -Become part of team	
B. Reflection -Self (processes feelings, actions and feedback) -With others (supervisor, peers, others)	
C. Active in Supervision -Communicate needs to supervisor (seek supervision for guidance and processing; express needs) -Ask questions	

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B. Discussion Section: Questions to Facilitate Dialogue and Problem Solving

1. A positive fieldwork experience includes a balance between the environment, fieldwork educator and student components. Collaboratively reflect upon the descriptions outlined by the student and fieldwork educator and identify perceptions below.

Common perspectives between student and fieldwork educator	Different perspectives between student and fieldwork educator
---	--

Environment	
Fieldwork Educator	
Student	

2. What patterns are emerging across the three key components?

3. What strategies or changes can be implemented to promote a successful fieldwork experience? Describe below:

Components of a Successful Fieldwork	Environment, Fieldwork Educator and/or Student Strategies and Changes to Promote Successful Fieldwork Experience at this Setting
Environment Experiences Resources	
Fieldwork Educator Attitudes Behaviors Professional attributes	
Student Attitudes Behaviors	

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This Fieldwork Assessment Tool (FEAT) was developed by The Fieldwork Research Team: Karen Adler, Karmen Brown, Lou Ann Griswold, Wendy Krupnick, Luz Muniz de Melendez and Patricia Stutz-Tanenbaum; project funded by The American Occupational Therapy Foundation; Reprinted by permission of the publisher

Appendix G: Weekly Summary / Performance Form

WEEKLY SUMMARY / PERFORMANCE FORM STRATEGIES / ACTIVITIES PLANNED FOR THE UPCOMING WEEK

TO BE COMPLETED VIA THE FIELDWORK EDUCATOR

Fieldwork Educator's Name: _____ Student's Name: _____

Week: 1 2 3 4 5 6 7 8 9 10 11 12

1. Three things that went well:
 - a.
 - b.
 - c.
2. Three things for the student to improve on:
 - a.
 - b.
 - c.
3. Measurable goals the student achieved this week:
 - a.
 - b.
 - c.
4. Measurable goals for student to achieve next week:
 - a.
 - b.
 - c.
5. Strategies to achieve goals (what will you suggest the student do, i.e., review charts, research tx protocols, etc.)

6. Overall I think this past week went:

Great	Okay	Fair	Poor
-------	------	------	------

7. Feedback for your student:

TO BE COMPLETED VIA THE STUDENT

- Strongly Agree: I agree with greater than 80% of the fieldwork educator’s comments
 Moderately Agree: I agree with 60 – 79% of the fieldwork educator’s comments
 Mildly Agree: I agree with 40 – 59% of the fieldwork educator’s comments
 Disagree: I agree with less than 40% of the fieldwork educator’s comments

Using the above scale, please rate the following comments.

Please note: If any statement receives less than “moderately agree,” (you agree with less than 60% of the fieldwork educator’s comments), please review with the fieldwork educator and modify as necessary.

	Strongly Agree	Moderately Agree	Mildly Agree	Disagree
1. Fieldwork Educators list of things that went well				
2. Fieldwork Educators list of things that the student needs improvement				
3. Fieldwork Educators list of goals the student achieved this week				
4. Fieldwork Educators goals for the student to achieve next week				
5. Fieldwork Educators identified strategies to assist student for achieving s/he goals				
6. Overall weekly assessment				

COMMENTS:

_____ Date

Student’s Signature

_____ Date

Fieldwork Educators Signature

WEEKLY SUMMARY / PERFORMANCE FORM
AND STRATEGIES / ACTIVITIES PLANNED FOR THE UPCOMING WEEK

TO BE COMPLETED VIA THE STUDENT

Student's Name: _____ Fieldwork Educator's Name: _____

Week: 1 2 3 4 5 6 7 8 9 10 11 12

1. Three things that went well:

- a.
- b.
- c.

2. Three things to improve on:

- a.
- b.
- c.

3. Goals achieved this week (make sure these goals are measurable):

- a.
- b.
- c.

4. Goals for next week (make sure these goals are measurable):

- a.
- b.
- c.

5. Strategies to achieve goals (what will you do - - - i.e., review charts, research tx protocols, etc.)

6. Overall I think this past week went:

Great

Okay

Fair

Poor

7. Feedback for your Fieldwork Educator:

TO BE COMPLETED VIA THE FIELDWORK EDUCATOR

- Strongly Agree: I agree with greater than 80% of the student’s comments
 Moderately Agree: I agree with 60 – 79% of the student’s comments
 Mildly Agree: I agree with 40 – 59% of the student’s comments
 Disagree: I agree with less than 40% of the student’s comments

Using the above scale, please rate the following comments.

Please note: If any statement receives less than “moderately agree,” (you agree with less than 60% of the student’s comments), please review with the student and have the student revise the form until a “moderately agree” consensus is reached.

	Strongly Agree	Moderately Agree	Mildly Agree	Disagree
1. Student’s list of things that went well				
2. Student’s list of things that need improvement				
3. Student’s list of goals achieved this week				
4. Student’s goals for next week				
5. Student’s identified strategies for achieving his/her goals				
6. Overall weekly assessment				

COMMENTS:

Student’s Signature

Date

Fieldwork Educators Signature

Date

Appendix H: Affiliation Agreement Template

SAINT FRANCIS UNIVERSITY AFFILIATION AGREEMENT

This agreement is entered into effective {INSERT DATE} between:

Saint Francis University	and	Site
School of Health Sciences		Street Address
PO Box 600		City, State Zip
Loretto, PA 15940		
(UNIVERSITY)		(Facility)

The School, accredited by Middle States Association of Schools and Colleges, wishes to provide Clinical/Fieldwork/Internship educational experiences for its students enrolled in academic programs. The Clinical/Fieldwork/Internship Site has the necessary facilities and personnel to provide such experiences for the students of the University. Therefore, School and Clinical/Fieldwork/Internship Site are desirous of establishing a relationship whereby students may receive, subject to the provisions of the Agreement, Clinical/Fieldwork/Internship training at the Clinical/Fieldwork/Internship Site in keeping with the mission to enrich the region with trained healthcare professionals.

RESPONSIBILITIES OF THE UNIVERSITY:

1. The University will retain full responsibility for the planning and execution of the educational program, including admission, philosophy, the curriculum, content, grading requirements for matriculation, progression, graduation, and accreditation.
2. The University will provide a Coordinator to serve as liaison between the University and the Clinical/Fieldwork/Internship Site, coordinate the Clinical/Fieldwork experience of the students, and assist the Clinical/Fieldwork/Internship Site as necessary to conduct an effective education program.
3. The number and scheduling of students to be placed at the Clinical/Fieldwork Site will be determined by mutual agreement between the Coordinator and the Clinical/Fieldwork/Internship Site.
4. The University will provide curriculum information to the Clinical/Fieldwork/Internship Site.
5. The University will place at the Clinical/Fieldwork/Internship Site only those students meeting all qualifications for participation in the academic program.
6. The University will hold confidential, all patient and Clinical/Fieldwork/Internship Site information to which they may have accessed, and will obtain appropriate authorization for the release of such information.
7. The students placed at and the Clinical/Fieldwork/Internship Site will be required to obtain personal and professional liability insurance in the amount of one million dollars per occurrence and three million dollars per aggregate. Proof of the liability insurance will be maintained at the University. It is the responsibility of the student to maintain his/her own health insurance coverage.
8. The University will maintain a file of verification of student's insurance coverage at the University. The Clinical/Fieldwork/Internship Site will have access to these files as necessary for licensing, accreditation or performance improvement purposes.
9. The University will inform the student that he or she is responsible for adherence to administrative policies, rules, standards, schedules, and practices of the facility. The student will be required to obtain and sign the necessary documentation required by the Clinical/Fieldwork/Internship Site policy, i.e. Confidentiality form.
10. The Coordinator will assume responsibility of assigning student grades in consultation with the on-site supervisor.
11. The University understands and agrees that this Agreement is not intended and will not be construed to create the relationship of agent, servant, employee, partner, joint venture, or association between the University, and of its students and the Clinical/Fieldwork/Internship Site.

12. The University will provide students with general education regarding safety, infection control including blood and body fluid precautions, and tuberculosis.
13. The University will require the student, prior to student assignments, to have completed a physical examination, current (at least yearly) negative PPD testing or evidence of no active tuberculosis disease, Hepatitis B immunization or refusal of an offer, and any other immunization deemed necessary by the University, students and the Clinical/Fieldwork/Internship Site.
14. The University will maintain a file of verification of student's physical examination, testing results, and immunizations at the University. The Clinical/Fieldwork Site will have access to these files as necessary for licensing, accreditation or performance improvement purposes.

AFFILIATION AGREEMENT

RESPONSIBILITIES OF THE CLINICAL/FIELDWORK/INTERNSHIP SITE:

1. The Clinical/Fieldwork/Internship Site will provide a planned program of Clinical/Fieldwork/Internship experiences designed in cooperation with the University. The student experience will be under supervision by the agreed upon facility employee.
2. The Clinical/Fieldwork/Internship Site will maintain full responsibility for the patient/client care and services provided at its facility.
3. The Clinical/Fieldwork/Internship Site will provide orientation to the students to the facility, including policies and procedures pertaining to the student.
4. The Clinical/Fieldwork/Internship Site agrees to release select information on clients to the student for Clinical/Fieldwork/Internship information/education research purposes only in order to fulfill assignments.
5. The Clinical/Fieldwork/Internship Site will provide the student opportunities to participate in patient/client care to accomplish clinical educational objectives under supervision, while realizing that the student must not be used to substitute for regular clinical or administrative staff.
6. The Clinical/Fieldwork/Internship Site will provide appropriate facilities such as parking, library, and cafeteria needed for use in the learning experience to the student and faculty members during Clinical/Fieldwork/Internship Site education assignments.
7. The Clinical/Fieldwork/Internship Site will evaluate the performance of students on a timely basis and will provide the University with such reports.
8. The Clinical/Fieldwork/Internship Site will assist the student in arranging for emergency medical care in the event of an injury or student illness while participating in Clinical/Fieldwork/Internship education activities. Neither the University nor the Clinical/Fieldwork/Internship Site will be liable for medical expenses incurred by the student. Financial responsibility remains with the student.
9. The Clinical/Fieldwork/Internship Site retains the right to terminate any student's Clinical/Fieldwork/Internship education experience due to reasons of conduct, unsatisfactory performance, or other reasonable cause after notifying and discussing such plans with the University.
10. The Clinical/Fieldwork/Internship Site will designate an individual as the Site Coordinator of Clinical/Fieldwork/Internship Education who will serve as liaison to the University, coordinate the Clinical/Fieldwork/Internship experience of the students, and assist with supervision.
11. The Clinical/Fieldwork/Internship Site will maintain professional liability insurance to cover their staff and employees.
12. The Clinical/Fieldwork/Internship Site will hold confidential all student and University information to which they may have access.

BOTH PARTIES AGREE:

1. This Affiliation Agreement may be terminated by either party upon ninety (90) days' notice in writing to the other. Such termination will not affect students placed at the Clinical/Fieldwork/Internship Site at the time notice is given.

2. The Agreement will begin on the Effective Date and continue for a period of one year. Thereafter, the Agreement will be renewed automatically for consecutive one year terms unless terminated by either party.
3. This Agreement may be revised by written agreement signed by both parties.
4. No individual will discriminate or be discriminated against, on the basis of race, color, age, national origin, sex, religion, disability, sexual orientation or health status.
5. This Agreement will be governed by the laws of this state.
6. Indemnification:

School: The University will indemnify the Clinical/Fieldwork/Internship Site, its officers, directors, and employees from any costs, damages, and fees, including reasonable attorney fees, awarded in an action against them to the extent that such costs, damages, and fees are directly caused by the negligence or willful misconduct of the University or its employees.

Clinical/Fieldwork/Internship Site: The Clinical/Fieldwork/Internship Site will indemnify the University, its officers, directors, employees, and students from any costs, damages, and fees, including reasonable attorney fees, awarded in an action against them to the extent that such costs, damages, and fees are directly caused by the negligence or willful misconduct of the clinical site or its employees.

CLINICAL/FIELDWORK/INTERNSHIP SITE

SAINT FRANCIS UNIVERSITY

By: _____

By: _____

Donald E. Walkovich, DHSc, MS, OTR/L, FAOTA
 Dean, School of Health Sciences and Education

Date: _____

Date: _____

 Name (Please Print)

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