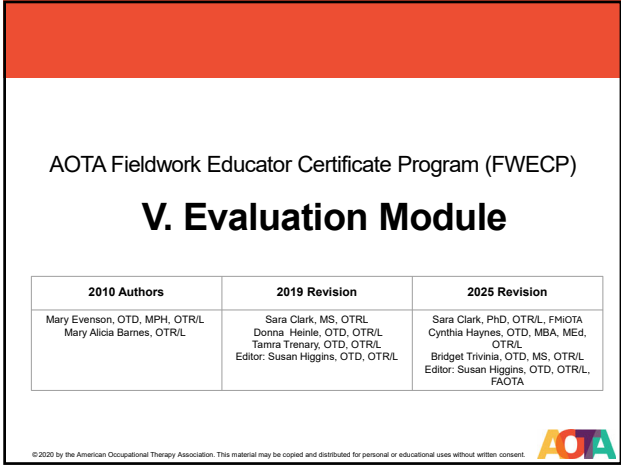
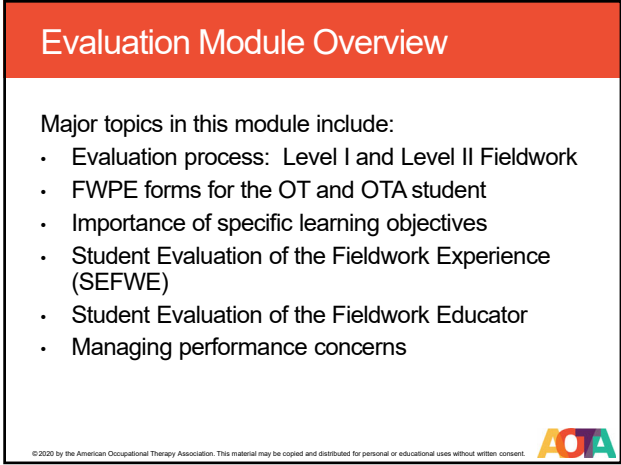


1



2



3

Evaluation Process: Learning Objectives

On completion of this module, participants will be able to discuss the purpose of and guidelines for the evaluation process of an OT or OTA student.

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4

EVALUATION

SAFECom Items

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5

Site-Specific Learning Objectives

Evaluation SAFECom 1

Reviews expectations and evaluation methods with the student at the start of FW, midterm and at final. This includes review of fieldwork goals and objectives, and methods for assessing entry level practice readiness, (e.g., AOTA Fieldwork Performance Evaluation (FWPE) or alternative evaluation tool).

Evaluation SAFECom 3

Assesses student's performance based on appropriate OTA/OT entry-level roles of the fieldwork practice setting.

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6

FWPE Scoring

Evaluation SAFECom 2

Assesses student according to performance standards based on objective information (e.g., direct observation, discussion with student, review of student's documentation, observation by others).

Evaluation SAFECom 5

Understands the purpose, scope and scoring criteria of the current AOTA FWPE or other identified evaluation tool to objectively measure student performance and provide feedback.

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Reflection & the Evaluation Process

Evaluation SAFECom 4

Utilizes the evaluation process to advise and guide the student regarding opportunities for growth and progression towards meeting site-specific objectives and attaining entry level competency.

Evaluation SAFECom 7

Guides the student in the use of feedback provided by the supervisor on the fieldwork performance evaluation tool, as a method of promoting self reflection, and continued professional growth and development.

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8

FWPE

Evaluation SAFECom 6

Completes and reviews all evaluations regarding student performance (e.g., AOTA FWPE, Fieldwork Experience Assessment Tool, etc.) with the student at midterm and final evaluation in a timely manner.

Evaluation SAFECom 8

Documents student's fieldwork performance recognizing ethical and legal rights (e.g., due process, confidentiality, American with Disabilities Act, integrity, etc.).

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Purpose of Performance Appraisal

- Stimulate desire for improved performance
- Help identify current functioning
- Note strengths/areas of needed growth
- Recognize barriers to improved performance

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Purpose of Evaluation Steps

Midterm

- Formative

Final

- Formative
- Summative



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Preparation for Mid-Term or Final Evaluation

- How can you prepare in advance?
- Consider
 - Collecting data – “evidence based”
 - Your attitudes toward student
 - What you put in electronic format
 - Establishing a collegial context

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Evaluation Preparation Checklist: Level I or Level II Fieldwork

Performance Evaluation Checklist: Level I or Level II Fieldwork

Preparation for evaluation performance review:

- o Familiarize self with the evaluation tool before the rotation [starts](#)
- o Examine own attitude toward student throughout the [rotation](#)
- o Differentiate between issues related to student's knowledge base, skills, behaviors, and attitude
- o Review supervisory records and data on student ("avoid highlighting only one isolated example during formal evaluation")
- o Remind student to complete a self-assessment, using the same evaluation tool
- o Solicit written and/or verbal input from colleagues and clients in [advance](#)
- o Discuss evaluation meeting procedures and date/time in advance with [student](#)

For written evaluation:

- o Complete all items (scoring and comments sections as appropriate)
- o Be clear and factual with comments
- o Substantiate comments with specific [examples](#)
- o Ensure congruence between comments and numerical [scores](#)

During the evaluation meeting:

- o Start with purpose of meeting, agenda, and estimated time length of [meeting](#)
- o Review all evaluation procedures for the rotation to decrease student's [anxiety](#)
- o Have the student share thoughts on the self-assessment process and content, prior to the evaluator(s) sharing [information](#)
- o Be clear on who contributed to the evaluation [report](#)
- o When sharing evaluation data provide specific feedback and highlight patterns of behavior/skills
- o Recognize the student may need increase time to process [feedback](#)
- o The evaluation meeting may take increased time than anticipated, if providing significant constructive feedback. In this scenario, a follow-up meeting may be needed.

Adapted from: [Gallagher, B. & Anthony, A. \(1992\). Fundamentals of supervision: A practical course for those who supervise students.](#) University of Toronto.



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LEVEL I FIELDWORK



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Variety of Level I Fieldwork Models and Performance Evaluation Tools

ACOTE C.1.11.

Level I fieldwork may be met through one or more of the following instructional methods:

- Virtual environments
- Simulated environments
- Standardized patients
- Faculty practice
- Faculty-led site visits
- Supervision by a fieldwork educator in a practice environment

(ACOTE, 2023)



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Examples of Level I FW Models

- **Program A:** 1 student:1 fieldwork educator in a practice setting
- **Program B:** more than one student running groups in a nontraditional setting
- **Program C:** standardized patients on campus
- **Program D:** 2 students:1 FW educator with a faculty-facilitated pro-bono clinic

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Understanding The Academic Program Partner

Review **prior** to the start of the Level I fieldwork rotation:

Curriculum Framework

Psychosocial Objective for Placement

Level I FW Course Syllabus or Handbook

Site Specific Objectives

Level I FW Evaluation Tool

Level I FW Course Sequence

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Examples of Level I Fieldwork Evaluation Tools

Understand the evaluation tool **prior to the start** of the Level I fieldwork

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Level I Evaluation for Longer Experience

- *AOTA Level I Fieldwork Competency Evaluation for OT and OTA Students*
- Includes an evaluation skills section

(AOTA,2024)



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Level I Evaluation for Short Term Experience

- *Philadelphia Region Fieldwork Consortium Level I Fieldwork Student Evaluation*
- Second Edition



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Level I Evaluation for More than One Student



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[illegible]

LEVEL II FIELDWORK

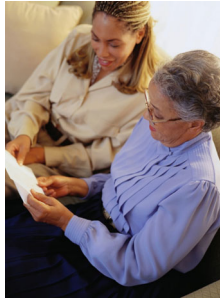
Primary Purpose of FWPE

- Accurate assessment of competence relative to **entry-level practice**
- Monitor growth that occurs with time:
 - Mid-term scores
 - No midterm “satisfactory” score
 - Final scores: Pass/no pass
- Certify performance for academic program

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The AOTA logo is located in the bottom right corner of the slide. It consists of the letters 'AOTA' in a stylized, bold font. The 'A' is orange, the first 'O' is blue, the second 'O' is green, and the 'T' and 'A' are blue. The letters are slightly overlapping and have a modern, sans-serif appearance.

Characteristics of FWPE



- Are companion documents for OT/OTA
- Measure entry-level competence
- Focus on occupation-based practice
- Reflect current and future practice
- Are used in a variety of settings
- Provide feedback to students
- Are easily used in a timely manner

(Kottorp et al., 2023; Preissner et al., 2020)

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Content Layout of FWPE

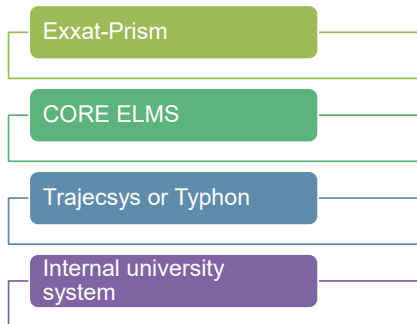
- Terminology reflects
 - AOTA Vision 2025 (AOTA, 2017)
 - 2023 ACOTE Standards (ACOTE, 2023)
 - *Occupational Therapy Practice Framework* (AOTA, 2020)
- Overview/instructions
- Organization of items
- Space for comments: each section and summative comments (midterm and final)
- Performance rating summary (generated automatically)

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Academic Data Management Systems: Fieldwork Education



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OT & OTA FWPE Content

OTA	OT
• Fundamentals of Practice (3)	• Fundamentals of Practice (3)
• Basic Tenets (3)	• Basic Tenets (3)
• Screening/Evaluation (5)	• Screening/Evaluation (9)
• Intervention (7)	• Intervention (9)
• Management of OT Services (4)	• Management of OT Services (4)
• Communication and Professional Behaviors (9)	• Communication and Professional Behaviors (9)

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FWPE Design: Continuum of Competencies

- Easier
 - Ethics
 - Safety
 - Professional behaviors
- Harder
 - Evaluation
 - Intervention
 - Management

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Factors That Influence Scoring

Intentional Planning-Synthesize:

- Objectivity
- Sources of data
- Experience

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Challenges

Common challenges to avoid when administering competency-based practice assessments.

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Fieldwork Educator: Self-Assessment of Evaluator Bias

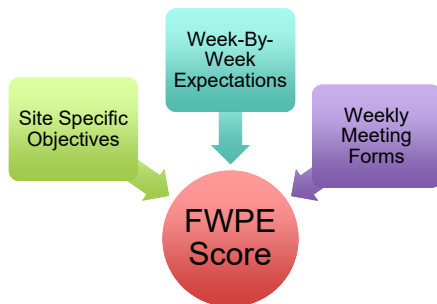


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FWPE "Evidence Based" Score



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AOTA FWPE Number Description

Number	FWPE (2020)
4	Exemplary Performance
3	Proficient Performance
2	Emerging Performance
1	Unsatisfactory

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2020 FWPE Rating Scale Descriptions

Number	Label	Description
4	Exemplary Performance	Demonstrates satisfactory competence in specific skills <u>consistently</u> ; demonstrates substantial breadth and depth in understanding and/or skillful application of fundamental knowledge and skills.
3	Proficient Performance	Demonstrates <u>satisfactory</u> competence in specific skills; demonstrates <u>adequate</u> understanding and/or application of fundamental knowledge and skills.
2	Emerging Performance	Demonstrates <u>limited competence</u> in specific skills (inconsistencies may be evident); demonstrates limited understanding and/or application of fundamental knowledge and skills (displays <u>some gaps and/or inaccuracies</u>).
1	Unsatisfactory Performance	<u>Fails to demonstrate</u> competence in specific skills; performs in an inappropriate manner; demonstrates <u>inadequate understanding</u> and/or application of fundamental knowledge and skills (displays <u>significant gaps and/or inaccuracies</u>).

35

When Should a Rating of 4 Be Given?



- Self-sufficient: communicating with co-workers, competently verifies physician orders, lead OT voice in IEP meeting/team meeting, independently verifies insurance coverage
- Demonstrates confident and competent performance at the level of current entry-level OT/OTA employees.

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FWPE (2020) Mid-Term & Final Scores

OT

Mid-Term Score

No recommended midterm score

Final Score

Pass = 111 & above

No Pass = 110 & below

OTA

Mid-Term Score

No recommended midterm score

Final Score

Pass = 91 & above

No Pass = 90 & below

(Kottorp et al., 2023; Preissner et al., 2020)

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WARNING: Items #1,#2,#3

Fundamentals of Practice Items



#1 = Ethics: AOTA Code of Ethics
#2 = Safety Regulations
#3 = Ensures Safe Environment/
Anticipates Safety Concerns

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FWPE: Automated Score Calculations

PERFORMANCE RATING SUMMARY SHEET		
Performance Item	Relative Rating	Final Rating
Professionalism and Ethics		
1. Adherence to the AOTA Code of Ethics	0	0
2. Adherence to safety regulations	0	0
3. Adherence to the standards of self and others	0	0
Knowledge		
4. Knowledge of the scope of practice	0	0
5. Knowledge of the standards of practice	0	0
6. Knowledge of the standards of practice	0	0
Attitudes and Values		
7. Attitudes and values	0	0
8. Attitudes and values	0	0
9. Attitudes and values	0	0
10. Attitudes and values	0	0
Skills		
11. Skills	0	0
12. Skills	0	0
13. Skills	0	0
14. Skills	0	0
15. Skills	0	0
16. Skills	0	0
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98. Skills	0	0
99. Skills	0	0
100. Skills	0	0

- Performance Rating Summary Sheet
- Check your computer software (Adobe Acrobat) compatibility with PDF file, if experiencing challenges.

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Midterm Review Process

1. **Student completes self-evaluation** using the FWPE-midterm.
2. **Fieldwork educator completes evaluation** of the student's competencies using the FWPE-midterm.
3. **Student and fieldwork educator meet** to review self-assessment, scores and feedback.
4. The midterm review is **submitted to the academic program**.

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Midterm Review Basics

- **Qualitative Feedback** (Comments Box)
 - The feedback/comments are equally important to the numerical scores and should, wherever possible, **provide examples of performance related to established learning objectives**.

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Formal Evaluation: Importance of Comments

Meaningful qualitative comments are encouraged and significantly contribute to student development:

Positive/Strengths

Constructive/Areas of Improvement

Specific

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FWPE: Location of Comment Sections

**Each Section:
Midterm and Final**

**Summative:
Page One**

FUNDAMENTALS OF PRACTICE

All items in this area must be scored at a 2 or above on the final evaluation in order to pass feedback.

1. Adherence to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations.

Examples: Addressing feedback, client privacy, social media, human subject research.

Midterm: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 Final: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

2. Adherence to safety regulations and responsibilities/competencies consistently.

Examples: Fire safety, OSHA regulations, safety regulations/procedures, emergency procedures.

Midterm: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 Final: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

3. Ensure the safety of self and others during all feedback-related activities by anticipating potentially unsafe situations and taking steps to prevent accidents.

Examples: Body mechanics, medical safety, equipment safety, client specific precautions, contraindications, emergency safety.

Midterm: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 Final: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Comments on strengths and areas of improvement:

Midterm:

Final:

Page: _____ of _____

ASSESSMENT COMMENTARY
ASSESSMENT COMMENTARY

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Interpreting Midterm Review

- Interpretation of performance should consider both the qualitative (feedback) and quantitative (scores) in determining the **student's potential for achieving entry-level competence by the end of the affiliation.**



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Midterm Review Basics

- The midterm review process should establish the expectations for a plan, which would **enable the student to achieve entry-level competence** by the end of the fieldwork experience.



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Midterm Review Basics

- This plan should include specific learning objectives and enabling activities, to be used by the student and fieldwork educator, in order to achieve the desired competence.

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Contact the school at midterm if.....

- A student exhibits **unsatisfactory behavior** (scores of 1) in a substantial number of tasks
- A score of 1 on any of the “Fundamentals of Practice” (**safety & ethics**) items; and/or
- A student’s potential for achieving **entry-level competence** by the end of the affiliation is in question. A learning contract may be needed.

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Final Review Basics

- **Quantitative Feedback (Scoring):**
 - **All items must be scored** to receive a Pass on the final FWPE
 - A score of **3 or higher** on the “**Fundamentals of Practice**” (safety & ethics) items is required to receive a Pass on the FWPE
 - **Scores of 1** on any of the items are **not** allowed to receive a **Pass on the final FWPE**
 - A sum score of **91 or higher** is required to receive a **Pass on the final FWPE for OTAS**
 - A sum score of **111 or higher** is required to receive a **Pass on the final FWPE for OTS**

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Student Questions

Can students still ask questions and demonstrate competency?

*Analyze the type and frequency

FWPE Score	Purpose of Questions
4	Substantial deeper understanding
3	Clarification of a concept
2	Asking for the initial answer
1	Not asking questions

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Scoring Dilemmas:
Weighing Performance Between Score Levels

Consider:

Consistency with a skill

Development (number of weeks into placement)

Skill with transferability to novel cases

Complexity of caseload

Description of Score Levels:
substantial, satisfactory, gaps, fails to demonstrate

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Operationalize Rating Descriptions:
FWPE Item 3

- Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents.

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Operationalize Rating Descriptions FWPE Item 3

- **Score of 4:**
 - **For a deeper understanding**, student may seek guidance from FWE when student has questions regarding medical conditions, handling of equipment, appropriate procedures, etc. **after** thorough chart review, literature review and review of precautions and policy & procedures.
- **Score of 3:**
 - Occasionally seeks supervisor support **for clarification or confirmation of knowledge** regarding medical conditions, handling of standard equipment, appropriate procedures, etc. **after** thorough chart review, literature reviews and review of precautions and policy & procedures; seeks additional support for rare and/or medically complex conditions, novel or high-tech equipment, new policies/procedures with limited guidance from supervisor

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Operationalize Rating Descriptions FWPE Item 3

- **Score of 2:**
 - **Inconsistently seeks appropriate supervisor support** OR overly relies on supervisor support for common medical conditions, handling of standard equipment, appropriate procedures, etc.; occasionally asks for initial answer.
- **Score of 1:**
 - **Fails to seek supervisor support** when appropriate; AND/OR supervisor provides excessive/constant guidance; AND/OR student fails to demonstrate understanding of need to seek supervisor support; does not ask for supervisor support when appropriate

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TEST YOUR KNOWLEDGE OF FWPE SCORING



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True or False?

If a student scores a 1 on Item 2 (OT or OTA) at **midterm**, the student will fail FW.



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True or False?

If a student scores a 2 on Item 2 (OT or OTA) at **final**, the student will fail FW.



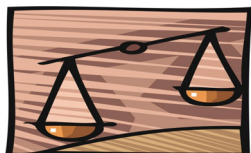
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True or False?

If the student scores all 2s at **midterm**, the **student** will pass the mid-term evaluation.



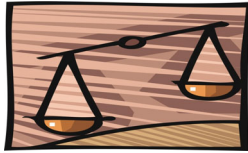
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True or False?

The students needs to get at **least** all 3s at final to pass FW.



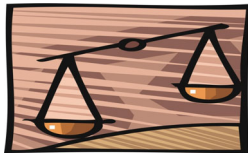
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True or False?

The student can ask questions for **clarification** after midterm and still receive a **final** score of 3.



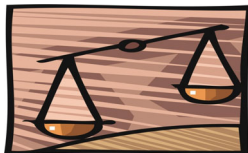
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True or False?

The student can ask questions to gain a **deeper understanding** of a concept after midterm and receive a **final** score of 4.



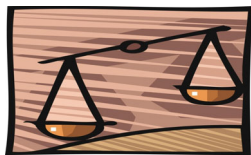
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True or False?

It is OK to skip some items if the student has not had a chance to do them.



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OT FWPE 25: Applicability in Different Settings

OT FWPE 25— Demonstrate through practice or discussion the ability to **collaborate with and assign appropriate tasks to the occupational therapy assistant, occupational therapy aide, or others** to whom responsibilities might be assigned, while remaining responsible for all aspects of treatment.

Examples: paraprofessionals, nurses' aides, volunteers

How do you handle this in your setting?

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OTA FWPE 19 : Applicability in Different Settings

OTA FWPE 19— Demonstrate through practice or discussion the ability to **collaborate with and assign appropriate tasks to, as indicated, to the occupational therapy aide, or others** to whom responsibilities might be assigned.

Examples: paraprofessionals, nurses' aides, volunteers

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The FWPE is designed to...

- Measure **entry-level competence** of the OT/OTA student.
- Differentiate the **competent student from the incompetent student**.
- Measure the **performance** of the student on the **established learning objectives for the placement**.

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The FWPE is **not** designed to.....

- Differentiate levels **above** entry level competence.
- Measure **specific** occupational therapy tasks in isolation.

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Multiple Fieldwork Educators

Multiple FW Educators can be added to the FWPE for PDU credit and can contribute to the evaluation report at any time.

*****Note name, credentials, email, number of weeks/dates of supervision for each additional FW Educator.**

**Method of adding additional fieldwork educator information to the FWPE is unique for each online fieldwork data management system.*

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LEVEL II FIELDWORK LEARNING OBJECTIVES

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ACOTE: Fieldwork Objectives Requirement

- Document that academic and fieldwork educators agree on established fieldwork objectives **prior to the start** of the fieldwork experience, and communicate with the student and fieldwork educator about progress and performance **throughout** the fieldwork experience.

(ACOTE C.1.3)

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ACOTE: Psychosocial Objective Requirement

- Ensure that fieldwork objectives for **all** experiences include an objective with a focus on the occupational therapy practitioner's role in addressing the **psychosocial aspects** of the client's engagement in occupation.
- Each Level I and Level II Fieldwork Rotation

(ACOTE C.1.3)

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FWPE: Psychosocial Factors

Screening/Evaluation:

- Selects relevant screening/assessment tools
- Evaluates and analyzes client factors to support or hinder occupational performance: including psychological functions and social contexts

***Includes the consideration of all client centered components including psychosocial factors. (OT.11, OTA.10)

Intervention

- Selects client-centered and occupation-based interventions that motivate and challenge the client to achieve established goals that support targeted outcomes.
- Implements client-centered and occupation-based intervention plans.

****Includes the consideration of all client centered components including psychosocial factors. (OT.19, OTA.14, OTA.14)

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Tools to Guide Learning and Evaluation

Site-Specific Objectives

- Identifies entry-level competency expected of all students by the end of the experience
- Big picture goals
- Ideally match FWPE sections

Week-By-Week Schedule

- Helps structure the experience with *estimated* weekly expectations
- Understand how caseload will be graded over time

Weekly Meeting Forms

- Short-term student learning goals (usually one week)
- Written on weekly meeting sheets
- Use FWPE headings for goals

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Guidelines for Student Objectives

SMART =

- S**—Specific
- M**—Measurable
- A**—Attainable
- R**—Relevant
- T**—Time frame

Bjerke & Renger (2017); Doran (1981)

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Applying the SMART Rubric

Generic OT FWPE Item 3: *Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents.*

Weekly Objective: Students will perform wheelchair transfers **independently**, taking into consideration **all relevant medical precautions and demonstrating accurate judgment related to position of self and wheelchair, brakes, lines, and IVs.** Students are expected to be independent by _____
(add appropriate time frame for your setting and student).

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Learning Activity #1: Developing Site-Specific Objectives vs. Weekly Expectations

1. Choose an FWPE Item from the evaluation or intervention planning sections
2. Brainstorm contextual examples for your practice setting for that FWPE item.
3. Provide examples of how a score of 4,3,2,1 would be defined at your site.

(Refer back to slides 52-53 for an example)

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Examples of Site-Specific Psychosocial Objectives

- Fieldwork student will address psychosocial factors during treatment by facilitating stress/anxiety reduction with coping strategies, while working on a functional goal.
- When appropriate, fieldwork student will identify psychosocial factors that may benefit from a referral to a different discipline such as social work or psychology.
- Fieldwork student will demonstrate the ability to teach children skills for self-regulation, to improve attention, promote active listening, and/or social skills for engagement in desired occupations and environments.

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Learning Activity #2: Create a Psychosocial Objective

- **Reflect** on the psychosocial factors of your clients, inhibiting participation in desired occupations.
- How will you teach the best way to address the psychosocial concerns?
- **Write** a site-specific psychosocial objective for the OT/OTA student to achieve during the fieldwork rotation.

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Site Specific Objectives Examples:

Physical Rehabilitation
Mental Health
Pediatrics
OTA – Inpatient Medical
School System
NEOTEC – Site Profile

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Physical Rehabilitation

Site Specific Objectives

Weekly Schedule

Category	AOA Examples	Site Specific
Fieldwork Performance Evaluation & Fieldwork Objectives		
Fieldwork Objectives	<ul style="list-style-type: none"> Adherence to American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations Medication, Medication administration, and medical history Review and demonstrate actions for the client's rights (autonomy, privacy, confidentiality) Complete with tasks and student profiles during the professional of occupational therapy as stated in AOTA Code of Ethics and Moral Principles Teach clients and other health care colleagues with barriers, education, impact, and integrity, maintain and enhance confidentiality and security of medical record information Observing federal, state, and local regulations If student is impaired, they will volunteer to terminate their network experience if they are not able to competently perform the duties and responsibilities of the role. 	<ul style="list-style-type: none"> Fulfill professional obligation of acting in the best interest and best interest in dealing with all clients Review and demonstrate actions for the client's rights (autonomy, privacy, confidentiality) Complete with tasks and student profiles during the professional of occupational therapy as stated in AOTA Code of Ethics and Moral Principles Teach clients and other health care colleagues with barriers, education, impact, and integrity, maintain and enhance confidentiality and security of medical record information Observing federal, state, and local regulations If student is impaired, they will volunteer to terminate their network experience if they are not able to competently perform the duties and responsibilities of the role.

Mayo Clinic - Rochester, Acute Care/Inpatient Rehab (2000 Campus), Terms Therapy & Health (2000 Campus), 2021
 Updated 10/2022 T. T. T.

Category	AOA Examples	Site Specific
Fieldwork Performance Evaluation & Fieldwork Objectives		
Fieldwork Objectives	<ul style="list-style-type: none"> Adherence to American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations Medication, Medication administration, and medical history Review and demonstrate actions for the client's rights (autonomy, privacy, confidentiality) Complete with tasks and student profiles during the professional of occupational therapy as stated in AOTA Code of Ethics and Moral Principles Teach clients and other health care colleagues with barriers, education, impact, and integrity, maintain and enhance confidentiality and security of medical record information Observing federal, state, and local regulations If student is impaired, they will volunteer to terminate their network experience if they are not able to competently perform the duties and responsibilities of the role. 	<ul style="list-style-type: none"> Fulfill professional obligation of acting in the best interest and best interest in dealing with all clients Review and demonstrate actions for the client's rights (autonomy, privacy, confidentiality) Complete with tasks and student profiles during the professional of occupational therapy as stated in AOTA Code of Ethics and Moral Principles Teach clients and other health care colleagues with barriers, education, impact, and integrity, maintain and enhance confidentiality and security of medical record information Observing federal, state, and local regulations If student is impaired, they will volunteer to terminate their network experience if they are not able to competently perform the duties and responsibilities of the role.

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Mental Health

Site Specific Objectives

Level 1 Fieldwork Site-Specific Objectives – Inpatient Setting
Occupational Therapy Assistant (OTA) Student

1. Supportive Therapy
 a. Supportive therapy involves providing emotional support and encouragement to the client.
 b. Supportive therapy is used to help the client cope with stress and anxiety.
 c. Supportive therapy is used to help the client develop coping strategies.
 d. Supportive therapy is used to help the client develop problem-solving skills.
 e. Supportive therapy is used to help the client develop self-esteem.

2. Crisis Intervention
 a. Crisis intervention involves providing immediate support and assistance to the client in a crisis situation.
 b. Crisis intervention is used to help the client manage acute stress and anxiety.
 c. Crisis intervention is used to help the client develop coping strategies.
 d. Crisis intervention is used to help the client develop problem-solving skills.
 e. Crisis intervention is used to help the client develop self-esteem.

3. Group Therapy
 a. Group therapy involves providing support and assistance to the client in a group setting.
 b. Group therapy is used to help the client manage acute stress and anxiety.
 c. Group therapy is used to help the client develop coping strategies.
 d. Group therapy is used to help the client develop problem-solving skills.
 e. Group therapy is used to help the client develop self-esteem.

4. Individual Therapy
 a. Individual therapy involves providing support and assistance to the client in a one-on-one setting.
 b. Individual therapy is used to help the client manage acute stress and anxiety.
 c. Individual therapy is used to help the client develop coping strategies.
 d. Individual therapy is used to help the client develop problem-solving skills.
 e. Individual therapy is used to help the client develop self-esteem.

5. Family Therapy
 a. Family therapy involves providing support and assistance to the client in a family setting.
 b. Family therapy is used to help the client manage acute stress and anxiety.
 c. Family therapy is used to help the client develop coping strategies.
 d. Family therapy is used to help the client develop problem-solving skills.
 e. Family therapy is used to help the client develop self-esteem.

6. Community Therapy
 a. Community therapy involves providing support and assistance to the client in a community setting.
 b. Community therapy is used to help the client manage acute stress and anxiety.
 c. Community therapy is used to help the client develop coping strategies.
 d. Community therapy is used to help the client develop problem-solving skills.
 e. Community therapy is used to help the client develop self-esteem.

7. Case Management
 a. Case management involves providing support and assistance to the client in a case management setting.
 b. Case management is used to help the client manage acute stress and anxiety.
 c. Case management is used to help the client develop coping strategies.
 d. Case management is used to help the client develop problem-solving skills.
 e. Case management is used to help the client develop self-esteem.

8. Research
 a. Research involves providing support and assistance to the client in a research setting.
 b. Research is used to help the client manage acute stress and anxiety.
 c. Research is used to help the client develop coping strategies.
 d. Research is used to help the client develop problem-solving skills.
 e. Research is used to help the client develop self-esteem.

9. Evaluation
 a. Evaluation involves providing support and assistance to the client in an evaluation setting.
 b. Evaluation is used to help the client manage acute stress and anxiety.
 c. Evaluation is used to help the client develop coping strategies.
 d. Evaluation is used to help the client develop problem-solving skills.
 e. Evaluation is used to help the client develop self-esteem.

10. Documentation
 a. Documentation involves providing support and assistance to the client in a documentation setting.
 b. Documentation is used to help the client manage acute stress and anxiety.
 c. Documentation is used to help the client develop coping strategies.
 d. Documentation is used to help the client develop problem-solving skills.
 e. Documentation is used to help the client develop self-esteem.

Weekly Schedule

Week 1
 a. Introduction to the fieldwork site and the role of the OTA student.
 b. Review of the site's policies and procedures.
 c. Review of the site's safety protocols.
 d. Review of the site's documentation requirements.
 e. Review of the site's evaluation requirements.

Week 2
 a. Supportive therapy session with the client.
 b. Crisis intervention session with the client.
 c. Group therapy session with the client.
 d. Individual therapy session with the client.
 e. Family therapy session with the client.

Week 3
 a. Community therapy session with the client.
 b. Case management session with the client.
 c. Research session with the client.
 d. Evaluation session with the client.
 e. Documentation session with the client.

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Pediatrics – Weekly Schedule



WEEKLY OBJECTIVES

This schedule is a guideline. Services may be made as appropriate to your PT's schedule. Please refer to the site's policies and procedures for more information.

WEEK ONE
 a. Introduction to the fieldwork site and the role of the OTA student.
 b. Review of the site's policies and procedures.
 c. Review of the site's safety protocols.
 d. Review of the site's documentation requirements.
 e. Review of the site's evaluation requirements.

WEEK TWO
 a. Supportive therapy session with the client.
 b. Crisis intervention session with the client.
 c. Group therapy session with the client.
 d. Individual therapy session with the client.
 e. Family therapy session with the client.

WEEK THREE
 a. Community therapy session with the client.
 b. Case management session with the client.
 c. Research session with the client.
 d. Evaluation session with the client.
 e. Documentation session with the client.

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OTA – Inpatient Medical

Site Specific Objectives

Level 1 Fieldwork Site-Specific Objectives – Inpatient Setting
Occupational Therapy Assistant (OTA) Student

I. FUNDAMENTALS OF PRACTICE

- Ethics:** Adhere consistently to the American Occupational Therapy Association Code of Ethics, site's policies and procedures, and all relevant regulations.
 - Demonstrate work behaviors that reflect an understanding of professional standards and codes of ethics appropriate to the practice environment.
 - Recognize and acknowledge the professional standards and codes of ethics are an integral component of being a professional.
 - Identify and address ethical concerns in the context of clinical supervision.
- Follow HIPAA/FOIA rules:**
 - Practice ethical billing procedures.
 - Establish and maintain an ethical relationship with the client and caregiver.
- Proactive - Safety:** Adhere consistently to safety regulations and report and document incidents appropriately.
 - Understand the location of the fire exit and fire alarm pull station and address for a fire call.
 - Recognize and/or identify safety hazards in the practice environment.
 - Appropriate routes to attend to precautions and changes in status, while keeping the client safe.
 - Utilize infection control precautions and procedures (OSHA requirements).
 - Recognize and/or identify safety hazards in the practice environment.
 - Follow facility policies for emergency code or drill situations (Fire).
 - Set up a safe treatment environment.
 - Identify and report safety concerns to supervisor and/or appropriate clinical staff.

OTA Level 1 Student Weekly Progression – Ethics Section

- Week One**
- Introduction to facility staff and discipline, treatment services, client medical needs.
 - Review of the site's policies and procedures, and all relevant regulations.
 - Review of the site's safety protocols.
 - Review of the site's documentation requirements.
 - Review of the site's evaluation requirements.
 - Review of the site's billing procedures.
 - Review of the site's fire safety protocols.
 - Review of the site's infection control procedures.
 - Review of the site's emergency code or drill situations.
 - Review of the site's safe treatment environment.
 - Review of the site's safety concerns.
 - Review of the site's ethical relationship with the client and caregiver.
 - Review of the site's HIPAA/FOIA rules.
 - Review of the site's proactive safety measures.

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School System: 12-Week Progression

School System Weekly Progression for a 12-Week Level II OT Fieldwork Student

- Week 1:**
- Student will be oriented to the fieldwork experience and expectations; the OT team; and team members at the school at which they will be working.
 - Fieldwork Educator will review and discuss information on IDEA, Section 504, No Child Left Behind (NCLB), and ADA and how they apply to related services.
 - Fieldwork Educator will review any medical precautions relevant to students on caseload (including transfer training, pressure points, how to use wheelchairs and other assistive devices).
 - Fieldwork educator will review how to communicate with a child using an assistive device for communication (if applicable on the caseload).
 - Introduction to daily note and progress note formats and Medicaid billing.
 - Introduction to goal writing and the development of short-term benchmark goals and how these related to the IEP.
 - Review evaluation format and assessments.
 - Select at least one assessment to review in depth that is commonly used in the school district for the age range of the caseload for the fieldwork experience. Look at a real evaluation that used this assessment and read the assessment report/see goals were generated from assessment data.
 - Review current student caseload files and IEPs, make note of OT-related goals.
 - Discuss strategies for ideal consultation methods/working with teachers/staff.
 - Fieldwork student should create and maintain a confidential log of children seen (throughout fieldwork rotation) using abbreviations for names, use within a password-protected platform approved by the school district.
 - Practice writing one daily note per day – Thursday and Friday of week one.
 - Clean up all sessions Thursday and Friday to better understand available materials for caseload (filing and storage location and cleaning procedures).
 - Find one evidence-based practice article related to OT deliver in the school system.

- Week 2:**
- Assignment Due: Written Treatment Sessions for at least one child per day, choose day/date/time for review.
 - Continue to observe full schedule/visit as needed.
 - Continue review of student files and IEPs.
 - Continue review of common assessment tools always making the connection between an assessment tool and real data.
 - Plan and lead individual session for at least one student per day.
 - Plan and lead a group session (if group interventions are a part of caseload).
 - Write daily notes for students you treat.
 - Collect observational data for evaluation (if applicable).
 - Find one evidence-based practice article related to OT deliver in the school system.
 - Complete 1 student per day.

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NEOTEC Fieldwork Site Profile

- NEOTEC =
New England OT Education Council
- Modifiable PDF for OT and OTA Site Specific Objectives for any type of fieldwork setting: "Fieldwork Site Profile".
- <https://neotecouncil.org/resources/>

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NEOTEC: Fieldwork Site Profile

Thank you for your participation in the fieldwork education process. The Fieldwork Site Profile form helps maximize efficiency by using a standard format that can be shared among the NEOTEC academic programs.

The purpose of the Fieldwork Site Profile is to:

- Facilitate communication between fieldwork sites, academic programs, and students.
- Ensure students have access to information to help prepare for fieldwork placements.
- Ensure that the occupational therapy student coming to your program has a clear understanding of the expectations and learning objectives of OT practice in your fieldwork location. This includes program documentation (plans and process for completing with all site requirements, including site objectives and site data, and communicating this information to students prior to the start of the fieldwork experience).
- Create a tool to help our OT/OTA program document the criteria and process for complying with all site requirements, including site objectives and site data, and communicating this information to students prior to the start of the fieldwork experience.
- Meet accreditation standards for Accreditation Council for Occupational Therapy Education (ACOTE).

Information Sharing Authorization – OT educational programs regularly share this information with each other to ensure the best of all using fieldwork sites to provide the same data to multiple OT educational programs. If you do not wish to have the above information shared amongst other OT educational programs, please indicate your preference by checking the box below.

☐ I do not agree to authorize sharing of the above information with other OT educational programs.

Part 2 - Site Specific Objectives

The purpose of this section is to ensure that the occupational therapy student coming to your program has a clear understanding of the expectations and learning objectives of OT practice in your fieldwork location. This includes program documentation (plans and process for completing with all site requirements, including site objectives and site data, and communicating this information to students prior to the start of the fieldwork experience).

REGULATIONS

Please check any laws below that apply to fieldwork in your practice. Once completed, our OT program will retain this document for future student fieldwork placements with your organization.

FUNDAMENTALS OF PRACTICE

NAFHE Item #1: Adherence to the American Occupational Therapy Association's Code of Ethics and all federal, state, and local regulations. Student:

- ☐ Adherence to AOTA Code of Ethics (Principles of Beneficence, Nonmaleficence, Autonomy, Justice, Veracity, and Altruism)
- ☐ Adherence to all federal, state and facility regulations

NAFHE Item #2: Adherence to safety regulations and reports & documents incidents appropriately. The student is responsible for understanding and/or completing:

- | | | |
|--|--|--|
| <input type="checkbox"/> Documentation | <input type="checkbox"/> ILS for personal safety or | <input type="checkbox"/> Wheelchair lifts, transfers & |
| <input type="checkbox"/> Medication site effects | incident prevention | self-harm prevention |
| <input type="checkbox"/> Fall-related | <input type="checkbox"/> Safety court | <input type="checkbox"/> Vital signs |
| <input type="checkbox"/> Medication-related | <input type="checkbox"/> Documentation of factors (e.g., | <input type="checkbox"/> Hand & wrist extension/monitoring |
| <input type="checkbox"/> Fall prevention | duration, weight, visual field, etc.) | <input type="checkbox"/> Fine manipulation & dexterity |
| <input type="checkbox"/> Strength & conditioning | <input type="checkbox"/> OT certification | <input type="checkbox"/> OT certification |
| <input type="checkbox"/> Fall prevention | <input type="checkbox"/> State & educational programs | <input type="checkbox"/> Communication of patient |
| <input type="checkbox"/> Functional assessment and | <input type="checkbox"/> All cases & labels | changes in status of |
| functional readiness | <input type="checkbox"/> All cases & labels | other |
| <input type="checkbox"/> Behavior system & change | <input type="checkbox"/> Incident reduction | |
| reporting & incident tracking | <input type="checkbox"/> OSHA OSHA and | |
| <input type="checkbox"/> Work environment | compliance | |

NAFHE Item #3: Ensure the safety of self and others during all fieldwork-related activities by anticipating potentially unsafe situations and taking steps to prevent accidents. Student:

- ☐ Adherence to safety protocol & standards
- ☐ Completion of thorough physical and health screenings
- ☐ Thoroughly supervised exposure to direct hand-on direct
- ☐ Risk assessment
- ☐ Accurate identification of needs and functional mobility status
- ☐ Consideration and assessment for potential hazards
- ☐ Anticipation and address of safety hazards
- ☐ Demonstrate proper safety techniques such as correct selection of lifts, correct selection of materials, & making adjustments as needed

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Two Student Feedback Forms

Student Evaluation
of the **Fieldwork
Experience**
(AOTA, 2022b)

*Student Evaluation
of the **Fieldwork
Educator** (AOTA,
2022a)

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Student Evaluation of the Fieldwork Experience (SEFWE)

Objectives:

- Enable the Level II fieldwork student to evaluate and provide feedback to the fieldwork site
 - This content can be used for program evaluation purposes by the site
- Enable academic programs to benefit from student feedback to develop and refine their Level II fieldwork programs and didactic curriculum.
 - Provide objective information to students who are selecting sites for future Level II fieldwork placements: Parking, schedule, orientation, caseload, assessment, treatment

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(AOTA, 2022b)



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Student Evaluation of the Fieldwork Experience (SEFWE) - Communication

- Each academic program guides students on how to share information with the fieldwork site
- Method of delivery to the fieldwork site will depend on the academic program's fieldwork data management system (online portal vs. email attachment).

(AOTA, 2022b)

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Sample SEFWE Item: Feedback on Orientation Process

Summary of Fieldwork Experience

Rate your expectations	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
Expectations of fieldwork experience were clearly defined	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expectations were challenging but not overwhelming	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiences supported student's professional development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please identify the extent of opportunities that students will have to incorporate the following themes in occupational therapy practice during the fieldwork experience

	No opportunities	Limited opportunities	Some opportunities	Many opportunities (with most clients)	Consistent opportunities (for all clients)
Client-centered practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Occupation-based practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evidence-based practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership & advocacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interprofessional education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please specify the themes that were not listed in the list above:

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*Student Evaluation of the Fieldwork Educator

Objectives:

- Student provides feedback to the academic program on the quality of the supervision and teaching style of the fieldwork educator

(AOTA, 2022a)

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*Student Evaluation of the Fieldwork Educator – Communication

- Form may not be automatically emailed to the fieldwork educator
- *Each academic program guides students on how to share information with the fieldwork site
- Each student can have a unique experience with the same fieldwork educator (positive or negative)

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Sample Section of the Evaluation of Fieldwork Educator

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

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
Facilitated student's clinical reasoning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Used a variety of supervisory approaches to facilitate student performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Elicited and responded to student feedback and concerns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adjusted responsibilities to facilitate student's growth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supervision changed as fieldwork progressed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provided a positive role model of professional behavior in practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Modeled and encouraged occupation-based practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Modeled and encouraged client-centered practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Modeled and encouraged evidence-based practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Modeled and encouraged interprofessional collaboration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Modeled and encouraged intraprofessional collaboration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional comments:

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Final Evaluation Meeting: Recommended Steps

Student shares self-assessment of performance (FWPE) per academic program guidelines

Fieldwork Educator shares summary of student's performance (FWPE)

Student and Fieldwork Educator sign the FWPE

Student reviews the SEFWE and the *FW Educator Evaluation(s) with the site

Student checks the box on SEFWE confirming the form has been shared with the site. Student signs the SEFWE.

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SEFWE: Final Page

Your fieldwork experience must be discussed with your supervisor before you submit this form.

Yes, I have discussed my fieldwork experience with my supervisor

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Evaluation Submission Steps

- Ensure the following forms are submitted to the academic program:
 - FWPE (signed)
 - SEFWE (signed)
 - *Fieldwork Educator Evaluation(s)

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MANAGING PERFORMANCE CONCERNS

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Managing Performance Concerns

- Initiate contact with academic program and use AFWC for support
- Collaboratively develop strategies for success, including a remedial learning contract
- Document concerns, plans, meetings, and communications

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Students in Danger of Failing

- Student has **not** achieved **minimal** levels of performance, after specific constructive feedback.

Fieldwork Educator: GATEKEEPER to the field, in collaboration with the AFWC

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Remedial Learning Contracts

“A written agreement between teacher and student which makes explicit what a learner will do to achieve specific learning outcomes.”

(Gallant et al., 2006)

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Learning Contract Outline

- Opening statement (problems/needs)
- Desired outcome (goals) – connect to FWPE items
- Context of learning (e.g., onsite, off-site, in meetings, independently)
- Strategies
- Duties/responsibilities of student and FWE
- Methods of evaluation (e.g., review, observed, reported)
- Timeline for review (e.g., daily, weekly, in 2 weeks)
- Course of action if terms not met (e.g., termination, withdrawal, extension)
- Closing statement
- Co-signatures

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Learning Contract Sample Item					
Date	Measurable Goal FWPE Item # Current FWPE Score	Resources	Strategies to Achieve the Goal Target FWPE Score	Target Date for Completion	Student & Supervisor Initials
4/23/25	Complete initial evaluation documentation within 30 minutes with 2 corrections by FWE FWPE Item #s: Time Management = #35 Evaluation Accuracy (#12) Modification (#13) Interpretation (#14) Current FWPE Score on all items above: 2	Existing documentation Other therapists	Become familiar with evaluation form by reviewing it and identifying source of information for each section. Read initial evaluation documentation completed by other therapists. Observe other therapists conducting evaluations and read their documentation. Find a quiet environment for completing documentation. Target FWPE Score for all items at final: 3 (Modified from Trivinia & Johnson, 2023)	5/30/25 4/30/25 4/30/25 4/30/25	

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Learning Contract: Roadmap to Success

Setting the stage for a positive experience

- Student tool or roadmap
- “Can-do” attitude
- Focus on successful outcome
- Collaborative approach

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Example Learning Contract

Level II Fieldwork Performance Goals Learning Agreement

Fieldwork Site: _____
 Supervisor: _____
 Student: _____
 Academic Fieldwork Coordinator: _____

Setting: Level II Fieldwork experience of _____ of a 12 Week _____ phase of _____
 (Student name) continues to struggle with the _____
 (Student name) continues to struggle with the _____
 (Student name) continues to struggle with the _____

Procedural and Pragmatic Clinical Reasoning:
 (Describe specific examples)
Documentation:
 (Describe specific examples)
Problem Solving:
 (Describe specific examples)
Writing:
 (Describe specific examples)

This document is filed a Learning Agreement to list the specific goals that _____
 to be achieved by mid-term in order for _____
 to continue with this Level II Fieldwork placement. Feedback about the
 performance concerns (as provided in this document) will be given to the
 improvement in all areas listed in this document. The purpose of this report is to
 outline the specific concerns in writing in order to help _____
 grow as a professional and meet the performance goals.

Concerns Related to the Items on the AOTA Fieldwork Performance Evaluation (2020)

(List the date the final goal is accomplished)

CLINICAL REASONING: under INTERVENTION

FWPE Item 22: **Modify task and/or environment to maximize the client's performance.**
 Current AOTA FWPE Score: 1
 Target AOTA FWPE Score: 2
 Target AOTA FWPE Final Score: 3

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Terminating a Placement

- Challenging
- The reasons are unique for each student
- Should take place in three stages:



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1. Preparation Phase

- Termination should never be a surprise
- Plan for a closing meeting: date/time/location
- Involve all players: AFWC, student, FW Educator(s), Clinical Coordinator as appropriate
- Decide who is sharing information
- Emotionally prepare everyone
- Anticipate overt reactions of sadness and/or anger from student

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2. Implementation

- Lay the ground rules/expectations for meeting
- Reinforce any student accomplishments
- Highlight pattern of primary limitations and performance gaps
- Identify specific academic/financial consequences related to termination of the placement
- Identify future plans as appropriate

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3. Follow Up - Critical

AFWC Responsibilities

- Contact with student/emotional support
- Contact with FW Educator

FW Educator Responsibilities

- Detailed documentation/evaluation
- Communicate student departure to site staff in confidential manner

Student Responsibilities

- Process/reflect and use support systems
- Proceed with remediation plan if appropriate

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Reflect: "Failure to Fail"

- Why do we assign a passing grade when a student when the student is not demonstrating entry-level competence?

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Potential Reasons: Failure to Fail

Insufficient documentation /evidence

Give the "benefit of the doubt"

Unclear procedures for failing

Worried about impact on student's future/finances

Worried about conflict with the student, school, or your employer

Belief you will be seen as a "bad teacher"

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In Summary

- This module has introduced you to:
 - Level I FW Evaluation
 - Level II FW Competency - FWPE
 - Learning objectives: site specific and weekly
 - Student Evaluation of the Fieldwork Experience (SEFWE)
 - Student Evaluation of the Fieldwork Educator
 - Managing Performance Concerns

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