



Occupational Therapy Assistant Program
Fieldwork II
Fieldwork Manual

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Occupational Therapy Fieldwork Education: Value and Purpose

The purpose of fieldwork education is to propel each generation of occupational therapy practitioners from the role of student to that of practitioner. Through the fieldwork experience, future practitioners achieve competence in applying the occupational therapy process and using evidence-based interventions to meet the occupational needs of a diverse client population. Fieldwork experiences may occur in a variety of practice settings, including medical, educational, and community-based programs. Moreover, fieldwork placements also present the opportunity to introduce occupational therapy services to new and emerging practice environments.

Fieldwork experiences constitute an integral part of the occupational therapy and occupational therapy assistant education curricula. Through fieldwork education, students learn to apply theoretical and scientific principles learned from their academic programs, to address actual client needs within the context of authentic practice environments. During fieldwork experiences, each student develops competency to ascertain client occupational performance needs to identify supports or barriers affecting health and participation, and to document interventions provided. Fieldwork education also provides opportunities for the student to develop advocacy, leadership, and managerial skills in a variety of practice settings, while incorporating principles of evidence-based practice and client-centered care. Finally, the student develops a professional identity as an occupational therapy practitioner, aligning his or her professional judgments and decisions with the American Occupational Therapy Association (AOTA) *Standards of Practice* (AOTA, 2015b) and the *Occupational Therapy Code of Ethics* (AOTA, 2015a).

As students proceed through their fieldwork experiences, performance expectations become progressively more challenging. *Level I fieldwork* experiences occur concurrently with academic coursework, and the goal “is to introduce students to the fieldwork experience, to apply knowledge to practice, and to develop understanding of the needs of clients” (Accreditation Council for Occupational Therapy Education® [ACOTE®], 2012, p. S61). Furthermore, Level I is “designed to enrich didactic coursework through directed observation and participation in selected aspects of the occupational therapy process” (ACOTE, 2012, p. S61).

Level II fieldwork experiences occur at or near the conclusion of the didactic phase of occupational therapy curricula and are designed to “develop competent, entry-level, generalist practitioners” (ACOTE, 2012, p. S62). Level II fieldwork features “in-depth experience(s) in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation” (ACOTE, 2012, p. S62). For the occupational therapist student, there is an additional exposure to “research, administration, and management of occupational therapy services” (ACOTE, 2012, p. S62). Students should be “exposed to a variety of clients across the lifespan and to a variety of settings” (ACOTE, 2012, p. S62).

The value of fieldwork transcends the obvious benefits directed toward the student. Supervising students enhances fieldwork educators’ own professional development by providing exposure to current practice trends, evidence-based practice, and research. Moreover, the experience of fieldwork supervision is recognized by the National Board for Certification in Occupational Therapy and many state regulatory boards as a legitimate venue for achieving continuing competency requirements for occupational therapy practitioners.

Another benefit to the fieldwork site of sponsoring a fieldwork education program is the recruitment of qualified occupational therapy personnel. Through the responsibilities expected during Level II fieldwork, occupational therapy staff and administration are given opportunity for an in-depth view of a student’s

potential as a future employee. In turn, an active fieldwork program allows the student, as a potential employee, to view firsthand the agency's commitment to the professional growth of its occupational therapy personnel and to determine the fit of his or her professional goals with agency goals. The fieldwork program also creates a progressive, state-of-the-art image to the professional community, consumers, and other external audiences through its partnership with the academic programs.

In summary, fieldwork education is an essential bridge between academic education and authentic occupational therapy practice. Through the collaboration between academic faculty and fieldwork educators, students are given the opportunity to achieve the competencies necessary to meet the present and future occupational needs of individuals, groups and, indeed, society as a whole.

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COE Guidelines for an Occupational Therapy Fieldwork Experience - Level II

History and Purpose

The intent of this document is to describe the desired characteristics of a fieldwork placement for occupational therapy and occupational therapy assistant students in Level II Fieldwork Education. It is intended to be a reference document that articulates the desired attributes of a fieldwork setting to maximize students' learning in context. It is not a document of standards for fieldwork education and programs are not mandated to follow these guidelines.

This document was originally prepared by the Loma Linda Fieldwork Council at the request of the Commission on Education (COE) and approved by the COE on April 15, 1985. The document was revised by the AOTA Fieldwork Issues Committee in 1992, and by the COE in 2000 and 2012.

Definition

The ACOTE Standards (2012) describe fieldwork as "a crucial part of professional preparation." The goal of Level II Fieldwork is to develop competent, entry-level, generalist occupational therapists and occupational therapy assistants (AOTA, 2012).

I. The Fieldwork Experience

A. Description and Purpose:

The Level II Fieldwork experience, an integral part of OT education, should be designed to promote clinical reasoning and reflective practice, to support ethical practice through transmission of the values and beliefs of the profession, to communicate and model professionalism as a developmental process and a career responsibility, and to expand knowledge and application of a repertoire of occupational therapy assessments and interventions related to human occupation and performance. Through the fieldwork experience, students learn to apply theoretical and scientific principles learned in the didactic portion of the academic program to address actual client needs and develop a professional identity as an occupational therapy practitioner within an interdisciplinary context. The fieldwork experience shall meet requirements in accordance with the Standards for an Accredited Educational Program for the Occupational Therapist and/or the Standards for an Accredited Educational Program for the Occupational Therapy Assistant (AOTA, 2012).

- i. 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 occupations. Throughout the fieldwork experience, the fieldwork educator should structure**

opportunities for informal and formal reflection with the student regarding the OT process in action with the client population.

- ii. The OT and OTA student should have the opportunity to develop increased knowledge, attitudes, and skills in advocacy, administration, management and scholarship.
 - 1. Skills in administration and management may be attained through the actual supervision of support staff, volunteers, or Level I Fieldwork students in certain tasks or work assignments and involvement in administrative/staff/team meetings.
 - 2. Scholarship may be enhanced as students learn to use evidence to inform their professional decision making and to generate new evidence through independent or collaborative research at the fieldwork site. This may be accomplished through investigation of the effectiveness of an intervention, the reliability, validity or utility of assessment tools, and publication or presentation of scholarly work.
- iii. Inter-professional practice competencies should be encouraged throughout the fieldwork experience through engagement of OT and OTA students in interactive learning with students of different professions.

B. Outcomes Desired

The fieldwork placements should provide the student with experience with various groups across the life span, persons with various psychosocial and physical performance challenges, and various service delivery models reflective of current practice in the profession.

- i. Within the required total of 16 weeks for the occupational therapy assistant student and 24 weeks for the occupational therapy student, there should be exposure to a variety of traditional and emerging practice settings and a variety of client ages and conditions. In all settings, psychosocial factors influencing engagement in occupation must be understood and integrated for the development of client-centered, occupation-based outcomes. What this means is that even if this is not a mental health placement, the fieldwork educator should assist the student in addressing any psychosocial issues the client may have. This will help to insure that the student will have developed some entry-level competencies in mental health practice even if they do not complete a fieldwork experience in a mental health setting. See link:
http://www.aota.org/Practice/Manage/~/_/media/04748BEB6FEE4C7EBFB83DFB81E41E8F.ashx

C. Expectations of Fieldwork Students

Students are responsible for compliance with site requirements as specified in the fieldwork site student handbook developed by the fieldwork site and the affiliation agreement between the fieldwork site and the academic program. This typically includes completion of prerequisite requirements (health requirements, background checks, HIPAA training, orientation to site documentation system, etc.) and attention to state regulations impacting student provision of client services. In addition to providing the required occupational therapy services to clients, students are also

responsible for active participation in the supervision process, which includes the creation, review, and completion of learning objectives; completion of assigned learning activities and assignments; proactive and ongoing communication with the assigned fieldwork educator; continual self-assessment and reflection; and participation in formal and informal assessments directed by the fieldwork educator. By the end of the fieldwork experience, the student should demonstrate the attitudes and skills of an entry-level practitioner, including assumption of responsibility for independent learning.

D. Fieldwork Educator Preparation

Fieldwork educators responsible for supervising Level II Fieldwork occupational therapy students shall meet state and federal regulations governing practice, have a minimum 1 year of practice experience subsequent to initial certification, and be adequately prepared to serve as a fieldwork educator. If supervising in a role-emerging site where there is no on-site occupational therapy practitioner, the fieldwork educator should have a minimum of 3 years of practice experience after initial certification (see II.E.ix for more specific detail).

i. Initial and ongoing education supporting the fieldwork educator role should include attention to the following:

1. Principles and theories of adult education models, knowledge of learning styles, and diverse teaching approaches.
2. Administrative aspects, including relevant regulations and content for development and management of the fieldwork program.
3. The design of educational experiences supporting student development as an OT practitioner.
4. Adaptation of supervisor strategies in response to individual student learning style.
5. Enhancement of student clinical/professional reasoning through guided learning experiences.
6. Provision of formal and informal evaluation of student performance.

ii. Methods for becoming adequately prepared to serve as a fieldwork educator include but are not limited to the following:

1. Attendance at an AOTA Fieldwork Educator Certificate Program (preferred).
2. Completion of the Self-Assessment Tool for Fieldwork Educator Competency (SAFECOM).
3. Attendance at continuing education events on the topic of practice education.
4. Mentorship by an experienced fieldwork educator.
5. Completion of on-line training modules.
6. Documented readings of texts/papers on clinical/fieldwork education.

E. Fieldwork Models

There are a variety of fieldwork models that can be utilized, depending on the preferences of the fieldwork educator, the nature of the fieldwork site, and the learning needs of the students. Fieldwork models exist on a continuum from the traditional apprenticeship model in which one fieldwork educator has one student to a more collaborative approach in which a group of students work with one fieldwork educator. Each fieldwork model has an inherent theoretical approach to learning. The more collaborative the fieldwork model, the more active student learning occurs. Fieldwork models can also be classified as either role-established, which is a more traditional fieldwork site, or role-emerging, where occupational therapy services are being introduced and/or developed.

- i.** 1:1 – this is the traditional model of one student to one fieldwork educator, also known as the apprenticeship model.
- ii.** 1:2 – one fieldwork educator to two students.
- iii.** 2:1 – two fieldwork educators sharing one student.
- iv.** Multiple sites – a model where one fieldwork educator has a group of students spread out at several fieldwork sites, usually all the same type of setting.
- v.** Group – a model where one fieldwork educator has a group of students, but maintains the traditional “fieldwork educator as expert” role.
- vi.** Peer – a model in which students provide feedback to each other; this cannot be the sole form of supervision provided to students, as there must be an OT or OTA identified as the fieldwork educator.
- vii.** Off-site/role-emerging – a fieldwork model in which occupational therapy services are in the process of being developed; the occupational therapy practitioner setting this up may be employed by the agency or the educational program.
- viii.** Collaborative – a specific model of fieldwork education used with a group of students in which knowledge is constructed jointly between the fieldwork educator and the students. This is an active model of student learning that places more responsibility on the student for his/her own learning. The fieldwork educator does not function as the “expert” but more in the role of facilitator of learning.
- ix.** Role-emerging fieldwork sites are those at which the provision of occupational therapy services is being developed. The occupational therapy practitioner developing the services may be employed by the agency as a consultant, or may be employed by the academic program. When fieldwork placements occur in role-emerging practice settings, the occupational therapy fieldwork educator is typically only present on site for a limited amount of time. The ACOTE Standards require that the fieldwork educator provide a minimum of eight hours per week at the site (AOTA, 2012). In addition, the fieldwork educator must be easily accessible by a variety of means during the hours a student is at the site. Furthermore, the person serving as

the fieldwork educator must have a minimum of 3 years experience after initial certification, as this is considered advanced supervision.

- x. International fieldwork occurs in another country and requires a great deal of advance planning from the academic program, student, and fieldwork educator as there are multiple issues involved. The Academic Fieldwork Coordinator should ensure that the fieldwork educator and fieldwork site staff are conversant with and in compliance with current ACOTE standards and that regular formal and informal communication is maintained during the fieldwork experience. The ACOTE Standards require that the individual serving as the fieldwork educator must be a graduate of a WFOT-approved educational program. Students cannot complete more than 12 weeks in an international placement. The reader is referred to the section of the AOTA Web site where there are multiple documents describing policies, procedures, and other issues related to international fieldwork.

II. Fieldwork Site Development

When developing a fieldwork experience for a new site, the preferred way to begin is by reaching out to the academic programs in the immediate area. The establishment of a contract between the fieldwork site and the academic program can take a very long time and so it is best to start with that process early. Students cannot be accepted until the contract has been signed by both parties. If there are several academic programs in the area, there is no reason why contracts cannot be initiated with all of them at once. During the contract development and approval process, the fieldwork educator can begin doing some of the other activities that will need to be in place before students are accepted. The reader is referred to the AOTA Web site for additional fieldwork educator resources, including "Steps to Starting a Fieldwork Program," located at the following link:
<http://www.aota.org/en/Education-Careers/Fieldwork/NewPrograms/Steps.aspx>

- A. **The fieldwork site should meet all existing local, state, and/or federal safety and health requirements, and should provide adequate and efficient working conditions. The occupational therapy practitioner should comply with state regulations governing the scope of practice for OT services.**
 - i. Adherence to standards of quality in regard to safety, health requirements, and working conditions may be verified through a review process by the University/ program using the center as a fieldwork site or by an established body such as the Joint Commission on Accreditation of Health Care Organizations, the Commission on Accreditation of Rehabilitation Facilities, or a state regulatory board.
 - ii. Adequate time should be available to supervising staff for student supervision activities.
 - iii. Space for client-related consultation, preparation, writing, in-service education and research activities by occupational therapists, practitioners, and students should be provided.

- iv. The fieldwork educator and student should have access to current professional information, publications, texts, and Internet resources related to occupational therapy education and practice.
- v. Client records should be available to the staff and students for intervention planning and practice.

B. Ideally, the fieldwork site will have a stated philosophy regarding service delivery which serves as a guide for the delivery of service, scholarly activities, and education for individuals and groups. Where occupational therapy services are already established, the occupational therapy philosophy/mission/vision regarding practice and education programs should be stated in writing, and should reflect the specific contribution occupational therapy makes to the overall agency. Where established, the occupational therapy philosophy/mission/vision guides the development of learning objectives for the fieldwork experience. Ideally, the established occupational therapy program will articulate a philosophy/mission/vision of service delivery reflective of best practices in the profession. Best practices in the profession result in services which are client-centered, occupation-based, and supported by research evidence. The partnering academic institution will work with the fieldwork site to provide resources to support best practice ideals.

- i. Client-centered practice is evident when there are regular intervention planning/review meetings between the client and occupational therapy practitioner to ensure client participation in the evaluation and intervention process (Mortenson & Dyck, 2006).
 - 1. In situations where there is limited possibility for client participation in intervention planning/review meetings due to the nature or severity of the client's impairment, the occupational therapy practitioner should seek the perspectives of family members/significant others who would act in the client's best interest.
- ii. Occupation-based practice is client centered and requires an understanding of the client's needs, wants and expectations. Interventions are meaningful to the client and include participation in occupations that are reflective of the client's lifestyle and context (Chisholm, Dolhi, & Schreiber, 2000).
- iii. Evidence-based intervention includes the creation of "strategies and tools for practitioners to access, understand, and use the latest research knowledge to improve services for clients" (Law & MacDermid, 2008, p. 6).

C. The administrators of the fieldwork setting should articulate support for the fieldwork education program.

- i. Since the occupational therapy fieldwork education experience exists within the philosophy and policies of the fieldwork agency, it is essential that the administration as well as the occupational therapy staff accept and support the education of future practitioners.

D. At fieldwork sites where occupational therapy services are already established, there should be occupational therapy representation in planning programs and formulating policies which would affect occupational therapy practice and services delivery or involvement.

- i.** The occupational therapy perspective should be represented at program-related conferences, in quality review processes, and in planning for occupational therapy services delivery. The profession of occupational therapy should be represented in policy-making groups at the fieldwork site.
- ii.** Consideration should be given to the occupational therapy department philosophy of service delivery in the planning of programs and the formation of policies influencing occupational therapists' service delivery at the fieldwork site.

E. The fieldwork agency should recognize that the primary objective of the fieldwork experience is to benefit the student's education.

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

F. Opportunities for continuing education and professional development of the occupational therapy staff and students should be encouraged to support life-long learning.

- i.** Attendance at workshops, institutes, conferences, courses, in-services and professional meetings should be encouraged.
- ii.** Financial support should be given for professional development whenever feasible within the budget of the fieldwork agency.
- iii.** Fieldwork students should be encouraged to participate in continuing education and be provided time to do so, when content is relevant to the fieldwork experience.
- iv.** State and National Association Membership is encouraged.

G. Collaboration with academic program - Both the ACOTE Standards and the Model Curriculum documents address the need for collaboration between the fieldwork site/fieldwork educator and the academic program. The ACOTE Standards require that the Academic Fieldwork Coordinator and the fieldwork educator collaborate when establishing fieldwork objectives, identifying fieldwork site requirements, and when communicating students' performance and progress during fieldwork (AOTA, 2012). The OT Model Curriculum documents describe how fieldwork experiences need to be planned in such a way that they are integrated into the academic program's mission and curriculum design. The reader is referred to the OT Model Curriculum, the OTA Model Curriculum and the ACOTE Standards for more information.

H. Supervision guidelines - There are multiple sources of supervision guidelines that are applicable to Level II fieldwork. The first source are state laws and state practice acts that govern the practice of occupational therapy. These documents will specify if there are any specific requirements for supervision that need to be upheld in that state. Another source of supervision guidelines are federal regulations such as Medicare that specify what type of supervision must be provided to fieldwork students in certain healthcare settings and with certain types of Medicare coverage. The AOTA Web site is a good source for the most up-to-date information on Medicare regulations for student supervision. The ACOTE Standards specify that during Level II fieldwork, students must be supervised by a licensed or credentialed occupational therapy practitioner with at least 1 year of experience who is adequately prepared to serve as a fieldwork educator. Further, the Standards state that supervision should initially be direct, and then progress to less direct supervision as is possible given the demands of the fieldwork site, the complexity of the client's condition being treated, and the abilities of the fieldwork student. The COE and Commission on Practice (COP) Fieldwork Level II position paper (COE/COP, 2012) additionally recommends that supervision of occupational therapy and occupational therapy assistant students in Fieldwork Level II settings will be of the quality and scope to ensure protection of consumers and provide opportunities for appropriate role modeling of occupational therapy practice, and that the supervising occupational therapist and/or occupational therapy assistant must recognize when direct versus indirect supervision is needed and ensure that supervision supports the student's current and developing levels of competence (COE/COP, 2012).

Specific to the role-emerging fieldwork placement, where the site does not employ an occupational therapist on staff and the fieldwork is designed to promote the development of occupational therapy services, supervision guidelines specify that students be supervised daily on site by another professional familiar with the role of occupational therapy and 8 hours of direct supervision should be provided weekly by an occupational therapist or occupational therapy assistant with at least three years of experience. It is recommended that the Academic Fieldwork Coordinator (AFWC), fieldwork educator (FWEd), the on-site coordinator (if identified) and student maintain regular formal and informal communication during the fieldwork experience (AOTA, 2001).

III. Student Engagement in the Learning Process

A. It is recommended that students collaborate with their fieldwork educator to develop learning objectives which stem from the site-specific learning objectives for the individual FW site. This may be accomplished through the use of learning contracts, which are both a teaching strategy and an assessment tool used to encourage self-directed learning. Learning contracts allow for shared responsibility in the planning of learning experiences offered in fieldwork. Pro-active learning contracts are an effective teaching strategy and encourage students to become intrinsically motivated to attain competence in the fieldwork experience.

- i. The use of learning contracts is highly recommended. If used, learning contracts should be developed within 2 weeks of initiating the FW experience. They should address individual student learning styles, needs and

interests, and should include specific learning objectives, resources and strategies, assessment, and target dates for completion. Learning contracts should be reviewed and updated regularly to reflect and communicate student progress towards the attainment of objectives.

- ii. The student shall be evaluated and kept informed on an ongoing basis of his/her performance status.
 - 1. The student will collaborate with fieldwork educator to determine the most effective supervision style and feedback methods.
 - 2. Formative assessment shall be provided to students on a weekly basis and recorded in written format, providing specific recommendations addressing observable behaviors.
 - 3. Supervision and feedback is intended to empower the student to change performance, facilitate student self-reflection and self-assessment, and guide the student regarding strengths and opportunities for growth-based on site-specific objectives.
 - 4. AOTA's COE recommends the use of the AOTA Fieldwork Performance Evaluation for the Occupational Therapy Student (AOTA, 2002a) and the AOTA Fieldwork Performance Evaluation for the Occupational Therapy Assistant Student (AOTA, 2002b) as a rating tool. The student's performance should be evaluated formally at mid-term and at the completion of the FW experience.
 - 5. The student should self-assess performance at mid-term using a copy of the AOTA Fieldwork Performance Evaluation (FWPE), and student evaluation and fieldwork educator evaluation scores should be compared and differences discussed.
 - 6. Weekly supervision logs are a good way for both the supervisor and student to keep track of what was discussed in supervision sessions. It is important for both the fieldwork educator and student to sign and date each log to verify the supervision process.
 - 7. When there are multiple supervisors, care should be taken to ensure that communication regarding student progress is shared among all supervisors and that all contribute to evaluation of the student's progress.

B. Learning Challenges on Fieldwork:

- i. Fieldwork educators should monitor student progress, and match students' abilities with the demands of setting by providing the just-right challenges designed to maximize each student's individual learning needs.
- ii. Structured forms of feedback, such as the Fieldwork Experience Assessment Tool (FEAT; AOTA, 2001), should be used to promote fieldwork educator and student communication.
- iii. If the student's performance is not satisfactory at mid-term or any point in the fieldwork experience, both the student and academic institution must be notified immediately, and documentation concerning the student's progress and outcomes of interventions should be maintained.
- iv. Fieldwork educators should initiate written remedial learning contracts with clear expectations and specific time frames for all students who are struggling to meet site-specific objectives.

IV. Continued Assessment and Refinement of the Fieldwork Program

A. Fieldwork experiences should be implemented and evaluated for their effectiveness by the educational institution and the fieldwork agency.

- i.** The Academic Fieldwork Coordinator representing the educational institution should regularly evaluate learning opportunities offered during fieldwork to ensure that settings are equipped to meet curricular goals and ensure student exposure to psychosocial factors, occupation-based outcomes and evidence-based practice.
 1. This may be accomplished through regular communication (e.g., emails, phone calls, written correspondence, etc.) between the AFWC and faculty and ongoing communication regarding the academic program's curriculum design to the fieldwork site. In addition, the fieldwork site should have opportunity to inform the didactic program preparation.
- ii.** The fieldwork site should regularly evaluate the effectiveness of its fieldwork program to ensure that students are able to meet learning objectives and deliver ethical, evidence-based, and occupation-centered intervention to clients. The learning objectives should be reviewed regularly to maximize the effectiveness of the fieldwork experience and create new opportunities. Supervisors are encouraged to participate in routine evaluations of their effectiveness in the supervisory role.
 1. Fieldwork site evaluation may occur through:
 - a. AOTA Student Evaluation of Fieldwork Experience (SEFWE)
 - b. Cumulative review of AOTA Fieldwork Performance Evaluations (FWPE) to determine student patterns of strength and weaknesses
 - c. Fieldwork Experience Assessment Tool (FEAT)
 - d. Review of the Self-Assessment Tool for Fieldwork Educator Competency (SAFECOM)

Resources

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Fieldwork Level II and Occupational Therapy Students: A Position Paper

The purpose of this paper is to define the Level II fieldwork experience and to clarify the appropriate conditions and principles that must exist to ensure that interventions completed by Level II fieldwork students are of the quality and sophistication necessary to be clinically beneficial to the client. When appropriately supervised, adhering to professional and practice principles, and in conjunction with other regulatory and payer requirements, the American Occupational Therapy Association (AOTA) considers that students at this level of education are providing occupational therapy interventions that are skilled according to their professional education level of practice.

AOTA asserts that Level II occupational therapy fieldwork students may provide occupational therapy services under the supervision of a qualified occupational therapist in compliance with state and federal regulations. Occupational therapy assistant fieldwork students may provide occupational therapy services under the supervision of a qualified occupational therapist or occupational therapy assistant under the supervision of an occupational therapist in compliance with state and federal regulations.

Occupational therapy Level II fieldwork students are those individuals who are currently enrolled in an occupational therapy or occupational therapy assistant program accredited, approved, or pending accreditation by the Accreditation Council for Occupational Therapy Education (ACOTE®; 2012). At this point in their professional education, students have completed necessary and relevant didactic coursework that has prepared them for the field experience.

The fieldwork Level II experience is an integral and crucial part of the overall educational experience that allows the student an opportunity to apply theory and techniques acquired through the classroom and Level I fieldwork learning. Level II fieldwork provides an in-depth experience in delivering occupational therapy services to clients, focusing on the application of evidence-based purposeful and meaningful occupations, administration, and management of occupational therapy services. The experience provides the student with the opportunity to carry out professional responsibilities under supervision and to observe professional role models in the field (ACOTE, 2012).

The academic program and the supervising occupational therapy practitioner¹ are responsible for ensuring that the type and amount of supervision meet the needs of the student and ensure the safety of all stakeholders. The following General Principles represent the minimum criteria that must be present during a Level II fieldwork experience to ensure the quality of services being provided by the Level II student practitioner:

- a. The student is supervised by a currently licensed or credentialed occupational therapy practitioner who has a minimum of 1 year of practice experience subsequent to initial certification and is adequately prepared to serve as a fieldwork educator.

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

- b. Occupational therapy students will be supervised by an occupational therapist. Occupational therapy assistant students will be supervised by an occupational therapist or an occupational therapy assistant in partnership with the occupational therapist who is supervising the occupational therapy assistant (AOTA, 2009).
- c. Occupational therapy services provided by students under the supervision of a qualified practitioner will be billed as services provided by the supervising licensed occupational therapy practitioner.
- d. Supervision of occupational therapy and occupational therapy assistant students in fieldwork Level II settings will be of the quality and scope to ensure protection of consumers and provide opportunities for appropriate role modeling of occupational therapy practice.
- e. The supervising occupational therapist and/or occupational therapy assistant must recognize when direct versus indirect supervision is needed and ensure that supervision supports the student's current and developing levels of competence with the occupational therapy process.
- f. Supervision should initially be direct and in line of sight and gradually decrease to less direct supervision as is appropriate depending on the
 - Competence and confidence of the student,
 - Complexity of client needs,
 - Number and diversity of clients,
 - Role of occupational therapy and related services,
 - Type of practice setting,
 - Requirements of the practice setting, and
 - Other regulatory requirements (ACOTE, 2012).
- g. In all cases, the occupational therapist assumes ultimate responsibility for all aspects of occupational therapy service delivery and is accountable for the safety and effectiveness of the occupational therapy service delivery process involving the student. This also includes provision of services provided by an occupational therapy assistant student under the supervision of an occupational therapy assistant (AOTA, 2009).
- h. In settings where occupational therapy practitioners are not employed,
 1. Students should be supervised daily on site by another professional familiar with the role of occupational therapy in collaboration with an occupational therapy practitioner (see b above).
 2. Occupational therapy practitioners must provide direct supervision for a minimum of 8 hours per week and be available through a variety of other contact measures throughout the workday. The occupational therapist or occupational therapy assistant (under the supervision of an occupational therapist) must have 3 years of practice experience to provide this type of supervision (ACOTE, 2012).
- i. All state licensure policies and regulations regarding student supervision will be followed, including the ability of the occupational therapy assistant to serve as fieldwork educator.
- j. Student supervision and reimbursement policies and regulations set forth by third-party payers will be followed.

It is the professional and ethical responsibility of occupational therapy practitioners to be knowledgeable of and adhere to applicable state and federal laws and payer rules and regulations related to fieldwork education.

References

- Accreditation Council for Occupational Therapy Education. (2012). 2011 Accreditation Council for Occupational Therapy Education (ACOTE®) standards. *American Journal of Occupational Therapy*, 66(Suppl.), S4–S74. <http://dx.doi.org/10.5014/ajot.2012.66S4>
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for

The Commission on Practice

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and

The Commission on Education

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Note. This document is based on a 2010 Practice Advisory, “Services Provided by Students in Fieldwork Level II Settings.” Prepared by a Commission on Practice and Commission on Education Joint Task Force:

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Program Philosophy

Performance Standards

Fieldwork Objectives

Course Syllabi

Fieldwork Terminology

State College of Florida
Occupational Therapy Assistant Program

Mission Statement

Mission of the Program and Institution

The OTA Program has aligned the program's mission with the college mission to provide engaging and accessible learning environments that results in student success and community prosperity. The OTA program provides an engaging environment via class, laboratory, simulation and fieldwork experiences to facilitate the maturation of skills in critical thinking, communication, self-expression and problem solving to meet measurable standards of institutional and professional excellence. This prepares the graduate to enter the workforce as a professional providing services to the community in all areas of practice.

State College of Florida
Occupational Therapy Assistant Program

PROGRAM PHILOSOPHY

The philosophy of the Occupational Therapy Assistant Program reflects the mission of the State College of Florida and is guided by measurable standards of institutional and professional excellence by providing an accessible, dynamic learning environment that facilitates the achievement of educational, professional, and personal goals through engagement in quality educational opportunities. The program is designed to incorporate concepts from the biological, social, and behavioral sciences with professional content to assist the student in obtaining the knowledge and skills to promote and maintain the holistic health of individuals across the lifespan.

Occupational therapy education is firmly established in a shared belief that humans are complex and active beings, influenced using purposeful activity/ occupation. They are involved in an interactive process of continuous adaptation and growth in response to their physical, social, and cultural environments. Human beings are capable of influencing their physical and mental health and are seen as actively seeking their highest potential through purposeful activities/occupation. Occupational therapy is based upon these beliefs and uses purposeful activities/occupations to facilitate growth and maximize functional abilities. The goals of occupational therapy are directed towards enhancing the ability of individuals across the lifespan to carry out those tasks and roles that provide satisfaction and independence in daily living.

The occupational therapy assistant works under the direction of an occupational therapist to assist clients in developing or restoring their ability to perform functional/occupational activities essential for adaptation and productivity. The occupational therapy assistant participates in the development of adaptive skills and performance capabilities and is concerned with factors that promote, influence, or enhance performance, as well as those that serve as barriers or impediments to the individual's ability to function. The occupational therapy assistant provides service to those individuals whose abilities to cope with tasks of daily living are threatened or impaired by developmental deficits, the aging process, cultural diversity, physical illness, or injury, or psychological or social disability. Acknowledging the dignity, worth, and the right of all human beings to have their health needs met, the occupational therapy assistant utilizes specialized knowledge and skills to empower individuals to meet these needs.

The educational program assists the student to integrate scientific principles, to use critical thinking as part of the decision-making process, and to act responsibly according to professional standards of practice. The faculty believes that learners in the occupational therapy assistant program are self-motivated adults, diverse in cultural, religious, social, and educational backgrounds and experiences. To best meet the learner's needs the teaching-learning process should be flexible, individualized and collaborative. Learning occurs when it is perceived as relevant by the student and has concurrent application. Students learn best by being active participants in the learning process. This requires that the student engage in the learning experiences which will assist in developing an understanding of occupational therapy and their role as an occupational therapy assistant in assisting the client to achieve an optimum level of independence.

Education for all occupational therapy practitioners is lifelong and dynamic. It includes goal-directed experiences from the cognitive, affective, and psychomotor domains. The program is based on the belief that the role of the faculty is to facilitate learning through a multitude of opportunities and experiences and that the role of the student is to seek and develop the knowledge, skills, and attitudes

to prepare them for professional practice. Evaluation of student learning throughout the program is formative and summative and focuses on utilizing an authentic assessment approach which requires the student to "do" and requires the use of judgment, innovation, and critical thinking to address complex problems and situations.

Following the completion of the program, the practice of the graduate reflects critical thinking, clinical accountability, and a commitment to learning and caring. This practice ensures that the graduate has the ability to efficiently and effectively use their repertoire of knowledge and skills in a variety of health care settings and function within the policies and procedures of the facility. It is assured that the graduate will be able to utilize evidenced-based practice and assess resources as needed to support their decisions and actions. As a member of the discipline, the occupational therapy assistant will practice within an ethical and legal framework and is accountable for making professional decisions. As a professional, the graduate is expected to assume responsibility for continued personal and professional growth and involvement in community partnerships.

Developed: 12/10/97

Revised: 2/99, 1/02, 6/02, 5/04, 8/05, 8/09, 9/10, 6/11, 5/14, 5/16, 3/2021

Reviewed: 11/10/99, 6/00, 6/01, 6/03, 6/04, 6/06, 8/08, 4/09, 5/10, 5/12, 5/13, 5/15, 5/18,
6/19

PERFORMANCE STANDARDS FOR PROGRESSION AND GRADUATION
In the Occupational Therapy Assistant Program
State College of Florida

Successful participation and completion of the Occupational Therapy Assistant Program requires that the student must be able to meet the demands of the program. Occupational therapy assistant students must be able to perform academically in a safe, reliable, and efficient manner in classrooms, laboratory, and clinical situations. The student must demonstrate behaviors, skills, and abilities to be in compliance with legal and ethical standards as set forth by the AOTA Code of Ethics and Standards of Practice.

Students acquire the foundation of knowledge, attitudes, skills, and behaviors needed throughout the occupational therapy assistant's professional career. Those abilities that the occupational therapy assistant must possess to practice safely are reflected in the standards that follow.

Candidates for the degree must be able to meet these minimum standards, with or without reasonable accommodation, for successful completion of degree requirements.

	STANDARD	EXAMPLES
Critical Thinking	Demonstrates critical thinking ability sufficient for clinical judgment and problem solving.	<ul style="list-style-type: none"> • Applies critical thinking processes to work in the classroom, laboratory, and the clinical experiences. • Exercises judgment in decision making abilities during class, laboratory and in clinical experiences. • Follows safety procedures established for each class, laboratory, and clinical experience. • Demonstrates the ability to self-evaluate. • Demonstrates the ability to identify problems and offer possible solutions.
Interpersonal	Demonstrates the ability to interact and relate to other people beyond giving and receiving instructions. Cooperates with others.	<ul style="list-style-type: none"> • Demonstrates interest in classmates, faculty, patients/clients. • Demonstrates the ability to get along with and cooperate with others. • Demonstrates the ability to listen to others • Demonstrates the ability to provide suggestions/ recommendations to others. • Demonstrates ability to maintain poise and flexibility in stressful or changing conditions. • Recognizes and responds appropriately to individuals of all ages,

		genders, races, socio-economic, religious, sexual preferences, and cultural backgrounds.
Communication	<p>Demonstrates the ability to communicate clearly with patients/clients, physicians, others health professionals, family members, significant others, care givers, community or professional groups and colleagues.</p> <p>Communication includes speech, language, nonverbal, reading, writing and computer literacy.</p>	<ul style="list-style-type: none"> • Communicates effectively with classmates in simulated laboratory activities and situations for data collection, instruction, and intervention • Participates in group meetings to deliver and receive information and respond to questions from a variety of sources. • Reports clearly and legibly through progress notes in patient/clients charts, communicates with physicians and insurance providers including billing and order/referral forms. • Responds to patient calling or any other warning call and machine alarm. • Demonstrates skill in utilizing various computer programs to prepare assignments, presentations, and documentation as required in the classroom, laboratory, and clinical environments. • Effectively communicates and work interprofessionally with those who provide services, clarifying each member's responsibility in executing an intervention plan.
Motor Skills	Demonstrates the ability to execute motor movements reasonably required to provide general and emergency care and treatment to patients/clients.	<ul style="list-style-type: none"> • Moves around in classroom, laboratory, patient/client's room, therapy/treatment area. • Moves to and from departments to patient/client's rooms. • Provides for patient/client safety and well-being in all therapeutic or transporting activities by utilizing proper body mechanics. • Exhibits sufficient manual dexterity to manipulate small and large equipment, provide support, assistance and resistance as needed for movement, exercise, data collection and interventions.

		<ul style="list-style-type: none"> • Knowledge of how to perform CPR
Hearing	Demonstrates functional use of hearing to monitor and assess health needs.	<ul style="list-style-type: none"> • Demonstrates ability to obtain and utilize information directly from instructors, fieldwork educators and classmates in lecture, laboratory simulations/ activities and clinical experiences. • Demonstrates ability to obtain appropriate medical history and data collection directly from the patient/client, caretaker and/or family member. • Responds to monitor alarms or cry for help and/or assistance.
Visual	Demonstrates visual acuity and perception sufficient for observation and assessment.	<ul style="list-style-type: none"> • Demonstrates ability to obtain and utilize information directly from lectures, and laboratory demonstrations/activities. • Demonstrates the ability to obtain and utilize information via observation from patients/clients, e.g., movement, posture, body mechanics, etc. necessary for comparison to normal standards for purposes of evaluation of performance and response to interventions. • Receives information from treatment environment.
Tactile	Demonstrates tactile abilities sufficient to gather assessment information and provide intervention.	<ul style="list-style-type: none"> • Demonstrates the ability to sense changes in an individual's muscle tone, muscle strength, skin quality, joint mobility, kinesthesia, and temperature. • Demonstrates the ability to gather accurate objective evaluative information via tactile abilities in a timely manner. • Demonstrates the ability to obtain and utilize information about an individual via tactile abilities during treatment activities.
Self-Care	Maintains general good health and self-care in order not to jeopardize the health and safety	<ul style="list-style-type: none"> • Maintains hygiene while in lectures, laboratory experiences and clinical experiences.

	of self and individuals with whom one interacts with in the academic and clinical setting.	<ul style="list-style-type: none"> • Demonstrates safety habits and work area neatness. • Understands components of a healthy lifestyle. • Meets all health requirements of the OTA Program.
Intellectual Abilities	Demonstrates the ability to read, write, speak and understand English at a level consistent with successful course completion and development of a positive patient-student relationship.	<ul style="list-style-type: none"> • Demonstrates ability to comprehend and follow verbal and written instructions. • Consistently meets course requirements of all courses in the OTA Program, passing each course with a grade of "C" or better. • Can learn to reconcile conflicting information • Written communication: Demonstrates ability to use proper punctuation, grammar, spelling; work is neat and legible.
Commitment to Learning	Demonstrates a positive attitude towards decision-making, policies and operating methods, rules, etc.	<ul style="list-style-type: none"> • Completes readings, assignments, and other activities outside of class hours. • Demonstrates initiative, motivation and enthusiasm related to course requirements. • Demonstrates ability to complete all work without evidence of cheating or plagiarism. • Attends all class/ laboratory/fieldwork as assigned. • Is consistently punctual to all class, laboratory, and fieldwork assignments. • Understands the ongoing professional responsibility for providing fieldwork education and the criteria for becoming a fieldwork educator.
Affective Learning Skills (behavioral & social attitudes)	Demonstrate appropriate affective behaviors and mental attitudes in order not to jeopardize the emotional, physical, mental, and behavioral safety of clients and other individuals with whom one	<ul style="list-style-type: none"> • Demonstrates ability to sustain the mental and emotional rigors of a demanding educational program, which includes an academic and clinical component, that occur within set time constraints. • Demonstrates willingness to accept challenges.

	<p>interacts with in the academic and clinical setting.</p> <p>Acknowledges and respects individual values and opinions to foster harmonious working relationships with colleagues, peers and patients/clients.</p>	<ul style="list-style-type: none"> • Demonstrates the ability to work with others on projects/assignments, sharing the workload • Open to feedback both positive and negative • Listens actively. • Follows guidelines and rules for the program and college. • Understands the need for supervisory, responsibilities and collaborative professional relationships between the occupational therapist and the occupational therapy assistant.
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If a student cannot demonstrate the skills and abilities identified above, it is the responsibility of the student to request an appropriate accommodation. The College will provide reasonable accommodation as long as it does not fundamentally alter the nature of the program offered and does not impose an undue hardship such as those that cause a significant expense, difficulty or are unduly disruptive to the educational process.

Developed: 6/00

Reviewed: 9/01, 10/06, 5/07, 6/08, 5/10, 6/11, 5/12, 5/13, 5/18 6/19, 6/20, 5/21

Revised: 7/04, 2/05, 8/05, 8/09, 8/10, 5/14, 5/15

State College of Florida
Occupational Therapy Assistant Program

Curriculum Design

The curriculum is designed as a problem-learning curriculum combining general education and basic science courses with professional course work. The curriculum is structured so that content and skills developed are progressive and provide the maximum opportunity for students to synthesize and apply information to function at increasingly higher cognitive, affective, and psychomotor levels. Learning activities are based upon a "Learn it, Try it, and Apply it" principle. Key components of the Self-Directed Learning Model are incorporated into the curriculum, whereby the student becomes responsible and independent in the learning process. Course sequencing is predicated upon the supposition that occupational therapy intervention is based upon an awareness of and appreciation for normal development as well as the consequences of deviations from, that which is viewed as "normal". Knowledge and skills, which are learned at early levels, provide the substratum for problem solving, complex thinking and physical capabilities. Concepts that are introduced early in the curriculum are used over again as a base for more complex thinking and problem solving. The curricular threads that link each semester through didactic and interactive learning include problem solving and critical thinking, the concept of occupation, normal development and human function throughout the lifespan, utilization of communication and the development of professional behaviors. General education courses must be completed by the semester identified in the program curriculum but may also be taken and successfully completed prior to acceptance into the OTA program. All occupational therapy courses must be taken in the specific sequence of the program curriculum.

Students' progress through an integrated program of didactic, laboratory and fieldwork experiences. Essential knowledge is discussed prior to the application of knowledge in the laboratory and fieldwork settings. Through an initial exposure to occupational therapy, the curriculum provides the student the opportunity to explore areas of normal conditions as well as those that deviate from what we have come to expect as "normal". The concept of occupation is introduced and expanded as the student progresses through the program as the basis for all we do in our lives and the professions unique focus on in the treatment process. Communication techniques are discussed with a focus of how they are influenced by client factors, body functions, body structures, contexts, and activity demands. The program is designed to introduce more difficult concepts early in the program to allow for repetition to allow the student to use this knowledge and skills in various contexts related to occupational therapy assessment and treatment.

STATE COLLEGE OF FLORIDA
OCCUPATIONAL THERAPY ASSISTANT PROGRAM
GUIDELINES AND GOALS FOR OCCUPATIONAL THERAPY ASSISTANT
FIELDWORK II

Purpose of Fieldwork II:

Supervised fieldwork experiences in occupational therapy are an integral part of the educational and professional preparation. The fieldwork experience is designed to provide the occupational therapy assistant student with the opportunity to integrate academic knowledge with the application of skills at progressively higher levels of performance and responsibility. The fieldwork experience is intended to complement the academic preparation by offering additional opportunities for growth, for learning, to apply knowledge, and to develop and test critical thinking skills. The fieldwork experience also provides the student with situations to practice and develop interpersonal skills with patient/clients and staff and to develop characteristics and professional behaviors essential to productive working relationships. Upon completion of Level II Fieldwork education, the student is expected to function at or above minimum entry-level competence.

Occupational Therapy Assistant students at the State College of Florida are required to complete two Fieldwork II experiences in two different clinical settings prior to graduation from the program.

Goals for the Level II Fieldwork Experience:

Upon completion of the Level II Fieldwork experience, the student will demonstrate the following:

1. Competence in utilizing assessment tools and evaluation procedures routinely used by COTAs at the fieldwork center.
2. Proficiency in implementing treatment and justifying treatment plans and methods based on the models and theories of occupational therapy practiced at the fieldwork center.
3. Effective oral and written communication of ideas and objectives relevant to the roles and duties of an occupational therapist and occupational therapy assistant.
 - a. The student will demonstrate the ability to interact with patients/clients and staff in an effective and professional manner.
4. Acquisition of professional characteristics/behaviors that demonstrate the following:
 - a. The ability to establish and sustain therapeutic relationships;
 - b. A sensitivity to and respect for confidentiality;

- c. The ability to work collaboratively with others and to relinquish or assume responsibility when appropriate to task at hand (i.e. team work);
- d. Responsibility in maintaining, assessing, and improving self-competency;
- e. The ability to use supervision as a tool for self-directed learning;
- f. The development of a broad sense of professional responsibility to the community at large and concern for social and health care issues;
- g. Understanding of the roles of other health professionals;
- h. Development of a positive professional self-image.
- i. Understanding of the AOTA Code of Ethics, safety regulations, accreditation and licensure standards/regulations and all state, federal and facility regulations and how these impact the delivery of services;
- j. Demonstrates skills in management of occupational therapy services related to knowledge of the organization and reimbursement;
- k. See the course syllabi for specific course objectives.

State College of Florida
Occupational Therapy Assistant Program

OTH 2840L/2841L SUPERVISED CLINICAL PRACTICE I AND II
FIELDWORK II
FIELDWORK MANUAL

Arrangement for first fieldwork visit:

Students will be given an assigned fieldwork placement. After receiving this assignment, it is the student's responsibility to make contact with the fieldwork educator prior to the first day at clinic, to confirm hours of work, travel directions, dress code, health requirements, fingerprinting requirements and other pertinent information relating to the clinical setting.

Attendance:

All students are required to attend fieldwork during the regular hours of the facility that the student is assigned to. The fieldwork setting determines the work hours and hours may not be negotiated by the student without approval from the OTA Academic Fieldwork Coordinator (AFWC) at the State College of Florida. This is a 40-day fieldwork experience (4 ½ days per week). Students are expected to attend regularly and arrive promptly. If the student will be late or absent, it is the student's responsibility to notify the fieldwork educator and the AFWC prior to the time you would normally arrive. This fieldwork experience is based upon completion of a specific number of days. All missed time must be made-up prior to the completion of the fieldwork experience to receive a passing grade.

If assigned fieldwork hours are shortened secondary to caseload/billing/staffing or any other reason, the AFWC must be notified as soon as possible. If this is a temporary change, the student may be assigned a special project for the setting or alternate arrangement may need to be made to complete the fieldwork hours. Changes in fieldwork expectations will be made in collaboration with the fieldwork educator, student and AFWC and put in writing to ensure clear expectations of the fieldwork experience.

FAILURE TO NOTIFY THE ACADEMIC FIELDWORK COORDINATOR OF THIS CHANGE MAY RESULT IN AN INCOMPLETE FIELDWORK EXPERIENCE WHICH WILL BE CONSIDERED A FAILING GRADE. THIS WILL IMPACT THE STUDENTS ABILITY TO COMPLETE AND GRADUATE FROM THE PROGRAM.

Assignments:

Two treatment plans have been assigned for this fieldwork experience. Forms for the treatment plans are in the student's learning management system (Canvas). Each treatment plan must be reviewed by the fieldwork educator, signed and then submitted to the class instructor.

Your fieldwork educator may assign additional assignments/activities that are appropriate to the fieldwork experience. Additional assignments may include: construction of adaptive/assistive equipment, splint construction, case presentation, inservice program for the department/staff, daily log, and/or any other assignment/activity (written or oral) that the fieldwork educator feels is appropriate to the students level of knowledge and skill.

The student should be responsible for writing progress notes for each treatment session that he/she participates in. All notes will be done in the format utilized within the clinical setting. They do not need to be handed in to the class instructor.

Please refer to the section for **ASSIGNMENTS** for specific forms and instructions.

Evaluation:

Students will be evaluated using the **Fieldwork Performance Evaluation for the Occupational Therapy Assistant Student (FWPE/OTAS)**. This new document has been designed to help fieldwork educators determine whether students are ready for entry-level practice by assessing whether the objectives of fieldwork have been met. The primary purpose of fieldwork is to develop entry-level occupational therapy assistants who possess (a) competency to deliver occupational therapy services across practice settings and (b) sound, logical, and ethical clinical reasoning (American Council for Occupational Therapy Education – ACOTE).

An evaluation link will be emailed by Formstacks, to the fieldwork educator and the student, for the midterm and final evaluation. **The original evaluation form must be utilized for the evaluation process.** The student will be evaluated midway through the fieldwork experience and during the last week of the fieldwork.

A copy of the midterm evaluation will be sent to the school upon its completion. The midterm evaluation is used as a counseling device to clarify to the student the expectations for successful completion of the fieldwork experience and to identify the student's strengths and weaknesses.

The final evaluation should be completed the last week of the fieldwork experience and is used to calculate the grade for OTH 2840L/2841L. The fieldwork educator and the student will meet to review the final evaluation on the last day of the fieldwork experience. The final evaluation must be returned to the college within one week after completion of the fieldwork experience. **You may have the student hand carry the evaluation vs. mailing it. Please return the evaluation in a sealed envelope if hand carried.**

If the student has had the opportunity to work with other staff members at your facility, please elicit feedback from them about the student's performance related to application

of theoretical knowledge, communication skills and professional behaviors when completing the midterm and final evaluation.

The fieldwork educator will have the student do a self-assessment of their performance using the *Fieldwork Evaluation Form for Occupational Therapy Assistant Students (FWEF)* for both the midterm and final assessment and bring their assessments to the meetings when the evaluations are discussed. This becomes a valuable tool for both the student and fieldwork educator when reviewing the evaluation results and setting future goals.

The student will also complete an evaluation of the fieldwork experience. This will be completed during the last week of the experience and reviewed with the fieldwork educator on the last day of the experience after the student has reviewed the final evaluation.

The student and the fieldwork educator **MUST** sign all evaluation forms and the originals MUST be returned to the college. Copies of the student's evaluation of the fieldwork experience will be sent to the fieldwork educator by the program director/fieldwork coordinator.

Problems???

If you encounter any problems related to the fieldwork experience, they should be worked through as early and quickly as possible with your fieldwork educator and the program director/class instructor. It is important to maintain open lines of communications between you, your fieldwork educator and the program faculty.

For any questions, problem, or concerns please contact Lora May by phone (941-752-5346) or email:

Lora May Swart – swartl@scf.edu

Site Visit:

The instructor/fieldwork coordinator will schedule a phone conference and/or site visit around the midpoint of the fieldwork experience. This is a chance to look at how the fieldwork experience is going and answer any questions from the fieldwork educator and/or student. Please schedule the onsite visit during a time when the student is working with a patient/client and the fieldwork educator. The student will provide you with a Communication Form completed which is completed by the fieldwork educator and returned to the school. This form should be completed around the midterm period of the fieldwork experience.

Supervision:

A regular supervision time should be scheduled for the student and the fieldwork educator for direct supervision. This time should be used to answer questions, review

assignments engage in problem solving related to client problems and treatment planning, reviewing the theoretical basis for treatment and treatment goals, etc.

The fieldwork educator may assign additional activities (within or outside the setting) that are appropriate the student's level of knowledge and skill. This may include observation of other therapies, observation of special programs or services offered at the facility, fieldtrips, observation of surgery, etc.

**STATE COLLEGE OF FLORIDA
OCCUPATIONAL THERAPY ASSISTANT PROGRAM**

FIELDWORK II

Suggested Pacing of Fieldwork Experience – 8 weeks

I. Orientation (2-4 days)

- a. Student receives a full orientation of fieldwork site including Placement Orientation, Department Orientation, and Orientation to Student Expectation.

II. Initial Involvement (Week 1-2)

- a. Student assumes responsibility for tasks assigned by fieldwork educator including but not limited to transporting patients/clients to and from therapy, preparing work area, cleaning up work area.
- b. Student maintains equipment, materials and supplies as assigned by fieldwork educator.
- c. Student reports relevant observations to fieldwork educator.
- d. Student and fieldwork educator discuss information related to patients/clients including but not limited to: diagnosis, disability, strengths, limitations, treatment goals, techniques utilized for treatment, safety precautions, etc.
- e. Fieldwork educator assigns patients/clients appropriate to a beginning student.
- f. Supervision meetings established. Fieldwork educator provided constructive feedback on student's performance.
- g. Student attends lectures and training sessions offered within the facility, reads texts and educational materials, and receives instruction on disabilities, treatment procedures, etc., relevant to the fieldwork setting.

III. Development of Skills (Weeks 2-6)

- a. Student continues activities as appropriate and begins to assume more responsibility.
- b. Student instructs assigned patients/clients in activities of daily living.
- c. Student initiates new treatment that has been planned and/or reviewed by the fieldwork educator with assigned patients/clients.
- d. Fieldwork educator instructs student in administration of standardized evaluations that a COTA would be expected to administer at the fieldwork site.
- e. Student administers appropriate standard evaluations.
- f. Fieldwork educator assigns patients/clients who represent a variety of ages, disability and symptomatology, as available within the fieldwork setting. The

fieldwork educator will grade the difficulty of assignments, adjusts pace and sequence to the individual student.

IV. Closure of the Fieldwork Experience (weeks 7-8)

- a. Student plans activities to meet treatment goals with assigned patients/clients.
- b. Student discusses plan with patient/client.
- c. Student contributes to assessment process with assigned patients/clients by observation, interview, and testing, and reports results verbally and/or in writing to appropriate persons.
- d. Student constructs assistive devices and adapts equipment when appropriate.
- e. Student informs and confers with family and health care workers.
- f. Student collaborates with other disciplines to integrate patient/client program.
- g. Student assists in formulation of discharge plan.
- h. Student orients or demonstrates to visitors, volunteers or new workers.
- i. Student presents inservice and/or case study presentation to staff.
- j. Student completes self-evaluation and evaluation of the fieldwork site.

State College of Florida
Occupational Therapy Assistant Program
OTH 2840L/2841L – Fieldwork II

Student Orientation

Placement Orientation

1. Type, philosophy and purpose of placement.
2. Client census (diagnostic categories, ages, total #).
3. Policies of the facility: work hours, absences, holidays, safety precautions, reporting accidents or emergencies and fire precautions.
4. Introduction to key personnel and tour of placement.
5. Methods of communication with other departments (conferences, team meetings, rounds, etc.)
6. Location and method for using client charts and documentation
7. Orientation to appropriate services.

Department Orientation

1. Physical layout – location of records, supplies, equipment.
2. Department organizational structure, lines of authority.
3. Objectives of services provided by OT.
4. Method and types of records used.
5. Policies and procedures of department.
6. Orientation to equipment and materials used in treatment.
7. Discussion of type of clients and referral system.
8. Discussion of type of treatment utilized.
9. Discussion of type of evaluation tools/tests used.

Orientation to Student Expectations

1. Review of student objectives.
2. Review of learning assignments.
3. Review of weekly expectations regarding caseload, documentation and assignment due dates.
4. Review of resources available to students.
5. Review of special events: fieldtrips, inservice training, and lectures.
6. Review contents of student manual.
7. Review of student's orientation and routine weekly schedule.
8. Review of student evaluation proceedings.
9. Discussion of student expectations and goals for the fieldwork experience.

**STATE COLLEGE OF FLORIDA
OCCUPATIONAL THERAPY ASSISTANT PROGRAM**

**FIELDWORK II
Suggestions for Students**

The fieldwork experience is an opportunity for you to develop professional behaviors that strongly contribute to your development as an occupational therapy assistant. Your effectiveness as a therapist is dependent upon the development of these behaviors, which may include but are not limited to: **personal initiative, punctuality, responsibility and resourcefulness, dependability, the ability to relate openly and effectively on a professional level.**

Your fieldwork educator and other staff members may provide guidance and direction in this area of professional development; however, you must assume responsibility for your professional behavior.

Here are some suggestions to help you assume responsibility for your professional development:

1. **Communication is the most critical component.** Initiate and maintain open, honest, communication with you supervisor.
 - a. Provide feedback to your supervisor about the nature, quantity and quality of supervision time. You must assess your needs and share them with your supervisor.
 - b. Let your supervisor know your interests and goals/expectations. Clarify performance expectation with your fieldwork educator. If you are unclear – ask!
 - c. If you feel you are not getting enough feedback, let your fieldwork educator know.
 - d. If you have a question or doubt in you mind, try whenever possible to take the initiative to find the answer for yourself. Never hesitate to utilize staff members as resources.
2. **Independently take the initiative to familiarize yourself with the department's organization and available resources.** Schedule time to look through the cabinets, file drawers, bookcases, etc., and see what is available. Becoming familiar with the department, it's supplies and equipment will prevent you from having to keep asking where equipment is kept and will facilitate your treatment planning. If you are uncertain about the use of purpose of any equipment, always ask!
3. **Learn how to effectively plan and utilize your time.**
 - a. Make out a schedule for each day. Include lectures, meetings, and supervision time as well as patient/client treatment.
 - b. Know your work requirements and set target dates for timely completion.

- c. Utilize your "spare" time appropriately for reading, writing notes, developing patient/client treatment programs, observing treatment, etc. Don't get behind on paperwork.
- 4. **Procedures for routine, day-to-day treatment and departmental responsibilities should be established as a habit as quickly as possible.** If you are still confused after the first week, let your supervisor know!
- 5. **Suggestions for treatment planning:**
 - a. Observe other therapists and keep a list of media/techniques they use. This can be a helpful resource during treatment planning.
 - b. Prepare a list of treatment media, equipment, and evaluations for each session. Be sure to include alternative incase the equipment is not available. The extra preparation time can increase your self-confidence during treatment.
- 6. **Self esteem and confidence:**

Realize that you know more than you think. At times you will be just as much an "expert" in your field as the PTs, nurses, and physicians are in theirs. Be prepared to talk about OT to your patients, families and other professionals.
- 7. **Talk to the School:**

At any time if you feel there is a problem or you have any concerns about the fieldwork experience or your fieldwork educator, please contact the program (Lora May, Su, Barb and/or Debbie) **immediately**. Problems and concerns need to be addressed as quickly as possible so they do not interfere with your experience. We want this to be a positive experience and it is your responsibility to keep us informed.

Fieldwork Terminology

ACOTE	Accreditation Council of Occupational Therapy Education establishes the Standards for all accredited OT and OTA academic programs for academic curriculum education content and fieldwork expectations.
AOTA	American Occupational Therapy Association, Bethesda, MD.
Areas of Occupation social	Activities in which people engage: activities of daily living, instrumental activities of daily living, rest and sleep, education, work, play, leisure and participation.
Cancellation	Fieldwork site terminates student placement after a confirmation is signed
Certification Exam	Certification Examination to become an OTR or COTA; AKA registration exam, Boards; administered on-demand by NBCOT.
Clinical Reasoning	Complex multifaceted cognitive process used by practitioners to plan, direct, perform and reflect on intervention
COE	The Commission on Education (COE) is one of the standing commissions established by the Bylaws of the American Occupational Therapy Association (AOTA). The COE promotes quality occupational therapy education for occupational therapists and occupational therapy assistants relative to the needs of educators, students, and consumers. The COE provides educational leadership, envisioning the future as well as addressing current issues with the membership.
Competent	To have the requisite abilities/qualities and capacity to function in a professional environment.
Confirmation	Form indicating practice area, location & timing of fieldwork placement
COTA	Certified Occupational Therapy Assistant
Curriculum Design planned, the sequence	An overarching set of assumptions that explains how the curriculum is implemented, and evaluated. Typically, a curriculum design includes educational goals and curriculum threads and provides a clear rationale for selection of content, the determination of scope of content , and the of the content. A curriculum design is expected to be consistent with the mission and philosophy of the sponsoring institution and the program.
Emerging Practice Area	A practice setting in occupational therapy which is not based in medical or School environments, but is a relatively new area of employment for OT's utilizing roles that are based in the community and clients daily activities.
Entry Level Occupational	The outcome of the occupational therapy educational and certification

Therapy Assistant occupational	process; an individual prepared to begin generalist practice as an Therapy Assistant.
Fieldwork Agreement/Contract/ Letter of Agreement Fieldwork Coordinator	Legal agreement between University & fieldwork site defining the terms, procedures, liability and laws under which fieldwork occurs. Faculty member who is responsible for the development, implementation, management and evaluation of fieldwork education.
Fieldwork Data Form	Form used by facility to provide information regarding its program; kept in the resource room for student access.
Fieldwork Educator	Terms for the supervisor at a fieldwork site.
Fieldwork Experience Evaluation	A method for student and supervisor to identify and communicate learning characteristics and preferences for supervision for a positive fieldwork experience.
Fieldwork Handbook	Handbook provided to all fieldwork coordinators/supervisors and student. Provides updated information regarding policies, procedures & guidelines for each fieldwork experiences provide by the OT Department.
FW	Abbreviation for fieldwork
FWPE	Abbreviation for Fieldwork Performance Evaluation; a form developed by AOTA to assess student performance during Level II fieldwork based on an entry-level standard. The Academic fieldwork coordinator assigns the Student final grade.
HIPAA Health Insurance Portability and Accountability Act	This congressional act protects health coverage when there is a change of employment, and requires health care institutions to protect confidential client information called Protected Health Information, which could identify a particular person and jeopardize their confidentiality.
Health Literacy appropriate	Degree to which individuals have the capacity to obtain, process, and understand basic health information and services needed to make health decisions (National Network of Libraries of Medicine, 2011)
Internship/Affiliation	Another way of referring to Level II fieldwork experience.
Interprofessional Collaborative Practice	"Multiple health workers from different professional backgrounds working together with patients, families, careers, and communities to deliver the Highest quality of care" (World Health Organization, 2010)
Level I (OTH 1520C, OTH2802L)	Three progressive practical experiences, each ranging from 10 to 12 full time days at various clinical facilities.
Level I Fieldwork Evaluation	Form completed by the student and fieldwork educator assessing the student during the level I fieldwork to determine readiness for next phase of fieldwork; reviewed by the fieldwork educator, student and fieldwork advisor. Fieldwork Advisor assigns final grade.

Level II (OH 2840L/284L)	Advanced fieldwork required after completion of academic coursework, prior to receiving degree; student must complete a minimum of 40 days- generally divided into two, 8 week placements.
Models of Practice	The set of theories and philosophies that defines the views, beliefs, assumptions, values, and domain of concern of a particular profession or discipline. Models of practice delimit the boundaries of a profession.
NBCOT	National Board for Certification in Occupational Therapy; regulates and administers Certification Examination for OTR and COTA
OSHA Regulations/Standard Transmission Precautions	Occupational Safety & Health Administration policy regarding the procedures of universal precautions for blood-borne pathogens, and other health issues.
OT	Abbreviation for occupational therapy, or occupational therapy Practitioner (OTR/COTA).
OTAS	Indicates an occupational therapy assistant student (future COTA).
OTR	Indicates an NBCOT initially certified occupational therapist.
OTS	Indicates an occupational therapy student (future OTR).
Personal Data Sheet	Information form completed by the student at the beginning of the second Year of the academic program; one copy is kept in the student's file; Other copies are used by the student to send to the Level I and Level II fieldwork sites.
Practice Area	Indicates the type of OT environment where the student will do either Level I or Level II fieldwork. Refers to the characteristics of the setting where OT occurs; e.g. Comm-School=community based school setting.
Professional Liability Insurance	Malpractice insurance, which is usually required by the fieldwork site, is purchased by the student prior to doing Level I and Level II fieldwork through MCC (via laboratory fees)
Reflective Practice	Thoughtful consideration of one's experiences and knowledge when applying such knowledge to practice. Reflective practice includes being coached by professionals.
Skill execution	The ability to use one's knowledge effectively and readily in or performance.
SEFWE	Student Evaluation of Fieldwork Experience; used for Level I and Level II

Completed along with the fieldwork evaluation and turned in upon completion of fieldwork experience. Must be signed by the student and the supervisor

Supervision	To direct and inspect the performance of workers or work.
Supervision, Direct	Two-way communication that occurs in real time and offers both audio and visual capabilities to ensure opportunities for timely feedback.
Telehealth technologies.	<p>The application of evaluative, consultative, preventative, and therapeutic services delivered through telecommunication and information</p> <p>Occupational therapy services provided by means of a telehealth service delivery model can be synchronous, that is, delivered through interactive technologies in real time, or asynchronous, using store-and-forward technologies. Occupational therapy practitioners can use telehealth as a mechanism to provide services at a location that is physically distant from the client, thereby allowing for services to occur where the client lives, works, and plays, if that is needed or desired (AOTA, 2012)</p>
TX	Abbreviation for treatment

Reference

National Network of Libraries of Medicine. (2011). *Health Literacy*. Retrieved February 3, 2012, from <http://nnlm.gov/outreach/consumer/hlthlit.html>

World Health Organization. (2010). *Framework for action on interprofessional education and collaborative practice*. Geneva: Author. Retrieved from http://whqlibdoc.who.int/hq/2010/WHO_HRH_HPN_10.3_eng.pdf

2011 Accreditation Council for Occupational Therapy Education (ACOTE) Standards and Interpretive guide (effective July 31, 2013)

Policies Affecting Fieldwork:

Medicare Requirements for Student
Supervision

HIPAA and Fieldwork

FERPA

State College of Florida
Occupational Therapy Assistant Program

Policy for Fieldtrips during Fieldwork Experiences

Fieldtrips have been identified as a potential learning experience that the OTA student can use to compliment the fieldwork experience. It is an opportunity to visit another site, to compare and contrast different clinical settings.

The following policies have been established related to fieldtrips:

1. The number of fieldtrips permitted is limited based on the fieldwork experience. For a Level I experience (OTH 1520L/ OTH 2802L), the student may schedule one (1) fieldtrip for each level I experience (pediatrics, physical disabilities, mental health). For a Level II experience (OTH 2840L/ OTH 2841L), the student may schedule no more that two (2) fieldtrips for each experience.
2. The fieldtrip will be considered as a fieldwork day as long as the fieldtrip is a minimum of five (5) hours. For any fieldtrips scheduled for less than 5 hours, the student must complete the rest of the day at the assigned clinical site.
3. All fieldtrips must be approved by the Fieldwork Educator at the assigned clinical facility prior to the fieldtrip.
4. All fieldtrips must be approved by the Academic Fieldwork Coordinator or other designated faculty, after it has been approved by the Fieldwork Educator. All approvals must be done prior to the actual date of the fieldtrip.
5. A fieldtrip that has been approved by both the Fieldwork Educator and Academic Fieldwork Coordinator (or designee), will be considered part of required days for the clinical experience. Any fieldtrips completed without authorization will not be counted as a fieldwork experience day and the student will need to make-up the day at the assigned fieldwork site to complete the experience.
6. All fieldtrips must be arranged by the student requesting the fieldtrip. It is the student's responsibility to contact the fieldtrip site and make arrangements directly with the contact at that site. Student should not be asking classmates to arrange a fieldtrip, even if the classmate is completing a fieldwork experience at that site. The student assigned to a facility for a fieldwork experience is not the facility contact.
7. Students must realize that "visitors" may be disruptive to some fieldwork sites and their request for a fieldtrip may be denied. Do not take this refusal personally. The fieldwork site must consider the effects of "visitors" on the clients and the staff.

State College of Florida
Occupational Therapy Assistant Program
OTH 1520 Occupational Therapy During the Growth Years - Level I
OTH 2802 Occupational Therapy Practicum – Fieldwork Level I
OTH 2840L and OTH 2841L – Supervised Clinical Practice I and II

DRESS CODE

The personal appearance and demeanor of the occupational therapy assistant students at SCF reflect the college and program standards and are indicative of the student's interest and pride in the profession. A properly maintained appearance, as designated by the program, shall be met by all students. Failure to follow the uniform guidelines may result in the student being sent home and a fieldwork absence recorded. Continued violation of the dress code policy may result in probation or dismissal from the program.

The school uniform for the OTA program is gray scrub top and scrub pants (**no jeans, capris, yoga or exercise pants**), plain socks and the SCF nametag. This uniform **MUST** be worn during all fieldwork experiences regardless of the dress code at the facility.

The following are specific areas of concern related to dress code. Students **MUST** adhere to all of the following:

1. Nails must be fingertip length and clean. Nail polish must be intact without chips to prevent bacteria growth. Artificial nails are not allowed in any clinical setting.
2. A functioning watch with the capability of measuring seconds must be worn. Jewelry will be limited to earrings and a simple wedding band.
3. Earrings will be limited to the stud type and only on the ear lobe. Looped or dangling earrings may not be worn. Other body piercings/jewelry must not be observable while in uniform. All visible piercings must be removed when in the clinical setting. This includes tongue piercings.
4. Undergarments **MUST** be worn and should **NOT** be visible.
5. Hair must be clean, neat, pulled back and controlled in a conservative manner.
6. Gum chewing while engaged in any fieldwork activities is not permitted.
7. Uniforms and apparel worn to the fieldwork experience must be clean and pressed.
8. Socks and professional shoes are required. Sandals, open toe shoes and clog-type shoes with open backs of any kind are not permitted.
9. Smoking is not permitted when in uniform. The smoking odor in your clothes may be offensive and/or detrimental to the clients you see.

Practice Advisory: Services Provided by Students in Fieldwork Level II Settings

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

General Principles:

- a. Supervision of occupational therapy and occupational therapy assistant students in Fieldwork Level II settings should ensure protection of consumers and provide opportunities for appropriate role modeling of occupational therapy practice.
- b. To ensure safe and effective occupational therapy services, it is the responsibility of the supervising occupational therapist and occupational therapy assistant to recognize when supervision is needed and ensure that supervision supports the student's current and developing levels of competence with the occupational therapy process.
- c. In all cases the occupational therapist is ultimately responsible for all aspects of occupational therapy service delivery and is accountable for the safety and effectiveness of the occupational therapy service delivery process. This would include provision of services provided by an occupational therapy assistant student under the supervision of an occupational therapy assistant (see Addendum 1).
- d. Initially, supervision should be in line of sight and gradually decrease to less direct supervision as is appropriate depending on the (ACOTE, 2007a.; b. & c.):
 - Competence and confidence of the student,
 - Complexity of client needs,
 - Number and diversity of clients,
 - Role of occupational therapy and related services,
 - Type of practice setting,
 - Requirements of the practice setting, and
 - Other regulatory requirements.

In settings where occupational therapy practitioners¹ are employed:

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

In settings where occupational therapy practitioners are not employed:

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

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

References:

- Accreditation Council for Occupational Therapy Education. (2007a). Accreditation standards for a doctoral-degree-level educational program for the occupational therapist. *American Journal of Occupational Therapy*, 61, 641–651.
- Accreditation Council for Occupational Therapy Education. (2007b). Accreditation standards for a master's-degree-level educational program for the occupational therapist. *American Journal of Occupational Therapy*, 61, 652–661.
- Accreditation Council for Occupational Therapy Education. (2007c). Accreditation standards for an educational program for the occupational therapy assistant. *American Journal of Occupational Therapy*, 61, 662–671.
- American Occupational Therapy Association. (2006). Policy 1.44: Categories of occupational therapy personnel. In *Policy manual* (2009 ed., pp. 33–34). Bethesda, MD: Author
- American Occupational Therapy Association (2009). *Guidelines for Supervision, Roles, and Responsibilities During the Delivery of Occupational Therapy Services*. *American Journal of Occupational Therapy*, 63(November/December).

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OT/OTA Student Supervision & Medicare Requirements

Historically, OT and OTA students have participated in the delivery of occupational therapy services under the supervision of occupational therapy personnel in a variety of fieldwork sites. The following provides information about the way in which the Centers for Medicare & Medicaid Services (CMS) interprets how and whether the Medicare program should provide payment for services provided by students.

For those settings that serve Medicare patients, it is important to be aware of both new and existing Medicare payment policies. CMS has published specific criteria relating to how and when the program will pay for services when the student participates in service delivery. When developing fieldwork plans for sites that serve Medicare patients, two issues must be considered:

1. Whether Medicare payment rules specifically allow students to participate in the delivery of services to Medicare beneficiaries, and
2. What type and level of supervision are required by the Medicare program.

All relevant Medicare coverage criteria must be reviewed if reimbursement is sought for services when the student participates in service delivery. In addition, many state practice acts and regulations address occupational therapy services provided by students. You can find the regulatory board contact information on the State-by-State OT Law Database located in the [Licensure](#) section of this website. For details regarding AOTA's position on Level II fieldwork, please see the document [Practice Advisory: Services Provided by Students in Fieldwork Level II Settings](#).

The following sets out for each Medicare setting whether Medicare payment rules specifically allow or restrict coverage of services provided by students and what type and level of supervision Medicare requires to raise the services provided by students to the level of covered "skilled" occupational therapy. Practitioners should take care to ensure an appropriate level of supervision, whether or not a specific CMS rule regarding students has been issued.

Medicare Coverage of Services When a Student Participates in Service Delivery

- **Medicare Part A—Hospital and Inpatient Rehabilitation Facility (IRF)**

Type and Level of Supervision of Student Required:

CMS has not issued specific rules, but in the excerpt here referencing skilled nursing facilities (SNFs), CMS mentions other inpatient settings. In the Final SNF PPS Rule for FY 2012 (76 Fed. Reg. 48510-48511), CMS stated: *"We are hereby discontinuing the policy announced in the FY 2000 final rule's preamble requiring line-of-sight supervision of therapy students in SNFs, as set forth in the FY 2012 proposed rule. Instead, effective October 1, 2011, as with other inpatient settings, each SNF/provider will determine for itself the appropriate manner of supervision of therapy students consistent with state and local laws and practice standards."* See relevant state law for further guidance on supervision for the services to be considered occupational therapy.

* CMS recently discussed a different interpretation of the use of students in IRF. See our [Joint Statement on Use of Students in Hospitals](#) for information about ongoing AOTA advocacy on this issue.

- **Medicare Part A—SNF**

- Type and Level of Supervision of Student Required:**

- The minutes of therapy services provided by OT and OTA students may be recorded on the Minimum Data Set (MDS) as minutes of therapy received by the beneficiary. Before October 1, 2011, services of OT and OTA students had to be provided in the "line of sight" of the OT. OTAs could provide clinical supervision to OTA students; however, if the services were to be recorded for payment purposes, they had to be performed in "line of sight" of an OT.

- CURRENT POLICY:** Effective October 1, 2011, line-of-sight supervision is no longer required in the SNF setting (76 Fed. Reg. 48510-48511). The time the student spends with a patient will continue to be billed as if it were the supervising therapist alone providing the therapy, meaning that a therapy student's time is not separately reimbursable. See the MDS Version 3.0 Resident Assessment Instrument Manual ([MDS 3.0 RAI Manual](#)), Chapter 3, Section O Therapies for more details and examples. According to the MDS 3.0 RAI Manual, supervising therapists and therapy assistants within individual facilities must determine whether or not a student is ready to treat patients without line-of-sight supervision. The supervising therapist/assistant may not be engaged in any other activity or treatment, with the exception of documenting. It is AOTA's policy that OTAs may supervise OTA students, not OT students.

- **Because of advocacy by AOTA, CMS recognized Recommended Guidelines by AOTA, APTA, and ASHA:** AOTA, APTA, and ASHA worked together to develop suggested guidelines for CMS to incorporate into its guidance on student supervision. CMS recognized the guidelines and posted them on its website after issuing the FY 2012 SNF PPS final rule. In the final rule, CMS stated, "we appreciate the detailed supervision guidelines that several of the trade associations have developed, which we recognize as playing a significant role in helping to define the applicable standards of practice on which providers rely in this context."

Recommended Skilled Nursing Facility Therapy Student Supervision Guidelines

Submitted to CMS by the American Occupational Therapy Association (AOTA)

during the comment period for the FY 2012 SNF PPS Final Rule

Please note, these suggested guidelines would be in addition to the student supervision guidelines outlined in the RAI MDS 3.0 Manual and all relevant Federal Regulations

- The amount and type of supervision as determined by the supervising therapist/assistant must be appropriate to the student's documented level of knowledge, experience, and competence.
- Students who have been approved by the supervising therapist or assistant to practice independently in selected patient/client situations can perform those selected patient/client services without line-of-sight supervision by the supervising therapist/assistant.
- The supervising therapist/assistant must be physically present in the facility and immediately available to provide observation, guidance, and feedback as needed when the student is providing services at all levels of supervision.
- When the supervising therapist/assistant has approved the student to perform medically necessary patient/client services and the student provides the appropriate services, the services will be counted on the MDS as skilled therapy minutes.
- The supervising therapist/assistant is required to review and sign all students' patient/client documentation for all levels of clinical experience and retains full responsibility for the care of the patient/client.
- The supervising therapist/assistant is required to have one year of practice experience prior to supervising any students.
- Students who have not been approved by the supervising therapist/assistant to practice independently require line-of-sight supervision by the qualified therapist/assistant during all services. In addition, under these circumstances the supervising therapist/assistant will have direct contact with the patient/client during each visit.
- **Medicare Part A—Hospice**
Type and Level of Supervision of Student Required:
CMS has not issued specific rules. AOTA is recommending that the approach for Part A inpatient settings be followed for hospice providers. See relevant state law for further guidance on supervision for the services to be considered occupational therapy.
- **Medicare Part A—Home health**
Type and Level of Supervision of Student Required:
Regulations (§484.115) specifically cite definitions for "qualified personnel," which do not include students. However, CMS has not issued specific restrictions regarding students providing services in conjunction with a qualified OT or OTA. Services by students can be provided (as allowed by state law) as part of a home health visit, when the student is supervised by an OT or

OTA in the home. AOTA is recommending that the approach for Part A inpatient settings be followed for home health agencies. See relevant state law for further guidance on supervision for the services to be considered occupational therapy.

- **Medicare Part B—*Private Practice, Hospital Outpatient, SNF, CORF, ORF, Rehabilitation Agency, and other Part B providers including Home Health Agencies when providing Part B services***

Type and Level of Supervision of Student Required:

Under the Medicare Part B outpatient benefit, the services of students directly assisting a qualified practitioner (OT) are covered when the type and level of supervision requirements are met as follows: Students can participate in the delivery of services when the qualified practitioner (OT) is directing the service, making the skilled judgment, responsible for the assessment and treatment in the same room as the student, and not simultaneously treating another patient. The qualified practitioner is solely responsible and must sign all documentation.

The following is guidance to the entities that pay for Medicare benefits contained in the [Medicare Benefit Policy Manual, Chapter 15](#)—see Section 230B:

1. General

Only the services of the therapist can be billed and paid under Medicare Part B. The services performed by a student are not reimbursed even if provided under “line of sight” supervision of the therapist; however, the presence of the student “in the room” does not make the service unbillable. Pay for the direct (one-to-one) patient contact services of the physician or therapist provided to Medicare Part B patients. Group therapy services performed by a therapist or physician may be billed when a student is also present “in the room”.

EXAMPLES:

Therapists may bill and be paid for the provision of services in the following scenarios:

- The qualified practitioner is present and in the room for the entire session. The student participates in the delivery of services when the qualified practitioner is directing the service, making the skilled judgment, and is responsible for the assessment and treatment.
- The qualified practitioner is present in the room guiding the student in service delivery when the therapy student and the therapy assistant student are participating in the provision of services, and the practitioner is not engaged in treating another patient or doing other tasks at the same time.
- The qualified practitioner is responsible for the services and as such, signs all documentation. (A student may, of course, also sign but it is not necessary since the Part B payment is for the clinician’s service, not for the student’s services).

AOTA continues to work with a coalition of organizations to advocate for additional government support for educating allied health providers and to develop long-term solutions to the problems caused by Medicare’s limitations on reimbursement when students participate in service delivery.

Addendum 1:

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

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

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

And,

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

And,

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

And,

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

And,

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

And,

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

And,

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

And,

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

And,

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

And,

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

Therefore,

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

Accreditation Council for Occupational Therapy Education. (2007c). Accreditation standards for an educational program for the occupational therapy assistant. *American Journal of Occupational Therapy*, 61, 662–671.

HIPAA Guidelines for Fieldwork

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

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

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

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

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

Resource:

[HIPAA Frequently Asked Questions](#)

Privacy of Student Records – Family Educational Rights and Privacy Act (FERPA)

The Family Educational Rights and Privacy Act (FERPA) afford eligible students certain rights with respect to their education records. (An “eligible student” under FERPA is a student who is 18 years of age or older or who attends a postsecondary institution.) These rights include:

1. The right to inspect and review the student's education records within 45 days after the day State College of Florida receives a request for access. A student should submit to the registrar a written request that identifies the record(s) the student wishes to inspect. The school official will make arrangements for access and notify the student of the time and place where the records may be inspected. If the records are not maintained by the school official to whom the request was submitted, that official shall advise the student of the correct official to whom the request should be addressed.
- .2. The right to request the amendment of the student's education records that the student believes is inaccurate, misleading, or otherwise in violation of the student's privacy rights under FERPA. A student who wishes to ask the school to amend a record should write the school official responsible for the record, clearly identify the part of the record the student wants changed and specify why it should be changed. If the school decides not to amend the record as requested, the school will notify the student in writing of the decision and the student's right to a hearing regarding the request for amendment. Additional information regarding the hearing procedures will be provided to the student when notified of the right to a hearing.
3. The right to provide written consent before the university discloses personally identifiable information (PII) from the student's education records, except to the extent that FERPA authorizes disclosure without consent. The school discloses education records without a student's prior written consent under the FERPA exception for disclosure to school officials with legitimate educational interests. A school official is a person employed by the State College of Florida in an administrative, supervisory, academic, research, or support staff position (including law enforcement unit personnel and health staff); a person serving on the board of trustees; or a student serving on an official committee, such as a disciplinary or grievance committee. A school official also may include a volunteer or contractor outside of the State College of Florida who performs an institutional service of function for which the school would otherwise use its own employees and who is under the direct control of the school with respect to the use and maintenance of PII from education records, such as an attorney, auditor, or collection agent or a student volunteering to assist another school official in performing his or her tasks. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibilities for the State College of Florida.

4. The right to file a complaint with the U.S. Department of Education concerning alleged failures by the State College of Florida to comply with the requirements of FERPA. The name and address of the Office that administers FERPA is

Family Policy Compliance Office
U.S. Department of Education
400 Maryland Avenue, SW
Washington, DC 20202

Schools may disclose, without consent, "directory" information such as a student's name, address, telephone number, date and place of birth, honors and awards, and dates of attendance. However, schools must tell parents and eligible students about directory information and allow parents and eligible students a reasonable amount of time to request that the school not disclose directory information about them.

See the list below of the disclosures that postsecondary institutions may make without consent.

FERPA permits the disclosure of PII from students' education records, without consent of the student, if the disclosure meets certain conditions found in §99.31 of the FERPA regulations. Except for disclosures to school officials, disclosures related to some judicial orders or lawfully issued subpoenas, disclosures of directory information, and disclosures to the student, §99.32 of FERPA regulations requires the institution to record the disclosure. Eligible students have a right to inspect and review the record of disclosures. A postsecondary institution may disclose PII from the education records without obtaining prior written consent of the student –

- To other school officials, including teachers, within the [School] whom the school has determined to have legitimate educational interests. This includes contractors, consultants, volunteers, or other parties to whom the school has outsourced institutional services or functions, provided that the conditions listed in §99.31(a)(1)(i)(B)(1) - (a)(1)(i)(B)(2) are met. (§99.31(a)(1))
- To officials of another school where the student seeks or intends to enroll, or where the student is already enrolled if the disclosure is for purposes related to the student's enrollment or transfer, subject to the requirements of §99.34. (§99.31(a)(2))
- To authorized representatives of the U. S. Comptroller General, the U. S. Attorney General, the U.S. Secretary of Education, or State and local educational authorities, such as a State postsecondary authority that is responsible for supervising the university's State-supported education programs. Disclosures under this provision may be made, subject to the requirements of §99.35, in connection with an audit or evaluation of Federal- or State-supported education programs, or for the enforcement of or compliance with Federal legal requirements that relate to those programs. These entities may make further disclosures of PII to outside entities that are designated by them as their authorized representatives to conduct any audit, evaluation, or enforcement or compliance activity on their behalf. (§§99.31(a)(3) and 99.35

- In connection with financial aid for which the student has applied or which the student has received, if the information is necessary to determine eligibility for the aid, determine the amount of the aid, determine the conditions of the aid, or enforce the terms and conditions of the aid. (§99.31(a)(4))

- To organizations conducting studies for, or on behalf of, the school, in order to: (a) develop, validate, or administer predictive tests; (b) administer student aid programs; or (c) improve instruction. (§99.31(a)(6))

- To accrediting organizations to carry out their accrediting functions. (§99.31(a)(7))

- To parents of an eligible student if the student is a dependent for IRS tax purposes. (§99.31(a)(8))

- To comply with a judicial order or lawfully issued subpoena. (§99.31(a)(9))

- To appropriate officials in connection with a health or safety emergency, subject to §99.36. (§99.31(a)(10))

- Information the school has designated as “directory information” under §99.37. (§99.31(a)(11))

- To a victim of an alleged perpetrator of a crime of violence or a non-forcible sex offense, subject to the requirements of §99.39. The disclosure may only include the final results of the disciplinary proceeding with respect to that alleged crime or offense, regardless of the finding. (§99.31(a)(13))

- To the general public, the final results of a disciplinary proceeding, subject to the requirements of §99.39, if the school determines the student is an alleged perpetrator of a crime of violence or non-forcible sex offense and the student has committed a violation of the school’s rules or policies with respect to the allegation made against him or her. (§99.31(a)(14))

To parents of a student regarding the student’s violation of any Federal, State, or local law, or of any rule or policy of the school, governing the use or possession of alcohol or a controlled substance if the school determines the student committed a disciplinary violation and the student is under the age of 21. (§99.31(a)(15))

This information is made available to all current and prospective students via the institution’s website at the following URL, <https://www.scf.edu> Paper copies of these disclosures are available upon request from the Director of Financial Aid.

OTA Communication Form

Evaluation Forms

STATE COLLEGE OF FLORIDA
Occupational Therapy Assistant Programs

OTH 2840L/2841L

ASSIGNMENTS

- I. The following documents must be completed by the student and submitted on the first scheduled class day on campus:
 - a. Fieldwork Education Information Sheet – you are responsible for filling this form out. You can ask your FWE for information, but DO NOT give it to them to fill out for you.
 - i. Current means it must have been completed within the past year. Any forms over 1 year old must be redone.
 - b. Fieldwork Data Form – If the facility has a current Fieldwork Data Form, (you will need to ask to find this out), you can make a copy of it and submit it as your assignment. If they do not have a current Fieldwork Data Form, then you will need to fill this out by collecting data. DO NOT give this to your fieldwork educator to fill out for you.
 - c. Site Specific Objectives Form – This form must be filled out by you and your FWE.
 - i. If they currently have a listing of site specific objectives, you may copy this and submit it for your assignment.
 - ii. If they do not have a current listing, you will sit with your FEW and complete the form.
 - iii. The FWE has the option of checking they will use the goals from SCF and/or add site specific goals.
 - d. If your FWE refers you back to the program to access these forms, please see Lora May or Debbie to gain access to the facility file.
- II. **Student Hourly Log**
 - a. This will be kept by the student and signed by the fieldwork educator throughout the fieldwork experience. A copy of the log will be turned in at Week 4 of the fieldwork experience and the original log will be turned in at the end of the experience (Week 8).
 - b. The Attendance Log should reflect the actual hours you worked and not the hours you were assigned to the facility.
- III. The Occupational Therapy Assistant Program at the State College of Florida requires 2 treatment plans for each fieldwork experience.
- IV. **Assignment Policies:**
 - a. Assignments will be graded based upon content (thoroughness, quality), presentation (neatness, clarity), and technical components (spelling, grammar, and punctuation). It is the student's responsibility to seek assistance to improve his/her writing skills as needed. Since students will be writing in hospital/medical/educational charts, it is important that proper grammar/sentence structure be utilized. The best time to put proper English language usage into practice is in papers handed in to the course instructors. If poor technical

components do not improve throughout the semester, this may impact the student's ability to successfully complete a course with a grade of "C" or better.

- b. All assignments must be handed in at the start of class period to receive full credits. Assignment graded will be decreased by 10 points for each week it is late. All class work/assignments **MUST BE HANDED IN**, to receive a passing grade in the course. Assignments completed more than 2 weeks after the due date, will receive a grade of "ZERO" but must still be submitted to complete the course requirements. Failure to turn in any assignment by the **LAST DAY OF CLASS** will result in a grade of "F" being received in the course.

- c. Templates are provided for the assignments. Assignments must be submitted on the template provided. Do not change the template or format of the assignment

The student is to complete each treatment plan and submit it to their fieldwork educator. The fieldwork educator is to review the plan for accuracy and appropriateness to the patient/client. Fieldwork educators may make comments/suggestions directly on the treatment plan. If the treatment plan is not accurate or is inappropriate for the patient/client, the fieldwork educator may have the student re-submit the treatment plan with changes.

Once the treatment plan has been approved (with any changes/corrections), the fieldwork educator will sign the treatment plan. The student must submit the treatment plan, including all the original pages and drafts to the class instructor.

The first treatment plan is due by the end of the fourth week of the clinical experience. The second treatment plan is due by week seven.

The student will learn more from the treatment plans if completed throughout the fieldwork experience to allow for the teaching-learning process to occur rather than being done simultaneously during the last week of the fieldwork experience.

The fieldwork educator may assign additional assignments that are appropriate to the student's level of skill and the clinical setting. This may include but not limited to:

- ❖ Inservice presentation
- ❖ Case study presentation
- ❖ Construction of assistive /adaptive equipment

State College of Florida
Occupational Therapy Assistant Program
Fieldwork -OTA Program Communication Sheet

ATTENTION FIELDWORK EDUCATORS: This form MUST be completed and returned to the State College of Florida before the student completes their fieldwork experience. As part of our accreditation requirements, the program must show written documentation of communication with you. Completion of this form will help to satisfy this requirement. If you cannot complete this form, please telephone the school as soon as possible. You may complete this form any time from the midpoint of the fieldwork experience to the end. Thank you for your cooperation!

FWE _____ Student _____

Telephone Number _____

Have you had any questions or problematic areas during the fieldwork experience?

PLEASE DESCRIBE THE STUDENT'S STRENGTHS & WEAKNESSES IN THE FOLLOWING AREAS:

1. The student's adjustment to the fieldwork experience.

2. The student's academic preparation including practical application of knowledge and technical skills, i.e., data gathering, activity analysis and grading, participation in treatment planning and actual patient/client treatment.

3. The student's communication and observation skills.

4. The student's interpersonal skills with patients/clients/students, staff, peers.

5. The student's role in the supervisory relationship, i.e., self-awareness, ability to communicate ideas and needs, asks appropriate questions, modify behavior in response to feedback.

6. Other comments (use the reverse side of this form if necessary).

**STATE COLLEGE OF FLORIDA
OCCUPATIONAL THERAPY ASSISTANT PROGRAM**

The 2020 Fieldwork Performance Evaluation (FWPE) For the Occupational Therapy Assistant Student is now in a new online format. This evaluation tool was developed by AOTA in response to school requests. The new online tool will replace the printable forms that were previously used by SCF. This form is designed for evaluating performance of occupational therapy assistant students.

AOTA's new online evaluation will streamline the entire fieldwork performance evaluation process:

- Easy online access for educators and students to complete midterm and final reviews, anytime and anywhere.
- Built-in compliance with a validated assessment.
- Automatic scoring and documentation with reviews provided to educators and students via email and PDF and certificates of supervision hours provided to educators to support licensure and certification.
- Saves time for staff, educators and students in completing and processing evaluations.
- Instant access to aggregated data for a clear picture of student performance.
- Customizable forms to meet the schools needs with training resources for faculty and fieldwork educators.

The FWPE/OTAS identified 31 items that have been organized into sections that delineate the major competencies required to carry out the occupational therapy process in a professional and ethical manner.

A copy of the Rating Scale and items on the Fieldwork Performance Evaluation have been included in this manual for review. This is NOT the evaluation tool and should only be used as a reference.

Please note that the Rating Scale has changed. Review each rating scale definition prior to evaluation at midterm and final.

The Academic Fieldwork Educator and/or faculty from the State College of Florida will be providing all Fieldwork Educators with additional information regarding use of this evaluation tool.

Here are additional resources that can be accessed to assist with the transition to this tool:

Video – How to administer AOTA's Fieldwork Performance Evaluation

<https://www.youtube.com/watch?v=U5QIGHdh5NA&feature=youtu.be>

Training video:

<https://www.youtube.com/watch?v=T4wnbYJtOf0&feature=youtu.be>

Additional Resources:

- Fieldwork Performance Evaluation Rating Scoring Guide
- Copy of Fieldwork Performance Evaluation Items
- FWPE Guide for Students
- FWPE Guide for Fieldwork Educators

RATING SCALES

- 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).
-

SCORING

Overall Midterm Score:

Satisfactory Performance	=	65 points and above
Unsatisfactory Performance	=	64 points and below

Any student with a score of 64 points or below at midterm will be placed on academic probation. A meeting will be scheduled with the student, faculty, and fieldwork educator to establish an educational plan for remediation and continuation in the fieldwork experience.

Overall Final Score:

Pass	=	90 points and above
Not Pass	=	89 points and below

FWPE Guide for Fieldwork Educators

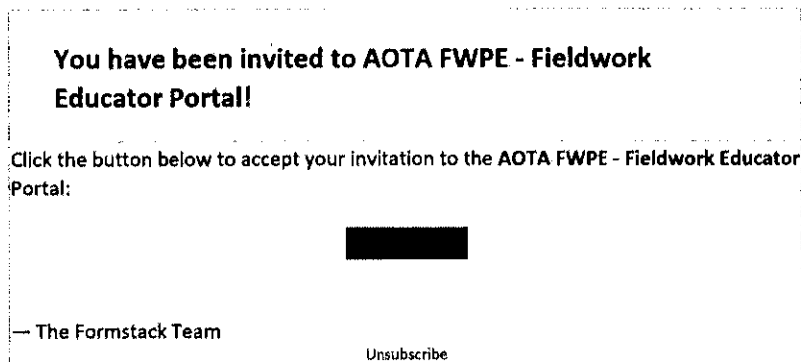
Audience: Fieldwork educators who supervise OT/OTA students at the fieldwork sites and need to complete the Fieldwork Performance Evaluation (FWPE) for the students

Purpose: Walk through the steps to access and complete the mid-term and final FWPE forms in Formstack

How to access and complete the mid-term FWPE form

Fieldwork educators do **NOT** need a Formstack login to access the FWPE forms. You will receive an email invitation from your school's fieldwork coordinator before the mid-term FWPE is due.

- Email is from **noreply@formstack.com**, please whitelist this email address
- A link to **the mid-term FWPE** form is included in the email
- Click on **"Get Started"** to access the form



- Then click on **"Open Form"** next to the form name
- Follow the directions listed on the first page for completing the Fieldwork Performance Evaluation. **All the scores will be calculated for you automatically. You will have a chance to review the total score along with the scores for each question before you submit your evaluation. Mid-term evaluation doesn't have PASS/FAIL status.**
- Once you have completed the mid-term evaluation, you will receive an **email confirmation with an attached PDF copy of your submission** to the email address listed in the form.

Note: Only the primary fieldwork educator listed on the form will receive the email.

- **The confirmation email will include a link to complete the final evaluation.** You will also receive an email reminder with the link to the final evaluation before it is due.

noreply@formstack.com
to me

12:21 PM (0 minutes ago) ☆

Hi Dan! Montano,

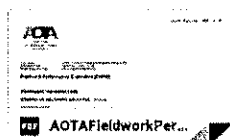
Thank you for submitting your mid-term evaluation. Attached is a copy of your evaluation.

Regards,

California State University

The link for your final evaluation is listed [here](#).

You will also be receiving a reminder email before the completion of your fieldwork.



Completing the Final Evaluation

- Before the final evaluation is due, you will receive an email reminder with a link to complete the final evaluation. Some of the data from the mid-term evaluation will be pre-populated into the final evaluation, including the scores from the mid-term evaluation.



I. FUNDAMENTALS OF PRACTICE

Final

RATING SCALE FOR STUDENT PERFORMANCE

At the end of the fieldwork, the student will be asked to rate the student's performance in order to pass the fieldwork.

4 — Exemplary Performance: Demonstrates satisfactory competence in specific skills consistently; demonstrates substantial breadth and depth in understanding and/or 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 (competencies may be evident); demonstrates limited understanding and/or application of fundamental knowledge and skills (displays some gaps and/or inconsistencies).

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.

1. Adherence 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.

- ☐ 1 (Unsatisfactory Performance)
☐ 2 (Emerging Performance)
☐ 3 (Proficient Performance)
☐ 4 (Exemplary Performance)
Final

Rating Scale for Student Performance

- A warning message will be shown on the summary page if any score is 1 or the scores for the ethics and safety areas are below 3. You may edit those scores by choosing the "back" button and updating accordingly if it was a mistake.

PERFORMANCE RATING SUMMARY SHEET (FINAL)

Satisfactory Performance 111 and above
Unsatisfactory Performance 110 and below

FINAL TOTAL

PASS/FAIL

A score under 3 on Question 1, Question 2 or Question 3 on the Final Evaluation will Fail this student.

1. (FINAL) AOTA CODE OF ETHICS

2. (FINAL) SAFETY REGULATIONS

3. (FINAL) SAFETY OF SELF/OTHER

4. (FINAL) ARTICULATED VALUES...

Note: the final evaluation also includes a pass/fail status based on the scores.

PERFORMANCE RATING SUMMARY SHEET (FINAL)

Satisfactory Performance 111 and above
Unsatisfactory Performance 110 and below

FINAL TOTAL

PASS/FAIL

- An email confirmation with an attached PDF copy of your submission will be sent to the PRIMARY fieldwork educator's email address listed on the form.
- A separate email with the certificate attached will also be sent to the PRIMARY fieldwork educator's email address listed on the form after the final evaluation is completed.

Formstack Documents <no-reply@webmerge.me>
to me

SEP 01 1:09 PM (3 minutes ago) ☆ ↶

College of Health Professions
Division of Occupational Therapy
1818 Rutledge Avenue, MSC 982
Charleston, SC 29425-9820
P: 843-792-2230; F: 843-792-2829

Sep 01, 2020

Dear Jane Doe, I,

I hope this message finds you well. On behalf of the California State University, I am writing to express my thanks and appreciation to you for mentoring and supervising Dani Dani at California State University from Sep 01, 2020 to Oct 15, 2020. This supervision lasted for 6 weeks.

Attached is a Verification of Occupational Therapy Level II Fieldwork Student Supervision document that can be used for your next NBCOT re-certification cycle. The NBCOT Professional Development Unit (PDU) value for Level II fieldwork is 1 unit per student supervised, up to a maximum of 18 units allowed per 3-year cycle.

You are the reason for the success of our students! Your time, energy, and commitment to educating future occupational therapists is truly appreciated. I have enjoyed collaborating with you and I look forward to working with you in the future. Best wishes!

Sincerely,

Mandie K. Sammons, DSc, OTR/L, ATC
Assistant Professor / Academic Fieldwork Coordinator
msammons@msc.edu



FWPE Guide for Students

Audience: OT and OTA Students who need to complete the Fieldwork Performance Evaluation (FWPE)

Purpose: Walk through the steps to access and complete the mid-term and final FWPE forms in Formstack

How to access and complete the mid-term FWPE form

Students do **NOT** need a Formstack login to access the FWPE forms. You will receive an email invitation from your school's fieldwork coordinator before the mid-term FWPE is due.

- Email is from noreply@formstack.com, please whitelist this email address
- A link to the **mid-term FWPE form** is included in the email
- Click on **"Get Started"** to access the form
- Then click on **"Open Form"** next to the form name

noreply@formstack.com [Unsubscribe](#)

12:14 PM (2 minutes ago) ☆



You have been invited to Student Portal Portal!

Click the button below to accept your invitation to the **Student Portal** Portal:

Get Started!

— The Formstack Team

[Unsubscribe](#)

Copyright © 2020 Formstack, LLC. All rights reserved. This is a customer service email.

Student Portal

Student Evaluation

denimontanast@gmail.com

AOTA - Fieldwork Performance Evaluation Mid-term OTS

Fieldwork Performance Evaluation

Open Form

- Follow the directions listed on the first page for completing the Fieldwork Performance Evaluation. **All the scores will be calculated for you automatically. You will have a chance to review the total score along with the scores for each question before you submit your evaluation. Mid-term evaluation doesn't have PASS/FAIL status.**

- Once you have completed the mid-term evaluation, you will receive an email confirmation with an attached PDF copy of your submission to the email address listed in the form.
- The confirmation email will include a link to complete the final evaluation. You will also receive another email reminder with the link to the final evaluation before it is due.

noreply@formstack.com
to me

12:21 PM (0 minutes ago) ☆

Hi Dani Montano,

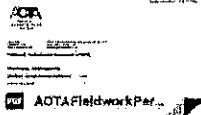
Thank you for submitting your mid-term evaluation. Attached is a copy of your evaluation.

Regards,

California State University

The link for your final evaluation is listed [here](#).

You will also be receiving a reminder email before the completion of your fieldwork.



Completing the Final Evaluation

- Before the final evaluation is due, you will receive an email reminder with a link to complete the final evaluation. Some of the data from the mid-term evaluation will be pre-populated into the final evaluation, including the scores from the mid-term evaluation.



I. FUNDAMENTALS OF PRACTICE

Final

RATING SCALE FOR STUDENT PERFORMANCE

All items in this area must be scored at a 3 or above on the final evaluation in order to pass fieldwork.

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).

1. Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations.
Examples: Medicare, Medicaid, client privacy, social media, human subject research

- ☐ 1 (Unsatisfactory Performance)
☐ 2 (Emerging Performance)
☐ 3 (Proficient Performance)
☐ 4 (Exemplary Performance)

4 (Exemplary Performance)

Student

- A warning message will be shown on the summary page if any score is 1 or the scores for the ethics and safety areas are below 3. You may edit those scores by choosing the "back" button and updating accordingly if they were entered by mistake.



PERFORMANCE RATING SUMMARY SHEET (FINAL)

Satisfactory Performance 111 and above
Unsatisfactory Performance 110 and below

FINAL TOTAL

PASS/FAIL

A score under 1 on Question 1, Question 2 or Question 3 on the Final Evaluation will Fail this student.

1. (FINAL) AOTA CODE OF ETHICS

2. (FINAL) SAFETY REGULATIONS

3. (FINAL) SAFETY OF SELF/OTHER

4. (FINAL) ARTICULATED VALUES...

Note: the final evaluation also includes a pass/fail status based on the scores.



PERFORMANCE RATING SUMMARY SHEET (FINAL)

Satisfactory Performance 111 and above
Unsatisfactory Performance 110 and below

FINAL TOTAL

PASS/FAIL

- An email confirmation with an attached PDF copy of your submission will be sent to the student email address listed on the form after you submit the evaluation.

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

Rating Scale

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

Rating scale definitions

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

FWPE for OTS Scoring:

- All items included must be scored to receive a Pass on the FWPE for OTS
- A sum score of 111 or higher will be required to receive a Pass on the FWPE for OTS
- A score of 3 or higher on the items
 - # 1 (Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations),
 - # 2 (Adheres to safety regulations and reports/documents incidents appropriately), and

- # 3 (Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents) will all be required to receive a Pass on the FWPE for OTS
- Scores of 1 on any of the items is not allowed to receive a Pass on the FWPE for OTS

FWPE for OTAS Scoring:

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

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

FUNDAMENTALS OF PRACTICE	
1	Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations. Examples: Medicare, Medicaid, client privacy, social media, human subject research
2	Adheres to safety regulations and reports/documents incidents appropriately. Examples: fire safety, OSHA regulations, body substance precautions, emergency procedures
3	Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents. Examples: body mechanics, medical safety, equipment safety, client specific precautions, contraindications, community safety
BASIC TENETS	
4	Articulates the values, beliefs, and distinct perspective of the occupational therapy profession to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public
5	Articulates the value of occupation as a method and desired outcome of occupational therapy to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public
6	Articulates the role of occupational therapy practitioners to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public
SCREENING AND EVALUATION	
7	Obtains sufficient and necessary information about factors that support and hinder occupational performance from relevant sources throughout the evaluation process. Examples: record or chart reviews, client, family, caregivers, service providers
8	Establishes service competency in assessment methods, in accordance with setting procedures and applicable laws, by administering assessments accurately and efficiently to ensure findings are valid, reliable, and timely. Examples: record or chart reviews, observations, interviews, standardized and non-standardized assessments
9	Administers delegated assessments using appropriate procedures and protocols. Examples: standardized and non-standardized assessments, interviews, and observations
10	Assists with interpreting information in relation to the client's needs, factors, and performance.

	<p>Examples: record or chart reviews, observations, interviews, standardized and non-standardized assessments</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>Includes the consideration of psychosocial factors</p>
11	Reports results clearly, accurately, and concisely, reflecting the client's occupational performance.
INTERVENTION	
12	<p>Articulates a clear and logical rationale for the intervention process based on the evaluation results and other relevant considerations.</p> <p>Examples: contexts, theories, frames of reference, practice models, and evidence</p>
13	<p>Under the supervision of and in cooperation with an occupational therapy practitioner, uses professional literature to make informed intervention decisions.</p> <p>Examples: textbooks, journal articles, other relevant and reliable informational resources</p>
14	<p>Selects client-centered and occupation-based interventions that motivate and challenge the client to achieve established goals.</p> <p>Includes the consideration of all client centered components including psychosocial factors</p>
15	<p>Implements client-centered and occupation-based intervention plans.</p> <p>Includes the consideration of all client centered components including psychosocial factors</p>
16	<p>Modifies the task and/or environment to maximize the client's performance.</p> <p>Examples: upgrades/downgrades task; arranges client's workspace for optimal performance</p>
17	Recommends modification or termination of intervention plan based on the client's status.
18	Documents the client's response to services in a manner that demonstrates the effectiveness of interventions.
MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES	
19	<p>Demonstrates through practice or discussion the ability to collaborate with and assign appropriate tasks to, as indicated, the occupational therapy aide or others to whom responsibilities might be assigned.</p> <p>Examples: paraprofessionals, nurses' aides, volunteers</p>
20	<p>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.</p> <p>Examples: billing for OT services, inventory and ordering of supplies for OT services, and options for client procurement of adaptive equipment</p>
21	<p>Demonstrates knowledge about the organization.</p> <p>Examples: mission and vision, accreditation status, licensing, specialty certifications</p>

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

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

FUNDAMENTALS OF PRACTICE	
1	Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations. Examples: Medicare, Medicaid, client privacy, social media, human subject research
2	Adheres to safety regulations and reports/documents incidents appropriately. Examples: fire safety, OSHA regulations, body substance precautions, emergency procedures
3	Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents. Examples: body mechanics, medical safety, equipment safety, client specific precautions, contraindications, community safety
BASIC TENETS	
4	Articulates the values, beliefs, and distinct perspective of the occupational therapy profession to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public
5	Articulates the value of occupation as a method and desired outcome of occupational therapy to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public
6	Articulates the role of occupational therapy practitioners to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public
SCREENING AND EVALUATION	
7	Obtains sufficient and necessary information about factors that support and hinder occupational performance from relevant sources throughout the evaluation process. Examples: record or chart reviews, client, family, caregivers, service providers
8	Establishes service competency in assessment methods, in accordance with setting procedures and applicable laws, by administering assessments accurately and efficiently to ensure findings are valid, reliable, and timely. Examples: record or chart reviews, observations, interviews, standardized and non-standardized assessments
9	Administers delegated assessments using appropriate procedures and protocols. Examples: standardized and non-standardized assessments, interviews, and observations
10	Assists with interpreting information in relation to the client's needs, factors, and performance.

	<p>Examples: record or chart reviews, observations, interviews, standardized and non-standardized assessments</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>Includes the consideration of psychosocial factors</p>
11	Reports results clearly, accurately, and concisely, reflecting the client's occupational performance.
INTERVENTION	
12	<p>Articulates a clear and logical rationale for the intervention process based on the evaluation results and other relevant considerations.</p> <p>Examples: contexts, theories, frames of reference, practice models, and evidence</p>
13	<p>Under the supervision of and in cooperation with an occupational therapy practitioner, uses professional literature to make informed intervention decisions.</p> <p>Examples: textbooks, journal articles, other relevant and reliable informational resources</p>
14	<p>Selects client-centered and occupation-based interventions that motivate and challenge the client to achieve established goals.</p> <p>Includes the consideration of all client centered components including psychosocial factors</p>
15	<p>Implements client-centered and occupation-based intervention plans.</p> <p>Includes the consideration of all client centered components including psychosocial factors</p>
16	<p>Modifies the task and/or environment to maximize the client's performance.</p> <p>Examples: upgrades/downgrades task; arranges client's workspace for optimal performance</p>
17	Recommends modification or termination of intervention plan based on the client's status.
18	Documents the client's response to services in a manner that demonstrates the effectiveness of interventions.
MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES	
19	<p>Demonstrates through practice or discussion the ability to collaborate with and assign appropriate tasks to, as indicated, the occupational therapy aide or others to whom responsibilities might be assigned.</p> <p>Examples: paraprofessionals, nurses' aides, volunteers</p>
20	<p>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.</p> <p>Examples: billing for OT services, inventory and ordering of supplies for OT services, and options for client procurement of adaptive equipment</p>
21	<p>Demonstrates knowledge about the organization.</p> <p>Examples: mission and vision, accreditation status, licensing, specialty certifications</p>

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

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

Rating Scale

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

Rating scale definitions

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

FWPE for OTS Scoring:

- All items included must be scored to receive a Pass on the FWPE for OTS
- A sum score of 111 or higher will be required to receive a Pass on the FWPE for OTS
- A score of 3 or higher on the items
 - # 1 (Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations),
 - # 2 (Adheres to safety regulations and reports/documents incidents appropriately), and

- # 3 (Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents) will all be required to receive a Pass on the FWPE for OTS
- Scores of 1 on any of the items is not allowed to receive a Pass on the FWPE for OTS

FWPE for OTAS Scoring:

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

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

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

PURPOSE

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

CONTENT

The self-assessment tool includes the following features:

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

WHO SHOULD USE THE TOOL

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

DIRECTIONS

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

Self-Assessment Tool:

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

Development Plan:

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

Originally developed in 1997 by the COE Fieldwork Issues Committee.

Revised in 2009 by the Commission on Education:

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

Andrea Billics, PhD, OTR/L

Judith Blum, MS, OTR/L

Paula Bohr, PhD, OTR/L, FAOTA

Jennifer Coyne, COTA/L

Jyothi Gupta, PhD, OTR/L

Linda Musselman, PhD, OTR, FAOTA

Linda Orr, MPA, OTR/L

Abbey Sipp, OTS

Patricia Stutz-Tanenbaum, MS, OTR

Neil Harvison, PhD, OTR/L (AOTA Liaison)

SELF-ASSESSMENT TOOL FOR FIELDWORK EDUCATOR COMPETENCY

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

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

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

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

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

FIELDWORK EDUCATOR PROFESSIONAL DEVELOPMENT PLAN

NAME: _____

DATE: _____

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

AMERICAN OCCUPATIONAL THERAPY ASSOCIATION RESOURCE LIST

- Atler, K. (2003). *Using the fieldwork performance forms: The complete guide*. Bethesda, MD: American Occupational Therapy Association.
- Atler, K. & Wimmer, R. (2003). *Online course—Using the Fieldwork Performance Evaluation forms: An interactive approach*. Bethesda, MD: American Occupational Therapy Association.
- Accreditation Council for Occupational Therapy Education (2009). *Standards and Interpretive Guidelines*. Downloaded June 8, 2009 from <http://www.aota.org/Educate/Accredit/StandardsReview/guide/42369.aspx>
- American Occupational Therapy Association (2009). *Occupational therapy fieldwork education: Value and purpose*. Bethesda, MD: American Occupational Therapy Association.
- American Occupational Therapy Association (2009). *Specialized knowledge and skills of occupational therapy educators of the future*. Bethesda, MD: American Occupational Therapy Association.
- American Occupational Therapy Association (2008). *Occupational therapy practice framework: Domain and process* (2nd edition). Bethesda, MD: Author.
- American Occupational Therapy Association (2008) *Guidelines for supervision, roles, and responsibilities during the delivery of occupational therapy services*. Bethesda, MD: Author.
- American Occupational Therapy Association (2008) *Recommendations for occupational therapy fieldwork experiences*. Bethesda, MD: American Occupational Therapy Association.
- American Occupational Therapy Association (2005). *Occupational therapy code of ethics*. Bethesda, MD: Author
- Costa, D. (2004). *Essential guide to occupational therapy fieldwork education: Resources for today's educators and practitioners*. Bethesda, MD: American Occupational Therapy Association.
- Costa, D. (2007) *Clinical supervision in occupational therapy: A guide for fieldwork and practice*. Bethesda, MD: American Occupational Therapy Association.
- Moyers, P.A. (2007). *The guide to occupational therapy practice*. Bethesda, MD: American Occupational Therapy Association.