

**THE HELPFUL GUIDE FOR LEVEL II
FIELDWORK EDUCATORS AND
SUPERVISORS**

A Sample of Weekly Tasks for a Level II Fieldwork OTA Student from Marion Technical College

WEEK ONE

- ▶ Introduction to fieldwork supervisor
- ▶ Receive hospital tour
- ▶ Review notebook of student information with education coordinator
- ▶ Receive orientation of facility and overview of clinical services
- ▶ Begin to review policy and procedure manuals
- ▶ Participate in structured clinical observation
- ▶ Receive first patient from supervisor's caseload

WEEK TWO

- ▶ Ongoing treatment planning, treatment, and creation of activities for OT
- ▶ Schedule orientations to physical therapy, speech-language, pathology, therapeutic recreation, rehabilitation engineering, vocation rehabilitation, social services, psychology, and nursing
- ▶ Schedule observations as possible of: therapeutic feeding evaluation and treatment, home visit, out trip, patient conferences, family conferences, treatment groups, and driving evaluation
- ▶ Continue observation in clinic

WEEK THREE

- ▶ Assignment of patients for which the OTA student will be responsible
- ▶ Continue scheduled observations as necessary
- ▶ Discuss ideas for a case study presentation or a presentation of useful information related to best practices in occupational therapy (project)

WEEK FOUR-FIVE

- ▶ Continue to receive patient assignments up to approximately half a full caseload
- ▶ Present detailed outline to fieldwork supervisor and education coordinator for the presentation of a case study or useful information related to best practices in occupational therapy (project)
- ▶ Participate in an informal evaluation under the guidance of the fieldwork educator
- ▶ Mid-term evaluation with fieldwork supervisor using AOTA Fieldwork Evaluation.
- ▶ Completion of Student Feedback Form.

WEEK SIX-SEVEN

- ▶ Continue patient assignments: evaluation, treatment, and evaluation as appropriate
- ▶ Present outline to fieldwork supervisor and education coordinator of project to include: issue or questions to be addressed by project; methods to be used; group to which that project will be presented

WEEK EIGHT

- ▶ Assume full caseload, if not already assumed
- ▶ Final project presentation
- ▶ Final evaluation by fieldwork supervisor
- ▶ Termination of patient relationships taking into account individual differences among patients
- ▶ Complete details related to patient assignments to other therapists, progress notes, evaluation and discharge summaries, returning all borrowed materials.

Adapted from Guide to Fieldwork Education Manual, AOTA: Contributor: National Rehabilitation Hospital, Occupational Therapy Services, Student Program, Washington, DC. Reprinted with permission of AOTA.

Weekly Objectives of Supervisory Sessions

Weekly objectives of supervisory sessions include, but are not limited to:

1. Review treatment plans including evaluation of effectiveness of previous week's plans
2. Discuss major issues of the week
3. Review stress analysis
4. Establish weekly learning objectives for student and supervisor
5. Review weekly goals of the affiliation as stated in the manual to be sure that additional assignments such as observations of other services, project, and group/class involvement are being met in a timely manner.
6. Review the student's performance in additional projects such as group/class and special project
7. Review documentation issues.

**SAMPLES OF SITE-SPECIFIC OBJECTIVES TO COMPLEMENT THE AOTA FIELDWORK
PERFORMANCE EVALUATION COMPLETED AT MIDTERM AND AT THE END OF THE LEVEL II
FIELDWORK EXPERIENCE**

I. FUNDAMENTALS OF PRACTICE	Site-Specific Objectives
<p>1. Adheres to ethics: Adheres consistently to American Occupational Therapy Association Code of Ethics and site's policies and procedures including, when relevant, those related to human subject research.</p>	<p>Adheres to all HIPAA procedural guidelines of confidentiality of patient information/records.</p> <p>Follows organizational policies and procedures of the facility.</p> <p>Follows procedural safeguards in regards to confidentiality.</p> <p>Demonstrates work behaviors that reflect an understanding of professional standards and code of ethics appropriate to the practice environment (e.g., concern for client wellbeing, avoidance of harm, right to privacy, autonomy and confidentiality, maintain high standards of competence, comply with law and Association policies, provide accurate information, uphold professional integrity).</p> <p>Recognizes personal strengths and limitations and uses treatment modalities within level of ability and experience.</p>
<p>2. Adheres to safety regulations: Adheres consistently to safety regulations. Anticipates potentially hazardous situations and takes steps to prevent accidents.</p>	<p>Follows universal precautions for infection control.</p> <p>Follows site's procedures for reporting injuries.</p> <p>Reports potential safety hazards and unusual occurrences to supervisor.</p> <p>Assists with the maintenance of equipment in working order.</p> <p>Contributes to cleanliness of work area and maintain a safe environment.</p> <p>Explains fire extinguisher use and fire procedures within the building.</p> <p>Adheres to identified client treatment precautions and contradictions.</p> <p>Anticipates potentially hazardous situations and takes steps to prevent accidents.</p> <p>Adheres to all department policies/procedures related to safety, with attention to policies related to the areas of treatment.</p>
<p>3. Uses judgment in safety:</p>	<p>Provides safe supervision of patients during high-risk</p>

<p>Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.</p>	<p>activities.</p> <p>Follows procedures of safe transfers to all surfaces.</p> <p>Consistently set-up and cleans up work environment in a manner that prevents injury.</p> <p>Never leaves a client unattended.</p> <p>Identifies changes in client status and the environment which may impact client or staff safety.</p> <p>Seeks assistance when activity of client's behaviors is beyond the level of own experience, knowledge, or student's role.</p> <p>Reviews records and/or seeks information from appropriate personnel to attend to changes in status.</p> <p>Able to assess and identify situations that require further knowledge for dealing with a situation.</p> <p>Accepts the responsibility for knowing and following procedures so that treatment is safe for client, therapist, and related personnel.</p>
<p>II. BASIC TENETS</p>	<p>Site-Specific Objectives</p>
<p>4. Clearly and confidently articulates the values and beliefs of the occupational therapy profession to students, families, significant others, colleagues, service providers, and the public.</p>	<p>Articulates the values and beliefs of the occupational therapy profession, as it relates to (your area of practice).</p> <p>Clearly communicates what occupational therapy is, and what therapists do, via such activities as correspondences, meetings, in-services, and/or public relations activities (for ex. May design in-service, PR brochure, bulletin board, radio announcement, etc.).</p>
<p>5. Clearly, confidently, an accurately articulates the value of occupation as a method and desired outcome of occupational therapy to students, families, significant others, colleagues, service providers, and the public.</p>	<p>Clearly communicates the importance of incorporating occupations in the clients' intervention plan.</p> <p>Able to explain the client's daily occupations within the context of the clinical setting and the use of client-centered activities.</p> <p>Able to explain the use of the occupational profile within the context of client's intervention plan.</p>

<p>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.</p>	<p>Utilizes AOTA Roles Documents to analyze respective responsibilities of COTA/OTR.</p> <p>If no COTA on site, adapts OTR job description to create a mock OTA job description based on state regulations and AOTA documents.</p> <p>Verbalizes the OTR/OTA similarities/differences in job responsibilities in current or similar settings.</p>
<p>7. Collaborates with client, family, and significant others throughout the occupational therapy process.</p>	<p>Collaborates with client, family, and staff to plan strategies on the basis of accurate analysis of the demands of client's occupations as well as the client's skills, values, and beliefs.</p> <p>Communicates goals appropriately to client's level of understanding.</p> <p>Clearly, concisely, and independently summarizes and reports OT information and ideas in all pertinent staff and client-related meetings.</p> <p>Reviews progress with client, family, and significant others at regular intervals.</p> <p>Develops and explains home program to client, family, and staff.</p>
<p>III. EVALUATION & SCREENING</p>	<p>Site-Specific Objectives</p>
<p>8. Articulates a clear and logical rationale for the evaluation process.</p>	<p>Demonstrates the ability to independently explain the occupational therapy evaluation process.</p> <p>Explains purpose and scope of evaluation process to client at his/her level of understanding.</p>
<p>9. Selects relevant screening and assessment methods while considering such factors as client's priorities, context(s), theories, and evidence-based practice.</p>	<p>Demonstrates knowledge of the various assessments available for use.</p> <p>Determines which assessments are appropriate for a specific client.</p> <p>Demonstrates an understanding of the differences among screening, consult, and evaluation.</p> <p>Discusses rationale for evaluation selection with supervisor.</p> <p>Incorporates resources from test manuals and research articles that justify appropriateness of tool.</p> <p>Critiques assessment tools to identify their appropriateness for use with designated clients.</p>
<p>10. Determine client's occupational profile and</p>	<p>Compiles occupational profile by gathering pertinent information during client/family interview, observations of</p>

<p>performance through appropriate assessment methods.</p>	<p>client performance, discussion with treatment team members, and review of client records.</p> <p>Demonstrates comfort when interviewing clients/family members.</p>
<p>11. Assesses client factors and context(s) that support or hinder occupational performance.</p>	<p>Assesses client capacities, roles, routines, and habits.</p> <p>Assesses client context in the areas of physical, social, cultural, and virtual environments.</p>
<p>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.</p>	<p>Obtains information from medical records, client/family interview and consultation with colleagues.</p> <p>Obtains information on client's diagnosis or medical condition.</p> <p>Identifies contraindications and precautions.</p> <p>Explains the importance or relevance of the information gathered.</p> <p>Identifies the need for additional or supplementary information.</p>
<p>13. Administers assessments in a uniform manner so as to ensure findings are valid and reliable.</p>	<p>Follows the procedures for administering the evaluation accurately.</p> <p>Gathers and prepares materials and equipment required by the assessment.</p> <p>Makes accurate, objective observations during the evaluation process.</p> <p>Accurately records evaluation information.</p> <p>Administers assessment procedures according to standardized techniques.</p> <p>Demonstrates competency in administering the following assessments (to be identified by fieldwork supervisor).</p>
<p>14. Adjusts or modifies the assessment procedures based on client's needs, behaviors, and culture.</p>	<p>Distinguishes between actual fatigue, uncooperative behavior, and/or manipulation and modifies approach as indicated.</p> <p>Identifies the need for and provides changes/adaptations to the environment and/or evaluation method to optimize client's performance and comfort.</p> <p>Reviews acceptable adaptations that can be applied without altering validity of test results.</p> <p>Alters methods of instructing client to accommodate limitations in cognition/communication as needed.</p>

<p>15. Interprets evaluation results to determine client's occupational performance strengths and challenges.</p>	<p>Relates assessment findings to functional performance.</p> <p>Identifies present level of performance and challenges based on evaluation data.</p> <p>Analyzes and selects pertinent data from one or more assessments in order to identify strengths and weaknesses.</p> <p>Interprets data according to standardized method.</p> <p>Articulates the significance of data and accurately reports evaluation findings to appropriate individuals.</p> <p>Provides rationale for interpretation of evaluation results.</p>
<p>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.</p>	<p>Based on evaluation results, identifies measurable outcomes and short-term objectives to facilitate participation and learning.</p> <p>Defines and sets priorities for realistic goals and objectives which are based on synthesis or relevant assessment data.</p> <p>Priorities reflect an understanding of the impact deficit areas have on performance.</p>
<p>17. Documents the results of the evaluation process that demonstrates objective measurement of client's occupational performance.</p>	<p>Accurately summarizes evaluation data into a formal document according to facility's program making note of any modification to evaluation procedure.</p> <p>Identifies specific problem areas.</p> <p>Documents time, frequency, duration, and location of OT services in recommendations.</p> <p>Accurately performs written evaluation summary of assessments and observations.</p> <p>Documentation of assessment contains all relevant OT performance areas.</p>
<p>IV. INTERVENTION</p>	<p>Site-Specific Objectives</p>
<p>18. Articulates a clear and logical rationale for the intervention process.</p>	<p>Identifies correlation between problem areas and activity selected for intervention.</p> <p>Articulates how activities selected relate to the occupational performance of the client.</p> <p>Demonstrates ability to articulate clinical reasoning regarding selection and use of treatment interventions.</p> <p>States understanding of concepts of "graded" activity and the rationale for sequencing a series of activities to meet client goals and needs.</p>

<p>19. Utilizes evidence from published research and relevant resources to make informed intervention decisions.</p>	<p>Reads, interprets, and applies scholarly information to justify selected intervention.</p> <p>Conducts literature search on relevant topics and applies to clinical decision making.</p>
<p>20. Chooses occupations that motivate and challenge clients.</p>	<p>Chooses occupations and/or activities based on the appropriate theoretical model that will be most effective in maximizing the patient's occupational performance and achieving established goals.</p> <p>Selects and modifies activities which are meaningful and appropriately challenging to the client.</p> <p>Recognizes and appreciates the importance of utilizing a variety of therapeutic approaches and activities to address goal areas.</p> <p>Uses preparatory activities that support occupation-based performance.</p>
<p>21. Selects relevant occupations to facilitate clients meeting established goals.</p>	<p>Considers a variety of occupations and/or activities to help the client accomplish goals.</p> <p>Sequences treatment activities to meet client goals.</p> <p>Demonstrates ability to incorporate client's goals and interests in the selection of treatment methodology.</p>
<p>22. Implements intervention plans that are client-centered.</p>	<p>Demonstrates flexibility to change from one activity to help the client accomplish goals.</p> <p>Demonstrates ability to incorporate client's goals and interests in the prioritization of treatment goals and selection of treatment methodology.</p> <p>Recognizes importance of client-centered practice and involvement of family/caregivers in the treatment process.</p>
<p>23. Implements intervention plans that are occupation-based.</p>	<p>Demonstrates ability to incorporate activities that are identified by client as meaningful and reflect areas of occupation.</p> <p>Demonstrates an interest in exploring alternative treatment ideas reflecting areas of occupation.</p>
<p>24. Modifies task approach, occupations, and the environment to maximize client performance.</p>	<p>Grades and modifies treatment activities to provide effective treatment, reflective of client's current status.</p> <p>Selects activities considering client abilities to promote progress without undue frustration.</p> <p>Changes and varies approach given the client's needs, age, diagnosis, and home/work situation.</p>

	<p>Identifies behaviors in client that require adjustment or termination or treatment activity to maintain and/or maximize client performance.</p> <p>Recognizes signs of client fatigue and/or frustration.</p>
<p>25. Updates, modifies or terminates the intervention plan based upon careful monitoring of the client's status.</p>	<p>Updates treatment plan at required intervals.</p> <p>Gathers data in preparation for staff/treatment team meetings.</p> <p>Consults with the team members regarding client's progress, concerns, and potential for change in services.</p> <p>Recognizes a plateau in therapy and suggests changes in the client's intervention plan.</p>
<p>26. Documents client's response to services in a manner that demonstrates the efficacy of interventions.</p>	<p>Writes OT progress notes to clearly indicate measurable behavioral response to treatment.</p> <p>Accurately documents client FIM scores and outcomes for self-care.</p>
<p>V. MANAGEMENT OF OT SERVICES</p>	<p>Site-Specific Objectives</p>
<p>27. Demonstrates through practice or discussion the ability to assign appropriate responsibilities to the occupational therapy assistant and occupational therapy aide.</p>	<p>Utilizes AOTA official documents regarding Standards of Practice, Roles, Supervision and Documentation to identify and analyze the respective tasks and responsibilities of the occupational therapist and occupational therapy assistant in the clinical setting as applied to current caseload. (May hypothetically select tasks which would be delegated to COTA in this setting).</p> <p>Identifies state practice requirements for performance and supervision of OT personnel.</p> <p>Discusses with supervisor various situations that might occur in practice setting appropriate for occupational therapy assistant's services.</p> <p>Utilizes occupational therapy assistant and/or aide with respect to standards of practice and supervisory guidelines.</p>
<p>28. Demonstrates through practice or discussion the ability to actively collaborate with the occupational therapy assistant.</p>	<p>Articulates understanding of the communication issues to be considered when interacting with COTA (e.g., establishing rapport, clarification of roles and responsibilities, evaluating competency, assisting with professional growth, etc.)</p> <p>Identifies appropriate supervision parameters based on skills of occupational therapy assistant, complexity of client needs and needs and requirements of setting.</p>

	<p>Teams with the occupational therapy assistants for treatment, special projects or adaptive equipment.</p> <p>Identifies appropriate documentation of supervision process including frequency, method of supervision and content.</p>
<p>29. Demonstrates understanding of the costs and funding related to occupational therapy services at this site.</p>	<p>Completes accurate documentation for payment of services.</p> <p>Demonstrates understanding of reimbursement system (e.g., Fee for Services, Prospective Payment System, etc.)</p> <p>Identifies reimbursement sources and their eligibility and reimbursement requirements. (e.g., private pay, state/federal insurance, 3rd party insurance, Workers Compensation, etc.)</p> <p>Makes responsible choices concerning treatment modalities.</p> <p>Ensures that patient care time is used efficiently and productively.</p>
<p>30. Accomplishes organizational goals by establishing priorities, developing strategies, and meeting deadlines.</p>	<p>Demonstrates appropriate priorities of the practice area, accommodating for varying caseloads and changes in schedules.</p> <p>Understands and articulates the priorities of the program and facilities mission.</p> <p>Maintains expected productivity requirements.</p> <p>Participates in individual and program performance improvement activities (e.g., quality assurance activities) as appropriate.</p> <p>Adjusts priorities to meet the established goals of the program by being flexible, making adjustments to daily schedule, and demonstrating willingness to help out as needed.</p>
<p>31. Produces the volume of work required in the expected time frame.</p>	<p>Delivers services expected by the program at a level commensurate to an entry-level therapist.</p> <p>Assumes responsibility for caseload of (___) by completion of fieldwork.</p> <p>Completes all assignments within expected timeframe.</p>
<p>VI. COMMUNICATION</p>	<p>Site-Specific Objectives</p>
<p>32. Clearly and effectively</p>	<p>Demonstrates active listening skills during interactions.</p>

<p>communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public.</p>	<p>Refers questions beyond the scope of OT to the appropriate source.</p> <p>Communicates with other team members regarding the client's progress.</p> <p>Uses clear and accurate language to explain assessment, treatment, and goals to patients and caregivers.</p> <p>Understands and recognizes client/family's need for reinforcement and additional instruction/demonstration and provide as needed.</p> <p>Maintains records as required including progress notes, treatment planning, supervision logs, consultation, home programs, billing forms, evaluations and observation write-ups.</p>
<p>33. Produces clear and accurate documentation according to site requirements.</p>	<p>Completes progress note for each session.</p> <p>Completes evaluation reports according to site's guidelines.</p> <p>Complies with facility policies for approved abbreviations.</p> <p>Provides understandable, clear, concise, accurate, well organized, neat, and complete documentation and reflect information on occupational performance.</p>
<p>34. All written communication is legible, using proper spelling, punctuation, and grammar.</p>	<p>Produces legible handwritten and computer-generated documents using proper spelling, punctuation, and grammar.</p> <p>100% accuracy with written communication by midterm.</p> <p>Incorporates appropriate terminology to convey functional progress and positive outcomes.</p>
<p>35. Uses language appropriate to the recipient of the information including, but not limited to, funding agencies and regulatory agencies.</p>	<p>Effectively varies language/approach based on the needs of the recipient (staff, client, family, outside agencies).</p>
<p>VII. PROFESSIONAL BEHAVIORS</p>	<p>Site-Specific Objectives</p>
<p>36. Collaborates with supervisor(s) to maximize the learning experience.</p>	<p>Collaborates with supervisor when ready to assume more responsibility, requiring less supervision.</p> <p>Comes prepared and participates in supervisory meetings.</p>
<p>37. Takes responsibility for attaining professional</p>	<p>Utilizes free time to read current journals and resource materials, review videotapes, etc.</p>

<p>competence by seeking out learning opportunities and interactions with supervisor(s) and others.</p>	<p>Requests information on areas other than those scheduled to gain overall knowledge of the program.</p> <p>Initiates collaboration with supervisor to participate in additional learning opportunities and observations center-wide.</p> <p>Seeks out answers to questions and takes initiative in acquiring knowledge.</p>
<p>38. Respond constructively to feedback.</p>	<p>Incorporates suggested changes in treatment or approach immediately, as directed by supervisor.</p> <p>Generalizes supervisor's suggestions to other situations.</p> <p>Responds to constructive feedback with openness and willingness to hear feedback.</p>
<p>39. Demonstrates consistent work behaviors including initiative, preparedness, dependability, and work site maintenance.</p>	<p>Follows regular schedule, maintaining punctuality. Informs supervisor of any changes in schedule.</p> <p>Maintains work area, equipment, and supplies in an efficient and safe manner.</p> <p>Is prepared for all therapy services including treatment planning, back-up activities, and the gathering of treatment materials.</p>
<p>40. Demonstrates effective time management.</p>	<p>Completes written documentation and assignments within timelines specified by the supervisor (i.e., progress notes, updates, evaluation completion, annual meeting preparation, etc.)</p> <p>Develops an efficient schedule for assigned workload.</p> <p>Uses free time constructively.</p> <p>Establishes priorities in workload.</p> <p>Requests additional responsibilities as free time becomes available.</p> <p>Arrives on time for meetings, treatment session, etc.</p>
<p>41. Demonstrates positive interpersonal skills including, but not limited to, cooperation, flexibility, tact, and empathy.</p>	<p>Establishes rapport and maintains an atmosphere conducive to positive interactions.</p> <p>Maintains a positive attitude and demonstrates flexibility in situations as they arise.</p> <p>Observe professional boundaries.</p>
<p>42. Demonstrates respect for</p>	<p>Demonstrates respect for clients and family</p>

<p>diversity factors of others including, but not limited to, sociocultural, socioeconomic, spiritual, and lifestyle choices.</p>	<p>members/significant others without prejudging or making assumptions about the family environment, culture, religion, etc.</p> <p>Demonstrates respect for staff members without prejudging or making assumptions.</p> <p>Demonstrates tolerance for differences in others and willingness to work with all patients.</p>
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