



Student Fieldwork Handbook AY 2019-20

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PURPOSE

The purpose of this handbook is to provide students, fieldwork educators and faculty with general information, curriculum design, policies and procedures, and forms, of the fieldwork component of the Master of Science in Occupational Therapy (OT) degree. This information is necessary to ensure successful fieldwork experiences for each student.

INTRODUCTION

Fieldwork education is an important part of the professional preparation as a student and it is integrated as a component of the OT department curriculum design. The fieldwork experiences provide the student with the opportunity to carry out professional responsibilities under supervision, as well as for role modeling (ACOTE, 2011). The fieldwork experiences will provide the student with the opportunities to experience occupational therapy in the clinical settings, thus preparing the student for the transition from the role of an occupational therapy student to an occupational therapy practitioner.

GLOSSARY of FIELDWORK TERMS

Accreditation Council for Occupational Therapy Education (ACOTE) –ACOTE is the American Occupational Therapy, (AOTA) accrediting body. It accredits occupational therapy and occupational therapy assistant educational programs. For details on specific accreditation standards visit: <https://www.aota.org/Education-Careers/Accreditation.aspx>. The 2011 ACOTE standards related to fieldwork are embedded in this handbook with the format (ACOTE X.X.X)

Academic Fieldwork Coordinator (AFWC) - Person who coordinates the fieldwork program for an academic institution. The AFWC has to meet the *Role Competencies for an Academic Fieldwork Coordinator* set by AOTA (2003). The AFWC is responsible for ensuring the fieldwork program reflects the sequence, depth, focus and scope of content in the curriculum design as well as ensuring that the fieldwork educators and faculty collaborate in the design of the fieldwork experiences. The AFWC is responsible for the program's compliance with the fieldwork education requirements (ACOTE C.1.0)

Fieldwork Education - Fieldwork education provides experiences to students to integrate academically acquired education with clinical practice. The term encompasses opportunities and experiences provided to students throughout the curriculum including level I and level II fieldwork experiences.

Fieldwork Educator (FWE) –The fieldwork educator was formerly known as the clinical instructor (CI). Emphasis is now focused on the important role of the therapist educating the student during the fieldwork experience. FWEs are qualified personnel who supervise students in the clinical setting. For level I fieldwork, fieldwork educators include, but are not limited to: currently licensed or credentialed occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, nurses, and physical therapists (ACOTE C.1.9). For level II fieldwork, the FWE must be a currently licensed or credentialed occupational therapist who has a minimum of 1 year of practice experience subsequent to initial certification, and is adequately prepared to serve as a fieldwork educator (ACOTE 1.14).

Fieldwork Educator Coordinator (FWEC) - At each clinical site, the individual who coordinates, arranges, and assigns occupational therapy students for a fieldwork experience is the FWEC. The FWEC communicates with the AFWC, the FWE, and student regarding student placement and issues between students and fieldwork educators. The FWEC is responsible for ensuring that students have quality clinical learning experiences that meet the program objectives.

Practice Standards - Standards that the student will uphold as an occupational therapy student during the fieldwork experiences and later on as an OT practitioner. These are translated in the adherence to the AOTA Code of Ethics.

CURRICULUM DESIGN

Facilities that meet the educational objectives, are reflective of the sequence, depth, focus and scope of content in the curriculum design are selected as fieldwork sites (ACOTE C.1.1).

Our curriculum follows a developmental curricular sequence and adopts the Blooms' Taxonomy. Fieldwork is in the Professional Practice Skills section of the Curricular Sequence. Following foundations, occupational performance and adaptation across the lifespan. Level I fieldwork is embedded in courses focused on the occupational process of assessment and planning, and then intervention. The level I fieldwork links what students have learned about the occupational therapy process with opportunities to acquire practice skills. Students are given the opportunity to apply, analyze, evaluate and begin to create assessment and intervention plans appropriate to individuals and populations. Level II FW is the final aspect of the curriculum. It follows all didactic work and prepares the student for entry-level practice. During the level II fieldwork, students are expected to use higher levels of knowledge such as: continue drawing connections among ideas, justify decisions, and create original work. The curricular themes, occupational performance, evidence-based practice, culture, and community engagement are reinforced throughout all fieldwork experiences.

Our curriculum uses the Person-Environment-Occupation-Performance (PEOP) Model revised by Christiansen, Baum, & Bass-Haugen in 2005. This conceptual model of practice organizes the dynamic, complex relationship between people, environments, and occupational performance.

Students acquire knowledge and understanding about the person's factors, including psychological, cognitive, neurobehavioral, physiological, and spiritual capacities and constraints. By understanding the Person-Environment-Occupation-Model, students recognize that when following a frame of reference that primarily addresses aspects of one's personal capabilities and deficits, individual roles and environmental issues equally contribute to occupational performance.

Environmental issues that may enable or create barriers include social support mechanisms, social policies and attitudes, cultural norms and values, and physical settings and geography. These factors make up the context for individual occupational performance. Students examine physical barriers within existing structures and recognize the importance and need for universal design. Learning experiences to explore cultural norms and values are embedded in courses that focus on individual and community service delivery. Students are given opportunities to

analyze and appreciate the significance of complex systems, from service delivery models to larger political-economic structures.

Occupational performance is central to the PEOP Model, thus, occupation is embedded throughout the curriculum. Students learn the meaning of both, individual and cultural occupations. They analyze the underlying demands of occupation, such as the cognitive, motor, sensory, and perceptual components. Students develop therapeutic plans using occupations to promote, restore, or enable occupational performance.

Although other models and frames of reference are utilized throughout the curriculum, the PEOP Model provides a solid guide to the consideration of clients' life roles, social and physical environments, along with personal performance capacities and constraints. The PEOP Model provides a structure for assimilation and integration of information leading to mastery of effective clinical reasoning in occupational therapy assessment and intervention.

The use of the ideas and descriptions from this conceptual model of practice provides a guide for occupational therapists to work within the medical model, the community model and non-traditional occupational therapy service settings.

The AFWC uses verbal and written communication to share our curriculum design with the clinical sites. Our fieldwork partners are required to complete the Curriculum Design Form (Appendix I).

FIELDWORK LEVELS

Level I Fieldwork:

The overall purpose of level I fieldwork is to introduce the student to the clinical environment. It provides basic experiences in observation, evaluation, treatment planning, treatment implementation, documentation, and the application and integration of occupational therapy theory in a closely supervised setting. Level I fieldwork also provides the opportunity for developing professional behaviors.

Level I fieldwork is integral to the academic program's curriculum design. It is not intended to develop independent performance, but to "include experiences designed to enrich didactic coursework through directed observation in selected aspects of the occupational therapy process" (ACOTE C.1.8). Services may be provided to a variety of populations through a variety of settings. Experiences may include those directly related to occupational therapy, as well as other situations to enhance an understanding of the developmental stages, tasks, and roles of individuals throughout the lifespan. Day care centers for children, schools, neighborhood centers, hospice, homeless shelters, assisted living residences, community mental health centers, frail- or well- elderly programs, and vocational training centers are among the many possible fieldwork sites.

Level I fieldwork may also include service management and administrative experiences in occupational therapy settings and community agencies. Populations served may also include individuals with disabilities, well populations, age-specific and diagnosis-specific clients.

Fieldwork is focused on providing the student with a variety of experiences within various populations and settings.

Qualified personnel for supervision of level I fieldwork include, but are not limited to: occupational therapists and occupational therapy assistants who are initially certified nationally and credentialed according to state requirements, psychologists, physician assistants, teachers, social workers, and physical therapists (ACOTE C.1.9). The Level I Qualified Supervisor form is used to ensure that our students are supervised by qualified professionals (Appendix II).

Each level I fieldwork has specific objectives and assignments which are reviewed prior to starting the rotation. Level I fieldwork is not substituted by any part of level II fieldwork (ACOTE C.1.10).

The fieldwork experiences reflect the sequence and scope of content in the curriculum design in collaboration with faculty so that fieldwork experiences strengthen the ties between didactic and fieldwork education (ACOTE C.1.1). During the first summer in the program, the student will complete a four-week, 8 hour/day fieldwork experience. This fieldwork is part of OTH 5430L- Adaptation of Human Occupation and Environment for Musculoskeletal Disorders Lab. The experience will provide the student with an opportunity to integrate the knowledge learned during the first year of the program with actual clinical practice. This fieldwork experience introduces the occupational therapy student to the clinical environment. It is designed to provide basic experiences in observation, evaluation, treatment planning, treatment implementation, and documentation, all of which require close supervision by the therapist directly responsible for the clients. For OTH 5430L, the students will have 24-hour access to e-Campus discussion board where they will post their assignments and share with faculty and class members their experience during fieldwork.

In the spring semester of the second year, the student will complete a two-week, 8 hour/day psychosocial fieldwork (ACOTE C.1.7) as part of OTH 5843. In OTH 5843, the student will gain intense preparation to effectively engage in various levels of clinical reasoning (procedural, pragmatic, interactive, and conditional) to optimize the occupational performance of individuals living with psychosocial disorders. The student will also develop advanced group leadership skills, become proficient in documentation in a mental health setting, and analyze environmental factors that promote or hinder occupational performance. The student will have the opportunity to apply the skills acquired in the classroom.

For the level I fieldwork experiences, the ratio of students to FWE is dependent on the type of facility and goals of the associated course. The supervisory model utilized may vary from 1:1 or 1:2 for student supervision in rehab and pediatric settings. In the level I psychosocial fieldwork, the ratio of students to supervisor may vary from 1:1 to 1:7. The ratio of FWE to students enables proper supervision and the ability to provide frequent assessment of student progress in achieving stated fieldwork objectives (ACOTE C.1.4).

At the completion of each level I fieldwork experience both, the student and the fieldwork educator complete formal evaluations (ACOTE C.1.10). The FWE assesses the student's performance by completing the Student's Performance Evaluation form (Appendix III). The

student will assess the fieldwork experience by completing the Student Evaluation of Clinical Experience form (Appendix IV).

LEVEL I GENERAL OBJECTIVES

1. To provide the student with the opportunity to apply and practice the skills learned in the academic coursework with actual patients/clients/consumers.
2. To provide verification of the knowledge acquired in the academic setting.
3. To provide the opportunity for the student to expand the knowledge acquired in the academic setting.
4. To provide the student with the opportunity to develop the interpersonal skills and attitudes necessary for effective interaction with:
 - Individuals having physical, psychosocial and/or developmental disabilities
 - Individuals from varied cultures and backgrounds
 - Members of the healthcare team
5. To provide the student with constructive criticism on their professional performance and to assist the student in developing strategies to use this feedback to modify and improve their professional performance.
6. To promote the development of self-evaluation & problem-solving skills.
7. To provide the student with role models in direct service to patients, clients, and consumers.
8. To assist in the transition from the role of student to the role of an occupational therapy practitioner.

LEVEL I FIELDWORK SCHEDULE

Semester	Year	Type	Length
Summer OTH 5430L	First Year	Inpatient rehab, SNF, acute long term care, outpatient rehab, UE/outpatient, pediatric hospital, pediatric outpatient clinic, pediatric community, school system, blind & low vision center, and early intervention	4 weeks 40 hr/wk
Spring OTH 5843	Second Year	Psychosocial / Mental Health (ex. psychiatric hospital, adult day care, program for DD, Alzheimer unit, behavioral health, older adult community living, hippotherapy center, blind and low vision center, and early intervention)	2 weeks 40 hr/wk

LEVEL I INTERNATIONAL FIELDWORK

The OT program at FIU has a limited number of fieldwork contracts with sites outside the continental USA such as, but not limited to: Bahamas, Chile, Costa Rica, Guatemala, Jamaica, Perú, Puerto Rico, Spain, and Trinidad. Students are encouraged to complete their level I fieldwork abroad. Students who are or have been on warning or probation are not eligible to

complete their level I fieldwork outside of Florida. International fieldwork placements will be at the discretion of the AFWC and faculty, based on student's performance at the time of the request. Policies and Procedures related to international clinical education experiences from FIU- Office of Study Abroad <https://globalaffairs.fiu.edu/study-abroad/about/> will be followed. FIU does not have resources to assist students with housing or travel costs associated with fieldwork. Obtaining these resources is the responsibility of the student.

LEVEL II FIELDWORK

Fieldwork standards (ACOTE, 2011) state that the goal of level II fieldwork is “to develop competent, entry-level, generalist occupational therapists.” Similar to level I fieldwork, level II fieldwork must be integrated into the curriculum design. Level II fieldwork experience provides students with the opportunity to integrate academic knowledge with the application of skills in a practice setting through “an in-depth experience in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupations” (ACOTE, 2011). This experience also includes research, as well as administration and management of occupational therapy services. The fieldwork experiences are to be in settings that expose the students to a variety of clients across the life span and in a variety of practice settings.

All didactic coursework **MUST** be completed prior to the start of a level II fieldwork experience. Level II fieldwork 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 responsibility (ACOTE C.1.11). In all settings, psychosocial factors must be understood and integrated for the development of client-centered, meaningful, occupation-based outcomes (ACOTE C.1.12).

ACOTE requires a minimum of 24 weeks' full-time level II fieldwork experiences (ACOTE C.1.13). Students may complete fieldwork on a part-time basis, as long as it is no less than 50% of the full-time equivalent at the fieldwork site. Students may complete their required weeks of fieldwork in a minimum of one setting if it is reflective of more than one practice area and a maximum of four settings (ACOTE C.1.12). At FIU, the 24 weeks of level II fieldwork is divided into two 12-week affiliations in two different settings. This provides the student with a variety of experiences and an opportunity to view different service delivery models. Upon completion of level II fieldwork, the student must be able to demonstrate entry-level competency.

All fieldwork must be completed within 24 months following completion of all didactic coursework.

Direct supervision for level II students is provided by a licensed or credentialed occupational therapist with at least one year of experience subsequent to initial certification and is adequately prepared to serve as a fieldwork educator (ACOTE C.1.14).

To ensure a mechanism for evaluating the effectiveness of supervision (ACOTE C.1.15), our program utilizes three documents, the Level II Supervision form (Appendix V), the Summary of Clinical Visitation form (Appendix VI) and the Student Evaluation of Fieldwork Experience form (Appendix VII). At the completion of each level II fieldwork experience, the fieldwork educator completes the AOTA Fieldwork Performance Evaluation (FWPE) form (Appendix VIII) to evaluate the student's performance on each level II fieldwork rotation (C.1.16).

During the midterm visit/phone call, the FWE addresses the topic of supervision with the student and the FWE to ensure that initially supervision is direct and then decrease to less direct supervision, as appropriate for the setting, the severity of the clients' condition, and the ability of the students (ACOTE C.1.16). All our level II experiences have occupational therapy services and employed occupational therapists. Our level II students are supervised by qualified licensed occupational therapists who have at least one year of clinical experience after initial certification (ACOTE C.1.17).

The OT Department has fieldwork contracts with sites outside the state of Florida. Students who are or have been on warning or probation are **not** eligible to complete their level II fieldwork outside of Florida.

Level II fieldwork rotations occur during the summer semester of the second year and the fall semester of the third year. OTH 5845 is the first level II fieldwork experience and OTH 5846 is the second level II fieldwork experience. Both OTH 5845 and OTH 5846 fieldwork courses include a web-assisted component. Students post their required assignments through e- Campus. Postings include topics such as, but not limited to: adaptation, evidence-based practice, cultural issues, and psychosocial factors.

An optional level II fieldwork experience can be completed in a foreign country as long as the student has completed two level II fieldwork experiences in the USA. The fieldwork educator must be an occupational therapist who graduated from a World Federation of Occupational Therapy (WFOT) approved program and has at least one year of experience in practice (ACOTE C.1.19). The experience cannot exceed 12 weeks. Additional information about international fieldwork experiences can be found at <http://www.aota.org/Education-Careers/Educators.aspx>.

Objectives for Level II Fieldwork:

Fieldwork objectives serve several purposes to the student and to the FWE. They indicate to the student the performance that is expected of him/her; may serve to promote self-directed learning and accountability. To the fieldwork educator, fieldwork objectives serve as a guide in planning learning experiences for the student. Fieldwork objectives also serve to guide student's evaluation process.

The 42 Behavioral Objectives are reflective of the AOTA Level II fieldwork evaluation and are reviewed with each fieldwork site prior to establishing a contract/MOU. The AFWC and the FWE also collaborate in establishing the fieldwork objectives (ACOTE C.1.3). Prior to students' fieldwork placement these objectives are reviewed and a copy included in students' fieldwork packet that is emailed to the fieldwork site. Objectives are explained to students through this handbook, and repeated during each semester's fieldwork preparation meeting(s).

As required by ACOTE, the FIU-OT program 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 collaborates with FWE to review, maintain, and develop site specific learning objectives. The Level II fieldwork site specific objectives and assessment measures demonstrate promotion of

clinical reasoning and reflective practice, as well as, demonstration of promotion of ethical practice and professionalism (ACOTE C.1.2 and C.1.3).

Students have access to the electronic Student Fieldwork Handbook on the FIU Website, outlining the fieldwork behavioral objectives. The OT program at FIU utilizes the FLOTEC site specific objectives form (Appendix IX). The objectives also outlined for students during fieldwork meeting(s) 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 (ACOTE 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 (ACOTE C.1.10).

The student will be provided with opportunities to master competencies in the following domains. These objectives are in concert with the AOTA Fieldwork Performance Evaluation. Upon completion of the level II fieldwork experience, the student will be able to:

I. Fundamentals of Practice:

1. Adhere consistently to AOTA Code of Ethics & Ethics Standards & site's policies & procedures, including, when relevant, those related to human subject research.
2. Adhere consistently to safety regulations. Anticipates potentially hazardous situations & takes steps to prevent accidents for clients & staff members throughout fieldwork related activities. Follows fieldwork level II site safety regulations that are specific to setting/client(s).
3. Use judgment in regard to safety of self and others during all fw-related activities.

II. Basic Tenets:

4. Clearly and confidently articulates the values of the profession to clients, families, colleagues, service providers and the public.
5. Clearly and accurately articulates the value of occupation as a method/outcome of occupational therapy to clients, families, colleagues, service providers and the public.
6. Clearly communicates the roles of the OT & the OTA.
7. Demonstrate the ability to define occupational therapy, its values and beliefs.

III. Evaluation and Screening:

8. Articulates a clear rationale for the evaluation process.
9. Selects appropriate screening and assessment methods for the clinical setting.
10. Determines occupational profile & performance through appropriate assessment methods.
11. Assesses context factors that support or hinder occupational performance.
12. Obtains sufficient/necessary information from relevant sources such as client, families, service providers & records prior to/during evaluation process.
13. Administers assessments in uniform manner to ensure valid/reliable results.
14. Adjusts/modifies assessment procedures based on client's needs, behaviors, cultural variables.
15. Interprets evaluation results to determine client's occupational performance strengths & challenges by integrating quantitative & qualitative information.
16. Establishes accurate & appropriate plan based on evaluation results, integrating factors such as client's priorities, context(s), theories & evidence-based practice.
17. Documents results of evaluation process in manner that demonstrates objective measurement of client's occupational performance.

IV. Intervention:

18. Articulates a clear and logical rationale for intervention process.
19. Utilizes evidence from published research & relevant resources to make informed decisions with supervisor/client/tem/caregiver/agency.
20. Chooses occupations that motivate and challenge clients.
21. Selects relevant occupations to facilitate clients meeting established goals.
22. Implements intervention plans that are client-centered.
23. Implements intervention plans that are occupation-based.
24. Modifies task, approach, occupations & environment to maximize client performance.
25. Updates, modifies, or terminates intervention plan based upon careful monitoring of client's status.
26. Documents client's response to services in a manner that demonstrates efficacy of interventions.

V. Management of Occupational Therapy Services:

27. Demonstrates through practice or discussion ability to assign appropriate responsibilities to the occupational therapy assistant & occupational therapy aide.
28. Demonstrates through practice or discussion ability to actively collaborate with occupational therapy assistant.
29. Demonstrates understanding the costs and funding related to occupational therapy services at this site.
30. Accomplishes organizational goals by establishing priorities, developing strategies, and meeting deadlines.
31. Produces the volume of work required in the expected time frame.

Communication:

32. Clearly & effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public.
33. Produces clear and accurate documentation according to site requirements.
34. 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 & regulatory agencies.

Professional Behaviors:

36. Collaborates with supervisor(s) to maximize the learning experience.
37. Takes responsibility for attaining professional competence by seeking out learning opportunities & interactions with supervisor(s) & 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 in social interactions w/ clients/patients, peers & colleagues.
42. Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices.

*All students must become familiar with the fieldwork objectives listed previously. These objectives **must** be met while at the fieldwork site.*

Level II Fieldwork Schedule:

Semester	Type	Course	Length
Summer Second Year	<p>Hospital-based settings</p> <ul style="list-style-type: none"> • In-Patient Acute • In-Patient Rehab • SNF/ Sub-Acute/ Acute LTC • General Rehab Outpatient • Outpatient Hands/UE • Pediatric Hospital Outpatient • In-Patient Psych <p>Community-based settings</p> <ul style="list-style-type: none"> • Pediatric Community • Behavioral Health Community • Older Adult Community Living • Older Adult Day Program • Outpatient/Hand Private Practice • Adult Day Program for DD • Home Health • Pediatric Outpatient Clinic • Low vision center <p>School-based settings</p> <ul style="list-style-type: none"> • Early Intervention • School 	OTH 5845 (first level II)	3 months
Fall Third Year	<p>Hospital-based settings</p> <ul style="list-style-type: none"> • In-Patient Acute • In-Patient Rehab • SNF/ Sub-Acute/ Acute LTC • General Rehab Outpatient • Outpatient Hands/UE • Pediatric Hospital/Unit • Pediatric Hospital Outpatient • In-Patient Psych <p>Community-based settings</p> <ul style="list-style-type: none"> • Pediatric Community • Behavioral Health Community • Older Adult Community Living • Older Adult Day Program • Outpatient/Hand Private Practice • Adult Day Program for DD • Home Health • Pediatric Outpatient Clinic • Low vision center <p>School-based settings</p>	OTH 5846 (second level II)	3 months

	<ul style="list-style-type: none"> • Early Intervention • School 		
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SELECTION PROCESS OF FIELDWORK SITES

- FIU has over 350 fieldwork contracts with sites in the state of Florida, the country, and abroad (ACOTE C.1.5). Students cannot complete their fieldwork experience at a facility unless there is a valid Memorandum of Understanding (MOU)/contract between the facility and FIU (ACOTE C.1.6).
- Students are encouraged to read the facility's resource files located in the AFWC office prior to making their fieldwork choices.
- Students are not allowed to set their own fieldwork with any facility with an established MOU with FIU. Under no circumstances is a student to telephone or meet anyone at a facility with an established MOU for the purposes of interviewing, touring, meeting staff members, or obtaining information in an attempt to secure a fieldwork slot.
- The AFWC will post the list of available fieldwork sites on the fieldwork bulletin board located in the hallway at AHC3-A, 4th floor.
- Students will be given a choice of fieldwork sites based on the availability indicated by the facilities. Not all facilities in the resource files will be able to accept students for fieldwork. Using the Fieldwork Facility Selection form (Appendix X), the students select five equally ranked sites for each Level II fieldwork placement.
- In the event that a facility is selected by more than one student, assignments will be made using a lottery format. Students may not get any of their choices.
- Students must be prepared to travel anywhere within the Tri-County area to complete their fieldwork experiences.
- The AFWC will make the final decision regarding fieldwork placements.
- Changes of site are not allowed after the placement has been confirmed with the facility, except for the following:
 - The facility cancels the fieldwork, in which case the student will be assigned by the AFWC to an available facility.
 - There is a real and immediate emergency which the student could not have foreseen, which requires a change in the fieldwork. Emergencies do not include weddings, divorces, traveling, moving, or elective surgery.
- New MOUs are established by the AFWC when the facility meets the guidelines for providing fieldwork education and agrees to the contractual relationship.
- Students should be aware that the process of setting up a MOU can last as long as one year and MOUs may not always be finalized.
- Students must contact the AFWC when they want to set up a MOU with a new facility.
- When a student initiates a contract with a new facility, the placement at the facility will be reserved for the student.
- Students should not request to be placed in facilities where they are currently employed or have previously been employed. Students are required to report employment and personal relationships that may conflict with this policy. Failure to comply with this policy will be

considered a breach of honesty, and a violation of the OT Code of Ethics. Students may be denied assignment to a fieldwork site when: a) student is or has been employed by a fieldwork site, or completed extensive volunteering; b) student has a personal relationship with a therapist at the site.

- All fieldwork experiences are completed at sites that comply with FIU guidelines and ACOTE accreditation guidelines.

ACADEMIC FIELDWORK COORDINATOR RESPONSIBILITIES

The academic fieldwork coordinator is a licensed occupational therapist and a full-time faculty member who is responsible for the development and monitoring of the fieldwork education program; and ensures the program's compliance with the ACOTE fieldwork requirements (ACOTE A.2.7). Responsibilities include, but are not limited to:

- Program's compliance with ACOTE fieldwork standards
- Ensure the fieldwork program reflects the sequence and scope of content in the curriculum design.
- Orients students to the policies and procedures of the fieldwork program
- Establishes new contracts. In order to establish a new fieldwork site, the AFWC performs an on-site visit. When on-site visits are not possible, due to travel distance, site information is gathered by telephone/email/Skype. For all fieldwork site selections, the following documents are reviewed by the site in collaboration with the AFWC, to determine the site's ability to meet curriculum objectives for level I and level II fieldwork and to facilitate the development of site specific fieldwork objectives. FIU is a member of the Florida Occupational Therapy Educational Consortium, (FLOTEC), and utilizes the FLOTEC data form and site specific objectives form.
 - FIU Occupational Therapy Curriculum Design
 - FIU Level I Fieldwork Objectives
 - FIU Level II Fieldwork Objectives
 - FLOTEC Level II Fieldwork Site Specific Objectives Checklist
 - Occupational Therapy Department Fieldwork Handbook
 - FLOTEC Fieldwork Data Form
- Following a collaborative and satisfactory site review, a Memorandum of Understanding (MOU)/contract is initiated by the Nicole Wertheim College of Nursing and Health Sciences Contract Office. This office is also responsible for renewing contracts. Memorandum of understanding/affiliation agreements with fieldwork sites are maintained in a locked filing cabinet at this location (ACOTE C.1.2).
- Ensures that for sites with established fieldwork contracts, the program's curriculum goals for each fieldwork experience are communicated to the Fieldwork Educator (FWE) through an active ongoing collaborative process between the AFWC, faculty, and the FWE. Curriculum fieldwork objectives for level I and level II fieldwork are provided to the FWE prior to the start of both level I and level II fieldwork experiences.
- Ensures Level II FW provides clinical reasoning and reflective practice, enables ethical practice, develops professionalism, and facilitates competence.
- Maintains files on each fieldwork site. Collects descriptive site data such as: data form, site objectives, feedback form completed by previous students, and health requirements for each fieldwork site and makes it available for students. Students are informed about how to access this information in several ways: during the initial orientation session, during the fieldwork meetings, and in this fieldwork handbook (ACOTE C.1.2).

- Collaborates with faculty and students in regards to student FW placements
- Collaborates with faculty and FWEs to strengthen the ties between coursework and fieldwork
- Ensures the FWE is qualified to serve as FWE and confirms FWE's occupational therapy license is validated on the State Board of Occupational Therapy website before student begins fieldwork.
- Maintains a collaborative relationship with FWE, including site visits, the sharing of resources, assistance in developing instructional strategies, and providing resources for continuing education/workshops or providing CEU.
- Reassigns students to other fieldwork placements, as needed
- Provides assistance/support/guidance to students and/or FWEs should fieldwork concerns or issues arise
- Assigns final grades for fieldwork, based on the information provided by the FWE on the Student Performance Evaluation
- Orients students to the procedures for applying for the National Board for Certification in Occupational Therapy (NBCOT) certification examination and the Florida Board of Occupational Therapy to practice as a licensed occupational therapist.

STUDENT RESPONSIBILITIES

- Students are required to attend all fieldwork meetings. Attendance will be taken. It is the student's responsibility to personally contact the AFWC if unable to attend a meeting.
- Students are responsible for researching their fieldwork choices prior to completing their fieldwork selection. Each fieldwork site has a file in the AFWC's office. Any information that the site has provided to the AFWC will be made available to students (ACOTE C.1.2). Usually included in each file is:
 - a current Fieldwork Data Form
 - site specific fieldwork objectives
 - brochures and general descriptions of the facility
 - Student Evaluation of the Fieldwork Experience (SEFWE) completed by students who have affiliated at the facility in the past
- Students must not remove information from the student fieldwork files. It is the students' responsibility to maintain the files in alphabetical order and in a neat manner. *If a file is empty, this likely means that it is a new site that has not completed its paperwork and it could still be a viable option.* However, the presence of a file does not guarantee that the facility has a spot for an FIU student.
- Students are responsible for checking the site requirements for each fieldwork facility they are scheduled to attend.
- Students are required to complete a Personal Data Form (Appendix XI) prior to each fieldwork experience. The form is sent by the AFWC to the clinical education facility at least two months prior to the beginning of the fieldwork experience. The Personal Data Sheet describes the student's personal educational and health information, as well as previous work experience and personal profile. Students must return a completed Personal Data Sheet to the AFWC by a designated deadline. Students who submit paperwork to the AFWC after the deadline will jeopardize their fieldwork placement.

- Students must show compliance with America Databank/Complio before being assigned to a fieldwork site.
- All requests regarding fieldwork issues must be given to the AFWC in writing, not by phone.
- After a placement for fieldwork has been confirmed, the student is responsible for contacting the facility and to schedule an interview, especially for level II fieldwork experiences.
- Any student with a disability has the right to decide if and when to disclose their disability. It is suggested that the student discusses their disability and accommodations with the AFWC and work closely with FIU's Disability Resource Center (DRC).
- Students are responsible for paying any additional requirements such as, but not limited to: background checks, drug testing, and/or fingerprinting required by the facility.
- Students are responsible for providing their own transportation to the fieldwork site.
- Upon completion of their fieldwork experience, students are responsible for submitting all fieldwork documentation to the AFWC in a timely manner.
- Students are responsible for maintaining a current address and phone number on file in the OT office at all times.
- Students who may become off-track are responsible for contacting the AFWC to plan and schedule their fieldwork experiences.

It is expected that the student will integrate didactic knowledge into the fieldwork experience through verbal communication, written documentation and professional conduct. In general, the responsibilities of students while on level II fieldwork include:

- Understanding that fieldwork is a learning experience. It is appropriate for students to ask questions, seek advice and guidance, explore resources, and engage in other activities that support learning and growth.
- Students must display professional behaviors at all times. If a student is unable to attend or may be late on a particular day, the fieldwork educator must be contacted as soon as possible. Missed days must be made-up.
- Students must follow the facility dress code requirements. Each facility will determine the type of clothing that is appropriate to the setting. Name tags may be required. In any setting, the following items are not appropriate: open toe shoes/sandals, tank tops/midriiffs, facial piercing, acrylic and/or long fingernails, dangling jewelry or suggestive clothing (e.g. low cut tops, leather, short skirts, and low riding pants). A neat appearance, in terms of clothing and grooming, is required. See Appendix XII.
- Fulfilling all duties and responsibilities identified by the clinical fieldwork educators and AFWC within the designated timelines.
- Notifying the AFWC immediately should any problem arise during fieldwork.
- Complying with the laws, regulations, and professional standards identified by the fieldwork supervisors, the University, state licensure boards, and the American Occupational Therapy Association.

- Sending all completed forms to the AFWC in a timely manner in order to earn a final grade.

ACADEMIC REQUIREMENTS

It is the student's responsibility to ensure that all academic requirements are completed prior to beginning level II Fieldwork. Students who are on warning or probation will not be allowed to complete their level II fieldwork. Students must be "*in good standing*" with the University in order to participate in fieldwork activities.

HEALTH REQUIREMENTS

Students must comply with the Nicole Wertheim College of Nursing and Health Sciences health and immunization screening, and background check policy. The health and immunization screening includes the following requirements:

- Immunization and/or titers of:
 - Varicella, Rubeola and Rubella, Mumps or MMR vaccine
 - Tetanus Toxoid booster; diphtheria; pertussis, or ADACEL vaccine
 - Hepatitis B Vaccine (3 doses) or signed declination
 - PPD- 2 step-if 1st time taker
- Medical history and physical exam
- CPR/BLS – for health care providers from AHA
- Proof of major medical health insurance coverage
- 7-year employment verification
- Background check

Florida International University-Nicole Wertheim College of Nursing and Health Sciences utilizes American Databank/Complio as the background check clearing house and for tracking student immunization records.

Students are: a) required to open an account with Complio, b) submit required paperwork to Complio and c) keep the requirements current for each semester, submitting documentation updates as needed.

CRIMINAL BACKGROUND CHECK and DRUG TESTING

To be approved for placement in clinical facilities, students must complete and pass criminal background checks and drug testing conducted in accordance with clinical background check and drug test requirements. The background check includes: social security number search (residency history, state and year SSN issued), criminal search (7 years), sex offender search, federal criminal search, and healthcare exclusion list.

Criminal background checks and drug testing information might be released to the Office of the NWCNHS Associate Dean for Academic Affairs. The Associate Dean or her/his designee will review the results of the NWCNHS students' criminal background checks and drug testing. A student's failure to pass the criminal background check and/or drug testing may result in non- approval for assignment to clinical facilities and may prevent the student from entering/completing the program

and/or from attaining the appropriate licensing.

Students must disclose to FIU Graduate Admissions charges and or convictions made before applying to the OT Program and to the NWCNHS during program progression. If convicted, charged with a criminal offense, or subject of any criminal proceedings, students must inform the Associate Dean of Academic Affairs or its designee, in writing within 48 HOURS of its occurrence.

Clinical agencies and professional licensing/certification may require students and applicants to provide background checks and/or drug test results directly to them. The expense associated with background checks and drug testing is the responsibility of the student.

Students must sign and submit the NWCNHS Consent and Release form.

Student's criminal background and drug testing information will be placed in secure, locked storage files within the Office of the Dean or designee. Only the NWCNHS Associate Dean and her/his designees who assist in the interview procedure will have access to the information. The student's information will be destroyed when the student graduates or upon separation from Florida International University.

Given a positive background check, the flagged incident will be reviewed by the NWCNHS Associate Dean for Academic Affairs with the Chair/Director or designee. A clearance decision will be made based on a number of factors, including but not limited to: agency requirements, date of conviction, nature of conviction, number of similar convictions, the relationship the conviction bears to professional and ethical duties and responsibilities in clinical facilities, completion of debt to society, and successful efforts in rehabilitation. If a student cannot be placed in one or more clinical agencies, that student may not progress in the program and, thus, the student will be dismissed from the program.

Students who have a flagged background check must seek an Early Determination & Character Review by NBCOT before enrolling in the OT program. Information is available at <https://www.nbcot.org/en/Students/Services>.

Students with a flagged background check must contact the Florida Occupational Therapy Board before attending classes in the OT program.

If a drug test is positive or diluted, the student will be given one additional opportunity to take a drug test **WITHIN FIVE DAYS** of receipt of the initial positive test. Students must report **ALL** medications being taken on the drug test form. The student will **NOT** be allowed to attend a clinical site unless the second drug test is negative or cleared.

Guidelines for Background Check Evaluation:

Offenses directly related to being "unsuited" for direct patient care include but are not limited to:

1. Violent Crime
2. Criminal sexual conduct I the third degree
3. Assault and battery of a high and aggravated nature
4. Unlawful neglect of a child or helpless person by a legal custodian
5. Child, elder and/or spouse abuse
6. Abuse or physical or mental injury to client or patient

7. Lewdness or indecent exposure
8. Possession, sale, and/or distribution of illegal substances
9. Administering or attempting to administer poison
10. Unlawful and malicious tampering with a human drug product or food
11. Any fraudulent practices including but not limited to Medicare/Medicaid fraud or perjury
12. A criminal offense similar in nature to above listed crimes committed in another jurisdiction or under federal law.

HIPAA, HIV/AIDS, MEDICAL ERRORS

Prior to participating in clinical experiences, students are required to complete 3 courses [HIPAA, Medical Errors and HIV/AIDS-Universal Precautions] and submit their final exams to the AFWC. Students must earn a minimum of 80% in the exam. A certificate of completion is issued to the student upon completion of the courses. The medical errors course is required for participating in fieldwork and does not meet the requirement for licensure.

HEALTH INSURANCE

Occupational therapy students are required to have major medical health insurance coverage. The student is personally responsible for his/her health care expenses. As a student health care practitioner, exposure to infectious pathogens and injury are potential hazards. Neither the University nor any of the fieldwork sites are responsible for any medical expenses that may occur while enrolled in this program. It is mandatory to have appropriate (major medical) insurance coverage in case of illness, accident or injury.

SOCIAL NETWORK POLICY

Being a health care professional, you now need to consider the following social network guidelines to ensure you are not unintentionally noncompliant with HIPPA regulations.

- When speaking with your peers while on fieldwork, you must realize that you cannot share any specific patient information on Facebook, Twitter, etc.
- It is a HIPPA violation if you mention a client/patient with enough information that the person might be identified, even if you avoid PHI. The consequences for violations, as you know, are severe.
- Names of supervisors, comments, and/or criticism about sites or information about what is happening at sites are not appropriate on social network sites.
- Students should not put posts or photos on social networks about fieldwork experiences (including location, clients, diagnosis, treatment, fieldwork educators and staff etc...).
- Publicizing where you are placed for fieldwork is up to you, but there might be problems with you being identified. Consider if you want privacy from clients, patients and staff.
- Use your official FIU e-mail address for all professional correspondence needed for all fieldwork related issues.

- Do not ask your supervisor to “friend” you while on fieldwork. This puts your supervisor and yourself in an awkward situation where personal information about each other can be accessed. If you mutually decide to do this after the fieldwork experience, this is your personal choice.
- If there are any questions or you are unsure of something regarding social networking, contact your FWE or Academic Fieldwork Coordinator for advice.
- If you are attached to your cell phone and have to look at it constantly, it is advised you leave your cell phone in your car or in the office so you are not tempted to pull it out while you are with a patient, caregivers, your FWE, etc.
- Consider what you post on any social networking site. Many potential employers go to these sites to see what you have posted and often determine if they are interested in having you as an employee. Consider typing your name in the web to discover what others can see about you on the Internet.

ATTENDANCE

Students are required to complete 24 weeks of level II fieldwork experiences. This is a requirement mandated by AOTA for accredited programs. There may be situations in which the student must complete additional days or weeks in order to meet fieldwork objectives.

Any prolonged or frequent absences may jeopardize the fieldwork placement, possibly resulting in a cancellation of the fieldwork experience. All missed time will need to be made up. The FWE and AFWC must be contacted regarding missed time.

Students are allowed two (2) excused absences per each level II fieldwork for emergencies only. Any additional time or leave for personal reasons must be made up.

Holiday time will be determined by each individual facility. Students are expected to adhere to the facility policies, therefore if your supervisor is working a holiday you also will be required to work. If a student requires leave time for a religious holiday, they must arrange to make up the days.
Contact the FWE regarding religious holidays.

Students are expected to follow the facilities work schedules. Many facilities work 6-7 days a week with flexible scheduling. Students will be required to follow their supervisor’s schedule, which may require working on Saturday and/or Sunday, or ten-hour days. The students work time should not exceed the full time schedule for the facility (usually 40 hours).

FIELDWORK SITES POLICIES & PROCEDURES

It is the student’s responsibility to obtain and/or inquire about the facility’s “Policies and Procedures”. The student is expected to adhere to all policies and procedures of the clinical facility. Failure to comply with facility policies and procedures may result in early termination of an internship and a failing grade.

INJURIES to the STUDENT

If a student is involved in an accident, personal injury or injury to a client while on fieldwork, the

student must:

- report the incident to the FWE
- follow the site's policies and procedures
- Immediately notify the FWE, FWEC, and AFWC
- Provide the AFWC with a copy of any incident reports (if available) that are completed. In the event that a copy of incident report is not available for the student to provide to the AFWC, the student must document the incident and include the date, time, location, and details to the best of their knowledge and submit this information to the AFWC.
- Complete and FIU incident report

Students are responsible for the management and costs incurred if they are injured during a fieldwork experience. Absences will be handled as stated under section "Absences", and may require documented proof of ability to return to the fieldwork site.

If a student is injured during the internship timeframe, but not at the facility, absences will be handled as indicated under section "absences", and may require documented proof of ability to return to the clinical affiliation. *Neither the fieldwork site nor FIU has any responsibility for the injury.*

FIELDWORK SITE VISITS

Knowledge of the clinical education programs is an important aspect of the AFWC's job. Periodic visits are made to programs, within geographic capabilities. Telephone communication is used extensively. Any site should expect and request the assistance of the fieldwork coordinator while students are completing fieldwork experiences. Every attempt will be made to visit any student whose performance on fieldwork is problematic.

During level II fieldwork, every student and FWE will receive a site visit or phone call at midterm.

REASONABLE ACCOMMODATIONS

The OT Department makes every effort to comply with the Americans with Disabilities Act (ADA) and the University's policies. Students with disabilities that may affect their fieldwork performance may request reasonable accommodation(s) for clinical placements. Students must be eligible under the definitions of the ADA in order to request accommodation and must be registered with the Disability Resource Center at FIU (<http://drc.fiu.edu>). Students with disabilities are encouraged to work with FIU's Disability Resource Center to develop a request for reasonable accommodations that would allow for successful completion of the fieldwork component of their program.

Students have the choice of disclosing a disability prior to starting fieldwork. Students who neglect to do so may find that the site cannot accommodate their needs at the last minute. The AFWC will work with students requiring accommodation to provide the student equal opportunities in fieldwork while meeting their individual needs.

GRADING

Assignments for level I fieldwork will be graded by the instructor of the related course (refer to the course syllabus for grading). Level I (OTH5843); (OTH 5430L), and level II (OTH 5845 & OTH 5846) fieldwork are graded Pass/Fail. Students at fieldwork must satisfactorily complete all associated assignments.

For level II fieldwork, each student's performance on fieldwork must be evaluated using the standard AOTA Fieldwork Performance Evaluation (FWPE). The FWPE is a formal assessment tool for evaluating a student's competence at the completion of a level II experience (C.1.18). The Fieldwork Performance Evaluation evaluates the student's competence for entry-level occupational therapy practice. Performance items include: Fundamentals of Practice, Basic Tenets of OT, Evaluation and Screening, Intervention, Management of OT Services, Communication, and Professional Behaviors. In order to successfully pass the level II fieldwork, the student must earn a minimum score of 122 and score at least a "3" in the Fundamentals of Practice items (ACOTE C.1.18).

The deadline for submission of grades for fieldwork to the Registrar follows the regular academic calendar. Students whose completion of fieldwork is "out-of sync" with the academic calendar will receive an incomplete (IN) until they have successfully completed the fieldwork experience. Passing grades will only be earned when the completed FWPE and required documents have been received by the Academic Fieldwork Coordinator. Final fieldwork evaluations are kept in the individual student's record in the Occupational Therapy Department Office at FIU and are not sent to AOTA.

WITHDRAWAL/TERMINATION of FIELDWORK

Students who withdraw from a fieldwork or are asked to withdraw due to inadequate performance will receive a *failing* (F) grade for that fieldwork. Inadequate performance may include unprofessional workplace behaviors, poor skill performance, poor clinical judgment, and any behaviors that put a patient/client at a safety risk. If an internship is terminated due to inadequate performance, there will **not** be any credit granted for partial time completed.

Any student who fails or withdraws from a fieldwork loses the right to choose clinical placement sites. Students who withdraw or are withdrawn from a scheduled fieldwork are not eligible to start another fieldwork until the next scheduled rotation. A student who marginally passes a fieldwork may be required to complete an additional fieldwork.

Students will be placed a maximum of three (3) times for clinical sites. The student will be required to meet with the AFWC and may be required to sign a contractual letter regarding responsibilities for subsequent clinical placements. Students who fail an internship may repeat one and only one internship. Students who fail two clinical internships will be dismissed from the program. Students who need to withdraw from a fieldwork due to illness are required to provide a physician's statement indicating the student's ability to resume full duties before being rescheduled for a clinical internship.

Students who have not completed six months of level II fieldwork are not eligible to receive their Master of Science degree in occupational therapy. Students must complete all level II fieldwork within 24 months of the completion of the didactic coursework.

WHAT TO DO IF THE STUDENT IS HAVING DIFFICULTY DURING FIELDWORK?

1. Discuss the issues with the fieldwork educator.
2. Keep a journal of meetings with the fieldwork educator. Document challenges, as well as strengths, weaknesses, and activities performed.
3. Contact the AFWC to discuss options for a successful continuation and completion of your fieldwork. A site visit may be suggested to discuss the issues presented. It is recommended that a Corrective Action Plan be completed at this time (Appendix XIII).

APPEALS

Students desiring to appeal a fieldwork grade may do so by following the NWCNHS policies and procedures. Refer to Appendix XIV.

LICENSURE

State licensure in Florida requires successful completion of the National Board for Certification in Occupational Therapy (NBCOT) examination. A felony conviction may affect a graduate's ability to sit for the NBCOT Certification Examination or attain state licensure. Students should be aware that it is difficult (or impossible) to obtain a license if they have ever been convicted, plead guilty, or nolo contendere to a felony violation.

For the specific statutes that regulate the practice of occupational therapy in Florida, go to <https://floridasoccupationaltherapy.gov/resources/>.

The laws vary but, in some states including Florida, graduates can obtain a temporary license after successfully completing their level II fieldwork and PRIOR TO CERTIFICATION. The requirements for licensure may be found in Chapter 468, Part III, Florida Statutes and Rule Chapter 64B11, Florida Administrative code. For specific requirements and deadlines, check the Florida Board of Occupational Therapy website <https://floridasoccupationaltherapy.gov/licensing/occupational-therapist>.

Students who plan to work outside of Florida need to follow the requirements for the state in which they intend to practice and are responsible for all necessary procedures.

NATIONAL CERTIFICATION EXAMINATION:

Once a student has successfully completed all academic and level II fieldwork requirements, he/she is eligible to sit for the National Certification Examination. The National Board for Certification in Occupational Therapy (NBCOT) offers continuous, computer-delivered, on-demand testing.

Students are responsible for obtaining the NBCOT Certification Examination Schedule, Candidate Handbook, and application form from NBCOT and submitting examination application and application related documents (e.g., special accommodations documentation) to

NBCOT.

Steps for applying for the NBCOT exam:

1. Check PantherSoft for grades and degree to be posted
2. Request from the Office of the Registrar official transcripts (with degree posted) to be sent to NBCOT. Check <https://www.nbcot.org/> for details.
3. Complete NBCOT application form.
4. When the candidate's application is complete at NBCOT (i.e., application filed, fees paid, official transcript filed, and any other required examination-related documentation is filed), NBCOT will send the candidate the "Authorization to Test" (ATT) letter. Upon receipt, the candidate may schedule a time to take the certification examination at a Prometric Test Center.

References:

American Occupational Therapy Association. (2003). Role competencies for an academic fieldwork coordinator. *American Journal of Occupational Therapy*, 58, 6, 653-654. Retrieved from <http://ajot.aota.org/> on 07/05/2017.

Accreditation Council for Occupational Therapy Education. (2012). 2011 Accreditation Council for Occupational Therapy Education (ACOTE) standards and interpretive guide. *American Journal of Occupational Therapy*, 66(Suppl.), S6-S74. <http://dx.doi.org/10.5014/ajot.2012.6656>.

Christiansen, C., & Baum, C., Bass-Haugen, J. (2005). *Occupational therapy: Performance, participation, and well-being* (3rd ed.). Thorofare, NJ: Slack Incorporated.

APPENDICES

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Curriculum Design

The Occupational Therapy Department at Florida International University selects facilities for fieldwork experiences which meet educational objectives reflective of the sequence, depth, focus and scope of content in the curriculum design.

Our curriculum follows a developmental curricular sequence and adopts the Blooms' Taxonomy. Fieldwork is in the Professional Practice Skills section of the Curricular Sequence. Following foundations, occupational performance and adaptation across the lifespan. Level I fieldwork is embedded in courses focused on the occupational process of assessment and planning, and then intervention. The level I fieldwork links what students have learned about the occupational therapy process with opportunities to acquire practice skills. Students are given the opportunity to apply, analyze, evaluate and begin to create assessment and intervention plans appropriate to individuals and populations. Level II FW is the final aspect of the curriculum. It follows all didactic work and prepares the student for entry-level practice. During the level II fieldwork, students are expected to use higher levels of knowledge such as: continue drawing connections among ideas, justify decisions, and create original work. The curricular themes, occupational performance, evidence-based practice, culture, and community engagement are reinforced throughout all fieldwork experiences.

Our curriculum uses the Person-Environment-Occupation-Performance (PEOP) Model revised by Christiansen, Baum, & Bass-Haugen in 2005. This conceptual model of practice organizes the dynamic, complex relationship between people, environments, and occupational performance.

Students acquire knowledge and understanding about the person's factors, including psychological, cognitive, neurobehavioral, physiological, and spiritual capacities and constraints. By understanding the Person-Environment-Occupation-Model, students recognize that when following a frame of reference that primarily addresses aspects of one's personal capabilities and deficits, individual roles and environmental issues equally contribute to occupational performance.

Environmental issues that may enable or create barriers include social support mechanisms, social policies and attitudes, cultural norms and values, and physical settings and geography. These factors make up the context for individual occupational performance. Students examine physical barriers within existing structures and recognize the importance and need for universal design. Learning experiences to explore cultural norms and values are embedded in courses that focus on individual and community service delivery. Students are given opportunities to analyze and appreciate the significance of complex systems, from service delivery models to larger political-economic structures.


Occupational performance is central to the PEO Model, thus, occupation is embedded throughout the curriculum. Students learn the meaning of both, individual and cultural occupations. They analyze the underlying demands of occupation, such as the cognitive, motor, sensory, and perceptual components. Students develop therapeutic plans using occupations to promote, restore, or enable occupational performance.

Although other models and frames of reference are utilized throughout the curriculum, the PEO Model provides a solid guide to the consideration of clients' life roles, social and physical environments, along with personal performance capacities and constraints. The PEO Model provides a structure for assimilation and integration of information leading to mastery of effective clinical reasoning in occupational therapy assessment and intervention.

References:

Christiansen, C., & Baum, C., Bass-Haugen, J. (Eds.). (2005). *Occupational therapy: Performance, participation, and well-being* (3rd ed.). Thorofare, NJ: Slack Incorporated.

As a fieldwork coordinator/educator, I am aware of the curricular design used by the OT Department at FIU.

PRINT Name	
Signature	
Facility	
Date	



Level I Fieldwork Qualified Supervisor

Dear Fieldwork Educator:

Thank you for agreeing to supervise our student, _____ during the student's Level I fieldwork experience.

The Accreditation Council for Occupational Therapy Education (ACOTE) standard C.1.9 requires that *"qualified personnel supervise Level 1 fieldwork. Examples include, but are not limited to: currently licensed or otherwise regulated OTs, OTAs, psychologists, physician assistants, teachers, social workers, nurses and PTs"*.

This form demonstrates that the fieldwork educator, in collaboration with our program, complies with the above standard.

A certificate of verification of fieldwork supervision will be sent to the fieldwork educator when the OT Department receives the student's final evaluation and all required paperwork. Please print or type the following information.

Name of Facility: _____

Name of Fieldwork Educator: _____

Credentials/Title: _____ Yrs. Experience: _____

Email: _____ License # _____ Exp. Date: _____

Thank you for your support to fieldwork education.

Alma R. Abdel-Moty, Dr. OT, MS, OTR/L
Academic Fieldwork Coordinator
Abdela@fiu.edu
Phone: 305-348-3092
Fax: 305-348-1240

STUDENT: After your FWE completes the form, email it to otfw@fiu.edu at least **ONE WEEK PRIOR** to the start of your fieldwork experience.

"We are fueled by intellect; driven by innovation and caring."

Occupational Therapy Department
11200 SW 8th Street, AHC3 442A, Miami, FL 33199
Tel: 305-348-2922 Fax: 305-348-1240



**Student's Performance Evaluation
Level I Fieldwork- SUMMER**

Complete the following in print.

Name of Student: _____

Name of Supervisor & Email: _____

Name of Facility: _____

Type of Facility: _____

Dates of Placement: from _____ to _____

Instructions: This evaluation is to be completed by the identified fieldwork educator for the level I experience. All items must be scored using the following scale:

4	Exceeds standards – Frequently carries out required tasks and activities that surpass requirements. At times, performance is exceptional.	65-80 points
3	Meets standards – Carries out required tasks and activities. Performance is consistent with the expectations of a level I student. This is an expected final score.	64 points
2	Needs improvement – Opportunities for improvement exist. However, student has not demonstrated adequate response to feedback. Performance is occasionally unacceptable.	63 points
1	Unsatisfactory – Performance is below standards and requires significant further development. This rating is given when there is a concern about performance.	62 points or less
If a student earns a score of 2 or less, please add comments about the student's performance & professional behaviors. A student must earn a minimum score of 84 points to pass.		

I. FUNDAMENTALS OF PRACTICE - The student:	1	2	3	4
1. Adheres consistently to the fieldwork site ethical standards. Follows ethical standards for fieldwork site. Abides by HIPAA and FERPA. Respects privacy of client.				
2. Adheres consistently to safety regulations, & uses sound judgment to ensure safety.				
II. FOUNDATIONS OF OCCUPATIONAL THERAPY – The student:	1	2	3	4
3. Articulates values and beliefs of occupational therapy. Verbalizes definition of OT as relevant to the fieldwork site or audience.				
III. PROFESSIONAL BEHAVIORS	1	2	3	4
4. Time management skills. Consider student's ability to be prompt, arriving and completing assignments on time.				
5. Organization. Consider the student's ability to be set priorities, be dependable, be organized, and follow through with responsibilities.				
6. Engagement in fieldwork experience. Consider student's apparent level of interest, level of active participation while on site, & investment in individuals and treatment outcomes.				
7. Self-directed learning. Consider student's ability to take responsibility for own learning and to demonstrate motivation.				

	1	2	3	4
8. Reasoning & problem solving. Consider student's ability to take responsibility for own learning and to demonstrate motivation.				
9. Initiative. Consider student's initiative, ability to seek and acquire information from variety of sources, and demonstrate flexibility as needed.				
10. Observation skills. Consider student's ability to observe relevant behaviors related to occupational performance and client factors and to verbalize perceptions and observations.				
11. Participation in supervisory process. Consider student's ability to give, receive, and respond to feedback; seek guidance when necessary; and follow proper channels of communication.				
12. Verbal communication & interpersonal skills with patients/clients, staff, and caregivers. Consider student's ability to interact appropriately with individuals, such as eye contact, empathy, limit-setting, respectfulness, use of authority, and so forth; degree and quality of verbal interactions; use of body language and non-verbal communication; and exhibition of confidence.				
13. Professional & personal boundaries. Consider student's ability to recognize ⁷ handle personal & professional frustrations; balance personal & professional obligations; handle responsibilities; work with others cooperatively, considerately, and effectively; and be responsive to social cues.				
14. Respects the views of others.				
15. Demonstrates respect for others at all times.				
16. Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choice.				
IV. SCREENING/EVALUATION	1	2	3	4
17. Contributes to screening/evaluation process. Identifies resources. Could include chart review. Assists with set-up/clean-up.				
18. Demonstrates awareness of client factors and contexts that support or hinder occupational performance.				
V. INTERVENTION	1	2	3	4
19. Contributes to the intervention process. Could include preparing area, identifying resources and evidence.				
20. Identifies interventions consistent with client evaluation and goals. Student collaborates to the selection of relevant occupations to facilitate meeting established goals.				

COMMENTS:

Student's signature: _____

Date: _____

Fieldwork educator's Signature: _____

Date: _____



**Student Evaluation of Clinical Experience
 Level I - Fieldwork**

Student Name: _____ Signature: _____

Facility Name & Address: _____

Fieldwork Dates: _____ Today's Date: _____

Assessments	Observed	Assisted	Diagnoses	Comments

Clients' profile: Check age group

List most commonly seen occupational performance issues in this clinical site:

Age	
0 – 5 years old	
6 – 12 years old	
13 – 21 years old	
22 – 64 years old	
65+ years old	

1.	
2.	
3.	
4.	
5.	
6.	

List other experiences provided (Ex: conferences, home visits, etc.):

Student Preparation by FIU:

- Skills Most Useful: _____
- Additional Skills Needed: _____
- What advice do you have for future students who wish to prepare for this placement? _____
- Would you recommend this fieldwork site to other students? Yes _____ No _____
- Overall, what changes, if any, would you recommend to this fieldwork experience? _____

Summary: Considering your overall experience, please rate this clinical as a learning experience:

- Excellent Very Good Good Poor

Add any further comments, descriptions, or information concerning your fieldwork at this site:

Fieldwork Educator's Name _____

Fieldwork Educator's Signature _____

Date _____



Level II Fieldwork Student Supervision Agreement

Dear Fieldwork Educator:

Thank you for agreeing to supervise our student, _____ during the student’s Level II fieldwork experience.

The following standards are required by The Accreditation Council for Occupational Therapy Education:

C.1.3 states that, *“academic and fieldwork educators collaborate in establishing fieldwork objectives and communicate with the student and fieldwork educator about progress and performance during fieldwork”*.

C.1.14 states that for a level II experience, *“the student is supervised by a currently licensed OT who has a minimum of 1 year full-time practice experience subsequent to initial certification”*.

C.1.16 states that *“initially, supervision should be direct and then decrease to less supervision, as appropriate for the setting”*.

This form demonstrates that the fieldwork educator, in collaboration with our program, complies with the above standards.

A certificate of verification of fieldwork supervision will be sent to the fieldwork educator when the OT Department receives the student’s final evaluation and all required paperwork. Please print or type the following information:

Name of Facility:

Name of Fieldwork Educator:

Signature of Fieldwork Educator:

Credentials/Title:

Yrs. of Experience:

Email:

License #:

Exp. Date:

Thank you for your support of fieldwork education.

Alma R. Abdel-Moty, Dr. OT, MS, OTR/L
Academic Fieldwork Coordinator
abdela@fiu.edu
Phone: 305-348-3092

STUDENT: After your FWE completes the form, email it to otfw@fiu.edu at least **ONE WEEK PRIOR** to the start of your fieldwork experience.

Appendix VI: Summary of Clinical Visitation Form



Summary of Clinical Visitation - Level II Fieldwork

Faculty: _____

Student: _____

Fieldwork Educator: _____

Date of Visit/Call (circle one): _____

Setting: _____

Facility and Location: _____

DISCUSSION WITH FWE	DISCUSSION WITH STUDENT
<p>Fundamentals of Practice (ethics and safety)</p> <p>On track: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Fundamentals of Practice (ethics and safety)</p> <p>On track: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Basic Tenets of Occupational Therapy (values & beliefs)</p> <p>On track: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Basic Tenets of Occupational Therapy (values & beliefs)</p> <p>On track: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Evaluation and Screening (selects, assess, interprets, establishes, documents)</p> <p>On track: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Evaluation and Screening (selects, assess, interprets, establishes, documents)</p> <p>On track: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Intervention (selects & implements)</p> <p>On track: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Intervention (selects & implements)</p> <p>On track: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>

<p>Communication (with patients/family, staff, meetings, FWE, delegation to OTA)</p> <p>On track: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Communication (with patients/family, staff, meetings, FWE, delegation to OTA)</p> <p>On track: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Professional Behaviors (professionalism, initiative, motivation, response to feedback)</p> <p>On track: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Professional Behaviors (professionalism, initiative, motivation, response to feedback)</p> <p>On track: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Supervision</p> 	<p>Supervision</p>
<p>Areas identified by FWE as needing improvement?</p> 	<p>Areas identified by student as needing improvement?</p>
<p>Is a follow up call/visit necessary? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> 	

STUDENT EVALUATION OF THE FIELDWORK EXPERIENCE (SEFWE)

Purpose:

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

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

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

Instructions to the Student:

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

Instructions to the Fieldwork Educator(s):

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

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

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

STUDENT EVALUATION OF THE FIELDWORK EXPERIENCE

Fieldwork Site: _____

Address: _____

Type of Fieldwork: _____

Placement Dates: from _____ to _____

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

Student work schedule:

Hours required: _____ per week

Weekends required Evenings required

Flex/Alternate Schedules Describe: _____

Identify Access to Public Transportation: _____

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

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

Experience report on _____
(date)

Student's Signature

FW Educator's Signature

Student's Name (Please Print)

FW Educator's Name and credentials (Please Print)

FW Educator's years of experience _____

ORIENTATION—WEEK 1

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

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

CLIENT PROFILE

Check age groups worked with

List most commonly seen occupational performance issues in this setting

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

Occupational Performance Issues

Describe the typical population: _____

OCCUPATIONAL THERAPY PROCESS

I. EVALUATION

List assessment tools used	Observed	Performed

II. INTERVENTION

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

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

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

Identify theory(ies) that guided intervention: _____

III. OUTCOMES

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

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

**OTPF-III terminology

ASPECTS OF THE ENVIRONMENT

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

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

Additional educational opportunities provided with comments (specify): _____

DOCUMENTATION AND CASE LOAD

Documentation Format:

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

If electronic, name format & program: _____

Time frame & frequency of documentation: _____

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

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

SUPERVISION

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

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

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

General comments on supervision: _____

SUMMARY of FIELDWORK EXPERIENCE

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

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

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

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

Study the following evaluations:

Study the following intervention methods:

Read up on the following in advance:

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

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

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

Why or why not? _____

INSTRUCTIONS

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

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

FIELDWORK EDUCATOR NAME: _____

FIELDWORK EDUCATOR YEARS OF EXPERIENCE: _____

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

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

Comments: _____



Fieldwork Performance Evaluation For The Occupational Therapy Student

MS./MR.
NAME: (LAST) (FIRST) (MIDDLE)

COLLEGE OR UNIVERSITY

FIELDWORK SETTING:

NAME OF ORGANIZATION/FACILITY

ADDRESS: (STREET OR PO BOX)

CITY STATE ZIP

TYPE OF FIELDWORK

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

FROM: TO:
DATES OF PLACEMENT

NUMBER OF HOURS COMPLETED

FINAL SCORE

PASS: _____ **NO PASS:** _____

SUMMARY COMMENTS:
(ADDRESSES STUDENT'S CLINICAL COMPETENCE)

SIGNATURES:
I HAVE READ THIS REPORT.

SIGNATURE OF STUDENT

NUMBER OF PERSONS CONTRIBUTING TO THIS REPORT

SIGNATURE OF RATER #1

PRINT NAME/CREDENTIALS/POSITION

SIGNATURE OF RATER #2 (IF APPLICABLE)

PRINT NAME/CREDENTIALS/POSITION

AOTA grants permission to photocopy the *Fieldwork Performance Evaluation for the Occupational Therapy Student* for training purposes only. Training purposes encompass using the FWPE forms in student notebooks and training manuals for clinical fieldwork sites, in training sessions for practitioners on the proper use and scoring of the forms, and for students to complete a self-analysis during their fieldwork training. Permission to use the forms must be submitted to copyright@aota.org

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 Therapy¹.

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 Standards² and the National Board for Certification in Occupational Therapy, Inc. Practice Analysis results³. In addition, this evaluation allows students to evaluate their own strengths and challenges in relation to their performance as an occupational therapist.

USE OF THE FIELDWORK PERFORMANCE EVALUATION FOR THE OCCUPATIONAL THERAPY STUDENT

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

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

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

DIRECTIONS FOR RATING STUDENT PERFORMANCE

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

OVERALL MIDTERM SCORE

Satisfactory Performance 90 and above
Unsatisfactory Performance 89 and below

OVERALL FINAL SCORE

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

RATING SCALE FOR STUDENT PERFORMANCE

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

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

2 — **Needs improvement:** Performance is **progressing but** still needs improvement for entry-level practice. This is a **realistic rating of 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**.

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 Ethics⁴ 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 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
-------	---	---	---	---

24. **Modifies task approach, occupations, and the environment** to maximize client performance.

Midterm	1	2	3	4
---------	---	---	---	---

Final	1	2	3	4
-------	---	---	---	---

25. **Updates, modifies, or terminates the intervention plan** based upon careful monitoring of the client's status.

Midterm	1	2	3	4
---------	---	---	---	---

Final	1	2	3	4
-------	---	---	---	---

26. **Documents client's response** to services in a manner that demonstrates the efficacy of interventions.

Midterm	1	2	3	4
---------	---	---	---	---

Final	1	2	3	4
-------	---	---	---	---

Comments on strengths and areas for improvement:

- **Midterm**

- **Final**

V. MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES:

27. **Demonstrates through practice or discussion the ability to assign** appropriate responsibilities to the occupational therapy assistant and occupational therapy 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	Midterm Ratings	Final Ratings
I. FUNDAMENTALS OF PRACTICE		
1. Adheres to ethics		
2. Adheres to safety regulations		
3. Uses judgment in safety		
II. BASIC TENETS OF OCCUPATIONAL THERAPY		
4. Articulates values and beliefs		
5. Articulates value of occupation		
6. Communicates role of occupational therapist		
7. Collaborates with clients		
III. EVALUATION AND SCREENING		
8. Articulates clear rationale for evaluation		
9. Selects relevant methods		
10. Determines occupational profile		
11. Assesses client and contextual factors		
12. Obtains sufficient and necessary information		
13. Administers assessments		
14. Adjusts/modifies assessment procedures		
15. Interprets evaluation results		
16. Establishes accurate plan		
17. Documents results of evaluation		
IV. INTERVENTION		
18. Articulates clear rationale for intervention		
19. Utilizes evidence to make informed decisions		
20. Chooses 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		
V. MANAGEMENT OF OT SERVICES		
27. Demonstrates ability to assign through practice or discussion		
28. Demonstrates ability to collaborate through practice or discussion		
29. Understands costs and funding		
30. Accomplishes organizational goals		
31. Produces work in expected time frame		
VI. COMMUNICATION		
32. Communicates verbally and nonverbally		
33. Produces clear documentation		
34. Written communication is legible		
35. Uses language appropriate to recipient		
VII. PROFESSIONAL BEHAVIORS		
36. Collaborates with supervisor		
37. Takes responsibility for professional competence		
38. Responds constructively to feedback		
39. Demonstrates consistent work behaviors		
40. Demonstrates time management		
41. Demonstrates positive interpersonal skills		
42. Demonstrates respect for diversity		
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

1. American Occupational Therapy Association. (1998). Standards of practice for occupational therapy. *American Journal of Occupational Therapy*, 52, 866–869.
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4. American Occupational Therapy Association. (2000). Occupational therapy code of ethics (2000). *American Journal of Occupational Therapy*, 54, 614–616.
5. American Occupational Therapy Association (2002). Occupational therapy practice framework: Domain and process. *American Journal of Occupational Therapy*, 56, 606–639.

GLOSSARY

Client Factors: Those factors that reside within the client and that may affect performance in areas of occupation. Client factors include body functions and body structures

- body functions (a client factor, including physical, cognitive, psychosocial aspects)—“the physiological function of body systems (including psychological functions)” (WHO, 2001, p.10)
- body structures—“anatomical parts of the body such as organs, limbs and their components [that support body function]” (WHO, 2001, p.10)

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

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

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

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

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

Efficacy: Having the desired influence or outcome (from Neistadt and Crepeau, eds. *Willard & Spackman's Occupational Therapy*, 9th edition, 1998)

Entry-level practice: Refer to American Occupational Therapy Association (1993). Occupational therapy roles. *American Journal of Occupational Therapy*, 47, 1087–99.

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?”, 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, ed., 1997, *Enabling Occupation: An Occupational Therapy Perspective*, p.181)

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

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

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

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

Level II Fieldwork Site Specific Objectives Checklist

for use with:

The AOTA Fieldwork Performance Evaluation (for the Occupational Therapy Student)



Prepared by:

FLORIDA OCCUPATIONAL THERAPY EDUCATIONAL CONSORTIUM (FLOTEC)

Please check one:

_____ As a fieldwork site for students from **Florida International University**, we currently utilize the goals as stated in the program fieldwork handbook/website (<http://cnhs.fiu.edu/ot/programs/clinical-fieldwork/index.html>) and do not have additional site specific goals.

_____ As a fieldwork site for students from **Florida International University**, we currently utilize the goals as stated in the program's fieldwork handbook/website (<http://cnhs.fiu.edu/ot/programs/clinical-fieldwork/index.html>) as well as the following site specific goals:

Site: _____

Date: _____

Fieldwork Educator/
Contact Person: _____

Phone #: _____

E-mail: _____

Fax #: _____

I. 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 below:

- 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
- 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

FWPE item #3 (con't): 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)
- Other : _____

II. 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:

- | | |
|--|---|
| <input type="checkbox"/> Client | <input type="checkbox"/> Nursing |
| <input type="checkbox"/> Families/ significant others | <input type="checkbox"/> LISCW |
| <input type="checkbox"/> OTA | <input type="checkbox"/> Psychologist |
| <input type="checkbox"/> OT | <input type="checkbox"/> CRTS |
| <input type="checkbox"/> OTA | <input type="checkbox"/> CRC |
| <input type="checkbox"/> SLP | <input type="checkbox"/> AT |
| <input type="checkbox"/> Teacher | <input type="checkbox"/> MT |
| <input type="checkbox"/> Aides | <input type="checkbox"/> 3 rd Party payers |
| <input type="checkbox"/> MDs | <input type="checkbox"/> Others: _____ |
| <input type="checkbox"/> Regulatory bodies | |
| <input type="checkbox"/> General public (e.g., promotional materials, in-services) | |

Communicates about these 3 tenets in:

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

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):

- | | |
|--|--|
| <input type="checkbox"/> Seeks & responds to client feedback | <input type="checkbox"/> Incorporates client/family priorities & interests |
| <input type="checkbox"/> Maintains client focus in sessions | <input type="checkbox"/> Tailors client/family education to individual needs |
| <input type="checkbox"/> Respectfully engages in discussion when conflict arises to address concerns | |
| <input type="checkbox"/> Provides written documentation of collaborative plan (e.g., home program) | |
| <input type="checkbox"/> Other : _____ | |

III. 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:
 - Client condition
 - Client priorities
 - Current context
 - Future context
 - Evidence
 - Psychometric properties/validity/reliability

Selects assessment based on Theories/Frames of reference pertinent to setting such as:

<input type="checkbox"/> PEOB	<input type="checkbox"/> Sensory integrative
<input type="checkbox"/> Biomechanical	<input type="checkbox"/> NDT
<input type="checkbox"/> Behavioral	<input type="checkbox"/> Functional group model
<input type="checkbox"/> Acquisitional	<input type="checkbox"/> MOHO
<input type="checkbox"/> Psychodynamic	<input type="checkbox"/> Occupational adaptation
<input type="checkbox"/> Cognitive behavioral	<input type="checkbox"/> Ecology of human performance
<input type="checkbox"/> DBT	<input type="checkbox"/> Rehabilitation
<input type="checkbox"/> Sensory processing	<input type="checkbox"/> Clinical reasoning
<input type="checkbox"/> Developmental	<input type="checkbox"/> Cognitive/ cognitive disability
<input type="checkbox"/> Motor learning	<input type="checkbox"/> Coping
<input type="checkbox"/> Other:	<input type="checkbox"/> Other
<input type="checkbox"/> Other:	<input type="checkbox"/> 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): _____
- Occupational history
- Client successes/ strengths
- Priorities
- Influence of environment/context

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, cultural variables such as:

- Fatigue
- O2 sat/respiration rate
- BP/heart rate
- Frustration tolerance
- Anxiety
- Concerns: safety (please specify): _____
- Cultural beliefs, values, customs, expectations
- Other: _____
- Cognitive status
- Pain
- Language
- Attention
- Inability to perform task
- Refusal
- acuity

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.)
- Other: _____
- Observation of client's performance
- Client's stated values, beliefs/motivations
- Identified problems/needs

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 (<http://www.otcats.com/index.html>)
- 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 (www.canchild.ca/en/canchildresources/educationalmaterials.asp#CriticalReview)
- 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, measurable, realistic, attainable, time-limited
- Utilizes outcome measurement methods when available or per setting policies

Other: _____

IV. INTERVENTION

FWPE item #18: Articulates a clear and logical rationale for intervention process:

- | | |
|--|--|
| <input type="checkbox"/> Verbally in supervision sessions | <input type="checkbox"/> Verbally in client sessions |
| <input type="checkbox"/> Via written assignments (journal, case study) | <input type="checkbox"/> In pt education materials |
| <input type="checkbox"/> Via sharing EBP article reviews | <input type="checkbox"/> In written documentation |
| <input type="checkbox"/> In rounds/team meetings | <input type="checkbox"/> Via in-services |
| <input type="checkbox"/> Other: _____ | |

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)
(www.aota.org/Educate/Research.aspx; <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
- Other: _____

FWPE items #20 & 21: Chooses relevant occupations that motivate & challenge clients to facilitate meeting established goals based on client's:

- | | |
|---|--|
| <input type="checkbox"/> Condition/Status | <input type="checkbox"/> Psychosocial needs |
| <input type="checkbox"/> Progress | <input type="checkbox"/> Current context & resources |
| <input type="checkbox"/> Stated interests | <input type="checkbox"/> Future context & resources |
| <input type="checkbox"/> Beliefs & values | |
| <input type="checkbox"/> Other: _____ | |

FWPE items #22 & 23: Implements client & occupation based intervention plans considering areas of occupation/outcomes such as:

- | | |
|---|--|
| <input type="checkbox"/> Role competence | <input type="checkbox"/> Leisure |
| <input type="checkbox"/> ADL | <input type="checkbox"/> Adaptation |
| <input type="checkbox"/> Play Work | <input type="checkbox"/> Health/wellness |
| <input type="checkbox"/> IADL | <input type="checkbox"/> Quality of life |
| <input type="checkbox"/> Sleep/rest | <input type="checkbox"/> Self advocacy |
| <input type="checkbox"/> Social participation | <input type="checkbox"/> Occupational (social) justice |
| <input type="checkbox"/> Education | |
| <input type="checkbox"/> Other: _____ | |

FWPE item #24: Modifies task, approach, occupations & environment to maximize client performance by:

- | | |
|---|--|
| <input type="checkbox"/> Adapting sequence of activity & objects used | <input type="checkbox"/> ↑↓ Amount of physical assistance provided |
| <input type="checkbox"/> ↑↓ sensory input | <input type="checkbox"/> ↑↓ Social demand (1:1 vs. group, family vs. peer(s), rules/norms) |
| <input type="checkbox"/> ↑↓ Visual/verbal cues | <input type="checkbox"/> ↑↓ Amount of emotional/behavioral support provided |

- Changing length/frequency/timing of sessions
 - ↑↓ Cognitive demand
 - Physical requirements
 - Promoting ↑ safety (↑awareness, education/feedback, environmental)
 - Other: _____
- 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: _____

V. MANAGEMENT OF OCCUPATIONAL THERAPY 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 (www.aota.org/Practitioners/Licensure/StateRegs/Supervision/36455.aspx)
- 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 (www.aota.org/Practitioners/Official.aspx)
- 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
- Other: _____

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)
- Other: _____

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:
- 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 per week
- 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: _____

VI. 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 proof reading, 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 conducive 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: _____

VII. 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

Signature

Date



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

Site:

Date:

Formal Assessment Tools	Expected to gain Proficiency	Expected to gain familiarity	Expected to gain awareness/observe
Allen Cognitive Level Screening:			
Allen Diagnostic Module			
Ashworth Scale (Tone)			
Assessment of Motor & Perceptual Skills			
Bay Area Functional Performance Evaluation			
Beery Visual Motor Integration test			
Box and Block test			
Borgs Scale: Rate of Perceive Exertion			
Bruininks-Oseretsky Test -2			
Children's Assessment of Participation & Enjoyment/Preference for Activities of Children			
Children's Occupational Self Assessment			
Canadian Occupational Performance Measure			
Cognitive Assessment of Minnesota			
Coping Inventory			
Crawford Small parts Dexterity Test			
Dynamometer			
Early Coping Inventory			
Functional Independence Measure:			
Global Deterioration Scale			
Goniometry			
Hawaii Early Learning Profile			
Jepson Hand Function Test			
Kitchen Task Assessment			
Kohlman Evaluation of Living Skills			
LOTCA			
Manual Muscle Testing			
MOCA(Montreal Cognitive Assessment)			
Mini Mental State:			
Motor-Free Visual Perception Test (MVPT-3)			
Moberg Pick Up Test:			
Nine Hole Peg Test			
Occupational Performance History Interview			
Occupational Self Assessment			
Peabody Developmental Motor Scale:			
Pediatric Evaluation of Disability (PEDI)			
Piers Harris Children's Self Concept Scale			
Pinch Meter			
Purdue Pegboard			
Routine Task Inventory			
School Function Assessment (SFA)			
Sensory Integration & Praxis Tests			
Semmes-Weinstein Monofilament:			
Sensory Profile			

Appendix X: Fieldwork Facility Selection Form

FLORIDA INTERNATIONAL UNIVERSITY
Nicole Wertheim College of Nursing and Health Sciences
Occupational Therapy Department
Fieldwork Facility Selection Form
Level II – Summer

INSTRUCTIONS: Please PRINT your name and current information below as well as your fieldwork site choices in equal order of preference. Placement will be assigned based on availability.

Name: _____

Address: _____

Phone: _____

Email: _____

Languages: _____

Please circle one or both: Speak / Understand

Where did you complete your 1 month fieldwork?: _____

Date of Internship: _____

Please type or print neatly facility name and address

1: _____

2: _____

3: _____

4: _____

5: _____

Please return to Dr. Alma Abdel-Moty by the due date.

If you have any questions, stop by my office AHC3-421A or email me at abdela@fiu.edu



Nicole Wertheim College of Nursing & Health Sciences
FLORIDA INTERNATIONAL UNIVERSITY
Occupational Therapy Department

**Personal Data Form
Level II Fieldwork**

PERSONAL INFORMATION

Name:

Permanent home address:

Email Address:

Phone number:

Emergency Contact to be notified in case of accident or illness

Name:

Address:

Phone number:

EDUCATION INFORMATION

1. **Expected degree:** MS in OT
2. **Anticipated year of graduation:**
3. **Prior degrees earned:**
4. **Foreign languages read:** **Spoken:**
5. **Current CPR certification card date of expiration:**

HEALTH INFORMATION

1. **Health Insurance**
Name of company: **Subscriber #:**
Group #:
2. **Date of last TB Test or chest x-ray:**
(If positive for TB, tine test is not given)

PREVIOUS WORK/VOLUNTEER EXPERIENCE

PERSONAL PROFILE

1. **Strengths:**

2. **Areas of growth:**

3. **Areas of interest related to occupational therapy:**

4. **Describe your preferred learning style:**

5. **Describe your preferred style of supervision:**

6. **Will you have your own transportation during your affiliation? Yes _____ No _____**

7. **(Optional) Do you require any reasonable accommodations (as defined by ADA) to complete your fieldwork? Yes _____ No _____**
If yes, were there any reasonable accommodations that you successfully used in your academic coursework that you would like to continue during fieldwork? If so, list them. To promote your successful accommodation, it should be discussed and documented before each fieldwork experience.

FIELDWORK EXPERIENCE SCHEDULE

	FACILITY	TYPE OF FW SETTING	LENGTH OF FW EXPERIENCE
Level I Exp.			
Level II Exp.			

PROFESSIONAL DRESS CODE

As a representative of Florida International University and the Occupational Therapy Department, the following dress code must be observed during fieldwork:

Uniform: Varies with the facility.

Level I fieldwork: Unless otherwise instructed, students are to wear their FIU-Occupational Therapy polo shirts and khaki slacks.

Facilities may require the following: White, short lab coat with FIU OT student emblem (lab coats and emblems are available in the bookstore) or scrubs.

General dress considerations: Students should always dress conservatively, even when casual dress is specified. Shirts/blouses must have collar and be long enough to tuck into skirt/slacks. Any tattoos should be covered. Shorts and jeans should never be worn, and skirts/dresses should be at or below the knee. Wear socks, closed toe shoes - no sandals, high heels or tennis shoes (unless specified by the clinical setting). When in doubt, be conservative.

Name Tag:

FIU or facility name tag.

Jewelry:

Be conservative. **NO** large earrings, bracelets, pins, flowers, pendants, or large rings are allowed.

Hygiene:

Hair: Clean and neatly styled. Beard or mustache must be neatly trimmed.

Body: Clean, use deodorant.

Perfume: Do not wear perfume or cologne to the clinic.

Nails: Neatly trimmed, clean, and less than ¼ inch in length. Nail polish, if worn, must be muted colors and not chipped.

Make-up: Conservative and low key.

Professional Behavior:

Smoke only in designated areas. Chewing gum is not allowed.

Do not bring cell phones to clinic. Always arrive on time. Do not plan to leave early.



Corrective Action Plan

Student Name (printed): _____ Date: _____

Faculty Advisor (printed): _____

Reason for Corrective Action:

Outline of Corrective Action Plan:	Expected Outcome (include date/time frame for completion):

Comments: _____

Student Signature: _____ Advisor Signature: _____

NWCNHS Student Academic Grievance/Appeal Procedure (revised 12-7-11)

NWCNHS students have the right to grieve/appeal academic grading/course complaints/ controversies and program progression/dismissal decisions. According to the FIU Student Policy (undergraduate and graduate) written guidelines:

The FIU Academic Grievance Procedure indicates the reasons (nature of appeal) for an academic grievance include: “covers academic grievances which are defined as any complaint or controversy alleging: 1) unprofessional conduct by a professor which adversely affects either a student’s ability to satisfy academic expectations, whether in the classroom, the field, or a lab, or the student’s actual performance; 2) improper admission counseling; 3) improper counseling by an adviser; 4) arbitrary grading for coursework, comprehensive examination, thesis or dissertation; and 5) arbitrary non-renewal of a graduate assistantship or arbitrary dismissal from a course or program.” Students who wish to appeal **MUST FIRST** follow the NWCNHS academic grievance/appeal procedure.

1. Speak with the course faculty member(s) about grade or other controversies/course complaints within two (2) business days after grade is posted.

If a grade impacts the student’s progression for the subsequent semester and the student wishes to appeal, the student must begin the appeal process within two (2) business days after the grade is officially posted by speaking with the faculty member. The student must explain the nature (what is the reason) and condition (what are the facts to support the complaint/controversy) of the appeal.

A student who is dismissed from a program and files a grievance will **NOT** be allowed to enroll in courses until the grievance process is completed.

2. If unresolved at the faculty level, the student has seven (7) business days to proceed with the appeal to the level of the department chair/director (or designee), if the student desires. The appeal must be in writing and include the nature (reason) and condition (set of factors with data) of the grievance, and a summary of previous efforts to resolve it. The written appeal must be addressed to the department chair/director; a hard copy must be signed by the student grievant, and must be date-stamped by program staff upon receipt. In addition, the student must include a current address and telephone contact number(s). An email notification is not acceptable. An appointment to meet with the department chair/director will be made.

3. After the student submits the written appeal and meets with the chair/director of the program, a written response to the student via certified mail from the administrator or his/her designee will occur within seven (7) business days of the date-stamped appeal. If a student has not received a certified letter within ten (10) business days of the submitted appeal, the student **MUST** contact the office of the administrator.

4. When the student receives the letter from the chair/director of the program, he/she has seven (7) business days from the date on the letter to proceed with the appeal to

the level of the Associate Dean of Academic Affairs (or designee), if the student desires. The document must include the nature and condition of the grievance, plus a summary of previous efforts to resolve it. The written appeal must be addressed to the Associate Dean of Academic Affairs; a hard copy must be signed by the student grievant, and must be date-stamped by program staff upon receipt. An appointment to meet with the Associate Dean will be made.

NOTE: For a clinical course or clinical progression complaint/controversy, the student appeals to the Faculty Assembly Student Affairs Committee following the same process as stated above in 4. The level of appeals for a clinical course or clinical progression complaint/controversy is first (#1)—faculty member; second (#2)—Chair, Faculty Assembly Student Affairs Committee; third (#3)—Associate Dean of Academic Affairs; and fourth (#4)—Dean.

5. After the student submits the written appeal and meets with the Associate Dean of Academic Affairs, a written response to the student via certified mail from the administrator or his/her designee will occur within seven (7) business days of the date-stamped appeal. If a student has not received a certified letter within ten (10) business days of the submitted appeal, the student **MUST** contact the office of the administrator.

6. When the student receives the letter from the Associate Dean of Academic Affairs, he/she has seven (7) business days from the date on the letter to proceed with the appeal to the level of the Dean (or designee), if the student desires. The document must include the nature and condition of the grievance, plus a summary of previous efforts to resolve it. The written appeal must be addressed to the Dean; a hard copy must be signed by the student grievant, and must be date-stamped by program staff upon receipt. An appointment to meet with the Dean will be made.

7. After the student submits the written appeal and meets with the Dean, a written response to the student via certified mail from the administrator or his/her designee will occur within seven (7) business days after the date-stamped appeal. If a student has not received a certified letter within ten (10) business days of the submitted appeal, the student **MUST** contact the office of the administrator.

8. The Dean's decision is final.



By my signature, I verify and confirm that I have received and read the Student Fieldwork Handbook. I acknowledge my responsibility to comply with the policies and procedures required by the Occupational Therapy Department.

Printed Name: _____

Signature: _____

Panther ID: _____

Date: _____