

# Learning to Score the Fieldwork Performance Evaluations — Case Scenarios

Handout for Slide 27

Read each scenario. Using the corresponding FWPE, rate each student's performance for the designated items (evaluation or intervention). Remember, it is essential to consider the context of the fieldwork rotation when determining how to rate entry-level competency. The context of the fieldwork rotation ascertains the specific knowledge, skills, and abilities required for entry-level competency at that site. It is important to realize that the fieldwork educator scores student performance of each item over time rather than according to a single "incident" in time. Be prepared to support your score, recognizing that the rationale will ascertain whether you are interpreting and scoring accurately.

## Occupational Therapy Student—Evaluation

John = OT Student; Mrs. Erwin = Client

John is in week 6 of his 12-week fieldwork in a skilled nursing unit. He has been working with several clients from his fieldwork educator's caseload, all of whom are being seen because of difficulties in self-care primarily due to orthopedic conditions. John has had the opportunity to complete several evaluations with guidance from his fieldwork educator. A new client has been referred, and his fieldwork educator asked him to complete the evaluation on his own. Before interviewing Mrs. Erwin, John gathers information from her chart, daughter, primary nurse, and nursing assistant. John then meets with Mrs. Erwin, an 80-year old homemaker who has been referred to occupational therapy following a total hip replacement due to significant arthritic changes. Mrs. Erwin has had a long history of osteoarthritis in her lower extremities and back. After introducing himself, John asks Mrs. Erwin a few questions. He learns that Mrs. Erwin has lived by herself without assistance from others since her husband's passing 10 years ago. Mrs. Erwin wants to continue to live and care for herself in her own home. "I love my home, it is all I know." Following the initial interview, John decides to observe Mrs. Erwin getting dressed from the wheelchair level. As John is writing up the evaluation, his fieldwork educator asks him to share what he has done and why. John reports that he completed a self-care assessment through observation following an initial interview because this is what he has done in the past and observed her (his fieldwork educator) doing each time. He shares with his fieldwork educator that he believes Mrs. Erwin will only need a few days of intervention as "she only requires min assist for safety with dressing." When his fieldwork educator asks him what his goals are for Mrs. Erwin, John states, "independence in her morning routine, including taking a shower." His fieldwork educator then asks John what Mrs. Erwin identified as her goals. John replied, "living at home independently." When asked whether he considered assessing instrumental activities of daily living or establishing goals in this area, he stated that Mrs. Erwin was so tired following dressing that he did not see how this was possible. When asked what he thought might be interfering with her ability to engage in activities over time, John responded, "She is just older than most of the other clients I have seen."

Referring to the evaluation items and the rating scale, score John’s performance:

| Evaluation Item  | Score | Support From Scenario |
|--|-------|-----------------------|
| Articulates a clear and logical rationale                |       |                       |
| Selects relevant screening and assessment methods        |       |                       |
| Determines client’s occupational profile and performance |       |                       |
| Assesses client factors and context(s)                   |       |                       |
| Obtains sufficient information from resources            |       |                       |
| Administers assessments                                  |       |                       |
| Adjusts/modifies the assessment procedures               |       |                       |
| Interprets evaluation results                            |       |                       |
| Establishes an accurate and appropriate plan             |       |                       |
| Documents the results of the evaluation                  |       |                       |

### **Occupational Therapy Student—Intervention**

Mary = OT Student; Kelly = On-Site Supervisor

Mary is in week 7 of a 10-week Level II fieldwork placement where she is working with Kelly, a social worker who provides services to at-risk youth in a small rural area. Services provided to the youth are delivered primarily through school activities and after-school programming. Mary has been assisting Kelly in planning and providing basic life skills during health class for the ninth graders. Often, as Mary is leading the class, Kelly has stepped in to assist with keeping the class on track and reaching the unit objectives. (Both Kelly and the OT fieldwork educator have provided modeling of ways to modify the activities and/or environment several times.) In addition, Mary, Kelly, and the OT fieldwork educator collaboratively gathered initial

information from various parties involved (students, teachers and administrators, parents, community members) to assess the need for structured youth activities outside of the school day. From the data gathered, the overall program outcome agreed on was to develop after-school and evening programming to promote healthy engagement in community activities for youth 12 to 15 years of age. Mary has been developing some specific ideas for intervention. However, she is feeling uncomfortable and approaches her OT fieldwork educator stating, “I don’t know where to start in planning activities for the youth. I have read through several articles I found that suggest engagement in ‘active’ doing versus ‘passive’ doing leads to greater health for adolescents, but when I talk with the youth, they say they just want to ‘hang out.’ I am not sure what to do to get them to be involved. I know that if I can have them engage in doing activities over time, this will help the kids establish some better routines and habits of how they are spending their time. They may also feel more connected with others and feel better about themselves. Last week I tried having some arts-and-crafts activities set up at the community center, and while kids came, they just sat around. These were things that they listed on their Interest Checklist that they were interested in. I am not sure where to go from here.”

| Evaluation Item  | Score | Support From Scenario |
|--|-------|-----------------------|
| Articulates a clear and logical rationale                        |       |                       |
| Uses evidence to make informed decisions                         |       |                       |
| Chooses occupations that motivate and challenge clients          |       |                       |
| Selects relevant occupations to facilitate client reaching goals |       |                       |
| Implements client-centered plans                                 |       |                       |
| Implements occupation-based plans                                |       |                       |
| Modifies task approaches, occupations, and environments          |       |                       |
| Updates, modifies, or terminates intervention                    |       |                       |
| Documents client responses                                       |       |                       |

## Occupational Therapy Assistant Student—Evaluation/Screening

Sandra = OTA Student; George = Client

Sandra is completing her Level II fieldwork rotation on the adult unit of a state hospital. She is beginning the final week of her 8-week affiliation. All new admissions to the adult unit receive an occupational therapy screening. For the first 5 weeks, Sandra assisted in the screening process with her OT supervisor, completed three screenings independently, and developed service competency. Over the weekend, there were four new admissions, so Sandra's supervisor assigned her to complete the occupational therapy screening on George, a 38-year-old Hispanic male with bipolar disorder. Sandra completes a chart review before interviewing George. She notes that he was very active over the weekend, talking nonstop to staff and patients and watching TV until late at night. She decides to interview George in an area of the unit that is quiet with minimal distractions. She begins the interview, asking follow-up questions when George's answers are unclear. After 15 minutes, she notices George is becoming distracted and agitated. She asks George if he would like to play a game of cards. George states, "That would be great!" As they play cards and talk, George appears calmer and more focused. Sandra leads the conversation into the areas that are on the screening interview, gaining the information that is needed. Sandra writes up the results of the screening interview and her observations of George while playing cards. When asked by her supervisor why she played cards with George, Sandra responded that she thought George would become less agitated when involved in an activity and that she would then be able to complete the screening process within the required time frame. Sandra and the OT supervisor established George's OT long-term goals collaboratively. Sandra provided many insights into George's needs, preferences, and abilities. She was then able to independently make suggestions for short-term goals to meet the long-term goals that her supervisor believed were "right on." The OT supervisor did not have to make any modifications to the short-term goals that Sandra suggested.

| Evaluation Item         | Score | Support From Scenario |
|-------------------------|-------|-----------------------|
| Gathers data            |       |                       |
| Administers assessments |       |                       |
| Interprets              |       |                       |
| Reports                 |       |                       |
| Establishes goals       |       |                       |

## Occupational Therapy Assistant Student—Intervention

David = OTA Student; Diane = Fieldwork Educator; Ralph and Sylvia = Clients

David is in week 4 of an 8-week Level II fieldwork rotation in home health. He has been going to Ralph and Sylvia’s home with Diane since his first week of his affiliation. Sylvia was referred to home health occupational therapy services after her stay in the hospital for congestive heart failure. She had a myocardial infarction and triple bypass surgery 6 years ago. Occupational therapy services are focused on pacing and work simplification in the areas of self-care and homemaking tasks. Sylvia’s goals are to be able to perform her self-care tasks without having shortness of breath and fatigue. She would like to be able to prepare a simple lunch each day for herself and her husband. For the past week, David has been responsible for Sylvia’s treatment while Diane does some caregiver education with Ralph. Sylvia reports that David “is a joy to work with. He is patient and kind.” Sylvia trusts him and “knows” he will help her to meet her goals. David’s verbal reports to Diane after his interventions with Sylvia is that she is progressing slowly in her self-care tasks, and because of her limited progress, they have not started on any homemaking tasks. Diane was a bit concerned about the slow progress, so she observed David’s next treatment session. Diane observed that David is doing the very same interventions that she demonstrated to him a week ago with no deviation from her techniques. She notices Sylvia is able to complete her morning shower and dressing with no shortness of breath and minimal fatigue. When Diane questioned David about using the same interventions for a week with no deviations, he stated, “Sylvia was still showing signs of fatigue, so I didn’t want to push her any further. I was afraid she would go into cardiac arrest. I wasn’t sure what else to do.”

| Evaluation Item            | Score | Support From Scenario |
|----------------------------|-------|-----------------------|
| Plans intervention         |       |                       |
| Selects intervention       |       |                       |
| Implements intervention    |       |                       |
| Activity analysis          |       |                       |
| Therapeutic use of self    |       |                       |
| Modifies intervention plan |       |                       |

The following section provides the trainer with guidelines for discussing the scores and rationale for the scores. Remember that when using the evaluation, the fieldwork educator would be rating more than one incident, and the context of the fieldwork is critical to keep in mind.

**OT Student—Evaluation: “John”**

| Evaluation Item  | Score | Support From Scenario   |
|--|-------|---|
| Articulates a clear and logical rationale                | 1     | States what he did is what he has done in the past, and what he has observed his fieldwork educator doing though this does not match the client’s desired goals. The rationale is not logical.  |
| Selects relevant screening and assessment methods        | 1     | He selected methods based on his past experiences and the typical assessments used in the setting but did not select an assessment based on the client’s priorities; therefore, the methods are not relevant.   |
| Determines client’s occupational profile and performance | 2     | Obtains partial information to determine client’s occupational profile; obtains information about client’s self-care needs but does not obtain information about client’s performance in areas that are important to the client. Obtains partial information to determine client’s occupational profile; obtains information about client’s self-care needs but does not obtain information about client’s performance in areas that are important to the client. |
| Assesses client factors and context(s)                   | 1     | Based on the information given, one would score this section a 1 because John has not assessed all client or context factors. When asked what was interfering with client’s ability to engage in activities, he stated, “She’s just older than most clients I’ve seen.” He did not assess the home environment; need further information to completely score this item.   |
| Obtains sufficient information from resources            | 2     | Gathers information from a variety of sources, including client, medical record, family member, and service providers. However, it is unclear whether he gained sufficient information related to client’s home.  |
| Administers assessments                                  |       | Unable to score with information given in the case scenario. Would require the fieldwork educator to observe the administration of the assessment procedures.   |
| Adjusts/modifies the assessment procedures               | 1     | Based on the information given, one would score this section a 1 because John quit the evaluation process when the client became too tired following dressing. Additional information is needed to accurately score this item and would be gathered through information or further questioning.   |
| Interprets evaluation results                            | 1     | Interpretation of “independent in morning routine” is not related to client’s priorities of returning home to live by herself.  |

| Evaluation Item                              | Score | Support From Scenario   |
|--|-------|---|
| Establishes an accurate and appropriate plan | 1     | Plan is based on what John has seen in the past and, therefore, fits the context of the skilled nursing facility. Plan does not incorporate client's priorities, and there is no evidence of John applying any model of practice or any evidence from the literature to support his plan. |
| Documents the results of the evaluation      |       | Unable to score with information given in the case scenario.  |

John is having difficulty on the evaluation section at midterm. One would expect that John's performance would improve over the next 6 weeks of the fieldwork experience; however, if his performance did not improve from midterm, he would not pass the evaluation section on final evaluation.

### OT Student—Intervention: “Mary”

| Evaluation Item  | Score | Support From Scenario   |
|--|-------|---|
| Articulates a clear and logical rationale                        | 3     | Mary gives a clear understanding of the general principles that are guiding her reason for developing community activities, citing relevant sources from the literature and reflecting application of occupational therapy theory.  |
| Uses evidence to make informed decisions                         | 3     | Mary examined the literature and found evidence to support overall plan.  |
| Chooses occupations that motivate and challenge clients          | 1     | Mary requires assistance in the health class even after modeling and repeated practice, and youth are not participating in activities at the community center.  |
| Selects relevant occupations to facilitate client reaching goals | 1     | Based on the information given, one would score this section a 1 because Mary has not been able to facilitate the youth actively engaging in community center activities. Additional information is needed to accurately score this item and would be gathered by having a clearer picture of the clients' goals and how occupations were used. |
| Implements client-centered plans                                 | 2     | Mary chose activities that were of interest to youth from the checklist, but because the youth are not actively engaging in the classroom or community activities, Mary may not have connected with what is meaningful to the youth.  |
| Implements occupation- based plans                               | 2     | Mary chose leisure activities for the community center that reflect the interests of adolescents. However, Mary needs to continue to identify and explore the meaningfulness of the activities to the youth.  |

| Evaluation Item   | Score | Support From Scenario  |
|---|-------|--|
| Modifies task approaches, occupations, and environments | 1     | Mary requires assistance in the health class even after modeling has been provided and is not able to come up with ideas or strategies to modify activities at the community center that result in the adolescents actively participating. |
| Updates, modifies, or terminates intervention           | 1     | Mary requires assistance in the health class even after modeling has been provided and is not able to come up with ideas or strategies to modify activities at the community center in order to effectively lead a group of youth.         |
| Documents client responses                              |       | Unable to score with information given in the case scenario.   |

In general, Mary may be at risk for not passing if her performance does not improve substantially over the next few weeks. This would be a good time for her fieldwork educator to review the site-specific objectives for this section and establish a clear expectation of performance competencies Mary needs to demonstrate to bring up her scores.

#### **OTA Student—Screening/Evaluation: “Sandra”**

| Evaluation Item         | Score | Support From Scenario   |
|-------------------------|-------|---|
| Gathers data            | 3     | Sandra gathered relevant data from a variety of sources.  |
| Administers assessments | 4     | Sandra modified the assessment process to fit the client’s needs. She did this independently, quickly, and effectively. |
| Interprets              |       | Unable to score with information given in the case scenario.  |
| Reports                 | 3     | Sandra independently reported accurate information related to both the interview and the observations.                  |
| Establishes goals       | 3     | Sandra was accurate in her establishment of short-term goals.   |

*Note.* Remember that the context of the fieldwork experience would determine whether some of Sandra’s behaviors met or exceeded standards.

In general, Sandra is an excellent student. She will have no trouble passing this fieldwork rotation. Be careful, however, not to let the glow of Sandra being such an easy student inflate the scores. She is doing excellent for a student, but we must compare her to an entry-level practitioner for scoring. If we hired a new OTA, we would expect this level of performance.

### OTA Student—Intervention: “David”

| Evaluation Item            | Score | Support From Scenario  |
|----------------------------|-------|--|
| Plans intervention         | 1     | David has not shown any independent planning or initiated collaborative planning with the OT.  |
| Selects intervention       | 1     | David is doing rote interventions he has been shown. He is not selecting interventions independently or collaboratively.   |
| Implements intervention    | 2     | David is able to carry out safe intervention as instructed but is not attending to all goals.  |
| Activity analysis          | 1     | David has not demonstrated any ability to analyze through his not modifying the activities. He also states verbally that he is not sure how to change the activity to get different results. |
| Therapeutic use of self    | 2     | Sylvia feels secure and wants to work with and for David; however, it is unclear whether David is using “self” effectively in order to move Sylvia toward her established goals.             |
| Modifies intervention plan | 1     | David has not attempted to do so, nor has he approached the supervisor to do this as a collaboration.  |

David is having difficulty at midterm on the intervention section. He is at risk for not passing if his performance does not improve substantially over the next few weeks. He has some strengths but many concerns. This would be a good time for his fieldwork educator to review the site-specific objectives for this section and establish a clear list of expected performance competencies that David needs to demonstrate to bring up his scores.