The Occupational Therapy Program Student Fieldwork Manual is designed to be a resource for students, Fieldwork Educators, and academic faculty. The manual contains general information, procedures, and copies of various forms and documents relevant to the fieldwork education program.

The italicized words within the manual, are for emphasis and/or are taken from the 2011 Standards for an Accredited Educational Program for the Occupational Therapist adopted by the Accreditation Council for Occupational Therapy Education of the American Occupational Therapy Association.
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FIELDWORK EDUCATION OVERVIEW

Fieldwork education in the occupational therapy program at Florida Gulf Coast University is a crucial part of the students' professional preparation and is best integrated as a component of the curriculum design. Florida Gulf Coast University implements and evaluates fieldwork experiences for their effectiveness. The fieldwork experiences provide the students with the opportunity to carry out professional responsibilities under the supervision of a qualified occupational therapy practitioner serving as a role model. The academic fieldwork coordinator (AFWC) is responsible for the program’s compliance with the fieldwork education requirements (C.1.0).

Fieldwork education is designed to provide students with multiple and varied opportunities to apply the knowledge and skills gained through didactic interactions and experiential learning experiences. Within the fieldwork practice settings, students further develop the professional skills necessary for the establishment of effective client-therapist relationships and for successful collaboration with other members of the client's service delivery team.

Occupational therapy education divides fieldwork education into two components, identified as Level I and Level II. The Accreditation Council for Occupational Therapy Education (ACOTE) provides general guidelines regarding fieldwork education, but the specific nature and structure is determined by the academic faculty of each educational program in collaboration with the FWEd.

Level I Fieldwork placements (Level IA, Level IB, & Level IC) are provided to students with experiences in a variety of occupational therapy practice settings serving clients experiencing a variety of physical and psychosocial occupational performance issues across the life span.

Level II Fieldwork placements (Level IIA & Level IIB) identify clients' occupational performance issues and select appropriate theoretical frames of reference to screen and assess clients. Students develop action plans with measurable goals and objectives that are matched to client-therapist agreed upon behavioral objectives, carry out interventions and plan for discontinuation of occupational therapy services or transition to other services.

There are several ways the AFWC ensures fieldwork education is integrated as a component of the curriculum design. The AFWC completes site visits, establishes Memorandum of Understanding (MOU)/Affiliation Agreements (AA), reviews AOTA/FLOTÉC Fieldwork Data Forms and SEFWE, and communicates Florida Gulf Coast University’s curriculum design and objectives with sites.

Reviewing the MOU/AA, the AOTA or FLOTÉC site specific fieldwork data form, site specific behavioral objectives, and talking with the OT site representative or FWEd, the AFWC confirms the fieldwork program reflects the sequence and scope of content in the curriculum design. Formally during staff meetings and informally throughout each
semester the AFWC and faculty discuss fieldwork experiences to ensure that the fieldwork program reflects the sequence and scope of content in the curriculum design so that fieldwork experiences strengthen the ties between didactic and fieldwork education (C.1.1).

The fieldwork site’s MOU/AA, AOTA or FLOTEC fieldwork data forms, and site-specific behavioral objectives provide the AFWC with the information needed to ensure site requirements are being met (C.1.2). These site specific forms are made available to the students in an electronic format on Canvas. Students are also informed these files exist during the fieldwork seminars and during the FW placement process. If a student is placed at a new fieldwork site, the AFWC will request a copy of the AOTA or FLOTEC Fieldwork Data form and site specific behavioral objectives. If the AOTA / FLOTEC Fieldwork Data form or site specific behavioral objectives are not available, the student will be required to develop these forms together with the FWEd and AFWC. Students are required to complete and sign a Student Fieldwork Agreement prior to each fieldwork experience; this agreement in another mechanism of communicating the site specific fieldwork information to the student (C.1.2).

MEMORANDUM OF UNDERSTANDING/AFFILIATION AGREEMENT PROCESS (C.1.2)

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

Each time a student is placed at a particular site the evidence of a valid MOU/AA is in effect and signed by both parties at the time the student is completing the Level I or Level II fieldwork experience (C.1.6). If there is not an MOU/AA the AFWC will initiate the process.

There is a database on the College of Health Professions and Social Work (CHPSW) share drive that gives information on 700+ contracts that presently exist or have existed in the past. The business manager in the CHPSW maintains this database. The hard files of these documents are located in the Dean’s Suite.

If a MOU/AA needs to be created or revised, the AFWC will contact all the CHPSW clinical/field coordinators to see which programs should be included in the MOU/AA.

If a facility/company uses or chooses to use the Florida Gulf Coast University’s MOU/AA, the following information will be sent to the business manager in the CHPSW:

- Legal name of the facility/company
- Mailing address
- Full name, title, & e-mail of signing authority
- Name & e-mail of contract coordinator, if different from signing authority
If a facility/company requires Florida Gulf Coast University (FGCU) to use their MOU/AA, the facility/company’s contract coordinator will be asked to e-mail their MOU/AA to the FGCU’s business manager; and to include FGCU’s legal name “Florida Gulf Coast University Board of Trustees” and our occupational therapy program within the MOU/AA. The business manager in the CHPSW will then forward the MOU/AA to FGCU’s Legal Office for edits and approval.

The business manager in the CHPSW will copy the AFWC on all follow-up e-mails, and after final execution, will send a copy of the agreement to all coordinators of the included programs.

*Responsibilities of Florida Gulf Coast University and each fieldwork site are clearly documented in the MOU/AA (C.1.6).* When a MOU/AA is established with a multi-site service, the policy of the site in regards to whom the MOU/AA needs established is implemented. There is always at least one MOU/AA established prior to the student completing fieldwork if not two.

A copy of Florida Gulf Coast University’s MOU/AA template follows:
MEMORANDUM OF UNDERSTANDING / AFFILIATION AGREEMENT

By and Between:

AFFILIATE NAME

and

FLORIDA GULF COAST UNIVERSITY BOARD OF TRUSTEES
10501 FGCU Boulevard South
Fort Myers, Florida  33965-6565

This Affiliation Agreement, hereinafter referred to as Agreement, is entered into by FLORIDA GULF COAST UNIVERSITY BOARD OF TRUSTEES, a public body corporate of the State of Florida, hereinafter referred to as “University”, and AFFILIATE NAME, hereinafter referred to as “Affiliate”. This Agreement is for the following program:

Program Name

WHEREAS, the University is desirous of establishing an agreement to guide and direct the parties respecting their affiliation and working relationship, inclusive of anticipated future arrangements and agreements in furtherance thereof, to provide high quality practice experiences for students of the University with AFFILIATE NAME.

NOW THEREFORE, in consideration of the mutual covenants contained herein, the parties hereto agree as follows:

GENERAL UNDERSTANDING:

The practice experiences to be provided will be of such content and cover such periods of time as may, from time to time, be mutually agreed upon by the University and Affiliate.

The number of students designated for participation in a practice experience, their academic level, the time and length of the learning experience, and the availability of learning opportunities will be mutually determined by agreement of the parties in advance of the clinical assignment.

All student participants must be mutually acceptable to both parties and either party may temporarily withdraw any student from the learning experience if safety is at risk. If for any other reason either party reasonably believes that it is not in the best interest of the Affiliate, University, and/or student for the student to continue, appropriate Affiliate and/or University officials will discuss the matter. Further action regarding student status will follow University policy.

The term of this Agreement shall be perpetual and shall not be affected by changes in ownership, personnel, positions and/or titles.
This Agreement may be terminated by either party with 90 days prior written notice provided the 90 day period does not interfere with a student practice experience. If the 90 day notice extends past the beginning of the term, then the 90 day notice will be waived so long as some notice was given. In no case will the Agreement be terminated during a practice experience, thereby allowing students currently enrolled and participating to have the opportunity to complete the practice experience with Affiliate. Notwithstanding the foregoing, this Agreement may be unilaterally cancelled by the University for refusal by the Affiliate to allow public access to all documents, papers, letters, or other materials subject to the provisions of Chapter 119, Florida Statutes, and made or received by Affiliate in conjunction with this Agreement.

This Agreement may be modified in writing by mutual agreement between the parties.

**MUTUAL RESPONSIBILITIES (University, Affiliate, Student):**

The parties will work together to maintain an environment of quality practice experiences and quality client care. At the request of either party, a meeting or conference will be promptly held between the University and Affiliate representatives to resolve any problems, evaluate and improve teaching methods, propose changes in curriculum design, or develop any improvements in the operation of the contemplated practice experience.

The parties will work together to develop and coordinate appropriate research and service projects when applicable. All research and service projects will be agreed upon by the University, Affiliate and student following all established institutional guidelines as related to research and/or service.

All parties will not discriminate on the basis of a person’s race, color, gender, religion, creed, national origin, disability, marital status, Vietnam or disabled veteran status, or age. All parties will make reasonable accommodations for disabled persons.

In the event of an accident or incident, which might involve legal liability on the part of a student or faculty member, each party will submit an incident or accident report to the appropriate department within the University and Affiliate.

The confidentiality of client and student records shall be maintained at all times.

**AFFILIATE RESPONSIBILITIES:**

The Affiliate will be responsible for the organization, administration, staffing, operating, financing of its services, the maintenance of accepted standards for efficient management and will operate in accordance with acceptable health care standards.

The Affiliate will retain responsibility for the care of clients/patients and will maintain administrative and professional supervision of students insofar as their presence and program assignments affect the operation of the Affiliate and its care, direct and indirect, of clients/patients. The Affiliate will provide qualified personnel to supervise/instruct
students in University programs, according to Program requirements as communicated to Affiliate personnel.

The Affiliate will not use students in lieu of professional or non-professional staff.

The Affiliate will accept from the University the number of students that qualified staff, time, and space permit.

The Affiliate will provide the student appropriate participation in client care or other learning processes necessary to accomplish the educational outcomes of the practice experience.

Subject to the Affiliate’s overall responsibility for client/patient care, it may invite appropriately credentialed faculty members to provide such services as may be necessary for teaching purposes.

The Affiliate shall provide appropriate orientation for both University faculty and participating students (e.g. facility tour, philosophies, rules, regulations, policies and conduct expectations).

The Affiliate will provide adequate resources for participating students and faculty in accordance with the objectives developed through cooperative planning by the University’s departmental faculty and the Affiliate’s staff. Included may be such resources as library, conference space, classrooms, cafeteria, lounges, parking, office or workspace and dressing rooms.

The Affiliate shall, as appropriate, assist the University in collaborative assessment of each student’s performance. Final responsibility for grading will be maintained by the University.

The Affiliate will encourage visits of University faculty and accreditation evaluators for the purpose of observing, auditing, participating in teaching, attending planning meetings, or evaluation for accreditation.

The Affiliate will provide first aid, with appropriate calls to emergency medical services or referral to a physician to students and faculty in case of accident or illness while engaged in practice experiences. All health care (emergency or otherwise) that a student or University faculty member receives will be at the expense of the individual involved.

The Affiliate will be responsible for informing Affiliate personnel regarding the rights and privileges of the University's students and faculty.

The Affiliate will be responsible for coordinating with the student any required criminal background checks.

Change in Affiliate ownership will be reported to the University within 30 days.
UNIVERSITY RESPONSIBILITIES:

The University will use its best efforts to ensure that the practice experiences are conducted in such a manner as to enhance client/patient care.

The University will retain responsibility for student education including the curriculum, student evaluation and granting of educational credit.

The University will assure that students selected for participation in practice experiences are prepared for competent and safe participation in the practice phase of their overall education.

Prior to the commencement of a practice experience, the University will provide responsible Affiliate officials with the name(s), dates and hours of assignment and academic class designation of prospective student participants.

The University will designate a faculty member as liaison to the Affiliate.

The University will assign appropriately credentialed faculty members to the Affiliate and will, upon request, provide evidence of these credentials.

The University will require students to abide by the Affiliate’s rules, standards, regulations and procedures.

The University will require students to either be vaccinated for Hepatitis B or sign a release if declining that vaccination, and complete all other immunizations/health examinations required by the Affiliate.

The University will maintain educational records and information relative to students in accordance with the Family Educational Rights and Privacy Act of 1974 and Section 1002.22, Florida Statutes.

The University will accept the responsibility of assisting in the orientation of appropriate Affiliate personnel to the goals, objectives and learning experiences of each educational program.

The University maintains the right to stipulate appropriate professional dress to be worn by students during practice experiences.

The University will encourage visits of Affiliate staff for the purpose of observing, auditing, participating in teaching, and attendance of planning meetings.

The University will require participating students maintain professional liability insurance with minimum limits of $1,000,000/$3,000,000 except for nurse anesthesia students with minimum limits of $250,000/$750,000. Upon request, evidence of such insurance will be provided.
GOVERNMENT REGULATIONS:

To the extent applicable, Affiliate agrees that it will comply with:

Title VI of the Civil Rights Act of 1964, as amended, 42 U.S.C. 2000d et seq., which prohibits discrimination on the basis of race, color, or national origin in programs and activities receiving or benefiting from federal financial assistance.

Section 504 of the Rehabilitation Act of 1973, as amended, 29 U.S.C. 794, which prohibits discrimination on the basis of handicap in programs and activities receiving or benefiting from federal financial assistance.

Title IX of the Education Amendments of the 1972, as amended, 20 U.S.C. 1681 et seq., which prohibits discrimination on the basis of sex in education programs and activities receiving or benefiting from federal financial assistance.

The Age Discrimination Act of 1975, as amended, 42 U.S.C. 6101 et seq., which prohibits discrimination on the basis of age in programs or activities receiving or benefiting from federal financial assistance.

The Omnibus Budget Reconciliation Act of 1981, P.L. 97-35, which prohibits discrimination on the basis of sex and religion in programs and activities receiving or benefiting from federal financial assistance.

Executive Order 11246 of September 24, 1965 as amended, and of the rules, regulations, and relevant orders of the Secretary of Labor, which prohibit discrimination in government employment on the basis of race, creed, color, or national origin.


The Americans with Disabilities Act of 1990, which prohibits discrimination on the basis of disability and/or perceived disability.

Section 413.036 of the Florida Statutes, which provides for the procurement of services from a qualified nonprofit agency for the blind or for the other severely handicapped.

Chapter 760, Florida Statutes, which prohibits discrimination on the basis race, color, religion, sex, national origin, age handicap, or marital status.

Title 45, C. F. R. 160.103, Health Insurance Portability and Accountability Act which governs privacy regulations associated with medical information.

All regulations, guidelines, and standards which are now or may be lawfully adopted under the above statutes, as well as any other federal, state, or local rules, regulations and ordinances.
NOTICES

All notices and all other matters pertaining to this Agreement requiring delivery to a party shall be in writing and shall be deemed to have been duly given when received by the addressees at the following addresses:

Authorized signer’s name and Mitchell L. Cordova, Ph.D.
Title Dean, College of Health Professions and Social Work
Affiliate Name Florida Gulf Coast University
Affiliate Address 10501 FGCU Boulevard South
and

Affiliate Address Fort Myers, Florida 33965-6565

Affiliate hereby acknowledges receipt of a copy of this Agreement. This Agreement is effective when the last party signs this Agreement.

AFFILIATE NAME and FLORIDA GULF COAST UNIVERSITY BOARD OF TRUSTEES

Signature

Signature

Authorized signer’s name Mitchell L. Cordova

Date: __________________________

Date: __________________________

Witness

Witness

Witness

Witness

The student is not permitted to contact the potential fieldwork site to set up the MOU/AA, request fieldwork placement, or to request fieldwork information. The student is only allowed to contact the site after permission is granted via the AFWC or after the AFWC has successfully placed the student at that site for fieldwork.
**SELECTION PROCESS OF FIELDWORK SITES (C.1.2)**

Fieldwork sites are selected based upon several factors to confirm the experience provides the student with the opportunity of carry out professional responsibilities under supervision of a qualified occupational therapy practitioner serving as a role model (C1.0). During the AFWC initial conversation with the student placement coordinator at the potential affiliating site, the AFWC ensures the ratio of fieldwork educators to students enables proper supervision and the ability to provide frequent assessment of student progress in achieving stated fieldwork objectives (C.1.4).

For Level I FW, the AFWC ensures the FWEd is a qualified personnel, including, but are not limited to, currently licensed or otherwise regulated occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, nurses, and physical therapist (C.1.9). Level II FW, the AFWC ensures the FWEd is a qualified OT practitioner serving as a role model, is currently licensed or otherwise regulated occupational therapist who has a minimum of 1 year full-time (or its equivalent) of practice experience subsequent to initial certification and who is adequately prepared to serve as a fieldwork educator (C.1.14).

The AFWC ensures that the fieldwork program reflects the sequence and scope of content in the curriculum design (C.1.1), provide educational experiences applicable to the occupational therapy program at Florida Gulf Coast University, and have FWEd who are able to effectively meet the learning needs of the students.

The AFWC discusses the university’s curriculum design and the fieldwork evaluation with the site student coordinator or the FWEd prior to establishing a MOU/AA. The AFWC also collaborates with the FWEd and either reviews the existing fieldwork objectives or establishes new fieldwork objectives. The AFWC requests a copy of the site’s AOTA Fieldwork Data form at this time.

The AFWC the OT Faculty Assistant perform annual program evaluation as another mechanism to ensure fieldwork experiences are implemented and effective (C.1.0). The AFWC monitors Student Evaluation Fieldwork Experience (SEFWE) forms, the student fieldwork assignments (i.e. Logs, Quality Posts, and Challenge Questions), performs site visits, and maintains communication via email or phone calls with students and FWEd.

The Occupational Therapy Program allows students to choose Level II fieldwork sites, this process ensures the fieldwork agreements are sufficient in scope and number to allow completion of graduation requirements in a timely manner in accordance with the policy adopted by the program and requires my Standard A.4.14 (C.1.5). Note, if the student chooses a new site, a site that an MOU/AA has not yet been established, the AFWC verifies the site reflects the sequence and scope of content of Florida Gulf Coast University’s occupational therapy program’s curriculum design prior to placement.

The Level II fieldwork experiences take place in settings consistent with the curriculum design (C.1.12). The student can complete a Level II fieldwork in a minimum of one setting if it is reflective of more than one practice area, or in a maximum of four different settings (C.1.12).
FIELDWORK TEAM – ROLES AND RESPONSIBILITIES

Fieldwork education is accomplished through the collaborative efforts of the Academic Fieldwork Coordinator (AFWC), the Faculty Assistant, the Fieldwork Educator (FWEd), and the Student. The following is a brief description of the roles and responsibilities of each.

Academic Fieldwork Coordinator (AFWC)
The AFWC is a licensed occupational therapist and full time faculty member who is responsible for the development and monitoring of the fieldwork education program; and ensures the needs of the fieldwork program are being met (A.2.7). Responsibilities include, but are not limited to:

- Responsible for the program’s compliance with fieldwork requirements per ACOTE C Standards
- Confirm fieldwork sites meet FGCU OT program’s sequence and scope of content in the curriculum design
- initiates the MOU/AA process and ensures a valid MOU/AA is signed by both parties before the student is completes Level I or Level II FW
- Collaborates with the FWEd in the development of student Level I and Level II Behavioral Objectives that reflect the purpose of fieldwork
- Ensure Level II FW provides clinical reasoning and reflective practice, enables ethical practice, develops professionalism, and facilitates competence.
- Maintenance of files on each fieldwork site
- Orient students to the policies and procedures of FW
- Collaborate with faculty and students in regards to student FW placements
- Collaborate with faculty and FWEd to strengthen the ties between coursework and fieldwork
- Ensures the FWEd is qualified to serve as FWEd and confirms FWEd’s occupational therapy license is validated on the State Board of Occupational Therapy website before student begins fieldwork.
- Maintains a collaborative relationship with FWEd, including site visits, the sharing of resources, assistance in developing instructional strategies, and providing resources for continuing education/workshops or providing CEU.
- Reassigning of students to other fieldwork placements, as needed
- Provides assistance to students and/or FWEd should FW concerns or issues arise
- Assigns final grades for fieldwork, based on the information provided by the FWEd on the Student Performance Evaluation and FW Assignment.
- Orient students to the procedures for applying for the National Board for Certification in Occupational Therapy, Inc. (NBCOT) certification examination and State of Florida license to practice as an occupational therapist.
Faculty Assistant
The Faculty Assistant is an occupational therapist whose faculty assignment supports the fieldwork education program. Responsibilities may include, but are not limited to:
- Confirming students meet all the Level I and Level II site requirements (i.e. drug screenings, Flu shots, site-specific training, etc)
- Ensuring FW sites’ MOU/AA is current and up-to-date prior to sending a student on FW
- Managing fieldwork files by making sure the FW site’s electronic folder has:
  - MOU/AA,
  - Behavioral Objectives,
  - FW Data Form (AOTA or FLOTec),
  - SEFWE, and
  - other pertinent site-specific information
- Sending FW sites Level I and Level II student packets prior to FW
- Sending email Thank You and Certificates to FWEds after Level I and Level II FW
- Obtaining Level I FW slots in preparing for the lottery placement
- Performing other duties as assigned and in collaboration with the AFWC

Fieldwork Educator (FWEd)
The FWEd is the professional responsible for student training in the fieldwork setting.

The Level I FWEd is a qualified personnel, including, but are not limited to, currently licensed or otherwise regulated occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, nurses, and physical therapist (C.1.9).

The Level II FWEd a currently licensed or otherwise regulated occupational therapist who has a minimum of 1 year full-time (or its equivalent) of practice experience subsequent to initial certification and who is adequately prepared to serve as a fieldwork educator. The supervising therapist may be engaged by the fieldwork site or by the educational program (C.1.14).

Responsibilities may include, but are not limited to:
- Day-to-day supervisory responsibilities include, but are not limited to:
- Orientation of the student to departmental and organizational policies and procedures.
- Direct instruction and guidance, as needed, in the screening, evaluation and intervention procedures used within the fieldwork site.
- Assignment of clients to the student.
- Assessment of the skill and knowledge levels of the student.
- Supervision of the student's skills in the delivery of occupational therapy services, including documentation in all forms.
- Conducting regular supervisory meetings, mid-term evaluation, and final evaluation
• Communication of student progress and evaluation results to AFWC, at mid-term and at the conclusion of fieldwork, and at any time concerns arise regarding the student’s performance
• Fosters clinical reasoning and reflective practice, enables ethical practice, develops professionalism, and facilitates competence
• Initially provides direct supervision and gradually increases student’s caseload to reflect growing competency

Student
The student collaborates with the FWEd and the AFWC to ensure requirements of FW are met. The student’s responsibilities include, but are not limited to:

• After placement, contacting the Level I and Level II FWEd to confirm the fieldwork experience starting date, time, and location of first day of FW
• Prior to the first day of FW will email the AFWC with the FWEd’s name
• In collaboration with the Faculty Assistant, ensure all site-specific requirements are met prior to the first day of Level I or Level II FW
• Access all medical results on the first day of FW (i.e. physical, 2-step PPD, immunization record, 5 titers, flu shot, etc results)
• Show proof of Professional Liability insurance, Medical Insurance, CPR certification, and other site required documents prior to and on the first day of FW
• Complying with all policies/procedures of the fieldwork, unless specifically exempted.
• Comply with provisions of The Health Insurance Portability and Accountability Act of 1996 (HIPAA) regarding patients’ Protected Health Information (PHI).
• Comply with all aspects of the Academic Code of Conduct, as defined in the FGCU Student Guidebook.
• Promptly notifying the FWEd and AFWC of Level I or Level II absence (see attendance policy)
• Conducting self in a professional manner
• Working the same hours as the FWEd, including weekends and holidays, unless otherwise determined by the FWEd and the AFWC.
• Fulfilling all duties and assignments given by the FWEd and the AFWC, within the specified time frame, unless otherwise exempted.
• Actively and appropriately participating in the supervisory process; receiving and reflecting on constructive feedback from the FWEd and modifying one’s actions accordingly.
• Completing the Student Evaluation of Fieldwork Experience after each FW and uploading it to Canvas.
• If a concern arises, the student should contact the AFWC immediately. The AFWC may determine that a conference call between the student, FWEd, and AFWC is needed. If the student continues to have concerns or issues following the AFWC’s attempts to assist with resolution of the conflict, the student may contact the Program Director of the Occupational Therapy Program.
Level I and Level II Fieldwork Progression and Student Requirements

FALL SEMESTER – 1st Semester of the OT Program
Overview of the Occupational Therapy Program Student Fieldwork Manual
Overview of Level I Fieldwork process and Behavioral Objectives

Reports, Cards, & Results must be uploaded to CastleBranch by October 31st:

- CPR Certification through American Heart Association (Infant, Child, & Adult good for 2 years) online course not acceptable. Cost ~ $35.00
- Health / Medical Insurance
- Professional Liability Insurance ($1,000,000 & $3,000,000)
- Level 1 Criminal Background Checks (Patriot Act, Social Security Alert, Residency History, Criminal Records, Sex Offender Index, and NW Healthcare Fraud & Abuse Scan)
- Level 2 FBI Fingerprinting
- Health Information Privacy and Security (HIPS) Training (thru FGCU’s Office of Research & Graduate Studies)
- Biosafety (Bloodborne Pathogens+) Training (thru FGCU’s Office of Research & Graduate Studies)
- Immunization Record
  - Measles, Mumps, Rubella (MMR)
  - Hepatitis B Series (3 dates)
  - Tetanus, Diphtheria, & Pertussis (Tdap)
- Physical Examination (due annually)
- 2-step PPD (PPD is due annually, a 1-step is only needed the second year)
- Influenza Vaccine (due annually)
- 5 Titers
  - Measles (Rubeola)
  - Mumps
  - Rubella
  - Varicella (chickenpox)
  - Hepatitis B (if negative or equivocal, the series & titer needs repeated or waiver signed)

SPRING SEMESTER – 2nd Semester of the OT Program
OTH6853 – Level IA – 1 credit
5 full time days – FW site is selected by the student during the lottery drawing; FW occurs during Spring Break or AOTA week

Reports, Cards, & Results must be uploaded to Canvas per syllabus dates:
- Level IA Student Fieldwork Agreement – due on Canvas before Level IA FW
- AOTA Personal Data Form – due on Canvas 3 weeks prior to Level IA FW
- Level IA Student Evaluation of FW Experience

Results must be uploaded to CastleBranch (lo43dt):
- Urine drug screening (10 Panel + alcohol), if applicable per Level IA FW site
SUMMER SEMESTER – 3rd semester of the OT Program
OTH6854 – Level IB – Psychosocial Fieldwork – 1 credit
8 afternoons at a fieldwork site selected during the lottery drawing
This FW is in conjunction with OTH6026 Group Process and Management (C.1.7).

Reports, Cards, & Results must be uploaded to Canvas per syllabus dates:
- Level IB Student Fieldwork Agreement
- AOTA Personal Data Form, needed updated to reflect Level IA information
- Level IB Student Evaluation of FW Experience

Results must be uploaded to CastleBranch (lo43dt):
- Urine drug screening (10 Panel + alcohol), if applicable per Level IB FW site

FALL SEMESTER – 4th semester of the OT Program
OTH6855 – Level IC – 1 credit
5 full-time days at a fieldwork site selected during the lottery drawing

Reports, Cards, & Results must be uploaded to Canvas per syllabus dates:
- Level IC Student Fieldwork Agreement
- AOTA Personal Data Form – needs updated to reflect Level IB FW information
- Level IC Student Evaluation of FW Experience

Results must be uploaded to CastleBranch per syllabus dates:
- Level 1 Criminal Background Check – needs renewed annually (lo43r)
- Level 2 Background Check – needs renewed annually (lo43r)
- Physical Examination (due annually)
- 1-step PPD (PPD due annually; if you had a 2-step PPD your 1st semester you only need a 1-step PPD your 4th semester)
- Influenza Vaccine (due annually)
- Renewal, Professional Liability Insurance ($1,000,000 & $3,000,000) annually

Results must be uploaded to CastleBranch (lo43dt):
- Urine drug screening (10 Panel + alcohol), if applicable per Level IC FW site

SPRING SEMESTER – 5th semester of the OT Program
OTH6845 – Level IIA Fieldwork – 6 credits (January to March)
12-weeks full time of Level II Fieldwork
OTH6846 – Level IIB Fieldwork – 6 credits (April to June)
12-weeks full time of Level II Fieldwork

Reports, Cards, & Results must be uploaded to Canvas per syllabus dates:
- AOTA Personal Data Form – needs updated to reflect Level IIA & IIB information
- Level IIA and Level IIB Student Fieldwork Agreements due 3 weeks prior to FW
- Site Specific Behavioral Objectives (42) - due week 11 of each Level II Fieldwork
- AOTA or FLOTEC Fieldwork Data Form - due week 11 of each Level II Fieldwork
- Level IIA and Level IIB SEFWE - due week 11 of each Level II Fieldwork
- Site-specific required documents – refer to the site’s folder for details

Results must be uploaded to CastleBranch (lo43dt):
- Urine drug screening (10 Panel + alcohol), if applicable per Level II FW sites
LEVEL I FIELDWORK OVERVIEW

The Standards for an Accredited Educational Program for the Occupational Therapist adopted by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association indicated that the goal of Level I Fieldwork is to introduce students to the fieldwork experience, to apply knowledge to practice, and to develop understanding of the needs of the clients. Level I fieldwork is integral to the program’s curriculum design and include experiences designed to enrich didactic coursework through directed observation and participation in selected aspects of the occupational therapy process (C.1.8).

The Level I fieldwork experiences, in the occupational therapy program at Florida Gulf Coast University, are integrated as a component of the curriculum design. The student is required to successfully complete three Level I fieldwork experience in the second, third, and fourth semesters of the program. OTH6853 Level IA fieldwork takes place in the second semester, OTH6854 Level IB fieldwork takes place in the third semester (psychosocial), and OTH6855 Level IC fieldwork takes place in the fourth semester. The fieldwork is integrated into the curriculum design and is not substituted for any part of Level II FW (C.1.10). A community trip, observation, or service learning activity is not used to count toward part of Level I fieldwork.

Level I Fieldwork introduces occupational therapy students to the overall fieldwork experience, under the supervision of an occupational therapy practitioner or other licensed professional (C.1.9). These courses provide directed participation and observation in selected aspects of the occupational therapy process at assigned fieldwork sites. These courses also include on-campus seminars and on-line assignments. The Level I Fieldwork courses enrich the didactic components of the curriculum and begin the student’s development of a basic level of comfort in establishing rapport with potential clients and professional colleagues.

To build upon this knowledge and the foundational knowledge in psychological and social factors presented during the third semester in OTH6026C Group Process and Management course, the OTH6854 Level IB fieldwork integrated and has as its focus psychological and social factors that influence engagement in occupation (C.1.7). The OTH6026C Group Process and Management course focuses on theory and practice of group dynamics; development of self-awareness and interpersonal communication skills necessary for successful management of therapeutic groups.

The Academic Fieldwork Coordinator (AFWC) and the Faculty Assistant conduct the on-campus seminars and students select Level IA, Level IB, and Level IC sites based upon the slots the AFWC and Faculty Assistant obtains. Students’ performance is evaluated by the FWEd using the Level I FW evaluation and assessing twelve Behavioral Objectives agreed upon between the FWEd and the occupational therapy program at FGCU (C.1.10). The AFWC determines students’ fieldwork grades, based on the ratings documented on this assessment tool and the journal completion.
LEVEL I FIELDWORK COURSE DESCRIPTIONS

LEVEL I FIELDWORK
ACOTE states the goal of Level I fieldwork is to introduce students to the fieldwork experience, to apply knowledge to practice, and to develop understanding of the needs of clients. Level I fieldwork is integral to the program’s curriculum design and include experiences designed to enrich didactic coursework through directed observation and participation in selected aspects of the occupational therapy process (C.1.8).

OTH6853 Level IA – 1 credit
Level IA Fieldwork, an integrated component of the curriculum design, introduces students to the fieldwork experience. Students begin developing clinical skills, working directly with clients, and actively participating under the supervision of qualified personnel.

Prerequisite(s): Successful completion of first semester coursework

OTH6854 Level IB “Psychosocial” – 1 credit
Level 1B Fieldwork continues the students’ integration of practice. Students further develop skills by working directly with clients whose psychological and social factors impair their ability to engage in meaningful occupations under the supervision of qualified personnel.

Prerequisite(s): Successful completion of first and second semesters’ coursework

OTH6855 Level IC – 1 credit
Level IC Fieldwork furthers integrates curriculum and practice through demonstration of clinical skills and professional behaviors when working directly with clients, and actively participating under the supervision of qualified personnel.

Prerequisite(s): Successful completion of first, second, and third semesters’ coursework
LEVEL I FIELDWORK STUDENT LEARNING OUTCOMES / BEHAVIORAL OBJECTIVES

ACOTE states the goal of Level I fieldwork is to introduce students to the fieldwork experience, to apply knowledge to practice, and to develop understanding of the needs of clients. Level I fieldwork is integral to the program’s curriculum design and include experiences designed to enrich didactic coursework through directed observation and participation in selected aspects of the occupational therapy process (C.1.8). Qualified personnel supervise Level I fieldwork. Examples may include, but not limited to, currently licensed or otherwise regulated occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, nurses, and physical therapists (C.1.9).

The Occupational Therapy program at FGCU adopted the following Level I FW Student Learning Outcomes / Behavioral Objectives with permission from Philadelphia Region OT FW Consortium. The student receives a copy of these student learning outcomes / behavioral objectives at the beginning of the occupational therapy program and are located in the Student Fieldwork Manual. These objectives are also made known to the student on Canvas and during the FW seminar, each semester (C.1.2). The student is formally evaluated by the FWEd while on each of the three Level I FW using these agreed upon behavioral objectives (C.1.10).

<table>
<thead>
<tr>
<th>Student Learning Outcomes / Behavioral Objectives</th>
<th>The student will demonstrate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Time Management Skills:</td>
<td>Be prompt, arrive on time, and complete assignments on time.</td>
</tr>
<tr>
<td>2. Organization:</td>
<td>Set priorities, be dependable, be organized, follows through with responsibilities.</td>
</tr>
<tr>
<td>3. Engagement in the fieldwork experience:</td>
<td>Demonstrate an apparent level of interest, level of active participation while on site; investment in clients and treatment outcomes.</td>
</tr>
<tr>
<td>5. Reasoning/Problem solving:</td>
<td>Use self-reflection, willingness to ask questions; ability to analyze, synthesize, and interpret information; understand the OT process.</td>
</tr>
<tr>
<td>6. Written Communication:</td>
<td>Use proper grammar, spelling, legibility, for successful completion of written assignments and documentation skills.</td>
</tr>
<tr>
<td>7. Initiative:</td>
<td>Demonstrate initiative, ability to seek and acquire information from a variety of sources; demonstrates flexibility as needed.</td>
</tr>
<tr>
<td>8. Observation skills:</td>
<td>Display the ability to observe relevant behaviors related to occupational performance and client factors, and to verbalize perceptions and observations.</td>
</tr>
<tr>
<td>Student Learning Outcomes / Behavioral Objectives:</td>
<td>The student will demonstrate:</td>
</tr>
<tr>
<td>-------------------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>9. Participation in the Supervisory Process:</td>
<td>Give, receive, and respond to feedback; seek guidance when necessary; and follows proper channels.</td>
</tr>
<tr>
<td>10. Verbal communication and Interpersonal skills with clients/staff/caregivers:</td>
<td>Interact appropriately with clients, such as eye contact, empathy, limit setting, respectfulness, use of authority; quality of verbal interactions; use of body language and non-verbal communication; and exhibiting confidence.</td>
</tr>
<tr>
<td>11. Professional and Personal Boundaries:</td>
<td>Recognize and handle personal / professional frustrations; balance personal / professional obligations; handle responsibilities; work with others cooperatively, considerately, and effectively; responsiveness to social cues.</td>
</tr>
<tr>
<td>12. Use of professional terminology:</td>
<td>Respect confidentiality; appropriately apply professional terminology (i.e. the Occupational Therapy Practice Framework, acronyms, abbreviations) in written and oral communication.</td>
</tr>
</tbody>
</table>
LEVEL I STUDENT FIELDWORK PERFORMANCE EVALUATION

Student's Name:  
Fieldwork Educator:  
Fieldwork Educator’s Email Address:  
Fieldwork Site:

FOR EACH OF THE 12 PROFESSIONAL BEHAVIORS PLEASE CIRCLE THE NUMBER THAT CORRELATES TO THE STUDENT’S PERFORMANCE.

<table>
<thead>
<tr>
<th>Professional Behaviors</th>
<th>Exceeds Standards</th>
<th>Meets Standards</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Time Management Skills:</td>
<td>5.0</td>
<td>4.0</td>
<td>3.0</td>
<td>2.0</td>
<td>(4.0)</td>
</tr>
<tr>
<td>Consider ability to be prompt, arrive on time, and complete assignments on time.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>N/A</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>2. Organization:</td>
<td>5.0</td>
<td>4.0</td>
<td>3.0</td>
<td>2.0</td>
<td>N/A</td>
</tr>
<tr>
<td>Consider ability to set priorities, be dependable, be organized, follow through with responsibilities</td>
<td>5</td>
<td>4</td>
<td>3</td>
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<td>N/A</td>
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<td>Comments:</td>
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<tr>
<td>3. Engagement in the fieldwork experience:</td>
<td>5.0</td>
<td>4.0</td>
<td>3.0</td>
<td>2.0</td>
<td>N/A</td>
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<tr>
<td>Consider student's apparent level of interest, level of active participation while on site; investment in individuals and treatment outcomes.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>N/A</td>
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<tr>
<td>Comments:</td>
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<tr>
<td>4. Self-Directed Learning:</td>
<td>5.0</td>
<td>4.0</td>
<td>3.0</td>
<td>2.0</td>
<td>N/A</td>
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<tr>
<td>Consider ability to take responsibility for own learning; demonstrate motivation.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>N/A</td>
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<tr>
<td>Comments:</td>
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<tr>
<td>5. Reasoning/Problem solving:</td>
<td>5.0</td>
<td>4.0</td>
<td>3.0</td>
<td>2.0</td>
<td>N/A</td>
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<tr>
<td>Consider ability to use self-reflection, willingness to ask questions; ability to analyze, synthesize and interpret information; understand the OT process.</td>
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<td>4</td>
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<td>N/A</td>
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<tr>
<td>Comments:</td>
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<tr>
<td>6. Written Communication:</td>
<td>5.0</td>
<td>4.0</td>
<td>3.0</td>
<td>2.0</td>
<td>N/A</td>
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<tr>
<td>Consider grammar, spelling, legibility, successful completion of written assignments, documentation skills.</td>
<td>5</td>
<td>4</td>
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<td>N/A</td>
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<tr>
<td>Comments:</td>
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<tr>
<td>Professional Behaviors</td>
<td>Exceeds Standards</td>
<td>Meets Standards</td>
<td>Needs Improvement</td>
<td>Unsatisfactory</td>
<td>N/A</td>
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<td>Points</td>
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<td>7. Initiative:</td>
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<td>Consider initiative, ability to seek and acquire</td>
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<td>information from a variety of sources;</td>
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<td>Consider ability to observe relevant behaviors</td>
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<td>related to occupational performance and client</td>
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<td>factors, and to verbalize perceptions and</td>
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<td>observations.</td>
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<tr>
<td>Comments:</td>
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<tr>
<td>9. Participation in the Supervisory Process:</td>
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<td>Consider ability to give, receive and respond to</td>
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<td>feedback; seek guidance when necessary; follow</td>
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<td>proper channels.</td>
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<tr>
<td>10. Verbal communication and Interpersonal skills</td>
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<td>with clients/staff/caregivers:</td>
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<td>Consider ability to interact appropriately with</td>
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<td>individuals such as eye contact, empathy, limit</td>
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<td>setting, respectfulness, use of authority, etc;</td>
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<td>degree/quality of verbal interactions; use of body</td>
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<td>language and non-verbal communication; exhibits</td>
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<td>confidence.</td>
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<td>Comments:</td>
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<td>11. Professional and Personal Boundaries:</td>
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<td>Consider ability to recognize and handle</td>
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<td>personal / professional frustrations; balance</td>
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<td>responsibilities; work with others cooperatively,</td>
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<td>considerately, and effectively; responsiveness to</td>
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<td>social cues.</td>
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<tr>
<td>Comments:</td>
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<td>4</td>
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<td>2</td>
<td>N/A</td>
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<tr>
<td>12. Use of professional terminology:</td>
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<tr>
<td>Consider ability to respect confidentiality;</td>
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<td>appropriately apply professional terminology (i.e.</td>
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<td>Occupational Therapy Practice Framework,</td>
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<td>acronyms, abbreviations, etc) in written and oral</td>
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<td>communication.</td>
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</tr>
<tr>
<td>Comments:</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>N/A</td>
</tr>
</tbody>
</table>

I have appraised the student and have conducted an interview.

FWEd’s Signature: ____________________________________________

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

Student’s Signature: _________________________________________

Modified with the permission from the
Philadelphia Region Occupational Therapy Fieldwork Consortium
LEVEL I STUDENT FIELDWORK PERFORMANCE EVALUATION
GRADING RUBRIC

Indicate the student's level of performance using the scale below.

5 – **Exceeds Standards**: Performance is highly skilled and self-initiated. Carries out tasks and activities consistently. Performance is the best expected from any student.

4 – **Meets Standards**: 80% of the time carries out tasks and activities that meet expectations. This rating is used more frequently than others.

3 – **Needs Improvement**: 70% of the time carries out required tasks and activities.

2 – **Unsatisfactory**: Opportunities for improvement exist however student has not demonstrated adequate response to feedback.

**N/A** – Not Applicable: Did not observe this Professional Behavior and unable to rate.

### Time Management Skills

<table>
<thead>
<tr>
<th>Rating</th>
<th>Point System</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Exceeds Standards</strong></td>
<td>5.0</td>
<td>Performance is highly skilled and self-initiated. Consistently demonstrates the ability to be prompt, arrive on time, and complete assignments on time.</td>
</tr>
<tr>
<td><strong>Meets Standards</strong></td>
<td>4.0</td>
<td>80% of the time requires supervision and encouragement to be prompt, arrive on time, and complete assignments on time.</td>
</tr>
<tr>
<td><strong>Needs Improvement</strong></td>
<td>3.0</td>
<td>70% of the time requires supervision and encouragement to be prompt, arrive on time, and complete assignments on time.</td>
</tr>
<tr>
<td><strong>Unsatisfactory</strong></td>
<td>2.0</td>
<td>Requires continual encouragement to be prompt, arrive on time, and complete assignments on time.</td>
</tr>
<tr>
<td><strong>N/A</strong></td>
<td>(4.0)</td>
<td>Professional Behavior was not observed, unable to rate.</td>
</tr>
</tbody>
</table>

### Organization

<table>
<thead>
<tr>
<th>Rating</th>
<th>Point System</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Exceeds Standards</strong></td>
<td>5.0</td>
<td>Performance is highly skilled and self-initiated. Consistently sets priorities, is dependable, organized, and follows through with responsibilities</td>
</tr>
<tr>
<td><strong>Meets Standards</strong></td>
<td>4.0</td>
<td>80% of the time sets priorities, is dependable, organized, and follows through with responsibilities</td>
</tr>
<tr>
<td><strong>Needs Improvement</strong></td>
<td>3.0</td>
<td>70 % on the time sets priorities, is dependable, organized, and follows through with responsibilities</td>
</tr>
<tr>
<td><strong>Unsatisfactory</strong></td>
<td>2.0</td>
<td>Does not set priorities, is not dependable, unorganized, and does not follow through with responsibilities</td>
</tr>
<tr>
<td><strong>N/A</strong></td>
<td>(4.0)</td>
<td>Professional Behavior was not observed, unable to rate.</td>
</tr>
</tbody>
</table>
### 3. Engagement in the fieldwork experience

<table>
<thead>
<tr>
<th>Rating</th>
<th>Point System</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Standards</td>
<td>5.0</td>
<td>Performance is highly skilled and self-initiated. Consistently demonstrates apparent level of interest and active participation; and is always invested in the clients and treatment outcomes.</td>
</tr>
<tr>
<td>Meets Standards</td>
<td>4.0</td>
<td>80% of the time demonstrates a level of interest, a level of active participation, and an invested interested in the clients and treatment outcomes.</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>3.0</td>
<td>70% of the time demonstrates a level of interest, a level of active participation, and an invested interested in the clients and treatment outcomes.</td>
</tr>
<tr>
<td>Unsatisfactory</td>
<td>2.0</td>
<td>Does not demonstrates any level of interest, level of active participation, and is not invested in clients and treatment outcomes.</td>
</tr>
<tr>
<td>N/A</td>
<td>(4.0)</td>
<td>Professional Behavior was not observed, unable to rate.</td>
</tr>
</tbody>
</table>

### 4. Self-Directed Learning

<table>
<thead>
<tr>
<th>Rating</th>
<th>Point System</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Standards</td>
<td>5.0</td>
<td>Performance is highly skilled and self-initiated. Consistently demonstrates the ability to take responsibility for own learning and demonstrate motivation.</td>
</tr>
<tr>
<td>Meets Standards</td>
<td>4.0</td>
<td>80% of the time demonstrates the ability to take responsibility for own learning and demonstrate motivation.</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>3.0</td>
<td>70% of the time demonstrates the ability to take responsibility for own learning and demonstrate motivation.</td>
</tr>
<tr>
<td>Unsatisfactory</td>
<td>2.0</td>
<td>Does not demonstrates the ability to take responsibility for own learning and does no demonstrate motivation.</td>
</tr>
<tr>
<td>N/A</td>
<td>(4.0)</td>
<td>Professional Behavior was not observed, unable to rate.</td>
</tr>
</tbody>
</table>

### 5. Reasoning/Problem solving

<table>
<thead>
<tr>
<th>Rating</th>
<th>Point System</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Standards</td>
<td>5.0</td>
<td>Performance is highly skilled and self-initiated. Consistently demonstrates the ability to use self-reflection, willingness to ask questions; ability to analyze, synthesize and interpret information; understand the OT process.</td>
</tr>
<tr>
<td>Meets Standards</td>
<td>4.0</td>
<td>Frequently demonstrates the ability to use self-reflection, willingness to ask questions; ability to analyze, synthesize and interpret information; understand the OT process.</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>3.0</td>
<td>Occasionally demonstrates the ability to use self-reflection, willingness to ask questions; ability to analyze, synthesize and interpret information; understands the OT process.</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Unsatisfactory</td>
<td>2.0</td>
<td>Does not demonstrate the ability to use self-reflection, willingness to ask questions; ability to analyze, synthesize and interpret information; does not understand the OT process.</td>
</tr>
<tr>
<td>N/A</td>
<td>(4.0)</td>
<td>Professional Behavior was not observed, unable to rate.</td>
</tr>
</tbody>
</table>

### 6. Written Communication

<table>
<thead>
<tr>
<th>Rating</th>
<th>Point System</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Standards</td>
<td>5.0</td>
<td>Performance is highly skilled and self-initiated. Consistently demonstrates the ability to use proper grammar, spelling, legibility, successful completion of written assignments, documentation skills.</td>
</tr>
<tr>
<td>Meets Standards</td>
<td>4.0</td>
<td>80% of the time, demonstrates the ability to use proper grammar, spelling, legibility, successful completion of written assignments, documentation skills.</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>3.0</td>
<td>70% of the time, demonstrates the ability to use proper grammar, spelling, legibility, successful completion of written assignments, documentation skills.</td>
</tr>
<tr>
<td>Unsatisfactory</td>
<td>2.0</td>
<td>Does not demonstrate the ability to use proper grammar, spelling, legibility, or successful completion of written assignments, documentation skills.</td>
</tr>
<tr>
<td>N/A</td>
<td>(4.0)</td>
<td>Professional Behavior was not observed, unable to rate.</td>
</tr>
</tbody>
</table>

### 7. Initiative

<table>
<thead>
<tr>
<th>Rating</th>
<th>Point System</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Standards</td>
<td>5.0</td>
<td>Performance is highly skilled and self-initiated. Consistently exhibits initiative, ability to seek and acquire information from a variety of sources; demonstrates flexibility as needed.</td>
</tr>
<tr>
<td>Meets Standards</td>
<td>4.0</td>
<td>80% of the time, exhibits initiative, ability to seek and acquire information from a variety of sources; demonstrates flexibility as needed.</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>3.0</td>
<td>70% of the time, exhibits initiative, ability to seek and acquire information from sources; demonstrates flexibility.</td>
</tr>
<tr>
<td>Unsatisfactory</td>
<td>2.0</td>
<td>Does not exhibit initiative or the ability to seek and acquire information from a variety of sources; or does not demonstrate flexibility as needed.</td>
</tr>
<tr>
<td>N/A</td>
<td>(4.0)</td>
<td>Professional Behavior was not observed, unable to rate.</td>
</tr>
</tbody>
</table>
8. Observation skills

<table>
<thead>
<tr>
<th>Rating</th>
<th>Point System</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Standards</td>
<td>5.0</td>
<td>Performance is highly skilled and self-initiated. Consistently demonstrates the ability to observe relevant behaviors related to occupational performance and client factors, and to verbalize perceptions and observations.</td>
</tr>
<tr>
<td>Meets Standards</td>
<td>4.0</td>
<td>80% of the time demonstrates the ability to observe relevant behaviors related to occupational performance and client factors, and to verbalize perceptions and observations.</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>3.0</td>
<td>70% of the time demonstrates the ability to observe relevant behaviors related to occupational performance and client factors, and to verbalize perceptions and observations.</td>
</tr>
<tr>
<td>Unsatisfactory</td>
<td>2.0</td>
<td>Does not demonstrate the ability to observe relevant behaviors related to occupational performance and client factors, and cannot verbalize perceptions and observations.</td>
</tr>
<tr>
<td>N/A</td>
<td>(4.0)</td>
<td>Professional Behavior was not observed, unable to rate.</td>
</tr>
</tbody>
</table>

9. Participation in the Supervisory Process

<table>
<thead>
<tr>
<th>Rating</th>
<th>Point System</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Standards</td>
<td>5.0</td>
<td>Performance is highly skilled and self-initiated. Consistently demonstrates the ability to give, receive, and respond to feedback; seeks guidance when necessary; follows proper channels.</td>
</tr>
<tr>
<td>Meets Standards</td>
<td>4.0</td>
<td>80% of the time demonstrates the ability to give, receive, and respond to feedback; seeks guidance when necessary; follows proper channels.</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>3.0</td>
<td>70% of the time demonstrates the ability to give, receive, and respond to feedback; seek guidance when necessary; and follows proper channels.</td>
</tr>
<tr>
<td>Unsatisfactory</td>
<td>2.0</td>
<td>Does not demonstrate the ability to give, receive, or respond to feedback; does not seek guidance when needed; and does not follow proper channels</td>
</tr>
<tr>
<td>N/A</td>
<td>(4.0)</td>
<td>Professional Behavior was not observed, unable to rate.</td>
</tr>
</tbody>
</table>

10. Verbal communication and Interpersonal skills with clients/staff/caregivers

<table>
<thead>
<tr>
<th>Rating</th>
<th>Point System</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Standards</td>
<td>5.0</td>
<td>Performance is highly skilled and self-initiated. Constantly demonstrates the ability to interact appropriately with individuals, such as eye contact, empathy, limit setting, respectfulness, use of authority; quality of verbal interactions; use of body language and non-verbal communication; and exhibits confidence.</td>
</tr>
<tr>
<td>Rating</td>
<td>Point System</td>
<td>Criteria</td>
</tr>
<tr>
<td>----------------------</td>
<td>--------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Meets Standards</strong></td>
<td>4.0</td>
<td>80% of the time demonstrates the ability to interact appropriately with individuals, such as eye contact, empathy, limit setting, respectfulness, use of authority; quality of verbal interactions; use of body language and non-verbal communication; and exhibit confidence.</td>
</tr>
<tr>
<td><strong>Needs Improvement</strong></td>
<td>3.0</td>
<td>70% of the time demonstrates the ability to interact appropriately with individuals, such as eye contact, empathy, limit setting, respectfulness, use of authority; quality of verbal interactions; use of body language and non-verbal communication; and exhibit confidence.</td>
</tr>
<tr>
<td><strong>Unsatisfactory</strong></td>
<td>2.0</td>
<td>Does not demonstrate the ability to interact appropriately with individuals, does not have good eye contact, empathy, use good limit setting abilities, have respectfulness or use of authority appropriately; does not have quality verbal interactions; does not have appropriate body language or non-verbal communication skills; and does not exhibit confidence.</td>
</tr>
<tr>
<td><strong>N/A</strong></td>
<td>(4.0)</td>
<td>Professional Behavior was not observed, unable to rate.</td>
</tr>
</tbody>
</table>

11. **Professional and Personal Boundaries**

<table>
<thead>
<tr>
<th>Rating</th>
<th>Point System</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Exceeds Standards</strong></td>
<td>5.0</td>
<td>Performance is highly skilled and self-initiated. Constantly demonstrates ability to recognize and handle personal / professional frustrations; balance personal / professional obligations; handle responsibilities; work with others cooperatively, considerately, and effectively; responsiveness to social cues.</td>
</tr>
<tr>
<td><strong>Meets Standards</strong></td>
<td>4.0</td>
<td>80% of the time demonstrates the ability to recognize and handle personal / professional frustrations; balance personal / professional obligations; handle responsibilities; work w/others cooperatively, considerately, and effectively; responsiveness to social cues.</td>
</tr>
<tr>
<td><strong>Needs Improvement</strong></td>
<td>3.0</td>
<td>70% of the time demonstrates the ability to recognize and handle personal / professional frustrations; balance personal/professional obligations; handle responsibilities; work with others cooperatively, considerately, and effectively; responsiveness to social cues.</td>
</tr>
<tr>
<td><strong>Unsatisfactory</strong></td>
<td>2.0</td>
<td>Does not demonstrates the ability to recognize or handle personal / professional frustrations; balance personal / professional obligations; handle responsibilities; work with others cooperatively, considerately, or effectively; and is unresponsive to social cues.</td>
</tr>
<tr>
<td><strong>N/A</strong></td>
<td>(4.0)</td>
<td>Professional Behavior was not observed, unable to rate.</td>
</tr>
</tbody>
</table>
## 12. Use of professional terminology

<table>
<thead>
<tr>
<th>Rating</th>
<th>Point System</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Standards</td>
<td>5.0</td>
<td>Performance is highly skilled and self-initiated. Consistently respects confidentiality; appropriately applies professional terminology (i.e. the Occupational Therapy Practice Framework, acronyms, abbreviations) in written and oral communication.</td>
</tr>
<tr>
<td>Meets Standards</td>
<td>4.0</td>
<td>80% of the time respects confidentiality; appropriately applies professional terminology (i.e. the Occupational Therapy Practice Framework, acronyms, abbreviations) in written and oral communication.</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>3.0</td>
<td>80% of the time respects confidentiality; appropriately applies professional terminology (i.e. the Occupational Therapy Practice Framework, acronyms, abbreviations) in written and oral communication.</td>
</tr>
<tr>
<td>Unsatisfactory</td>
<td>2.0</td>
<td>Does not respect confidentiality; does not appropriately apply professional terminology (i.e. the Occupational Therapy Practice Framework, acronyms, abbreviations) in written or in oral communication.</td>
</tr>
<tr>
<td>N/A</td>
<td>(4.0)</td>
<td>Professional Behavior was not observed, unable to rate.</td>
</tr>
</tbody>
</table>

### Level I Grading Scale

<table>
<thead>
<tr>
<th>Grade</th>
<th>Required Points</th>
<th>Criteria for Required Points/Letter grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Standards</td>
<td>54 - 60</td>
<td>Performance is highly skilled and self-initiated. Carries out tasks and activities consistently. Performance is the best expected from any student.</td>
</tr>
<tr>
<td>Meets Standards</td>
<td>48 - 53</td>
<td>80% of the time carries out tasks and activities that meet expectations. This rating is used more frequently than others.</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>42 - 47</td>
<td>70% of the time carries out required tasks and activities.</td>
</tr>
<tr>
<td>Unsatisfactory</td>
<td>≤ 41</td>
<td>Opportunities for improvement exist however student has not demonstrated adequate response to feedback.</td>
</tr>
</tbody>
</table>
LEVEL I FIELDWORK ASSIGNMENT AND GRADING RUBRIC

The occupational therapy students at Florida Gulf Coast University complete three Level I fieldwork experiences. Florida Gulf Coast University requires the student to complete a journal assignment during each Level I fieldwork experience. During OTH6854 Level IB the fieldwork assignment must focus on and address the psychological and social factors that influence engagement in occupation (C.1.7).

JOURNAL
The student is required to complete a minimum of a six page journal during each Level I fieldwork experience. The Journal is worth 40 points and must answer/address the ten content areas listed below; the Roman Numerals separating each section. The Journal must be have 10 links that correlate to a classroom / lab experience to ensure Level I fieldwork reflects the curriculum design (C.1.1). The links must be identified with a course number and highlighted.

Level IA fieldwork journal must link/correlate with the fall – 1st semester courses (OTH6002C, OTH6009, OTH6536C, OTH6605C, and OTH6415C) or with the spring – 2nd semester courses (OTH6226C, OTH6235C, OTH6018, OTH6751C, or OTH6325C).

Level IB “psychosocial” fieldwork journal must link/correlate with the spring – 2nd semester coursework (OTH6226C, OTH6235C, OTH6018, OTH6751C, or OTH6325C Behavioral Health) or with the summer – 3rd semester coursework (OTH6707, OTH6523C, or OTH6026 Group Process and Management).

Level IC fieldwork journal must link/correlate with the summer – 3rd semester coursework (OTH6707, OTH6523C, or OTH6026) or with the fall – 4th semester coursework (OTH6436C, OTH6725, or OTH6106C).

The links are one mechanism to ensure Level I fieldwork is integral to the program’s curriculum design and include experiences designed to enrich didactic coursework through directed observation and participation in selected aspects of the occupational therapy process (C.1.8). The OTH6854 Level IB Journal must emphasize components of the psychosocial domain. The ten content areas include:

I. Confidentiality, the student is expected to maintain complete confidentiality of all personal, social and medical history, etc. of the clients with whom they work (HIPAA). While pertinent client information is required for educational purposes, it will never include ANY identifying information such as names, identifying numbers, etc; use first initial or a fictional name only.

II. Describe 2 client occupational performance issues observed while on Level I FW.

III. Identify the OT theoretical approaches applied during sessions at your facility. Use professional medical/occupational therapy terminology.

IV. Describe the client criteria for selection and types of measures used to monitor progress in this setting. You may want to ask questions about evaluations, assessments, and progress notes; ask how clients end up in the setting; does the setting have steps – what is the criteria for moving from one step to the next. How does the facility document client progress? How is success measured?
V. Describe the collaboration process you are observing between the facility’s personnel. Can you identify their professional identification? (Counselor, OT, Social Worker, psychologist, COTA). If there are no OT or OTAs can you describe how they could best be integrated in this setting? Describe the hierarchy of supervision if you can. If you cannot, explain what prevents this observation.

VI. Outline your plans of intervention, include measurable goals and objectives that match the theoretical approaches and intervention plans you created as part of your initial proposals.

VII. Identify the use of occupation during the intervention, describe how the activities could be graded to enhance client performance, and issues related to estimated length of stay at this facility.

VIII. Describe the use of assistive devices observed or the potential for these devices.

IX. Describe how the treatment team, to include the client and family collaborate and evaluate client outcomes, and how they determine the need for continued services or discharge.

X. Discuss how the facility addresses discharges. Are clients enrolled in community-based programs or follow up programs? Do they receive home programs? Upon completion of this fieldwork, are there recommendations you could make to enhance the transition when clients are discharged?

**Journal Grading Rubric**

<table>
<thead>
<tr>
<th>Grade</th>
<th>Required Points</th>
<th>Criteria for Required Points/Letter grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Standards</td>
<td>36 to 40 points</td>
<td>All 10 sections are addressed; there are 10 links correlating with the semesters' foundations; the links are highlighted; the information is <strong>thorough</strong>, clear, and concise; 12 font, SS throughout with DS between paragraphs and sections; follows Roman numeral outline; name appears on each page, and is six full pages.</td>
</tr>
<tr>
<td>Meets Standards</td>
<td>32 to 35 points</td>
<td>All 10 sections are addressed, there are 9 links correlating with the semesters' foundations, and is five full pages.</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>28 - 31 points</td>
<td>9 sections are addressed, there are 8 links correlating with the semesters’ foundations, and is four full pages.</td>
</tr>
<tr>
<td>Unsatisfactory</td>
<td>≤ 28 points</td>
<td>Less than 9 sections are addressed, there are less than 8 links correlating with the semesters’ foundations, is less than four full pages, student’s name does not appear on each page.</td>
</tr>
</tbody>
</table>
The journal must be uploaded to Canvas on time, no late assignments will be accepted. A student experiencing an extenuating circumstance must contact the AFWC, via email within 24 hours of assignment deadline for reconsideration. The AFWC, along with the OT faculty, will reserve the right to grant or deny acceptance of a late assignment. If granted, the student can only earn up to a “C” on the assignment.

**LEVEL I FIELDWORK OVERALL GRADING SYSTEM**

Students earn an S (*Satisfactory*) or U (*Unsatisfactory*) for each course. Failure to successfully complete any Level I will result in Academic Probation. Refer to the Student Handbook for specifics in regards to the Corrective Action Plan. Grades are determined jointly by the FWEd and the AFWC. The Level I FW Evaluation and the Level I FW Journal are the tools used to determine the student’s Final Level I FW grade.

In order to successfully pass Level I FW the student must:
Achieve a minimum overall score of 45 / 60 points on the Level I FW Evaluation
Received an overall combined score of 77:

- **Level I Evaluation Meets Standards:** 45 points
- **Journal Entry Meets Standards:** 32 points
  
  \[
  \frac{77}{100} = \text{SATISFACTORY} \\
  \frac{76}{100} = \text{UNSATISFACTORY}
  \]
LEVEL I STUDENT FIELDWORK AGREEMENT

I, (student’s name) agree to honor my commitment to professionally participate in a FW program as an occupational therapy student of Florida Gulf Coast University at (facility name) beginning on (start date of FW) and ending on (end date of FW). Prior to FW I will review the facility site specific information and complete all necessary prerequisites.

I agree to be responsible for:
1. Respecting confidentiality of information regarding clients and the client records in accordance to HIPAA and with the fieldwork site’s policies and procedures.

2. Complying with the professional standards set up by the clinical program, Florida Gulf Coast University and the AOTA code of Ethics. If I do not know or understand these standards, it will be my responsibility to learn them and to raise any items in question for discussion.

3. Attending the fieldwork each day and on time for the duration of the fieldwork experience. **Time off is not allowed.** If an extenuating circumstance does occur, the FWEd and AFWC must be notified immediately. Missed time must be rescheduled and made up.

4. Adherence to the policies and procedures of the facility.

5. Arrange for my own transportation and/or housing when not provided by the facility; and arrange for my own meals when not provided by the facility.

6. Provide the fieldwork site with evidence of an annual physical examination, 2 step PPD, immunizations, titers, and other medical tests prior to or during FW.

7. The Occupational Therapy Program has permission to release health records & criminal background clearances to the student’s fieldwork site.

8. Wear the fieldwork site’s uniform (i.e. lab coat, scrubs); if not dress code is required, will adhere to Florida Gulf Coast University dress code. I will wear my name tag/identification at all times.

9. Obtain prior written approval from the facility and Florida Gulf Coast University before publishing any written material relating to the fieldwork experience.

10. Drug screening, it is my responsibility to review the AOTA FW Data form to identify whether or not drug screening if required. If so, I will obtain the proper panel of screening and have it done during the requested time.

________________________________________       ____________________
Student’s Signature                                      Date
LEVEL I FIELDWORK STUDENT PLACEMENT STEPS

Step 1: Affiliating sites are contacted at the beginning of each semester and Level I FW slots are requested. During the first semester of the program students are required to review the FGCU occupational therapy program’s Student FW Manual and sign a form indicating they have reviewed and understand the FW policies and procedures. During the FW selection day, each semester, students are oriented again to the FW policies and procedures; and an overview of the FW sites obtained for that semester.

Step 2: Numbers are placed in a container, the container circulates in the room, and each student draws a number from the container. The number the student picks is the order that each student chooses an obtained FW site.

Step 3: The student who picks #1 is first to select a facility for Level I FW. The student who picks #2 selects second, and so on. This process continues until all students are placed. The list of available FW sites is located on the white magnetic board in Room 205 prior to the FW selection day and on Canvas. Prior to placement, students can research each site’s website and on Canvas.

Step 4: Some sites require an interview before FW. Students who have selected a site that requires an interview will only receive final confirmation contingent on the interview outcome. If the student is not selected to complete FW at that site, that student will choose another site from the remaining list of FW options. If two or more students are required to choose from the facility list, after a “failed” interview, the student’s lottery number is used; the student with the lower number will select first.

Step 5: Exchange: The student has the opportunity to exchange FW sites. The student may exchange with another student or choose from the remaining sites on the board AFTER all the students are placed. All exchanges must be completed by 3:00 p.m. that same day.

Step 6: Once placed the student is responsible to ensure all the site-specific requirements are met (i.e. drug testing, medicals, site-specific training).

If the student does not attend the scheduled fieldwork placement meeting or contact the AFWC, the student’s name shall be placed at the bottom of the list. However, if the student informs the AFWC, prior to the placement day, they cannot attend due to an extenuating circumstance the student needs to: 1) formulate a list and rank the Level I fieldwork choices and 2) give the list to the AFWC prior to selection day. Students with special needs must submit the appropriate paperwork to the AFWC four weeks prior to fieldwork.
Facility Name:
Location:
Setting:
FWEd Name and Credentials:
FWEd’s email address:
FWEd’s telephone number:

1. Did the site require any prerequisites prior to this fieldwork; if so, what were the requirements?

2. What were some of the site expectations & student responsibilities?

3. What aspects of the experience did you find most meaningful?

4. What aspects of the experience did you find least meaningful?

5. Did you feel prepared for this experience? If not, what could have been done to prepare you to the fullest for this experience?

6. Do you feel you received effective supervision? Explain Why or Why not:

7. Would you recommend this fieldwork site to another student? Why?

8. Outline, at least three areas you like to share with other OT students or some things you would have like knowing prior to this FW.

9. Should FGCU continue to place students at this facility for Level I FW, why or why not?

10. What else would you like to share about this Fieldwork experience?
LEVEL II FIELDWORK OVERVIEW

The 2011 Standards for an Accredited Educational Program for the Occupational Therapist adopted by the Accreditation Council for Occupational Therapy Education of the American Occupational Therapy Association indicates the goal of Level II fieldwork is to develop competent, entry-level, generalist occupational therapists. ACOTE recommends that the student be exposed to a variety of clients across the life span and to a variety of settings.

Level II fieldwork at FGCU takes place in traditional and/or emerging settings consistent with the curriculum design. In all settings, psychosocial factors influencing engagement in occupation must be understood and integrated for the development of client-centered, meaningful, occupational-based outcomes (C.1.7 and C.1.12). The fieldwork experience is designed to promote clinical reasoning and reflective practice, to transmit the values and beliefs that enable ethical practice, and to develop professionalism and competence in career responsibilities (C.1.11).

The student is required to perform Level IIA and Level IIB fieldwork during the fifth semester of the program. Level II fieldwork can be completed in a minimum of one setting if it is reflective of more than one practice areas, or in a maximum of four different settings (C.1.12). The Level II fieldwork experiences require a minimum of 24 weeks full time. This may be completed on a part-time basis as defined by the fieldwork placement in accordance with the fieldwork placement’s usual and customary personnel policies, as long as it is at least 50% of a full-time equivalent (FTE) at that site. (C.1.13). All Level II Fieldwork experiences must be completed within one calendar year of the beginning of the fifth semester of the student’s planned program except where bona fide personal or family health problems interfere. In no circumstances will Level II Fieldwork extend beyond 2 calendar years from the designated start date for Level II Fieldwork.

ACOTE also states Level II fieldwork must be integral to the program’s curriculum design and must include an in-depth experience in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation and research, administration, and management of occupational therapy services.

There are several ways in which the AFWC ensures Level II fieldwork sites are consistent with the curriculum design and goals; and meet ACOTE standards.

- Prior to placement the AFWC contacts the fieldwork site to identify if the facility can offer the student the knowledge, skills, and attitudes to practice competently and ethically as an entry-level occupational therapist.

- The AFWC obtains and reviews the AOTA or FLOTEC Fieldwork Data Form

- The AFWC monitors student discussion posts on Canvas. The student is required to answer two questions: 1) Identify links between coursework and Level II fieldwork; and 2) Explain how learning experiences are consistent with FGCU curricular design.
To augment the psychosocial and social factors that influence engagement in occupation, during Level II fieldwork the student is required to answer the following challenge question on Canvas: Describe 1-2 situations, during Level II FW explaining how psychosocial factors influenced engagement in client centered, meaningful, and occupation-based outcomes.

Education and evaluation of students are joint responsibilities of the FWEd and the AFWC. Both must maintain an ongoing interest and involvement in each student’s progress. The FWEd provides direct daily supervision or selectively assigns the student to work with other experienced staff members. Regular meetings, approximately once a week, should be scheduled to provide the student with constructive feedback and to discuss pending activities.

The AFWC monitors each student’s progress via periodic reports; telephone conversations; site visits; emails; Canvas, etc. Students are required to post a minimum of twelve times on Canvas during each Level II fieldwork experience, with specific criteria and grading. Students are encouraged to contact the AFWC at the first sign of concern with the fieldwork placement and / or supervision. The AFWC is available for consultation should questions or problems arise. Routine communication is encouraged throughout fieldwork.

The FWEd reviews the fieldwork evaluation with the student, to prevent any unexpected results at midpoint of each FW experience. Students are given the opportunity to raise questions and clarify ways to improve performance, to comment on concerns, and to inform the FWEd of special areas of need or interest. The FWEd completes the final fieldwork evaluation at the end of the experience.

All Level II Fieldwork experiences must be completed within two calendar years of the beginning of the fifth semester of the student’s planned program (Spring semester of 2nd year), except in the case of a bona fide personal or family health problems. Students are required to provide documentation of any issues to the AFWC. Level II Fieldwork that extend beyond 2 calendar years from the designated start date for Level II fieldwork. Refer to the Academic Probation section of the Occupational Therapy Student Handbook pertaining to the failure of a fieldwork.

Level II fieldwork follows the completion of all academic course work. The goal of Level II fieldwork is to develop competent, entry-level, generalist occupational therapists. Level II fieldwork education is designed to promote clinical reasoning and reflective practice, to transmit the values and beliefs that enable ethical practice, and to develop professionalism and competence in career responsibilities (C.1.11).

During the two Level II fieldwork courses, occupational therapy students transition into the role of student occupational therapists. Students actively participate in all aspects of the delivery of occupational therapy services, from referral and screening through intervention and discontinuation of services. Emphasis is placed on the use of occupation that is purposeful and meaningful to clients and is grounded in evidence-
based practice. Clinical reasoning and reflective practice skills are developed, as well as the values and beliefs that guide ethical practice and the development of professionalism. Students are also exposed to various aspects of administration and management of occupational therapy services. On-line discussion forums, managed by the AFWC, provide students the opportunity to share experiences and to be resources for each other. Student learning outcomes for the Level II fieldwork courses are found in the Appendix. These generalized outcomes guide the fieldwork experience, and are complemented by the specific objectives and activities that reflect the uniqueness of each fieldwork placement.

Enrollment in the two Level II FW courses (OTH6845 & OTH6846) follows successful completion of all other academic requirements of the occupational therapy curriculum. Students register for both courses for the second spring semester of the program. OTH6845 begins on the first Monday of the spring semester (January) and is immediately followed by OTH6846 which continues through the summer semester (ending June). Each fieldwork course is a full-time, 12-week placement, for a total of 24 weeks of Level II experience. Actual days of the week and exact number of hours of work per week will vary, depending on the schedule of the FWEd to whom the student is assigned. Students should plan on each FW course including a 40 hour week, which may include weekend days and holidays, with several hours devoted to reflection, research, and preparation each evening. Fieldwork students DO NOT have FGCU holidays off of fieldwork. Students are strongly advised to NOT maintain outside employment during this last critical phase of their professional preparation.

The determination of Level II placements requires the combined efforts of the students, the AFWC, the Faculty Assistant, and personnel at potential fieldwork sites. During the first semester of the program, the AFWC will present a detailed explanation of the site selection process to the students. The AFWC and Faculty Assistant conduct pre-fieldwork on-campus seminars, and manage Level I & II placements and on-line discussion forums. Students’ progress during Level II placements is monitored through informal conversations and formal mid-term interviews with the FWEd and students. FWEd use the Fieldwork Performance Evaluation for the Occupational Therapy Student (FWPE) to evaluate students’ performance in the fieldwork setting. The AFWC determines students’ fieldwork grades (Satisfactory or Unsatisfactory), based on the ratings obtained from this performance assessment tool and fieldwork assignments.

Students are eligible to sit for the national certification examination and to apply for licensure to practice as an occupational therapist upon the successful completion of the final Level II fieldwork. At this point, students have transitioned from occupational therapy students, to student occupational therapists, to entry-level occupational therapists.
LEVEL II FIELDWORK COURSE DESCRIPTIONS

Level II Fieldwork:
ACOTE states the goal of Level II fieldwork is to develop competent, entry-level, generalist occupational therapists and recommends that students be exposed to clients across the life span in a variety of settings. The fieldwork experience is designed to promote clinical reasoning and reflective practice, to transmit the values and beliefs that enable ethical practice, and to develop professionalism and competence in career responsibilities (C.1.11). Prerequisite: Successful completion of all OT coursework.

OTH6845 Level IIA Fieldwork – 6 credits
Level IIA Fieldwork is twelve-weeks of full-time fieldwork placement in a clinical or community setting under the direct supervision of a licensed occupational therapist. The course includes pre-fieldwork seminars and requires web board discussions.

OTH6846 Level IIB Fieldwork – 6 credits
Level IIB Fieldwork is twelve-weeks, full-time fieldwork placement in a setting different in service delivery context or population from Level IIA; under the direct supervision of a licensed occupational therapist. The course includes web board discussions.

LEVEL II FIELDWORK STUDENTS LEARNING OUTCOMES

At the completion of each Level II FW, the student will have demonstrated the ability to:
1. Conduct self in a professional and ethical manner with clients and colleagues.
2. Effectively communicate and collaborate with clients and colleagues.
3. Name, validate, and prioritize client occupational performance issues.
4. Select theoretical approaches that guide the screening and assessment process.
5. Complete client screenings and assessments (standardized and non-standardized), according to established procedures within the facility/organization.
6. Develop plans of intervention with measurable goals and objectives matched to the targeted outcomes and chosen theoretical approaches.
7. Use occupation during interventions, and grades activities according to the client’s needs and abilities.
8. Develop and implement a variety of interventions matched to the client’s goals.
9. Recommend and teach the use of appropriate assistive technologies, as needed.
10. Instruct client and family/significant others in home program/follow-up programs.
11. Evaluate client outcomes, and determine the need for continued service/discharge
12. Demonstrate competency in documentation skills required for client records.
13. Identify issues related to estimated length of occupational therapy intervention.
14. Collaborate with client, family/significant others, and other professionals in the development of discharge plans.
15. Collaborate with the OTA and other OT support personnel in the provision of OT services, and demonstrate knowledge of the OT responsibilities for supervision.
16. Independently complete the entire evaluation process with clients.
17. Independently establish and implement appropriate plans of intervention.
18. Independently establish and complete discharge plans.
19. Demonstrate entry-level therapist competencies
LEVEL II FIELDWORK STUDENT BEHAVIORAL OBJECTIVES

The 42 Behavioral Objectives are reflective of the AOTA Level II fieldwork evaluation and will be reviewed with each fieldwork site prior to establishing an AA/MOU. The AFWC and the FWEd also collaborate in establishing the fieldwork objectives (C.1.3). Prior to students' fieldwork assignment these objectives will be reviewed and a copy included in students' fieldwork packet. Objectives will be explained to students through the Occupational Therapy Program Student Fieldwork Manual, and repeated during each semester's fieldwork preparation lecture.

As required by the American Occupational Therapy Association, Florida Gulf Coast University and the fieldwork sites must document a plan to assure collaboration between academic and fieldwork representatives. The plan shall include agreed upon fieldwork objectives that are documented and explained to the student. The AFWC will collaborate with FWEd to review, maintain, and develop site specific behavioral objectives, under each of the following categories The Level II fieldwork behavioral objectives and assessment measures demonstrate promotion of clinical reasoning and reflective practice, as well as, demonstration of promotion of ethical practice and professionalism (C.1.2 and C.1.3).

Students will have access to the electronic Student Fieldwork Manual, on the FGCU Website, outlining the fieldwork behavioral objectives. The objectives are on Canvas. Behavioral objectives will also be outlined for students during fieldwork seminar prior to each fieldwork experience.

Level II fieldwork may be completed at a minimum in one setting and in a maximum of four different settings (C.1.12). If a student chooses to complete Level II fieldwork in one setting, the setting must be reflective of more than one practice area. Level I fieldwork is not substituted for any part of Level II fieldwork (C.1.10).

Section I. Fundamentals of Practice:

1. **Adheres to ethics**: Adheres consistently to the American Occupational Therapy Association Code of Ethics and site's policies and procedures including when relevant, those related to human subjects research.

2. **Adheres to safety regulations**: Adheres consistently to safety regulations. Anticipates potentially hazardous situations and takes steps to prevent accidents.

3. **Uses judgment in safety**: Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.
Section II. Basic Tenets:
4. Clearly and confidently articulates the values and beliefs of the occupational therapy profession to client, families, significant others, colleagues, service providers, and public.

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

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

7. Collaborates with client, family, and significant others throughout the occupational therapy process.

8. Collaborates with client, family, and significant other throughout the occupational therapy process.

Section III. Evaluation and Screening:
9. Articulates a clear and logical rational for the evaluation process.

10. Selects relevant screening and assessment methods while considering such factors as client’s priorities, context(s), theories, and evidence-based practice.

11. Determines client’s occupational profile and performance through appropriate assessment methods.

12. Assesses client factors and context(s) that supports or hinder occupational performance.

13. Obtains sufficient and necessary information for relevant resources such as client, families, significant others, service providers, and records prior to and during the evaluation process.

14. Administers assessments in a uniform manner to ensure findings are valid and reliable.

15. Adjusts/modifies the assessment procedures based on client’s needs, behaviors, and culture.

16. Interprets evaluation results to determine client’s occupational performance strengths and challenges.

17. Establishes an accurate and appropriate plan based on the evaluation results, through integrating multiple factors such as client’s priorities, context(s), theories, and evidence-based practice.

18. Documents the results of the evaluation process that demonstrates objective measurement of client’s occupational performance.
Section IV. Interventions:
19. Articulates a clear and logical rationale for the intervention process.

20. Utilizes evidence from published research and relevant resources to make informed intervention decisions.

21. Chooses occupations that motivate and challenge clients.

22. Selects relevant occupations to facilitate clients meeting established goals.

23. Implements intervention plans that are client-centered.

24. Implements intervention plans that are occupation-based.


26. Updates, modifies, or terminates the intervention plan based upon careful monitoring of the client’s status.

27. Documents client’s response to services in a manner that demonstrates the efficacy of interventions.

Section V. Management of Occupational Therapy Services
28. Demonstrates through practice or discussion the ability to assign appropriate responsibilities to the occupational therapy assistant and occupational therapy aide.

29. Demonstrates through practice or discussion the ability to actively collaborate with the occupational therapy assistant.

30. Demonstrates understanding of the costs and funding related to occupational therapy services at this site.

31. Accomplishes organizational goals by establishing priorities, developing strategies, and meeting deadlines.

32. Produces the volume of work required in the expected time frame.

Section VI. Communication:
33. Clearly and effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public.

34. Produces clear and accurate documentation according to site requirements. All written communication is legible, using proper spelling, punctuation, and grammar.

35. Uses language appropriate to the recipient of the information including but not limited to funding agencies and regulatory agencies.
Section VII. Professional Behaviors:

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

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

38. Responds constructively to feedback.

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

40. Demonstrates effective time management.

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

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

LEVEL II AOTA FIELDWORK PERFORMANCE EVALUATION FOR THE OT STUDENT

The AOTA Fieldwork Performance Evaluation of the Occupational Therapy student will be used as the formal evaluation of student performance while on Level II FW (C.1.18). The Level II fieldwork evaluation is a revision of the 1987 American Occupational Therapy Association, Inc. Fieldwork Evaluation Form for the Occupational Therapist and was produced by a committee of the Commission of Education.

The primary purpose of the Fieldwork Performance Evaluation for the Occupational Therapy Student is to measure entry-level competence of the occupational therapy student. The evaluation is designed to differentiate the competent student from the incompetent student and is not designed to differentiate levels above entry level competence. For further clarification on entry-level competency refer to the Standard of Practice of Occupational Therapy which can be referenced: American Occupational Therapy Association (AOTA), (1998). Standards of practice for occupational therapy. American Journal of Occupational Therapy (AJOT), 52, 866-869.

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

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

Along with using the mid-term and final evaluation, it is suggested that students complete a self-evaluation. During the midterm review process, the student and FWEd should collaboratively develop a plan, which will enable students to achieve entry-level competence by the end of the fieldwork. This plan should include specific objectives and enabling activities to be used by students and FWEd to achieve the desired competence. The FWEd must contact the AFWC when a student exhibits unsatisfactory behavior or a student lacks the ability to reach entry-level competence by the end of the fieldwork.

Directions for Rating Student Performance
There are forty-two performance items. Every item must be scored, using the one to four point rating scale, 4 exceeding standards and 1 being unsatisfactory performance. The rating scales should be carefully studied prior to using this evaluation. The definitions of the scales, 1 thru 4, are given at the top of each page. The FWEd must circle the number that corresponds to the description that best describes the student’s performance. Note, the rating for the Ethics and Safety items must be scored at 3 or above on the final evaluation for the student to pass fieldwork. If the ratings are below 3, continue to complete the Fieldwork Performance Evaluation to provide feedback to the student on her/his performance. The FWEd should record midterm and final ratings on the Performance Rating Summary Sheet.

Compare overall midterm and final scores to the scale listed as follows:

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

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

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

1 - Unsatisfactory: Performance is below standards and requires development for entry-level practice. This rating is given when there is a concern about performance.
**Overall Mid-Term Score**
Students must achieve a score of 90 or above to be documented as obtaining *Satisfactory Performance* at midterm. If a student achieves a score of 89 or below they are considered performing below standards, labeled as unsatisfactory performance. If this situation occurs, the FWEd and student must contact the AFWC immediately so a site visit can be scheduled an action plan / learning contract developed. The Learning Contract Template follows the AOTA’s Fieldwork Performance Evaluation for the Occupational Therapy Student Fieldwork Manual.

**Overall Final Score**
Students must achieve an overall total score of 122 points and above — *AND* — the student must receive a 9 or above in Section I of the Level II Fieldwork Evaluation to successfully pass Level II fieldwork (a 3 or more in questions 1, 2, and 3). If the student receives an overall total score of 121 points or below OR < a 3 in questions 1, 2, and 3, the student did **not** successfully pass Level II fieldwork. A student may not withdraw from a Level II fieldwork (OTH6845 or OTH6846) without the negotiated agreement of the FGCU OT Program’s AFWC and the site’s FWEd. If a student unilateral withdraws from a Level II experience, the student will earn an unsatisfactory grade.
Fieldwork Performance Evaluation
For The Occupational Therapy Student

SIGNATURES:
I HAVE READ THIS REPORT.

SIGNATURE OF STUDENT

FIELDWORK SETTING:

NAME OF ORGANIZATION/FACILITY
NUMBER OF PERSONS CONTRIBUTING TO THIS REPORT

ADDRESS: (STREET OR PO BOX)

CITY STATE ZIP

SIGNATURE OF RATER #1

TYPE OF FIELDWORK
PRINT NAME/CREDS/POSITION

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

SIGNATURE OF RATER #2 (IF APPLICABLE)

FROM: 
DATES OF PLACEMENT

PRINT NAME/CREDS/POSITION

NUMBER OF HOURS COMPLETED

FINAL SCORE
PASS: NO PASS:

SUMMARY COMMENTS:
(ADDRESSES STUDENT’S CLINICAL COMPETENCE)
Fieldwork Performance Evaluation
For The Occupational Therapy Student

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

PURPOSE

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

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

USE OF THE FIELDWORK PERFORMANCE EVALUATION FOR THE OCCUPATIONAL THERAPY STUDENT

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

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

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

DIRECTIONS FOR RATING STUDENT PERFORMANCE

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

OVERALL MIDTERM SCORE
Satisfactory Performance. .................. 90 and above
Unsatisfactory Performance. ............... 89 and below

OVERALL FINAL SCORE
Pass .................................. 122 points and above
No Pass ................................ 121 points and below

RATING SCALE FOR STUDENT PERFORMANCE

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

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

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

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

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

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

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

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

Comments on strengths and areas for improvement:

* Midterm

* Final

II. BASIC TENETS:

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

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

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

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

Comments on strengths and areas for improvement:

* Midterm

* Final
RATING SCALE FOR STUDENT PERFORMANCE

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

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

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

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

III. EVALUATION AND SCREENING:

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

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

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

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

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

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

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

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

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

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

Comments on strengths and areas for improvement:

+ Midterm

+ Final

IV. INTERVENTION:

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

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

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

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

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

   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

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

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

Comments on strengths and areas for improvement:
   - Midterm
   - Final

V. MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES:

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

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

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

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

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

Comments on strengths and areas for improvement:
   - Midterm
   - Final
RATING SCALE FOR STUDENT PERFORMANCE

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

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

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

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

VI. COMMUNICATION:

32. Clearly and effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public.
   Midterm 1 2 3 4
   Final 1 2 3 4

33. Produces clear and accurate documentation according to site requirements.
   Midterm 1 2 3 4
   Final 1 2 3 4

34. All written communication is legible, using proper spelling, punctuation, and grammar.
   Midterm 1 2 3 4
   Final 1 2 3 4

35. Uses language appropriate to the recipient of the information, including but not limited to funding agencies and regulatory agencies.
   Midterm 1 2 3 4
   Final 1 2 3 4

Comments on strengths and areas for improvement:

* Midterm

* Final

VII. PROFESSIONAL BEHAVIORS:

36. Collaborates with supervisor(s) to maximize the learning experience.
   Midterm 1 2 3 4
   Final 1 2 3 4

37. Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisor(s) and others.
   Midterm 1 2 3 4
   Final 1 2 3 4

38. Responds constructively to feedback.
   Midterm 1 2 3 4
   Final 1 2 3 4

39. Demonstrates consistent work behaviors including initiative, preparedness, dependability, and work site maintenance.
   Midterm 1 2 3 4
   Final 1 2 3 4

40. Demonstrates effective time management.
   Midterm 1 2 3 4
   Final 1 2 3 4

41. Demonstrates positive interpersonal skills including but not limited to cooperation, flexibility, tact, and empathy.
   Midterm 1 2 3 4
   Final 1 2 3 4

42. Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices.
   Midterm 1 2 3 4
   Final 1 2 3 4

Comments on strengths and areas for improvement:

* Midterm

* Final
## Performance Rating Summary Sheet

### Performance Items

<table>
<thead>
<tr>
<th>I. FUNDAMENTALS OF PRACTICE</th>
<th>Midterm Ratings</th>
<th>Final Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Adheres to ethics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Adheres to safety regulations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Uses judgment in safety</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>II. BASIC TENETS OF OCCUPATIONAL THERAPY</th>
<th>Midterm Ratings</th>
<th>Final Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Articulates values and beliefs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Articulates value of occupation</td>
<td></td>
<td></td>
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<tr>
<td>6. Communicates role of occupational therapist</td>
<td></td>
<td></td>
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<tr>
<td>7. Collaborates with clients</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>III. EVALUATION AND SCREENING</th>
<th>Midterm Ratings</th>
<th>Final Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td>8. Articulates clear rationale for evaluation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Selects relevant methods</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Determines occupational profile</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Assesses client and contextual factors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Obtains sufficient and necessary information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. Administers assessments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Adjusts/Modifies assessment procedures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. Interprets evaluation results</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. Establishes accurate plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. Documents results of evaluation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IV. INTERVENTION</th>
<th>Midterm Ratings</th>
<th>Final Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td>18. Articulates clear rationale for intervention</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19. Utilizes evidence to make informed decisions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20. Chooses occupations that motivate and challenge</td>
<td></td>
<td></td>
</tr>
<tr>
<td>21. Selects relevant occupations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22. Implements client-centered interventions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>23. Implements occupation based interventions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24. Modifies approach, occupation, and environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25. Updates, modifies, or terminates intervention plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>26. Documents client's response</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>V. MANAGEMENT OF OT SERVICES</th>
<th>Midterm Ratings</th>
<th>Final Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td>27. Demonstrates ability to assign through practice or discussion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>28. Demonstrates ability to collaborate through practice or discussion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>29. Understands costs and funding</td>
<td></td>
<td></td>
</tr>
<tr>
<td>30. Accomplishes organizational goals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>31. Produces work in expected time frame</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>VI. COMMUNICATION</th>
<th>Midterm Ratings</th>
<th>Final Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td>32. Communicates verbally and nonverbally</td>
<td></td>
<td></td>
</tr>
<tr>
<td>33. Produces clear documentation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>34. Written communication is legible</td>
<td></td>
<td></td>
</tr>
<tr>
<td>35. Uses language appropriate to recipient</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>VII. PROFESSIONAL BEHAVIORS</th>
<th>Midterm Ratings</th>
<th>Final Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td>36. Collaborates with supervisor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>37. Takes responsibility for professional competence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>38. Responds constructively to feedback</td>
<td></td>
<td></td>
</tr>
<tr>
<td>39. Demonstrates consistent work behaviors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>40. Demonstrates time management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>41. Demonstrates positive interpersonal skills</td>
<td></td>
<td></td>
</tr>
<tr>
<td>42. Demonstrates respect for diversity</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Total Score

**Midterm:**
- Satisfactory Performance: 90 and above
- Unsatisfactory Performance: 89 and below

**Final:**
- Pass: 122 points and above
- No Pass: 121 points and below
REFERENCES


GLOSSARY

Client Factors: Those factors that reside within the client and that may affect performance in areas of occupation. Client factors include body functions and body structures:
- body functions (a client factor, including physical, cognitive, and psychosocial aspects)—the physiological function of body systems (including psychological functions) (WHO, 2001, p. 10)
- body structures—‘‘anatomical parts of the body such as organs, limbs and their components that support body functions’’ (WHO, 2001, p. 10).

(Occupational therapy practice framework: Domain and process, American Journal of Occupational Therapy, 56, 606–639.) (5)

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

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

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

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

Efficacy: having the desired influence or outcome (from Neistadt and Crepeau, Eds. Willard & Spackman’s Occupational Therapy, 9th edition, 1996)

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

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

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

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

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

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

Theory: “an organized way of thinking about given phenomena. In occupational therapy the phenomenon of concern is occupational endeavor. Theory attempts to (1) define and explain the relationships between concepts or ideas related to the phenomenon of interest, (2) explain how these relationships can predict behavior or events, and (3) suggest ways that the phenomenon can be changed or controlled. Occupational therapy theory is concerned with four major concepts related to occupational endeavors: person, environment, health, and occupation.” (Neistadt and Crepeau, Eds. Willard & Spackman’s Occupational Therapy, 9th edition, 1996, p.521)
LEVEL II FIELDWORK ASSIGNMENTS

The students are required to complete discussion posts (DP), answer challenge questions (CQ), ensure site-specific behavioral objectives and the AOTA or FLOTEC Fieldwork Data form are current; and complete a Student Evaluation of Fieldwork Performance at the end of Level IIA and at the end of Level IIB Fieldwork. The DPs are due bi-weekly, the first DP is due the first week of FW and the CQs are due when time permits, but before the last day of Level II FW, on Canvas.

DISCUSSION POSTS (DP):
During Level II Fieldwork experiences, students are required to maintain communication with the AFWC, MOT Faculty, and fellow students. DPs provide general information to classmates, pose questions, answer questions, ask advice, etc. Students are required to log on to Canvas and participate weekly in the discussions; any sensitive topics should be communicated directly and immediately to the AFWC. Students must maintain confidentiality of discussion posts.

Students are required to complete 6 DPs during Level IIA and 6 DPs during Level IIB Fieldwork. DPs are due bi-weekly; however, the evening of the first day or second day of Level IIA and the evening of the first day or second day of Level IIB students MUST post their first day experience.

This DP must include Fieldwork educator’s (FWEd):
- Name
- Credentials (i.e. OTR/L or OT/L, CHT)
- Telephone number (the number the AFWC can call them during FW),
- Email address,
- Preferred method of communication (i.e. mail, email, telephone),
- University OT degree was obtained,
- OT license number and date of expiration,
- Date of Initial Certification,
- Number of years practicing occupational therapy,
- Summarize your conversation with your FWEd regarding Level II Behavioral Objectives (site-specific),
- Share your initial feelings of the first day of FW, and your perception of how the remaining 12 weeks of fieldwork.

The remaining 5 DPs should be a Level II learning experience and may reflect:
- Challenging events that occurred during fieldwork
- New techniques observed
- Emerging areas of practice / diagnoses encountered
- Situations that required further clarification or you did not feel adequately prepared to handle
- Resources you found helpful
- Issues you problem-solved
- Ethical situations encountered
- Preparedness for Level IIA or Level IIB fieldwork
CHALLENGE QUESTIONS (CQ):
Throughout Level IIA and during Level IIB fieldwork the student is required to answer the following challenge questions:

1. Describe 2 situations of how the psychosocial factors influenced engagement in client-centered, meaningful, and occupation based outcomes.

2. Identify 1-2 links between coursework and Level II fieldwork.

3. Explain how your learning experiences are consistent with FGCU curricular design.

4. Outline how your Fieldwork Educator (FWEd) structures opportunities for informal and formal reflection regarding the OT process in action with the client population.

5. Describe the opportunities you have while on fieldwork to develop your clinical reasoning and reflective practice.

6. What did your FWEd say about your preparedness and readiness for Level II fieldwork based on the curriculum and list areas to enhance FGCU’s OT Program curriculum.

Students are required to complete a minimum of 24 weeks’ full-time Level II fieldwork (C.1.13). The student is required to complete discussion postings bi-weekly. These QP and CQ are additional mechanisms the AFWC ensures the setting is consistent with the curriculum design (C.1.1) and ensures the student is obtaining adequate supervision (C.1.15).

SITE SPECIFIC BEHAVIORAL OBJECTIVES:
On Level II fieldwork, the site should have site specific Behavioral Objectives that correlate with the AOTA Level II Fieldwork Performance Evaluation for the Occupational Therapy Student. If not, the student is required to obtain a copy and upload them to Canvas before the last day of Level II FW. If these site specific behavioral objectives are not available, the student is responsible to develop them collaboratively with the FWEd and AFWC. The Behavioral Objectives will be reflective of the AOTA Level II fieldwork evaluation; all 42 areas shall be addressed. Samples of site specific Behavioral Objectives can be found on Canvas.

AOTA FIELDWORK DATA FORM:
The purpose of the Fieldwork Data Form is to facilitate communication between occupational therapy (OT) and academic programs, OT students, and FWEd. FWEd and Academic Fieldwork Coordinators (AFWC) jointly complete the Fieldwork Data Form to describe the fieldwork setting where students may have placements. While much of the information may be completed by the FWEd, there will be additional information best obtained through AFWC interview of the fieldwork education coordinator at the site.
The AFWC will find opportunity to document fieldwork related Accreditation Council for Occupational Therapy (ACOTE) Standards that support the ACOTE on-site accreditation review process. In addition, OT students will find valuable information describing the characteristics of the fieldwork setting, the client population, commonly used assessments, interventions, and expectations and opportunities for students. The Fieldwork Data Form has been developed to reflect the Occupational Therapy Practice Framework terminology and best practice in occupational therapy to promote quality fieldwork experiences. It was developed through the joint efforts of the Commission on Education (COE) and Education Special Interest Section (EDSIS) Fieldwork Subsection with input from many dedicated AFWCs and FWEd.

Note: the following AOTA Fieldwork Data Form is the most recent form available via AOTA.

**AOTA FIELDWORK DATA FORM**

<table>
<thead>
<tr>
<th>Date:</th>
<th>Name of Facility:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address: Street</td>
<td>City</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FW I</th>
<th>FW II</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Person:</td>
<td>Credentials:</td>
</tr>
<tr>
<td>Phone:</td>
<td>E-mail:</td>
</tr>
</tbody>
</table>

**Director:**

- Phone:
- Fax:
- Web site address:

**Initiation Source:**
- FW Office
- FW Site
- Student

**Corporate Status:**
- For Profit
- Non-Profit
- State Gov’t
- Federal Gov’t

**Preferred Sequence of FW:**
- ACOTE Standards B.10.6
- Any
- Second/Third only; 1st must be in:
- Full-time only
- Part-time option
- Prefer Full-time

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

<table>
<thead>
<tr>
<th>Hospital-based settings</th>
<th>Community-based settings</th>
<th>School-based settings</th>
<th>Age Groups:</th>
<th>Number of Staff:</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-Patient Acute 1.1</td>
<td>Peds Community 2.1</td>
<td>Early Intervention 3.1</td>
<td>0-5</td>
<td>OTRs:</td>
</tr>
<tr>
<td>In-Patient Rehab 1.2</td>
<td>Behavioral Health Community 2.2</td>
<td>School 3.2</td>
<td>6-12</td>
<td>COTAs:</td>
</tr>
<tr>
<td>SNF/ Sub-Acute Acute Long-Term Care 1.3</td>
<td>Older Adult Community Living 2.3</td>
<td>Other area(s)</td>
<td>13-21</td>
<td>Aides:</td>
</tr>
<tr>
<td>General Rehab Outpatient 1.4</td>
<td>Older Adult Day Program 2.4</td>
<td></td>
<td>22-64</td>
<td>PT:</td>
</tr>
<tr>
<td>Outpatient Hands 1.5</td>
<td>Outpatient/hand private practice 2.5</td>
<td></td>
<td></td>
<td>Speech:</td>
</tr>
<tr>
<td>Pediatric Hospital/Unit 1.6</td>
<td>Adult Day Program for DD 2.6</td>
<td></td>
<td></td>
<td>Resource Teacher:</td>
</tr>
<tr>
<td>Peds Hospital Outpatient 1.7</td>
<td>Home Health 2.7</td>
<td></td>
<td></td>
<td>Counselor/Psychologist:</td>
</tr>
<tr>
<td>In-Patient Psych 1.8</td>
<td>Peds Outpatient Clinic 2.8</td>
<td></td>
<td></td>
<td>Other:</td>
</tr>
</tbody>
</table>

**Student Prerequisites** (check all that apply) ACOTE Standard B.10.6

Health requirements:
Performance skills, patterns, contexts and client factors addressed in this setting (check all that apply)

**Performance Skills:**
- Motor Skills
  - Posture
  - Mobility
  - Coordination
  - Strength & effort
  - Energy
- Process Skills
  - Energy
  - Knowledge
  - Temporal organization
  - Organizing space & objects
  - Adaptation
- Communication/Interaction Skills
  - Physicality - non-verbal
  - Information exchange
  - Relations

**Client Factors:**
- Body functions/structures
  - Mental functions - affective
  - Mental functions - cognitive
  - Mental functions - perceptual
  - Sensory functions & pain
  - Voice & speech functions
  - Major organ systems: heart, lungs, blood, immune
  - Digestion/ metabolic/ endocrine systems
  - Reproductive functions
  - Neuromusculoskeletal & movement functions
  - Skin
- Mental functions - affective
- Mental functions - cognitive
- Mental functions - perceptual
- Sensory functions & pain
- Voice & speech functions
- Major organ systems: heart, lungs, blood, immune
- Digestion/ metabolic/ endocrine systems
- Reproductive functions
- Neuromusculoskeletal & movement functions
- Skin
- Sensory functions & pain
- Voice & speech functions
- Major organ systems: heart, lungs, blood, immune
- Digestion/ metabolic/ endocrine systems
- Reproductive functions
- Neuromusculoskeletal & movement functions
- Skin
- Geography
- Culture
- Personal
- Spiritual
- Temporal - life stages, etc.
- Virtual - simulation of env, chat room, etc.

**Performance Patterns/Habits**
- Impoverished habits
- Useful habits
- Dominating habits
- Routine sequences
- Roles

**Context(s):**
- Cultural - ethnic beliefs & values
- Physical environment
- Social Relationships
- Personal - age, gender, etc.
- Spiritual
- Temporal - life stages, etc.
- Virtual - simulation of env, chat room, etc.

**Most common services priorities** (check all that apply)
- Consultation
- Direct service
- Discharge planning
- Evaluation
- In-service training
- Intervention
- Client education
- Billing
- Documentation

**Types of OT Interventions addressed in this setting** (check all that apply): *ACOTE Standards A.5.3*

**Occupation-based activity - within client’s own environmental context; based on their goals addressed in this setting** (check all that apply):

**Activities of Daily Living (ADL):**
- Bathing/showering
- Bowel and bladder mgmt
- Dressing
- Eating
- Feeding
- Functional mobility
- Personal device care
- Personal hygiene & grooming
- Sexual activity
- Sleep/rest
- Toilet hygiene

**Play:**
- Play exploration
- Play participation

**Instrumental Activities of Daily Living (IADL):**
- Care of others/pets
- Child rearing
- Communication device use
- Community mobility
- Financial management
- Health management & maintenance
- Home establishment & management
- Meal preparation & clean up
- Safety procedures & emergency responses
- Shopping

**Leisure:**
- Leisure exploration
- Leisure participation

**Education:**
- Formal education participation
- Exploration of informal personal education needs or interests
- Informal personal education participation

**Work:**
- Employment interests & pursuits
- Employment seeking and acquisition
- Job performance
- Retirement preparation & adjustment
- Volunteer exploration / participation

**Social Participation:**
- Community
- Family
- Peer/friend

Please list any other requirements:
**Purposeful Activity**
- Therapeutic context leading to occupation, practice in preparation for natural context
  - Practicing an activity
  - Simulation of activity
  - Role Play

**Preparatory Methods** - preparation for purposeful & occupation-based activity
- Sensory-Stimulation
- Physical agent modalities
- Splinting
- Exercise

**Therapeutic Use-of-Self**
- Consultation Process
- Education Process

**Method of Intervention**
- Direct Services/case load for entry-level OT
  - One-to-one:
  - Small group(s):
  - Large group:

**Discharge Outcomes of clients (% clients)**
- Home
- Another medical facility
- Home Health

**Outcomes of Intervention**
- Occupational performance - improve &/or enhance
- Client Satisfaction
- Role Competence
- Adaptation
- Health & Wellness
- Prevention
- Quality of Life

**OT Intervention Approaches**
- Create, promote (health promotion)
- Establish, restore, remediation
- Maintain
- Modify, compensation, adaptation
- Prevent, disability prevention

**Theory/ Frames of Reference/ Models of Practice**
- Acquisitional
- Biomechanical
- Cognitive- Behavioral
- Coping
- Developmental
- Ecology of Human Performance
- Model of Human Occupation (MOHO)
- Occupational Adaptation
- Occupational Performance Model
- Person/ Environment/ Occupation (P-E-O)
- Person-Environment-Occupational Performance
- Psychosocial
- Rehabilitation frames of reference
- Sensory Integration
- Other (please list):

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

<table>
<thead>
<tr>
<th>Identify safety precautions important at your FW site</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medications</td>
</tr>
<tr>
<td>Post-surgical (list procedures)</td>
</tr>
<tr>
<td>Contact guard forambulation</td>
</tr>
<tr>
<td>Fall risk</td>
</tr>
</tbody>
</table>

Please list how students should prepare for a FW II placement such as doing readings, learn specific evaluations and interventions used in your setting:

<table>
<thead>
<tr>
<th>Target caseload/ productivity for fieldwork students:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Productivity % per 40 hour work week:</td>
</tr>
<tr>
<td>Caseload expectation at end of FW:</td>
</tr>
<tr>
<td>Productivity % per 8 hour day:</td>
</tr>
<tr>
<td># Groups per day expectation at end of FW:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Documentation: Frequency/ Format (briefly describe):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hand-written documentation:</td>
</tr>
<tr>
<td>Computerized Medical Records:</td>
</tr>
<tr>
<td>Time frame requirements to complete documentation:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Administrative/ Management duties or responsibilities of the OT/ OTA student:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule own clients</td>
</tr>
<tr>
<td>Supervision of others (Level I students, aides, OTA, volunteers)</td>
</tr>
<tr>
<td>Budgeting</td>
</tr>
<tr>
<td>Procuring supplies (shopping for cooking groups, client/ intervention related items)</td>
</tr>
<tr>
<td>Participating in supply or environmental maintenance</td>
</tr>
<tr>
<td>Other:</td>
</tr>
</tbody>
</table>

| Research/ EBP/ Literature review |
| In-service |
| Case study |
| Participate in in-services/ grand rounds |
| Fieldwork Project (describe): |
| Field visits/ rotations to other areas of service |
| Observation of other units/ disciplines |
| Other assignments (please list): |

<table>
<thead>
<tr>
<th>Student Assignments. Students will be expected to successfully complete:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule hrs/ week/ day:</td>
</tr>
<tr>
<td>Room provided yes no</td>
</tr>
<tr>
<td>High High</td>
</tr>
<tr>
<td>Do students work weekends? yes no</td>
</tr>
<tr>
<td>Meals yes no</td>
</tr>
<tr>
<td>Moderate Moderate</td>
</tr>
<tr>
<td>Do students work evenings? yes no</td>
</tr>
<tr>
<td>Stipend amount:</td>
</tr>
<tr>
<td>Low Low</td>
</tr>
</tbody>
</table>

Describe the FW environment/ atmosphere for student learning:

Describe public transportation available:
ACOTE Standards Documentation for Fieldwork (may be completed by AFWC interview of FW Educator)

1. The fieldwork agency must be in compliance with standards by external review bodies. Please identify external review agencies involved with this FW setting and year of accreditation (JCAHO, CARF, Department of Health, etc.).

ACOTE on-site review
Name of Agency for External Review:
Year of most recent review:
Summary of outcomes of OT Department review:

2. Describe the fieldwork site agency stated mission or purpose (can be attached).

3. OT Curriculum Design integrated with Fieldwork Site (insert key OT academic curricular themes here):
   a. How are occupation-based needs evaluated and addressed in your OT program? How do you incorporate the client’s meaningful’ doing in this setting?
   b. Describe how you seek to include client-centered OT practice? How do clients participate in goal setting and intervention activities?
   c. Describe how psychosocial factors influence engagement in occupational therapy services?
   d. Describe how you address clients' community-based needs in your setting?

4. How do you incorporate evidence-based practice into interventions and decision-making? Are FW students encouraged to provide evidence for their practice?

5. Please describe FW Program & how students fit into the program. Describe the progression of student supervision from novice to entry-level practitioner using direct supervision, co-treatment, monitoring, as well as regular formal and informal supervisory meetings. Describe the fieldwork objectives, weekly fieldwork expectations, and record keeping of supervisory sessions conducted with student. Please mail a copy of the FW student objectives, weekly expectations for the Level II FW placement, dress code, and copy of entry-level job description with essential job functions to the AFWC.

6. Please describe the background of supervisors (please attach list of practitioners who are FW Educators including academic program, degree, years of experience since initial certification, years of experience supervising students) (provide a template)

7. Describe the training provided for OT staff for effective supervision of students (check all that apply).
   2:1 Supervisory models
   Training on use of FW assessment tools (such as the AOTA Fieldwork Performance Evaluation- FWPE, Student Evaluation of Fieldwork Experience—SEFWE, and the Fieldwork Experience Assessment Tool–FEAT)
   Clinical reasoning Reflective practice
8. Please describe the process for record keeping supervisory sessions with a student, and the student orientation process to the agency, OT services and the fieldwork experience.

**Supervisory patterns—Description** (respond to all that apply)
- 1:1 Supervision Model:
- Multiple students supervised by one supervisor:
- Collaborative Supervision Model:
- Multiple supervisors share supervision of one student, # supervisors per student:
- Non-OT supervisors:

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

**Status/Tracking Information Sent to Facility To be used by OT Academic Program**

**Which Documentation Does the Fieldwork Site Need?**
- A Fieldwork Agreement/ Contract? OR
- A Memorandum of Understanding?

**Which FW Agreement will be used:**
- OT Academic Program Fieldwork Agreement  Fieldwork Site Agreement

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

**Type of Business Organization** (Corporation, partnership, sole proprietor, etc.):

**State of Incorporation:**

**Fieldwork Site agreement negotiator:**

**Address** (if different from facility):
- Street:  City:  State:  Zip:

**Name of student:**

**Potential start date for fieldwork:**

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

**Information Status:**
- New general facility letter sent: ☐ Confirmation sent: ☐ Database entry:
- Level I Information Packet sent: ☐ Model Behavioral Objectives
- Facility Information:
- Level II Information Packet sent: ☐ Week-by-Week Outline: ☐ Student fieldwork
- Mail contract with intro letter (sent): ☐ Make facility folder: ☐ Print facility sheet:

Revised 10/25/2016
LEVEL II STUDENT FIELDWORK AGREEMENT

I, [student’s name] agree to honor my commitment to professionally participate in a fieldwork program as an occupational therapy student at Florida Gulf Coast University at [facility name] beginning on [start date of FW] and ending on [end date of FW].

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

I agree to be responsible for:

1. Respecting the confidentiality of information regarding clients in accordance to HIPAA and with the fieldwork site’s policies and procedures;

2. Complying with the professional standards set up by the fieldwork program, Florida Gulf Coast University (FGCU), and the AOTA code of Ethics. If I do not know or understand these standards, it will be my responsibility to learn them and to raise any items in question for discussion;

3. Attending fieldwork every day; a maximum of three days during the entire 6-months of Level II fieldwork may be missed in accordance of FGCU. However, if the facility does not allow students to miss fieldwork, FGCU will support the affiliating facility’s policy. If an absence does occur, the student must notify the FWEd and the AFWC at FGCU immediately. If a student does miss greater than three days an intervention plan will be devised. The FWEd, student, and AFWC will develop an action plan to address how the missed assignments and time will be made up.

4. Adherence to the policies and procedures of the facility;

5. Arrange for my own transportation, meals, and housing when not provided by the facility;

6. Provide the fieldwork site with evidence of an annual physical examination and 2 step PPD, immunizations, titers, and other medical tests as requested.

7. Wear the fieldwork site’s uniform (i.e. lab coat, scrubs); if not dress code is required, will adhere to the FGCU dress code. I will wear my name tag/identification.

8. The OT Program has permission to release health records, results from criminal background checks to the fieldwork site.

9. Obtaining prior written approval from the facility and Florida Gulf Coast University before publishing any written material relating to the fieldwork experience.

10. Drug screening, it is my responsibility to review the fieldwork site data form to identify whether or not drug screening if required. If so, I will obtain the proper panel of screening and have it done during the requested time.

11. I will complete Canvas Discussion Posts bi-weekly while on fieldwork and answer Challenge Questions while on each Level II fieldwork.

_________________________________________                    ____________________
Student’s Signature                                      Date
LEVEL II FIELDWORK STUDENT PLACEMENT STEPS

Step 1: During OTH6853, the student completes a Level II FW Placement Form. The student will list four sites to complete Level II fieldwork. The sites selected do not have to be a site FGCU has an established MOU/AA.

If a student chooses one site to complete a six (6) month Level II FW, that site must be reflective of more than one practice area. The student’s fieldwork list must expose them to a variety of clients across the life span and to a variety of settings.

Step 2: During OTH6853 the Level II fieldwork placement lottery drawing is conducted. A container holding numbers circulates the room. The student draws one number from the container. The 1st number drawn is the number used to place the student for one FW. The container circulates the room again and the 2nd number is used to place the student in the 2nd FW.

The goal is to place the student in OTH6845 first; however, if the site listed on the student’s form does not have availability for the OTH6845 FW but does have availability during the OTH6846 FW, the student is placed in OTH6846 first.

Step 3: The AFWC will contact the FW sites and begin the process of establishing an MOU/AA, if there is not one already on file. The AFWC will confirm the FW site reflects FGCU’s sequence and scope of content in the curriculum design (C.1.1). If the site does meet this criteria and there is a qualified occupational therapist, with a current OT license and has at least one year of occupational therapy experience, to mentor the Level II student, placement is confirmed. Formal verification of FWEd’s occupational therapy license is validated on the State Board of Occupational Therapy website before student begins fieldwork.

Step 4: Some sites require a student interview before FW placement. If the site requires an interview, the student arranges for that interview at least two months prior to the FW experience, if not sooner depending upon the site requirements. Final placement is contingent on the interview outcome.

Step 5: After the interview, the student is required to contact the AFWC to discuss this interview. The AFWC follows up with the FW site regarding the interview outcome. At that time, the final plans are made to have the student complete Level II experience at that site or arrangements are made for the student to complete Level II FW at another site.

Students who do not attend the scheduled lottery drawing meeting, and do not meet with the AFWC or a faculty member prior to the meeting will receive the last number in the container. Before final placements are made, the AFWC and the OT faculty will collaborate to verify a “facility to student” match. Students will only be placed at sites deemed to provide an optimal learning environment by the AFWC and faculty.
LEVEL II FIELDWORK STUDENT PLACEMENT FORM

Student: __________________________ Email: __________________________
Home Address: __________________________ Cell #: __________________________

Please list 4 sites where you would like to complete **Level IIA and Level IIB** FW. If you want to go to a specific site for Level IIA and a specific site for Level IIB please note that on this form. You will be placed in Level II FW sites using a lottery system. Please do not contact any sites before selection without the AFWC approval. Students cannot complete FW where a relative is employed to avoid the appearance of partiality.

1. Facility Name: __________________________ Address: __________________________ Telephone #: __________________________ Comments: __________________________

2. Facility Name: __________________________ Address: __________________________ Telephone #: __________________________ Comments: __________________________

3. Facility Name: __________________________ Address: __________________________ Telephone #: __________________________ Comments: __________________________

4. Facility Name: __________________________ Address: __________________________ Telephone #: __________________________ Comments: __________________________

Please check one box:

☐ I will take a placement at any site.

☐ I only want a placement in the site indicated above. I realize this may delay my placement process and I also understand that I may not be placed until a few weeks/days before the start of my FW.

________________________________________
Student’s Signature
________________________________________
Date
LEVEL II STUDENT EVALUATION OF FIELDWORK EXPERIENCE (SEFWE)

The SEFWE is used internally by the Occupational Therapy Program at FGCU. This evaluation is one mechanism the AFWC ensures fieldwork effectiveness (C.1.0), ensures effectiveness of FW supervision (C.1.15), and ensures FW meets the curriculum design (C.1.1). Once completed students will scan and upload the document to Canvas. This evaluation will not be given to the FW site or FWEd unless requested.

The main objectives of this evaluation are to:
Enable the Level II fieldwork student who is completing a placement at the site to evaluate and provide feedback regarding the fieldwork site;
Enable academic programs to benefit from student feedback in order to develop and refine fieldwork and/or the curriculum;
Ensure all aspects of the fieldwork reflect the sequence and scope of content in the curriculum design;
Provide information to students selecting sites for future Level II fieldwork; and
Provide a means of evaluation to ensure that fieldwork is performed in settings that provide educational experiences applicable to the academic program.

This form is designed to offer each program the opportunity to gather meaningful and useful information.

Fieldwork Site ____________________________ Site Code _________
Address _______________________________________________________________
Placement Dates: from _________________________ to _______________________
Order of Placement: [ ] First [ ] Second [ ] Third [ ] Fourth
Living Accommodations: (include type, cost, location, condition)

Public transportation in the area:

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

__________________________________________________________
Student's Signature           FW Educator’s Signature

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

   FW Educator’s years of experience _______
ORIENTATION
Indicate your view of the orientation by checking "Satisfactory" (S) or "Needs Improvement" (I) regarding the three factors of adequacy, organization, and timeliness.

<table>
<thead>
<tr>
<th>TOPIC</th>
<th>Adequate</th>
<th>Organized</th>
<th>Timely</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site-specific fieldwork objectives</td>
<td>S</td>
<td>I</td>
<td>S</td>
<td>I</td>
</tr>
<tr>
<td>Student supervision process</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requirements/assignments for students</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Student schedule (daily/weekly/monthly)</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Staff introductions</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Overview of physical facilities</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Agency/Department mission</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Overview of organizational structure</td>
<td></td>
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<tr>
<td>Services provided by the agency</td>
<td></td>
<td></td>
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<tr>
<td>Agency/Department policies and procedures</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Role of other team members</td>
<td></td>
<td></td>
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<tr>
<td>Documentation procedures</td>
<td></td>
<td></td>
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<tr>
<td>Safety and emergency procedures</td>
<td></td>
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<tr>
<td>Confidentiality/HIPAA</td>
<td></td>
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<tr>
<td>OSHA—Standard precautions</td>
<td></td>
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<tr>
<td>Community resources for service recipients</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Department model of practice</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Role of occupational therapy services</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Methods for evaluating OT services</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Comments or suggestions regarding your orientation to this fieldwork placement:
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

CASELOAD
List approximate number of each age category in your caseload.

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

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

<table>
<thead>
<tr>
<th>REQUIRED</th>
<th>HOW MANY</th>
<th>EDUCATIONAL VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td>1 2 3 4 5</td>
</tr>
</tbody>
</table>

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

List major therapeutic interventions frequently used and indicate whether it was provided in group, individually, Co-Treatment, or consultation. List other professionals involved.

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

**THEORY—FRAMES OF REFERENCE—MODELS OF PRACTICE**

Indicate frequency of theory/frames of reference used

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

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

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

### SUPERVISION

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

- [ ] one supervisor : one student
- [ ] one supervisor : group of students
- [ ] two supervisors : one student
- [ ] one supervisor : two students
- [ ] distant supervision (primarily off-site)
- [ ] 3 or more supervisors : 1 student (count person as supervisor if supervision occurred at least weekly)

List fieldwork educators who participated in your learning experience.

<table>
<thead>
<tr>
<th>Name</th>
<th>Credentials</th>
<th>Frequency</th>
<th>Individual</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
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<tr>
<td>3.</td>
<td></td>
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</tr>
</tbody>
</table>

### ASPECTS OF THE ENVIRONMENT

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

<table>
<thead>
<tr>
<th>Aspect</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff and administration demonstrated cultural sensitivity</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Practice Framework was integrated into practice</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Student work area/supplies/equipment were adequate</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opportunities to collaborate with and/or supervise OTs, OTAs, and/or aides</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opportunities to network with other professionals</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Opportunities to interact with other OT students</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opportunities to interact with students from other disciplines</td>
<td></td>
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<tr>
<td>Staff used a team approach to care</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Opportunities to observe role modeling of therapeutic relationships</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Opportunities to expand knowledge of community resources</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Opportunities to participate in research</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional educational opportunities (specify):</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>How would you describe the pace of this setting? (circle one)</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Types of documentation used in this setting:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ending student caseload expectation: _____ # of clients per week or day</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ending student productivity expectation: _____ % per day (direct care)</td>
<td></td>
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</tr>
</tbody>
</table>

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

- [ ] Slow
- [ ] Med
- [ ] Fast

Types of documentation used in this setting:

- [ ]

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

Ending student productivity expectation: _____ % per day (direct care)
ACADEMIC PREPARATION
Rate the relevance and adequacy of your academic coursework relative to the needs of THIS fieldwork placement, circling the appropriate number. (Note: may attach own course number)

<table>
<thead>
<tr>
<th>Adequacy for Placement</th>
<th>Relevance for Placement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low 2 3 4 5 High</td>
<td>Low 2 3 4 5 High</td>
</tr>
<tr>
<td>Anatomy and Kinesiology</td>
<td></td>
</tr>
<tr>
<td>Neurodevelopment</td>
<td></td>
</tr>
<tr>
<td>Human development</td>
<td></td>
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<tr>
<td>Evaluation</td>
<td></td>
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<tr>
<td>Intervention planning</td>
<td></td>
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<tr>
<td>Interventions</td>
<td></td>
</tr>
<tr>
<td>Theory</td>
<td></td>
</tr>
<tr>
<td>Documentation skills</td>
<td></td>
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<tr>
<td>Leadership</td>
<td></td>
</tr>
<tr>
<td>Professional behavior</td>
<td></td>
</tr>
<tr>
<td>Therapeutic use of self</td>
<td></td>
</tr>
<tr>
<td>Level I fieldwork</td>
<td></td>
</tr>
<tr>
<td>Program development</td>
<td></td>
</tr>
</tbody>
</table>

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

- Informatics
- Pathology
- Env.
- Interventions
- Social Roles

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

SUMMARY: 1 = Strongly disagree  2 = Disagree  3 = No Opinion  4 = Agree  5 = Strongly agree

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

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

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

Study the following evaluations & intervention methods:

Read up on the following in advance:
Overall, what changes would you recommend in this Level II fieldwork experience?

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

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

General comments on supervision:

AOTA SEFWE Task Force, June 2006
# LEVEL II MID-TERM EVALUATION LEARNING CONTRACT

This learning contract template is used for the occupational therapy student that may obtain < 89 at midterm. This form is completed among FWEd, student, and AFWC.

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

<table>
<thead>
<tr>
<th>Section and Criteria</th>
<th>Midterm Score</th>
<th>SITE SPECIFIC Goals to be met by Final</th>
<th>Feedback (week 8)</th>
<th>Feedback (week 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SECTION I:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Adheres to ethics</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>2. Adheres to safety regulations</td>
<td></td>
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</tr>
<tr>
<td>3. Uses judgment in safety</td>
<td></td>
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<tr>
<td>SECTION II:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Articulates values and beliefs</td>
<td></td>
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<tr>
<td>5. Articulate value of occupation</td>
<td></td>
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<tr>
<td>6. Communicates role of the OT</td>
<td></td>
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<tr>
<td>7. Collaborates with clients</td>
<td></td>
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</tr>
<tr>
<td>SECTION III:</td>
<td></td>
<td></td>
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<tr>
<td>8. Articulates clear rationale for evaluation</td>
<td></td>
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<td></td>
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<tr>
<td>9. Selects relevant methods</td>
<td></td>
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<tr>
<td>10. Determines occupational profile</td>
<td></td>
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<tr>
<td>11. Assesses client and contextual factors</td>
<td></td>
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<td></td>
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<tr>
<td>12. Obtains sufficient and necessary information</td>
<td></td>
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<tr>
<td>13. Administers assessments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Adjusts / modifies assessment procedures</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. Interprets eval results</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. Establishes an accurate plan</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>17. Documents results of evals</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**SECTION IV:**

| 18. Articulates clear rational for Intervention |
| 19. Utilizes evidence to make informed decisions |
| 20. Choose occupations that motivate and challenge |
| 21. Selects relevant occupations |
| 22. Implements client-centered interventions |
| 23. Implements occupation based interventions |
| 24. Modifies approach, occupation, and environment |
| 25. Updates, modifies, or terminates intervention plan |
| 26. Documents client’s response |

**SECTION V:**

<p>| 27. Demonstrates ability to assign through practice or discussion |</p>
<table>
<thead>
<tr>
<th>28. Demonstrates ability to collaborate through practice or discussion</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>29. Understands costs and funding</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30. Accomplishes organizational goals</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>31. Produces work in expected time frame</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SECTION VI:**

<table>
<thead>
<tr>
<th>32. Communicates verbally and nonverbally</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>33. Produces clear documentation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>34. Written communication is legible</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>35. Uses language appropriate to recipient</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SECTION VII:**

<table>
<thead>
<tr>
<th>36. Collaborates with supervisor</th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>37. Takes responsibility for professional competence</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>38. Responds constructively to feedback</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>39. Demonstrates consistent work behaviors</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>40. Demonstrates time management</td>
<td></td>
<td></td>
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<tr>
<td>41. Demonstrates positive interpersonal skills</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>42. Demonstrates respect for diversity</td>
<td></td>
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</tr>
</tbody>
</table>

**COLUMN TOTAL**

Student’s signature: ________________________  Date:____________________
FWEd(s) signature: ________________________  Date:____________________
AFWC’s signature: ________________________  Date:____________________
TERMINATION OF LEVEL I OR LEVEL II FIELDWORK

Unsuccessful Level I or II – Level I or II fieldwork may be terminated for a variety of reasons. The consequences of termination depends on the specifics of the situation.

Students Level I or Level II placement may be terminated as a result of extraordinary circumstances beyond the student’s control, the FWEd, or the AFWC. Examples of these circumstances include, but are not limited to:

- Extended illness of the student or family member for whom the student provides care
- Personal or family hardship
- Natural disaster (flood, fire, tornado, hurricane)
- FWEd is no longer available and there is no replacement available at the site
- Facility closes unexpectedly

Students will not be penalized for termination of fieldwork due to the aforementioned reasons. Students will receive an Incomplete (I) grade for the course and the AFWC will develop a new fieldwork site for the student. Grades will be adjusted following successful completion of the fieldwork. Delays in graduation may be inevitable depending on timing and circumstance.

Students Level I or Level II placement may be terminated as a result of circumstances considered to be within the student’s control. Examples of these circumstances include, but are not limited to:

- Student commits one egregious safety violation that causes the FWEd and the fieldwork organization to call for the immediate removal of the student
- Student demonstrates a pattern of behaviors that pose potential safety risks for patients/clients, staff and/or self
- Student demonstrates a serious, single act or a pattern of unprofessional or unethical behaviors, including insubordination
- Student fails to modify or correct unprofessional and/or unethical behaviors following numerous corrections and redirections by the FWEd
- Student demonstrates a pattern of incompetently performing expected skills, tasks and/or requirements specified for occupational therapists within the setting
- Student fails to modify or correct skill performance, tasks and/or other requirements following numerous corrections and redirections by the FWEd
- Student demonstrates a pattern of violations of patients’/clients’ rights, HIPAA rules, the rights of others within the setting and/or the AOTA Code of Ethics
- Student exhibits a pattern of excessive tardiness, absences and/or unexcused absences
Students fieldwork placements may be terminated (with the exception of a safety violation, or unprofessional / unethical behavior) only after the:

- FWEd provided informal and formal feedback to the student
- FWEd documentation of direct verbal and written feedback, redirection and direct instruction in deficient skills
- FWEd and AFWC have consulted on strategies to facilitate the student’s development in areas of weakness, use the learning contracts with specific measurable goals
- FWEd and student have conferred with the AFWC

If a Level I or Level II is terminated due to any aforementioned reason, the student will receive a failing grade. A grade of Unsatisfactory (U) will be entered for a failed Level I or Level II. This failing grade will remain on the student’s transcript.

The student will meet with the AFWC immediately following the termination of the fieldwork. Corrective Action Plan will be developed and will state the specific reason or reasons for the termination and clearly outline specific tasks and activities that the student must complete in order to be considered ready to repeat the fieldwork. The Corrective Action Plan will include expected measures of success and completion dates. The AFWC will develop a fieldwork placement similar to the placement that was failed. The student will enroll in this repeat course, paying the tuition for 1 credit of Level I or 6 credits of Level II. Time completed prior to the termination will not be counted in the repeat course. Failure of a Level I may or may not affect the student’s timely completion of the program. Failure of a Level II will delay the student’s completion of the program significantly. If the failure occurs in Level IIA, the student will not be permitted to walk in graduation with her/his class. If failure occurs in Level IIB, the student will have already walked in graduation. Failure of either Level II placement will result in delayed ability to take the NBCOT exam and to begin employment.

**OCCUPATIONAL THERAPY PROGRAM CORRECTIVE ACTION PLAN**

Date:

Student Name:

AFWC:

Reason for Corrective Action:

Outline of Corrective Action Plan:

Expected Outcome (include date/time frame for completion):

Student Signature:

AFWC Signature:
INTERNATIONAL FIELDWORK

The AFWC would ensure students attending a Level II fieldwork outside the United States are supervised by an occupational therapist who graduated from a program approved by the World Federation of Occupational Therapists (WFOT) and has one year of practice experience (C.1.19). The AFWC will also confirm the international fieldwork site is equipped to meet the curriculum goals, provide educational experiences applicable to the occupational therapy program at Florida Gulf Coast University, or have fieldwork educators who are able to effectively meet the learning needs of the students (C.1.0).

Students who request a Level II fieldwork internationally will need to meet additional requirements. These requirements include, but are not limited to, writing a 300 to 500 word essay explaining why they should be chosen to complete the Level II international fieldwork, have taken a class or can speak the language of the country they have requested, have the funds to pay for the experience, demonstrates excellent professional behaviors, and is in good standings with FGCU and FGCU occupational therapy program. Once this criteria is met, the AFWC and faculty will review the requests, rank them, and determine who best qualifies for the experience; a minimum of two students will be selected. Students are not permitted to complete an international Level II, or Level I, fieldwork experience independently.

FIELDWORK SUPERVISION

Prior to Level I fieldwork, the AFWC ensures students are supervised by qualified personnel, including, but not limited to, currently licensed or otherwise regulated occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, nurses, and physical therapists (C.1.9).

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

ACOTE standards state Level II fieldwork experience may be completed in a setting where no occupational therapy services exist, however, a documented plan for provision of occupational therapy services and supervision by a currently licensed or
otherwise regulated occupational therapist will be developed for the provision of occupational therapy services with at least 3 years’ of full-time or its equivalent of professional experience. Supervision must include a minimum of 8 hours per week of direct supervision each week of the fieldwork experience. An occupational therapy supervisor must be available, via a variety of contact measures, to the student during all working hours. An on-site supervisor designee of another profession must be assigned while the occupational therapy supervisor is off site (C.1.17).

The AFWC ensures supervision provides protection of consumers and opportunities for appropriate role modeling of occupational therapy practice. Initially, supervision should be direct and then decreased to less direct supervision as appropriate for the setting, the severity of the client’s condition, and the ability of the students (C.1.16).

Florida Gulf Coast University has never placed a student in a Level II FW where no occupational therapy services exist nor has the intention to have a student complete a Level II FW at a site where no occupational therapy services exist. Florida Gulf Coast University does understands if a student wishes to complete a Level II FW at a site where no occupational therapy services exit, the AFWC will confirm the FWEd has a current OT license, has at least 3 years’ of full time practice experience, will supervise the student a minimum of 8 hours per week (C.1.17), and will have daily direct contact with the student throughout the 12-week experience. Daily direct contact includes: face-to-face contact, SKYPE, and telephone calls. Prior to this type of placement, a written supervision plan including behavioral objectives will be established. Supervision may include, but is not limited to, Florida Gulf Coast University paying an occupational therapist a stipend for providing the supervision to the student. The AFWC will discuss the minimum requirements with the assigned FWEd and if adequate supervision cannot be provided, the student will not be placed at the site.
LEVEL II FIELDWORK SUPERVISION / FIELDWORK EDUCATION LOG

Florida Gulf Coast University
Department of Rehabilitation Sciences
Occupational Therapy Program

Student: ____________________  Dates of Fieldwork: ____________________  
FWEd: ______________________

<table>
<thead>
<tr>
<th>Date of Interaction with OT</th>
<th>Type of Supervision (i.e. phone call, email, face-to-face)</th>
<th>Hours/Minutes of Supervision</th>
<th>Content of Interaction</th>
<th>Initials</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>
Generally, there is a 1:1 ratio of FWEd to student. In some settings, the ratio is greater than 1:1 depending upon the population served, the FWEd experience, and the student’s capabilities. These fieldwork experiences are negotiated on an individual basis and must be mutually acceptable. The AFWC closely monitors the amount to supervision received, the opportunities for the student to receive feedback and the overall effectiveness of the experience. The AFWC encourages the student to meet formally with the FWEd to obtain strengths, areas of need, and goals to accomplish the following week. If the student reports any issue about supervision, feedback, excreta at any time during fieldwork, the AFWC immediately contacts the FWEd, inquire about the student fieldwork performance, and depending upon the feedback schedule a site visit. The site visit is scheduled to ensure appropriate role modeling of occupational therapy practice; to confirm the education the student is receiving promotes clinical reasoning and reflective practice to enable ethical practice, sound judgment and competence to meet the requirements of an entry-level therapist, generalist occupational therapist.

To formally evaluate the effectiveness of Level II fieldwork education, the AFWC confirms the student is supervised by a currently licensed or otherwise regulated occupational therapist who has a minimum of 1 year full-time (or its equivalent) of practice experience subsequent to initial certification and who is adequately prepared to server as a FWEd. The supervising therapist may be engaged by the fieldwork site or by the educational program (C.1.14).

During fieldwork, the AFWC maintains frequent communication with the student and the FWEd to confirm the student is meeting the fieldwork objectives. A site visit is scheduled when a student is placed at a site not previously visited. The AFWC schedules a site visit during one if not two visits during the student’s fieldwork experience. This visit ensures supervision provides protection of consumers and opportunities for appropriate role modeling of occupational therapy practice (C.1.16).

Student educational experience and the effectiveness of supervision is formally measured using the American Occupational Therapy Association’s SEFWE (Student Evaluation of Fieldwork Experience) (C.1.15). Initially, supervision should be direct and then decrease to less direct supervision as is appropriate for the setting, the severity of the client’s condition, and the ability of the student (C.1.16). The Fieldwork Performance Evaluation for the Occupational Therapy Student, the student’s FWEd completes midway thru the fieldwork experience, is one means to assist the FWEd in determining the amount of supervision the student needs.

The AFWC contacts each site and confirm a mid-term is completed. If the student is not meeting the mid-term requirements a site visit is scheduled and an action plan is developed between the student, the FWEd, and the AFWC.
ENHANCING STUDENT SUPERVISION

To enhance student supervision, the AOTA FEAT form and a copy of the NBCOT OTR Self-Assessment Resource Tool is available on the FGCU OT program website; there are additional resources also made available on this website (C.1.15). As a member of Florida Occupational Therapy Education Consortium (FLOTEC), FWEds are encouraged to access this website for additional student supervision resources. FWEds are directed to these resources in the cover letter of the Level II fieldwork student packet. The AFWC commitment to FLOTEC is to offer one to two fieldwork educational sessions per year.

FIELDWORK EXPERIENCE ASSESSMENT TOOL (FEAT)

MID-TERM
FIELDWORK EXPERIENCE ASSESSMENT TOOL (FEAT)

<table>
<thead>
<tr>
<th>Student's name:</th>
<th>Supervisor(s) names:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility name:</td>
<td></td>
</tr>
<tr>
<td>Type of fieldwork experience (setting, population, level):</td>
<td>Date:</td>
</tr>
</tbody>
</table>

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

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

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

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

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

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

### I. VARIETY OF EXPERIENCES

<table>
<thead>
<tr>
<th>Description</th>
<th>Environments (Limited ↔ Just right challenge ↔ Excessive)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. Patients/ Clients/ Diagnoses</strong></td>
<td></td>
</tr>
<tr>
<td>- Different diagnoses</td>
<td></td>
</tr>
<tr>
<td>- Range of abilities for given diagnosis (complexity, function- dysfunction)</td>
<td></td>
</tr>
<tr>
<td>- Diversity of clients, including socioeconomic &amp; lifestyle</td>
<td></td>
</tr>
<tr>
<td><strong>B. Therapy approaches</strong></td>
<td></td>
</tr>
<tr>
<td>- Engage in the entire therapy process (evaluation, planning, intervention, documentation)</td>
<td></td>
</tr>
<tr>
<td>- Learn about different roles of therapist (direct service, consultation, education and administration)</td>
<td></td>
</tr>
<tr>
<td>- Use variety of activities with clients</td>
<td></td>
</tr>
<tr>
<td>- Observe and use different frames of reference/theoretical approaches</td>
<td></td>
</tr>
<tr>
<td>- Use occupation vs. exercise</td>
<td></td>
</tr>
<tr>
<td><strong>C. Setting characteristics</strong></td>
<td></td>
</tr>
<tr>
<td>- Pace (setting demands; caseload quantity)</td>
<td></td>
</tr>
<tr>
<td>- Delivery system</td>
<td></td>
</tr>
</tbody>
</table>

### II. RESOURCES

<table>
<thead>
<tr>
<th>Description</th>
<th>Environments (Limited ↔ Just right challenge ↔ Excessive)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. OT Staff</strong></td>
<td></td>
</tr>
<tr>
<td>- See others' strengths and styles</td>
<td></td>
</tr>
<tr>
<td>- Have multiple role models, resources and support</td>
<td></td>
</tr>
<tr>
<td><strong>B. Professional Staff</strong></td>
<td></td>
</tr>
<tr>
<td>- Observe and hear a different perspective on clients</td>
<td></td>
</tr>
<tr>
<td>- See/experience co-treatments and team work to get whole person perspective</td>
<td></td>
</tr>
<tr>
<td>- Have others to share ideas and frustrations</td>
<td></td>
</tr>
<tr>
<td><strong>C. OT Students</strong></td>
<td></td>
</tr>
<tr>
<td>- Able to compare observations &amp; experiences</td>
<td></td>
</tr>
<tr>
<td>- Exchange ideas</td>
<td></td>
</tr>
</tbody>
</table>

### FIELDWORK EDUCATOR

<table>
<thead>
<tr>
<th>Description</th>
<th>Environments (Limited ↔ Just right challenge ↔ Excessive)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>I. ATTITUDE</strong></td>
<td></td>
</tr>
<tr>
<td><strong>A. Likes Teaching/Supervising Students</strong></td>
<td></td>
</tr>
<tr>
<td>- Devote time, invests in students</td>
<td></td>
</tr>
<tr>
<td>- Enjoy mental workout, student enthusiasm</td>
<td></td>
</tr>
<tr>
<td><strong>B. Available/ Accessible</strong></td>
<td></td>
</tr>
<tr>
<td>- Take time</td>
<td></td>
</tr>
</tbody>
</table>
### FIELDWORK EDUCATOR (continued)

<table>
<thead>
<tr>
<th>C. Supportive</th>
<th></th>
</tr>
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<tbody>
<tr>
<td>- Patient</td>
<td></td>
</tr>
<tr>
<td>- Positive and caring</td>
<td></td>
</tr>
<tr>
<td>- Encourages questions</td>
<td></td>
</tr>
<tr>
<td>- Encourages development of individual style</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>D. Open</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>- Accepting</td>
<td></td>
</tr>
<tr>
<td>- Alternative methods</td>
<td></td>
</tr>
<tr>
<td>- To student requests</td>
<td></td>
</tr>
<tr>
<td>- Communication</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>E. Mutual Respect</th>
<th></th>
</tr>
</thead>
</table>

#### II. TEACHING STRATEGIES

<table>
<thead>
<tr>
<th>Descriptions (Limited ↔ Just right challenge ↔ Excessive)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>A. Structure</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Organize information (set learning objectives, regular meetings)</td>
<td></td>
</tr>
<tr>
<td>- Introduce treatment (dialogue, observation, treatment, dialogue)</td>
<td></td>
</tr>
<tr>
<td>- Base structure on student need</td>
<td></td>
</tr>
<tr>
<td>- Identify strategies for adjusting to treatment environment</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>B. Graded Learning</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Expose to practice (observe, model)</td>
<td></td>
</tr>
<tr>
<td>- Challenge student gradually (reduce direction, probing questions, independence)</td>
<td></td>
</tr>
<tr>
<td>- Base approach on student learning style</td>
<td></td>
</tr>
<tr>
<td>- Individualize based on student's needs</td>
<td></td>
</tr>
<tr>
<td>- Promote independence (trial &amp; error)</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>C. Feedback/Processing</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Timely, confirming</td>
<td></td>
</tr>
<tr>
<td>- Positive &amp; constructive (balance)</td>
<td></td>
</tr>
<tr>
<td>- Guide thinking</td>
<td></td>
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<tr>
<td>- Promote clinical reasoning</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>D. Teaching</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Share resources and knowledge</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>E. Team Skills</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Include student as part of team</td>
<td></td>
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</tbody>
</table>

#### III. PROFESSIONAL ATTRIBUTES

<table>
<thead>
<tr>
<th>Descriptions (Limited ↔ Just right challenge ↔ Excessive)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>A. Role Model</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Set good example</td>
<td></td>
</tr>
<tr>
<td>- Enthusiasm for OT</td>
<td></td>
</tr>
<tr>
<td>- Real person</td>
<td></td>
</tr>
<tr>
<td>- Life long learning</td>
<td></td>
</tr>
</tbody>
</table>
### B. Teacher
- Able to share resources and knowledge

### FIELDWORK STUDENT

#### I. ATTITUDE

**A. Responsible for Learning**
- Active learner (ask questions, consult)
- Prepare (review, read and research materials)
- Self-direct (show initiative, is assertive)
- Learns from mistakes (self-correct and grow)

**B. Open/Flexible**
- Sensitive to diversity (non-judgmental)
- Responsive to client/consumer needs
- Flexible in thinking (make adjustments, try alternate approaches)

**C. Confident**
- Comfort in knowledge and abilities
- Comfort with making and learning from mistakes (take risks, branch out)
- Comfort with independent practice (take responsibility)
- Comfort in receiving feedback

**D. Responsive to Supervision**
- Receptive to feedback (open-minded, accept criticism)
- Two-way communication

#### II. LEARNING BEHAVIORS

**A. Independent**
- Have and use knowledge and skills
- Assume responsibility of OT without needing direction
- Incorporate feedback into behavioral changes
- Use "down time" productively
- Become part of team

**B. Reflection**
- Self (processes feelings, actions and feedback)
- With others (supervisor, peers, others)

**C. Active in Supervision**
- Communicate needs to supervisor (seek supervision for guidance and processing; express needs)
- Ask questions

Descriptions (Limited ↔ Just right challenge ↔ Excessive)
### B. Discussion Section: Questions to Facilitate Dialogue and Problem Solving

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

<table>
<thead>
<tr>
<th>Common perspectives between student and fieldwork educator</th>
<th>Different perspectives between student and fieldwork educator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environment</td>
<td></td>
</tr>
<tr>
<td>Fieldwork Educator</td>
<td></td>
</tr>
<tr>
<td>Student</td>
<td></td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Components of a Successful Fieldwork</th>
<th>Environment, Fieldwork Educator and/or Student Strategies and Changes to Promote Successful Fieldwork Experience at this Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environment</td>
<td></td>
</tr>
<tr>
<td>Experiences</td>
<td></td>
</tr>
<tr>
<td>Resources</td>
<td></td>
</tr>
<tr>
<td>Fieldwork Educator</td>
<td></td>
</tr>
<tr>
<td>Attitudes</td>
<td></td>
</tr>
<tr>
<td>Behaviors</td>
<td></td>
</tr>
<tr>
<td>Professional attributes</td>
<td></td>
</tr>
<tr>
<td>Student</td>
<td></td>
</tr>
<tr>
<td>Attitudes</td>
<td></td>
</tr>
<tr>
<td>Behaviors</td>
<td></td>
</tr>
</tbody>
</table>
WEEKLY SUMMARY / PERFORMANCE FORM FOR LEVEL II FW

Weekly Summary / Performance Form - TO BE COMPLETED BY THE FWEd
AND STRATEGIES / ACTIVITIES PLANNED FOR THE UPCOMING WEEK

FWEd Name: ____________________________ Student Name: ______________________

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

Three things that went well:
  a. 
  b. 
  c. 

Three things for the student to improve on:
  a. 
  b. 
  c. 

Measureable goals the student achieved this week:
  a. 
  b. 
  c. 

Measureable goals for student to achieve next week:
  a. 
  b. 
  c. 

Strategies to achieve goals (what will you suggest the student do; i.e. review charts, research tx protocols, etc)

Overall I think this past week went:

Great   Okay   Fair   Poor

Feedback for your student:

85
TO BE COMPLETED VIA THE STUDENT after reviewing the comments from the FWEd

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

Using the above scale, please rate the following comments.
Please note: If any statement receives less than “moderately agree,” (you agree with less than 60% of the FWEd comments), please review with the FWEd and modify as necessary.

<table>
<thead>
<tr>
<th>Comment</th>
<th>Strongly Agree</th>
<th>Moderately Agree</th>
<th>Mildly Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>(FWEd) list of things that went well</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(FWEd) list of things that the student needs improvement</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(FWEd) list of goals the student achieved this week</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(FWEd) goals for the student to achieve next week</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(FWEd) identified strategies to assist student for achieving s/he goals</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Overall weekly assessment</td>
<td></td>
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</tr>
</tbody>
</table>

COMMENTS:

______________________________  __________________________
Student Signature              Date

______________________________  __________________________
Fieldwork Educator Signature   Date

86
Weekly Summary / Performance Form - TO BE COMPLETED VIA THE STUDENT
AND STRATEGIES / ACTIVITIES PLANNED FOR THE UPCOMING WEEK

Student Name: ______________________ Fieldwork Educator Name: ________________

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

1. Three things that went well:
a. 
b. 
c.

2. Three things to improve on:
a. 
b. 
c.

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

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

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

6. Overall I think this past week went:
   Great          Okay          Fair          Poor

7. Feedback for your FWEd:

TO BE COMPLETED VIA THE FWEd after reviewing the comments from the student
Strongly Agree: I agree with greater than 80% of the student’s comments
Moderately Agree: I agree with 60 – 79% of the student’s comments
Mildly Agree: I agree with 40 – 59% of the student’s comments
Disagree: I agree with less than 40% of the student’s comments

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

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Moderately Agree</th>
<th>Mildly Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Student) list of things that went well</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Student) list of things that need improvement</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Student) list of goals achieved this week</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Student) goals for next week</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Student) identified strategies for achieving his/her goals</td>
<td></td>
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<tr>
<td>Overall weekly assessment</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**COMMENTS:**

______________________________

Student Signature

______________________________

Fieldwork Educator Signature

______________________________

Date

______________________________

Date
AOTA PERSONAL DATA FORM

PERSONAL INFORMATION
Name: Address: Cell #:

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

EDUCATION INFORMATION
Expected degree:
Baccalaureate Degree of , date of graduation -
Master of Occupational Therapy Degree, anticipated date of graduation -

Prior degrees obtained:
Foreign language (Read / Spoken):

HEALTH INFORMATION
Name of Health Insurance Company: Group #: Subscriber #:

PREVIOUS VOLUNTEER EXPERIENCE

PERSONAL PROFILE
1. Strengths:
2. Special skills or interests:
3. Describe you preferred learning style:
4. Describe you preferred style of supervision:
5. Will you need housing during your affiliation?
6. Will you have your own transportation during your affiliation?
7. Are there disability-related challenges to impact your ability to complete fieldwork?

FIELDWORK EXPERIENCE SCHEDULE

<table>
<thead>
<tr>
<th>Level I Experience</th>
<th>Site</th>
<th>Type of FW</th>
<th>Length of FW</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTH6853</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OTH6854</td>
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<tr>
<td>OTH6855</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Level II Experience</th>
<th>Site</th>
<th>Type of FW</th>
<th>Length of FW</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTH6845</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OTH6846</td>
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<td></td>
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</tbody>
</table>

ADDITIONAL INFORMATION NEEDED WITH REFERENCE DATES:
CPR Certification, Criminal Background Clearances, Level II FBI Fingerprinting, Health Information Privacy and Security / HIPAA Training, Biosafety / Bloodborne Pathogens / Universal Precautions Training, Safety Training and “Good Standings” with Florida Gulf Coast University, Health Insurance, and Professional Liability Insurance.
CPR CERTIFICATION

CPR certification is required for Infant, Child, and Adult. Training is available from the American Heart Association, a two year certification. A CPR recertification class can be organized within the College for a fee. Online courses will not be accepted. This can be organized after the start of the 1st semester.

HEALTH INSURANCE

Medical Insurance coverage must be maintained. Upload a copy of both sides of your insurance card to CastleBranch. Most students find they are susceptible to viruses circulating among the client populations with whom they are working while on fieldwork. Medical insurance eases the financial cost of seeking medical attention, and therefore reduces the potential days missed from fieldwork.

PROFESSIONAL LIABILITY INSURANCE

Malpractice insurance is also referred to as professional liability insurance, with minimum limits of $1,000,000/$3,000,000. Upload the page that states your identifying information, the dates and amounts of coverage. Students are not covered by the liability insurance carried by FGCU, the Florida State University System, or the fieldwork affiliate to whom the student is assigned. Two companies commonly used are:

Mercer Consumer
PO Box 14464
Des Moines, Iowa 50308-3464
1-800-621-3008

Healthcare Providers Service Organization (HPSO)
159 East County Line Road
Hatboro, PA 19040
1-800-982-9491

HEALTH POLICY

In order to meet the health requirements, HIPAA guidelines, and fieldwork site requests, OT students’ medical records are kept secure with CastleBranch. All health requirements MUST be up to date prior to fieldwork. The student is responsible for obtaining medical records and ensuring the results are uploaded to CastleBranch. This procedure ensures student records and data are stored in a secured location. The student is not permitted to begin FW until the following is uploaded to CastleBranch:

- Annual physical exam
- Annual intradermal PPD (tuberculosis test), a 2 step PPD is required the first year of the program and a 1 step PPD is required the second year of the program. If positive, a chest x-ray is required for fieldwork clearance.
- Tetanus immunization (Tdap) within the past 10 years, unless otherwise specified by your physician.
- Basic immunization record (measles, mumps, rubella)
- Evidence of the Hepatitis B vaccination series or Immunization Waiver
- 5 positive titers: Rubeola (measles), mumps, rubella, varicella, and Hepatitis B
If a student does not have the above health requirements completed and up-to-date prior FW they will not be permitted to participate in FW. If changes in health status occur after the paperwork submission date, the student must notify the AFWC immediately. The student is responsible and may be asked to access CastleBranch to obtain health records and clearances on the first day and during fieldwork. The cost of this service is ~ $35.00 and is paid to CastleBranch by the student.

HEPATITIS B IMMUNIZATION WAIVER

Hepatitis B virus infection is principally transmitted by contact with blood, blood products, and body fluids (saliva, tears, breast milk, etc.) of the infected person. Exposure to infectious blood, blood products, or body fluids by cuts, needle sticks, or abrasions that may result in introduction of the infectious blood or body fluid into the skin or mucous membrane potentially result in contracting the Hepatitis B virus. Health care workers who are among the people who are at the highest risk for exposure to any of the above, and therefore at a high risk for contracting Hepatitis B virus. If you have additional questions or concerns regarding these risks, please contact your personal health care physician and/or nurse practitioner.

Hepatitis B infection manifests itself in symptoms of jaundice, skin rash, headache, arthritis, fatigue, loss of appetite, and abdominal pain. The disease is fatal for 1% of the persons who contract it, and between 5% and 10% of the victims become chronic carriers who may later be predisposed to liver cancer or chronic liver impairment.

Hepatitis B Virus vaccine has been developed to prevent this infection. For immunization protection, three 1.0 ml intramuscular injections of the vaccine are administered at 0, 1, and 6 months. High titers of antibodies are produced in 95% of normal adult recipients. The duration of protection and need for booster doses has not yet been determined. Testing for immunity after vaccination is not routinely recommended unless you are in a health care profession or a profession at high risk of exposure to the disease.

As a student in the Occupational Therapy Program at Florida Gulf Coast University, you are required to provide proof of hepatitis immunization or sign a waiver. The Department of Occupational Therapy Program encourages you to complete the Hepatitis B immunization series for your protection. If you elect to waive the Hepatitis B immunization series, sign below and post this form to your CastleBranch profile.

I understand that due to my occupational/educational exposure to blood or other potentially infectious materials I may be at risk of acquiring hepatitis B virus (HBV) infection. I have been given sufficient time to complete the hepatitis vaccination schedule, however, I decline hepatitis B vaccination at this time. I understand by declining this vaccine, I continue to be at risk of acquiring hepatitis B, a serious disease. I also am aware that by declining this vaccine, I may not be able to enter into a clinical affiliation with certain health care facilities which require the vaccine.

Student Signature: ________________________________ Date: _______________

Witness Signature: ________________________________ Date: _______________
COLLABORATIVE INSTITUTIONAL TRAINING INITIATIVE (CITI)

Students are required to access FGCU’s Office of Research & Graduate Studies Website [http://www.fgcu.edu/ORSP/trainingprograms.html](http://www.fgcu.edu/ORSP/trainingprograms.html) and obtain training certificates in Health Information Privacy and Security (HIPS) for Students and Instructors and Biosafety.

The modules for Health Information Privacy and Security for Students and Instructors (HIPS) are:

- Plagiarism
- Basic of Health Privacy
- Health Privacy Issues for Student and Instructors
- Basics of Information Security – Part 1 and Part 2
- Protecting Your Portable Devices
- Safer Emailing and Messaging
- Security for Work/Workers Off-Site

The modules for Biosafety – Bloodborne Pathogens are:

- OSHA Bloodborne Pathogens
- Hepatitis B Virus (HBV) Vaccination
- Labels and Engineering Controls
- Universal Precautions and Work Practices
- Emergency Response Procedures

GENERAL FIELDWORK POLICIES (LEVEL I AND LEVEL II)

Communication

A successful fieldwork experience requires open communication between the student, the FWEd(s), and the AFWC. To maintain open communication, all parties should work within the following guidelines:

If a concern or problem arises during fieldwork, it should be immediately addressed by the student and FWEd. The AFWC should be informed, by the student and the FWEd, about any concerns or issues that may be anticipated to affect the student’s successful completion of the fieldwork experience. This provides the opportunity for the AFWC to advise the student about how to proceed. If the student or FWEd feels that the concern or issue has not been satisfactorily resolved during their discussion, then the assistance of the FWEd’s supervisor and/or the AFWC should be requested.

The AFWC is available to assist the student and FWEd individually or together to think through issues or concerns, suggest alternative communication techniques, and to develop solutions. In cases where a site visit is possible, the AFWC is available to meet with the student and the FWEd at the fieldwork site. If this is not possible, a telephone, Skype, or Face time conference call between all parties will be arranged. If the student or FWEd contacts the AFWC before attempting to work out the issues with the other party, the AFWC will actively listen, and then direct the student or FWEd back to the
other party with suggestions for alternative communication and/or problem solving strategies to employ.

While on fieldwork, students should seek to develop open lines of communication with their FWEd. All questions and concerns specific to the fieldwork site should be addressed directly to the FWEd. If students have questions or concerns which the FWEd are unable to address, or which go beyond the scope of the fieldwork site, the student should contact the AFWC.

**Absenteeism**

*The Standards for an Accredited Educational Program for the Occupational Therapist require a total of 24 weeks of Level II fieldwork.* The student is required to be in attendance during the hours their FWEd works; this includes any holidays. Days of the week and exact number of hours of work per week will vary, depending on the FWEd schedule. Students should plan on a 40 hour work week and several hours each evening devoted to reflection, research, and preparation for the next day.

Each fieldwork site may have its own established absenteeism policy. Florida Gulf Coast University accepts each site’s fieldwork policy. If the fieldwork site does not have an absenteeism policy the following guidelines are followed:

*Level I fieldwork* - the student is not be permitted to miss a day of Level I fieldwork. If an extenuating circumstance occurs, i.e. traveler's advisory for local highways, the student must notify the FWEd and the AFWC immediately. If the student does miss a day(s) of fieldwork, the student must reschedule missed time.

*Level II fieldwork* – Students can only miss 3 days during each 12 week Level II fieldwork. If the facility has a structures policy Florida Gulf Coast University will support the affiliating facility’s policy. If extenuating circumstances occur, the student must notify the FWEd and the AFWC immediately. The student must notify the AFWC via telephone or email. The student must call the FWEd and speak directly to the FWEd, a voicemail or a message left with another therapist is not allowed; this means the student may be required to call the FW site several times before speaking directly with the FWEd. If a student does miss greater than three days an intervention plan must be devised. The FWEd, student, and AFWC will develop an action plan to address how the missed assignments and missed time will be made up. If a student misses more than 3 days during the first Level II FW it may affect the student’s ability to graduate on time.

Students are strongly advised against outside employment during this last critical phase of their professional preparation. Vacation days during Level II Fieldwork are not permitted. The FGCU academic holidays do not apply to FW students. Students who violate this rule, will be withdrawn from their fieldwork placement, be assigned an Unsatisfactory (U) grade for unprofessional behavior, and be required to complete a Remediation Plan. Enrollment in a repeat FW placement will cost students the tuition of 1 credit (Level I) or 6 credits (Level II). Failure of a Level II may delay graduation and the ability to sit for the NBCOT exam. Do not plan trips, weddings, or any absences or Federal holidays during or within a few weeks of anticipated completion, as completion dates are subject to change. Notify the AFWC if there are days you cannot work due to religious observances.
Dress Code
Students are required to abide by the dress code of the facility in which they are completing fieldwork experiences. Florida Gulf Coast University abides by fieldwork sites’ dress code policy. Florida Gulf Coast University expects students to present themselves in a professional and courteous manner.

Throughout the fieldwork experience, students will display the Florida Gulf Coast University name tag or hospital ID badge at chest level, unless otherwise directed by the facility. Students must have good personal hygiene and free of odor that might be offensive to clients, be neatly groomed and wear clean casual/professional attire (no dresses or skirts are permitted). Clothing must be correctly sized, wrinkle free, and in good repair. Students will not wear t-shirts with slogans, sleeveless shirts, tank tops, halter tops, midriff shirts or shirts exposing the lower back when bending over, sweatshirts, jeans, denim, sweat pants, leggings, knickers, crop pants, stretch pants, shorts, hats, high-heeled shoes or open-toes shoes, work boots, or any clothing that allows cleavage or undergarments to be visible.

Makeup must appear natural, men’s facial hair must be neat and well-groomed, long hair must be pulled back. Fragrances (perfumes, colognes, or aftershave lotion) should not be worn; wear deodorant. No acrylic nails, only natural fingernails that do not extend beyond the tip of the finger.

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

Smoking
Students will comply with the fieldwork setting policies.

Social Networking
Avoid posts or photos on Facebook, Twitter, or public social network sites. Do not post name of FWEd, make comments, criticize sites, or post information about what is happening at sites on Facebook, Twitter, or public social network sites. If you have any posts even questionable, remove them immediately.

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

Be very careful about what you post on any social networking site. Many potential employers go to these sites and often determine if they are interested in having you as an employee. Consider Googling your name to discover what is in cyberspace that others can see. Use official FGCU e-mail address for all professional correspondence needed via e-mail for all fieldwork related issues.
Cell Phone Policy
Students are not permitted to carry cell phones or facility telephones for personal use while on fieldwork. It is suggested cell phones be kept in students’ lockers or cars during fieldwork. Students should obtain a telephone number for the facility or department that can be shared with family for emergency use only.

Expenses
Students are responsible for all expenses that accompany each fieldwork course. These include, but are not limited to, additional criminal background checks and TB tests, drug screens, FGCU OT polo shirts and/or surgical scrubs, tuition, travel, housing, and meals. Financial assistance from fieldwork sites is nearly non-existent; however, if funding is available it is identified on the AOTA Fieldwork Data Form, available for student review.

Enrollment in Level I and Level II Courses – Student Loan Info
Students enroll in Level I fieldwork during the 2nd, 3rd and 4th semesters, as follows:
Level IA -- spring of the 1st year
Level IB -- summer
Level IC – fall of the 2nd year
Students enroll in Level IIA and IIB in the spring of the 2nd year. Level IIA begins on the first Monday of the semester and is completed before the end of spring semester. There may be a 1 week break between Level IIA and Level IIB. Level IIB begins before the end of spring semester and is completed during the summer semester.

Enrollment in Level IIA and Level IIB during the spring semester enables the student to meet full-time status for student loan purposes. Students are cautioned that student loan repayment schedules begin 6 months after graduation. The actual date of graduation is the first weekend of May, even though IIB is not completed until approximately June 30. Students need to pay careful attention to all notices regarding the loan repayment schedule. If a delay in loan repayment is needed, contact the Office of Financial Aid & Scholarships immediately; ask to discuss loan forbearance.

Drug / Alcohol Policy
Students are not to report to class, fieldwork, or any university activity while under the influence of illegal drugs or alcohol. Violation of these policies by a student will be reason for evaluation and treatment for the drug / alcohol use disorder and disciplinary action up to and including expulsion and referral for prosecution consistent with local, state, and federal law. Refer to the FGCU Student Code of Conduct found in the FGCU Student Guidebook for university policies.

Drug screens are required by some affiliating fieldwork sites. Students assigned to those sites will be required to have a drug screen within the stated requirements. Students are responsible for reviewing and complying with the individual drug/alcohol policies of the affiliate site to which they are assigned. If the agency requires a drug screen, but does not provide it, the student needs order a 10 panel + alcohol through CastleBranch. CastleBranch will help coordinate this urine drug screening with Quest Laboratories. The results must be posted with www.castlebranch.com. The cost of this urine drug screening is $44.00 and is paid by the student.
Criminal Background Checks
Criminal Background Checks and Level 2 FBI Fingerprinting are required. Students must complete both background checks during the first semester of the OT program and throughout OT Program, if a Level I or Level II placement site requires an update. Students are responsible for the cost of these checks. Some fieldwork sites may not accept students with any negative results on background checks.

To obtain the background checks the student must log onto the CastleBranch website at [www.castlebranch.com](http://www.castlebranch.com) and order both background checks. The Level 2 Background Check from the Florida Department of Law Enforcement (FDLE) and the FBI and requires the student to be fingerprinted.

The FGCU package code is “LO43 OT Program.” The AFWC is able to verify the results of the check on-line. Criminal Background Check includes: Patriot Act, Social Security Alert, Residency History, Criminal Records, Sex Offender Index, and NW Healthcare Fraud & Abuse Scan. This criminal background check and Level 2 FBI Fingerprinting are paid by the student. Additional background checks or drug screens may be required by some fieldwork sites. Students are responsible for complying with the requirements of the agency they complete fieldwork.

STUDENT RESPONSIBILITIES IN THE EVENT OF AN ARREST CONVICTION FOR VIOLATION OF THE LAW

As developing professionals, FGCU Occupational Therapy Students are held to the highest standards of civic responsibility and professional conduct. Students are expected to abide by all federal, state, and local laws, the Occupational Therapy Code of Ethics and the Standards of Practice for Occupational Therapy, as well as all university, college, and departmental policies, regulations, and standards. In particular, violations of a variety of laws or standards may compromise a student’s ability to be placed in fieldwork, to sit for the NBCOT exam, and/or obtain licensure in various states. If arrested, charged with a crime (misdemeanor or felony), convicted of a crime, or charged with a violation of any standard, policy or code of conduct, the student MUST notify the AFWC immediately and schedule a meeting to discuss the implications of the violation and course of action. The student will need to provide a copy of all documentation regarding the violation to the AFWC on a timely basis. The student may also be required to complete another background check and may need to submit documentation regarding violation and/or background check to potential fieldwork placements.

Examples of legal offenses include:
- Arrest/conviction for driving under the influence
- Arrest/conviction for possession of illegal drugs/substances

Any arrests or convictions that may occur while a student is in the occupational therapy program MUST be reported to the AFWC immediately. Failure to do so may result in disciplinary action, to include removal from the program immediately. Students should read the notice posted on the Florida Board of Occupational Therapy website at [http://floridasoccupationaltherapy.gov/](http://floridasoccupationaltherapy.gov/) for additional information that may prevent granting of a license to practice occupational therapy in the state of Florida.
Completion of both background checks is required by October 31st of the first year in the program in order to permit registration for spring courses. A hold on registration will be placed on any student who does not successfully complete the background checks on time. This may potentially result in a late registration penalty fee.

Students cannot participate in fieldwork until the background checks are completed. The results of each of these background checks must be uploaded to CastleBranch. Any student whose background check yields negative information will be required to meet with the AFWC to review the processes for prescreening through NBCOT and the Florida Board of Occupational Therapy Practice, to determine if the identified offense(s) will prevent the student from sitting for the NBCOT exam or from obtaining a license to practice in FL. See the following section entitled: Student Responsibilities in Event of Arrest, Conviction for Violations of Law for any legal offenses which occur during enrollment in the OT program.

Graduates of the occupational therapy program are eligible to sit for the National Board for Certification in Occupational Therapy (NBCOT) certification examination. At the time of submission of an application for certification, the applicant is required to report if:

- a history of a felony
- denial, revocation or suspension of a professional license, or been subject to probationary conditions by a regulatory authority or certification board
- found by any court proceeding to be guilty of negligence, malpractice, recklessness, or willful or intentional misconduct - resulted in harm to another
- suspended and/or expelled from a college or university

If a student believes s/he would answer YES to any of the above questions they should request an Early Determination Review of her/his background, as soon as possible. See http://www.nbcot.org/early-determination. A history of a felony or a misdemeanor may jeopardize the applicant’s eligibility to become certified.

NBCOT uses a third party vendor to provide background checks to be used by NBCOT to determine if there is anything in the applicant’s background which would violate any of the principles of the Practice Standards/Code of Conduct <http://www.nbcot.org/certificant-code-of-conduct>. Each early review case is reviewed on an individual basis. NBCOT will notify the student in writing whether s/he will be eligible to sit for the NBCOT exam, provided that all eligibility requirements are met at the time of application.
STATE AND NATIONAL CONFERENCES
FLORIDA OCCUPATIONAL THERAPY ASSOCIATION (FOTA) AND
AMERICAN OCCUPATIONAL THERAPY ASSOCIATION (AOTA)

The FOTA and the AOTA hold annual conferences in the fall and April of each year, respectively. Students are strongly encouraged to attend one of these professional development opportunities. Level II fieldwork make-up days are not required for one or two days attendance at the AOTA conference, unless the FWEd feels that it is necessary for the student’s successful completion of the fieldwork rotation. Level I days can be adjusted to accommodate attendance at the AOTA conference.

ACCIDENT REPORTS

In the event of an accident, personal injury or injury to a client while on fieldwork or at a community site for another class, the student will report the accident or injury to the immediate supervisor at the site and complete the necessary documentation of the incident for that organization. The student MUST also notify the AFWC immediately, and submit a copy of the fieldwork site’s documentation. Completion of the FGCU Incident Report for Non-Employees is also required.

ADA REQUIREMENTS AND ACCOMMODATIONS

Florida Gulf Coast University, in accordance with the Americans with Disabilities Act and the University’s guiding principles, will provide classroom and academic accommodations to students with documented disabilities. If a student needs to request an accommodation for fieldwork due to a disability, or you suspect that your academic performance is affected by a disability, please see the AFWC or contact the Office of Adaptive Services. The office is located in the Wellness Building, on the Student Services Plaza. The phone number is (239) 590-7956 or Video Phone (VP) (239) 243-9453.

Students with identified disabilities are guaranteed access to and equal opportunities within the classroom setting according to Section 504 of the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990.

Under the Americans with Disability Act, occupational and occupational therapy assistant students with disabilities have the right to decide if and when they disclose their disability to the fieldwork site. Students with disabilities have the right to be seen as qualified capable students first, and secondly as a student who has a disability. Discuss your decision to disclose with your AFWC. Determine whether or not you need accommodations to fulfill the essential job functions for a student in your fieldwork setting. Once a student is accepted for the fieldwork placement, the student, academic fieldwork coordinator, and FWEd should determine the appropriate and most effective accommodations.
Students with identified disabilities are strongly encouraged to initiate a discussion with the AFWC during the second semester of the program to discuss their needs for accommodations within the fieldwork settings. This should allow sufficient time for the student to become well informed of his/her rights and to determine if and what information s/he wishes to disclose to the FWEd. Students who have a health condition that would pose safety concerns for patients and the student in the clinic (i.e. uncontrolled seizure disorder, fainting spells, and physical limitation) must disclose the condition to the AFWC and fieldwork site so that appropriate fieldwork placements and accommodations can be determined.

**NATIONAL BOARD OF CERTIFICATION IN OCCUPATIONAL THERAPY (NBCOT)**

NBCOT is independent from AOTA. NBCOT’s mission is to certify occupational therapy practitioners through the development, administration, review and update of the certification examination. Application materials can be downloaded from the NBCOT website. Students, who have a past conviction in a court of law, are encouraged to seek an Early Determination & Character Review by NBCOT, to determine approval to sit for the NBCOT exam. Detailed information is available at [http://www.nbcot.org/early-determination-character-review](http://www.nbcot.org/early-determination-character-review). This should be done as soon as possible after entering the OT program. During the second Level II fieldwork rotation, students begin the application process to NBCOT to take NBCOT’s national certification examination.

**FLORIDA OCCUPATIONAL THERAPY PROFESSIONAL LICENSURE**

Occupational therapy practitioners must be licensed by the Florida Department of Health -- Board of Occupational Therapy in order to practice in Florida. The application requires students to respond to a series of personal history questions regarding participation in drug and/or alcohol recovery programs, and treatment for a diagnosed mental disorder or impairment. Students who respond “yes” to any questions must provide documentation to the Board. Students are encouraged to review these questions when they enter the OT program. If they answer yes to any of the questions, they are encouraged to consult with the Florida Department of Health – Board of Occupational Therapy immediately to determine if their situation is likely to prevent them from obtaining a license to practice in the state of FL. Information regarding the Personal History section of the license application is found in the Appendix. Generally, students should initiate the application process during the final Level II fieldwork rotation. Licensure application materials are available at: [http://floridasoccupationaltherapy.gov/](http://floridasoccupationaltherapy.gov/)

**FLORIDA DEPARTMENT OF HEALTH OCCUPATIONAL THERAPY**

The Florida Department of Health [http://floridahealth.gov](http://floridahealth.gov) contains all the information that you need regarding the license application process, license renewal process, continuing education requirements, etc. All students are directed to carefully review this website. It is especially important that any student who has been “convicted or plead guilty or nolo contender, regardless of adjudication, to a felony violation”, as described below, carefully read the information from the following web page and seek direction from the licensure board before proceeding in the OT program. [http://www.doh.state.fl.us/mqa/laws.html](http://www.doh.state.fl.us/mqa/laws.html)
Appendix A

Level II Fieldwork Site Specific Objectives Checklist
The AOTA Fieldwork Performance Evaluation (for the Occupational Therapy Student)

Prepared by:
FLORIDA OCCUPATIONAL THERAPY EDUCATIONAL CONSORTIUM (FLOTEC)

Site: ______________________________ Date: ______________________________
Fieldwork Educator/Contact Person: _______________________________________

Phone #: __________________________ Fax #: _________________________________

E-mail: ______________________________

Please check one:

[ ] As a fieldwork site for students from __________________ we currently utilize the goals as stated in the educational institutions fieldwork handbook and do not have additional site specific goals. Please proceed to page 19 and 20 of this form, complete and sign.

[ ] As a fieldwork site for students from __________________ we currently utilize the goals as stated in facilities/corporation student fieldwork handbook and do not have additional site specific goals. Please attach facilities/corporation student fieldwork handbook, proceed to page 19 and 20, complete and sign.

[ ] As a fieldwork site for students from __________________ we currently utilize the goal as stated in the educational institutions fieldwork handbook as well as the following site specific goals: Please complete this form in its entirety.

FUNDAMENTALS OF PRACTICE
FWPE item # 1: Adheres consistently to AOTA Code of Ethics & Ethics Standards (AOTA 2010, draft) & site’s policies & procedures; including, when relevant, those related to human subject research as stated:

[ ] Demonstrates concern for well-being & safety of recipients of services (beneficence)

[ ] Intentionally refrains from actions that cause harm (nonmaleficence)

[ ] Respects right of individual to self rule (autonomy, confidentiality)
Provides services in fair & equitable manner (social justice)
Complies with institutional rules, local, state, federal, international laws & AOTA documents applicable to profession of occupational therapy (procedural justice)
Provides comprehensive, accurate, & objective information when representing profession (veracity)
Treats colleagues & other professionals with respect, fairness, discretion, & integrity (fidelity)

Other:

**FWPE item #2:** Adheres consistently to safety regulations. Anticipates potentially hazardous situations & takes steps to prevent accidents for clients & staff members throughout fieldwork related activities including:

- Record review
- Medication side effects
- Post-surgical
- Infection control
- Fall prevention
- Swallowing
- Food allergies
- Ambulation status
- Behavioral system/privilege level (e.g. locked area/unit, on grounds)
- 1:1 for personal safety/suicide precautions
- Sharps count
- Environment set up (no clutter, spills, unsafe items, etc.)
- OSHA/BBP
- I.V./ Lines
- ER codes/protocols
- Restraint reduction
- HIPAA
- W/C locks/bedrails/call button
- Vital signs (BP, O2)
- Trach/Ventilator monitoring
- Fire/Evacuation/Lockdown
- CPR certification
- Communication re: change in status

Other:

**FWPE item #3:** Uses sound judgment in regard to safety of self & others during all fieldwork related activities:

- Adheres to facility policies & procedures
- Thorough chart reviews/checks MD orders/parent agreement for IEP
- Consistently analyzes space for potential hazards based on client risk factors
- Addresses anticipated safety concerns
- Provides safe supervision of client based on client status

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Accurately identifies ambulation needs/functional mobility status
Uses safe transfer techniques/equipment according to protocols
Determines wheelchair positioning needs (e.g. footrests, cushions, trays/supports, etc.)
Correctly positions client (e.g. in chair/bed; at desk, for feeding, etc)
Provides supervision of client based on client status to ensure safety
Demonstrates proper splinting techniques such as
Correct selection of type
Correct selection of materials
Making adjustments as needed

Uses sound judgment in regard to safety of self & others during all fieldwork related activities:
Operates equipment according to training protocols
Attends to professional boundaries in therapeutic use of self-disclosure
Effectively limit sets & redirects client (s)
Establishes safe group climate (reinforce expectations/group rules or contract)

BASIC TENETS
FWPE items #4 -6: Clearly, confidently, & accurately communicates values/beliefs of occupational therapy profession, occupation as method/outcome, roles of OT/OTA as collaborative team appropriate to setting, using examples & language consistent w/ OTPF:
Verbally
Via written material (e.g., handout, article, sample job description, etc.)

Communicates about these 3 tenets with:
Client
Families/ significant others
OTA
OT
OTA
SLP
Nursing
LISCW
Psychologist
CRTS
CRC
Teacher
Aides
MDs
Regulatory bodies
General public (e.g., promotional materials, in-services)
AT
MT
3rd Party payers
Others:
FWPE items #4-6: Clearly, confidently, & accurately communicates values/beliefs of occupational therapy profession, occupation as method/outcome, roles of OT/OTA as collaborative team appropriate to setting, using examples & language consistent w/ OTPF:

Communicates about these 3 tenets in:
- Client intervention/education
- Meetings
- Documentation/correspondence

Communicates re: occupation using:
- Examples of occupation-based assessment tools
- Citations of literature/evidence base for use of occupation relative to person/context
- Terms & examples specific to person, organization, population (facility mission/level of care/services delivery)
- OTPF language (revised) verbally & in written work
- Current AOTA official documents/fact sheets
- Other:

Communicates re: OT/OTA roles using:
- Current AOTA official documents
- Federal & state laws/practice acts governing evaluation/intervention
- State laws/practice acts re: role of OT/OTA
- Other:

FWPE item #7: Effectively collaborates with clients, family/significant others throughout occupational therapy process (evaluation, intervention, outcome):
- Seeks & responds to client feedback
- Maintains client focus in sessions
- Respectfully engages in discussion when conflict arises to address concerns
- Provides written documentation of collaborative plan (e.g., home program)
- Incorporates client/family priorities & interests
- Tailors client/family education to individual need
- Other:
EVALUATION AND SCREENING
FWPE item #8: Articulates clear & logical rationale for evaluation process:
- Describes reasoning based on client, condition, context, FOR/EBP
- Explains choice of occupation-based &/or client factors
- Discuss psychometric properties (validity & reliability) of assessment tool
Other: ________________________________

FWPE item #9: Selects relevant screening/assessment*methods (*see assessment chart):
Selects assessments according to:
- Future context
- Evidence
- Psychometric properties/validity/reliability
- Client condition
- Client priorities
- Current context
Selects assessment based on Theories/Frames of reference pertinent to setting such as:
- PEOP
- Biomechanical
- Acquisitional
- Psychodynamic
- Cognitive behavioral
- DBT
- Sensory Processing
- Sensory Integrative
- NDT
- Functional Group Model
- MOHO
- Developmental
- Motor Learning
- Coping
- Clinical Reasoning
- Rehabilitation
- Occupational Adaptation
- Ecology of Human Performance
- Cognitive/Cognitive Disability
Other: ________________________________

FWPE item #10: Determines occupational profile & performance through appropriate assessment methods (see assessment chart on last page for specific tools/competency expectations)

FWPE item #11: Assesses client factors & context that support or hinder occupational performance (see assessment chart for specific tools/competency expectations)

FWPE item #12: Obtains sufficient/necessary information from relevant resources such as client, families, significant others, service providers, & records prior to & during evaluation process via:
- Thorough record/chart review
Client interview
Observation of client performance in areas of occupation (ADL/IADL, education, work, play, leisure, social participation, rest/sleep)
Assessment instruments addressing occupational performance (see assessment chart)
Observation of client person performance skills (motor & praxis, emotional regulation, cognitive, communication/social, sensory/perceptual)
Assessment instruments addressing client performance skills
Observation of client performance patterns (roles, routines, rituals, habits)
Assessment instruments addressing client performance patterns (see assessment chart)
Assess of client factors (see assessment chart)
Observation in current context(s) (personal, physical/environment, social, cultural, temporal, virtual)
Gathering information re: anticipated future context(s)
Gathering input from family/significant others/service providers (PCA, nursing, teachers, team members, referral source)
Discussion of psychosocial factors that effect performance/disposition (e.g., motivation, adjustment, anxiety, self-concept, participation, etc.,)
Assessment instruments that address psychosocial factors that affect performance/disposition (see assessment chart)
Occupational profile addresses
Who is client?
Client problems
Client values/interests/needs
Why seeking services?
Other (s):

FWPE item #13: Administers assessments in uniform manner to ensure valid/reliable results:
Adheres to assessment tool protocols/procedures (format, script, item use, scoring, etc.)

FWPE item #14: Adjusts/modifies assessment procedures based on client’s needs, behaviors, and cultural variables such as:
Fatigue
O2 sat/respiration rate
BP/heart rate
Frustration tolerance
Anxiety
Cultural beliefs, values, customs, expectations
Cognitive status
Pain
Concerns: safety (please specify):

Other:

FWPE item #15: Interprets evaluation results to determine client’s occupational performance strengths & challenges by integrating quantitative & qualitative information such as:

- Standardized assessment results
- Information re: client condition/dx
- Subjective/objective impressions
- Verbal reports of others (team, family/caretakers, etc.)
- Observation of client’s performance
- Client’s stated values, beliefs/motivations
- Identified problems/needs
- Other:

FWPE item #16: establishes accurate & appropriate plan based on evaluation results, integrating factors such as client’s priorities, context(s), theories & evidence-based practice:

- Integrates information with client priorities to create plan relative to setting/scope of practice
- Incorporates client’s present and future context(s) (personal, cultural, temporal, virtual, physical, social) in clinical reasoning/intervention planning
- Utilizes summarized evidence from Critically Appraised Topics/Papers (CATs/CAPs) to guide decision-making/reasoning.
- Uses EBP approach (e.g., PICO question: Person, Intervention, Comparison, Outcome) to search for/find relevant evidence according to client priorities & frame of reference
- Critically appraises findings (e.g., CAT: http://www.otcats.com/template/index.html ; or CanChild
- Uses structures method to review evidence (journals, case studies, consensus of experts)
- Creates realistic plan reflective of accurate understanding of client abilities and potential
- Sets goals consistent with client priorities, theory/frame of reference, evidence & setting
- Other:

FWPE item #17: documents results of evaluation process in manner that demonstrates objective measurement of client’s occupational performance:
Records observed performance in areas of occupation (ADL/IADL, education, work, play, leisure, social participation, rest/sleep) as per setting’s policies & procedures/scope of practice
Accurately reports standardized assessment data (raw scores/results) as applicable
Formulates goals that are specific, measureable, realistic, attainable, time-limited
Utilizes outcome measurement methods when available or per setting policies

INTERVENTION
FWPE item #18: articulates a clear and logical rationale for intervention process:
- Verbally in supervision sessions
- Via written assignments (journal, case study)
- Via sharing EBP article reviews
- In rounds/team meetings

FWPE item #19 (part 1): Utilizes evidence from published research & relevant resources to make informed decisions with supervisor/client/team/caregiver/agency (as appropriate) using:
- Critically Appraised Papers (CAPs)/Critically Appraised Topics (CATs)
  http://www.otcats.com/index.html
- Articles from peer reviewed journals (e.g., AJOT, OTJR, etc.,)

FWPE item #19 (part 2): Utilizes evidence from published research & relevant resources to make informed decisions with supervisor/client/team/caregiver/agency (as appropriate) using:
- Discussion/sharing of material learned via other sources (textbooks, OT Practice, coursework, association website searches, conferences, etc.,) in supervision

FWPE items #20 & 21: Chooses relevant occupations that motivate & challenge clients to facilitate meeting established goals based on client’s:
- Condition/Status
- Progress
- Stated interests
- Beliefs & values

FWPE items #22 & 23: Implements client & occupation based intervention plans considering areas of occupation/outcomes such as:
FWPE item #24: Modifies task, approach, occupations & environment to maximize client performance by:

- Adapting sequence of activity & objects used
- Sensory input
- Visual/verbal cues
- Amount of physical assistance provided
- Social demand (1:1 vs. group, family vs. peer(s), rules/norms)
- Amount of emotional/behavioral support provided
- Changing length/frequency/timing of sessions
- Cognitive demand
- Physical requirements
- Promoting safety (awareness, education/feedback, environmental modifications, removing potential sources of injury, etc.)
- Creating adaptive device(s)
- Reviewing/revising expectations with client(s) relative to desired occupations, role(s) & context
FWPE item #25: Updates, modifies, or terminates intervention plan based upon careful monitoring of client’s status:
- Accurately represents client progress verbally & in documentation
- Accurately reports change in client status (e.g., illness, affect) affecting performance
- Frequently re-evaluates effectiveness of intervention based on goal achievement and/or outcome measurement
- Subjective data consistent with objective data reported verbally or in documentation

FWPE item #26: Documents client’s response to services in a manner that demonstrates efficacy of interventions via:
- Progress reports with quantitative data (goal attainment scaling, excel charts/graphing, re-assessment, score comparison, outcome measurement results)
- Narrative summary with qualitative descriptors according to problems identified/goals achieved
- Other:

MANAGEMENT OF OCCUPATIONAL THERPAY SERVICES
FWPE item #27: Demonstrates through practice or discussion ability to assign appropriate responsibilities to the occupational therapy assistant & occupational therapy aide:
- Describes or assigns duties commensurate to educational level, assessed competency, federal & state laws regulating use of supportive personnel
- Considers number of clients, complexity of needs, type of setting, safety
- Describes or provides type of supervision required (close, direct, line of sight)
- Provides reference for state statues/regulations governing performance or services & definitions of supervision
- Other:

FWPE item #28: Demonstrates through practice or discussion ability to actively collaborate with occupational therapy assistant:
- Describes &/or engages in tasks with OTA relative to job description &/or scope of practice as defined by state guidelines (e.g., soliciting contributions to evaluation process &/or delegating implementing & adjusting intervention plan) in accordance with AOTA Official Guidelines for Supervision, Roles & Responsibilities
- Completes alternate assignment to meet objective (please describe or attach):
FWPE item #29: Demonstrates understanding the costs and funding related to occupational therapy services at this site:
- Discusses political issues/policy decisions that affect funding
- Outlines how services are regulated and funds allocated pertaining to local and/or federal laws such as IDEA, ADA, Medicare/Medicaid, etc.
- Describes agency billing/payment system (grant funding, types of insurance, private pay, cost-share, state/federal funding)
- Describes eligibility criteria for reimbursement and discharge
- Identifies possible resources available (grants, community partnerships, sources for donations, fundraising ideas, etc.)
- Demonstrates awareness of risk management and liability as part of costs and quality care
- Demonstrates awareness of budgetary implications when procuring/using supplies

FWPE item #30: Accomplishes organizational goals by establishing priorities, developing strategies, and meeting deadlines:
- Articulates setting’s mission & values
- Schedules meetings/sessions according to facility expectations
- Begins & ends sessions on time
- Attends meetings on time
- Reports meetings in concise manner
- Meets paper work deadlines per policy & procedures
- Prioritizes workload according to policies & caseload demands
- Uses time management strategies (checklists, templates, to-do list)

FWPE item #31: Produces the volume of work required in the expected time frame:
- Is self directed in managing schedule to meet workload/caseload
- Gathers necessary evaluation data within allotted amount of time – specify:
  - per day
  - per week
  - per month
- Completes evaluation write-up with documentation co-signed & in chart/record within:
  - 8 hrs
  - 24 hrs
  - 1 week
  - other:
- Conducts (specify number) of evaluations: per day
Serves caseload commensurate with entry-level therapist (please specify # of clients/groups):

 per day  per week  per month

Completes progress note documentation within expected time period of:

Completes (specify number) of progress notes:  per day  per week  per month

Other:

COMMUNICATION
FWPE item #32: Clearly & effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public:

- Uses language appropriate to the recipient of information, including but not limited to funding agencies & regulatory agencies
- Gauges use of terminology to level of understanding of person with whom communicating
- Utilizes examples to illustrate meaning/intent
- Uses active listening strategies (restates/paraphrases) to ensure both parties have shared understanding of information/plan
- Uses multiple modes of communication (verbal, written, nonverbal)
- Makes eye contact when appropriate
- Attends to physical boundaries/body space
- Demonstrates professional presentation/demeanor in facial expression, posture, grooming affect, & attire
- Utilizes setting’s services for translators of translation of written materials when indicated/available

Other:
FWPE item #33 – 34: Produces clear and accurate documentation according to site requirements. All written communication is legible, using proper spelling, punctuation, and grammar:

- Completes computerized &/or hand-written documentation per setting protocols/formats
- Uses approved institutional terminology/abbreviations
- Uses technology when available to check work (grammar, spelling)
- Uses strategies such as proofreading, reading aloud, checking against template, asking colleague/peer to proof if feasible

Other:

FWPE item #35: Uses language appropriate to the recipient of the information, including but not limited to funding agencies & regulatory agencies:

- Writes in a manner conductive to being read by recipients of services & other disciplines, free of jargon, retaining language consistent with OTPF-Revised (client profile, analysis of occupational performance, areas, skills/patterns, influence of context(s), client factors)
- Gauges use of terminology to level of understanding of person with whom communicating
- Utilizes examples to illustrate meaning/intent (verbal/demonstration)
- Takes into account cultural differences, providing handouts in client’s first language, when available, providing illustrations with written content
- Adjusts content (verbal/nonverbal) in response to clients/family/caregivers colleagues’ response
- Provides clear & concise instructions

Other:

PROFESSIONAL BEHAVIORS

FWPE item #36: Collaborates with supervisor(s) to maximize the learning experience:

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

FWPE item #37: Takes responsibility for attaining professional competence by seeking out learning opportunities & interactions with supervisor(s) & others:
- Comes to supervision w/ list of questions/concerns & possible options for how to address them
- Takes initiative to meet w/ other members of team to understand their role/perspective
- Reviews testing materials/manuals on own prior to observing or administering
- Seeks out, reviews & shares reading materials/articles on frames of reference/EBP, client conditions, public law/policy, etc.,
- Pilots new program ideas/improvements (e.g., assessment tools, outcome measures, groups, new forms or procedures, etc.,) when feasible/available
- Collaborates in research design or data collection with others (per IRB approval)
- Exercises good judgment when choosing to attend in-services or other continuing education opportunities (e.g., based on workload management, caseload focus, scope of practice)
Other:

FWPE item #38: Responds constructively to feedback:
- Engages in mutual feedback exchange (e.g., listen, clarify, acknowledge feedback &/or redirection, provide examples, ask “How can I improve?”; discuss ways to make active changes, identify what would be helpful, discusses options)
- Demonstrates commitment to learning by identifying specific goals/actions to improve behavior/performance in collaboration with supervisor
- Processes feedback & seeks support from supervisor appropriate to context of supervisory relationship & learning opportunity
- Utilizes tools to reflect on own performance or variables affecting performance (e.g., self-assessment on FWPE, journaling, FEAT)
- Takes initiative to contact academic program resource persons for support if needed
Other:
FWPE item #39: Demonstrates consistent work behaviors including initiative, preparedness, dependability, and work site maintenance:
- Takes initiative to address workload management
- Demonstrates consistent work behaviors in both task & interpersonal interaction
- Attends to site cleanliness, safety & maintenance of supplies as appropriate to role
- Comes prepared for meetings/sessions
- Takes responsibility to address areas of personal/professional growth
- Proactively plans for & requests appropriate supports or accommodations in manner consistent with federal law & site resources (e.g., open in communication, provides appropriate documentation, requests reasonable accommodation if indicated)
- Other:

FWPE item #40: Demonstrates effective time management:
- Monitors, maintains & adapts own schedule in accordance w/ site’s priorities
- Organizes agenda or materials for meetings & sessions
- Conducts evaluation &/or intervention sessions w/in allotted time, inclusive of set-up/clean-up
- Completes documentation/paperwork in timely manner
- Completes learning activities by due dates

FWPE item #41: Demonstrates positive interpersonal skills including but not limited to cooperation, flexibility, tact, and empathy in social interactions w/ clients/patients, peers & colleagues:
- Communicates concerns in 1st person manner (e.g., “I statements”)
- Remains calm when conveying point of view when conflict arises
- Compromises as needed when negotiating workload
- Demonstrates flexibility to support own learning or department mission (e.g., extra effort, stay late if needed, etc.,)
- Demonstrates ongoing awareness of impact of own behavior on others
- Displays positive regard for others
- Demonstrates effective use of self disclosure (e.g., moderate)/therapeutic use of self to build rapport, establish alliance(s) & motivate others (peers/colleagues/clients)
- Provides timely & specific feedback
- Sets limits to maintain safety & support positive behavior/performance improvement
**FWPE item #42:** Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices:

- Demonstrates awareness of own background and sensitivity to worldviews of others (clients, family, colleagues)
- Refrains from imposing own beliefs & values on others
- Maintains clients’ dignity
- Gathers information about clients’ cultural values &/or spiritual beliefs
- Incorporates clients’ values & beliefs into therapeutic interactions & interventions
- Considers clients socioeconomic & community resources & lifestyle when designing intervention plans & discharge planning
- Demonstrates tolerance for differences in others & willingness to work w/ all clients

**Other expectations not noted above:**

______________________________

Print Name

☐ Electronically signed by above individual on this date.

_________________________________________  ________________

Signature Date

**Assessment Checklist** (attach to Level II FW Site Specific Objectives)

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