

Fieldwork Educator: Nuts and Bolts 2017

Today's Topics

- Purpose & Goals of Fieldwork
- Starting a Fieldwork Program
- Student Supervision
- Professional Behavior
- Feedback & Evaluation Tools
- Formal Evaluation



Purpose & Goals of Fieldwork

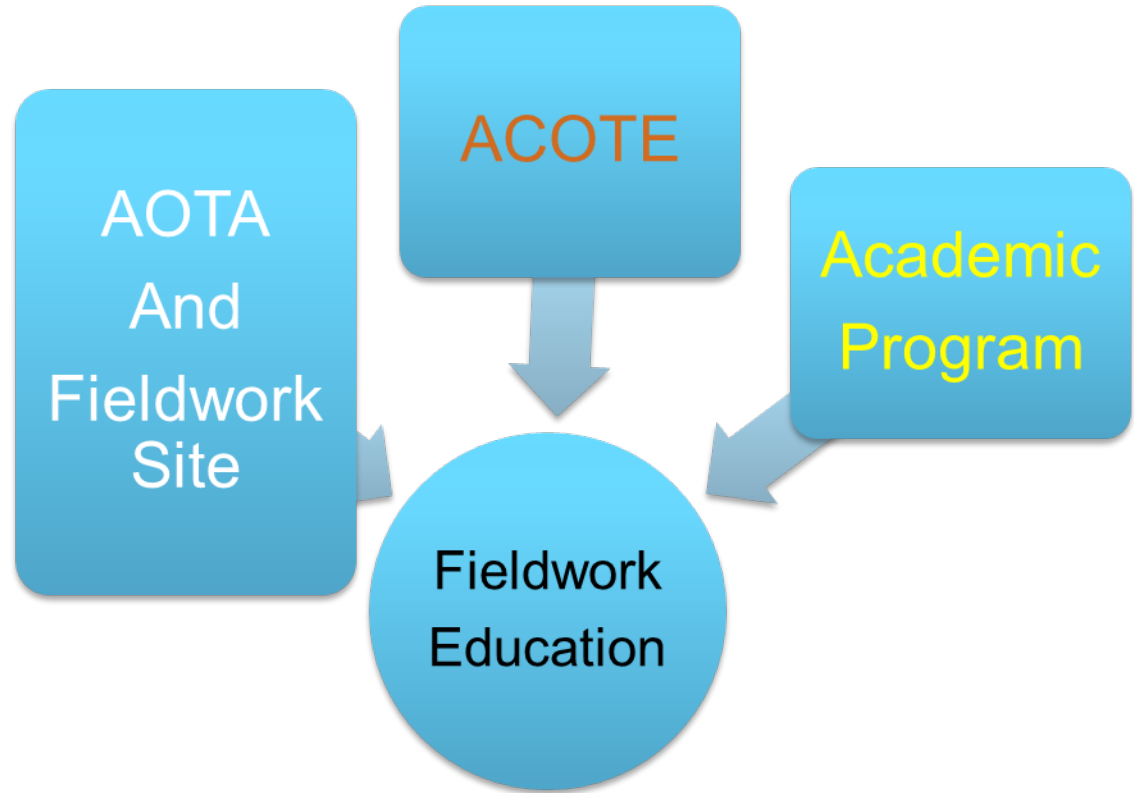
Purpose of Fieldwork Education

Professional Behaviors

Clinical Skills

-NBCOT EXAM
-Entry Level Practitioner (“Generalist”)

Fieldwork Education Guidelines



Settings for Fieldwork

- Medical, educational, home & community-based programs
- Emerging practice environments
- AFWC has to ensure a VARIETY of types of experiences (Level I and Level II)

Benefits of Taking Students

- Exposure to current practice trends, evidence-based practice, and research
- Earn continuing education credit toward NBCOT recertification & state licensure
- Recruitment of qualified personnel

Who Can Supervise Students?

- Level I: A variety of qualified personnel.
 - OT practitioners
 - Teachers
 - Nurses
 - Social Workers
 - Physical Therapists
 - Physician's assistants

Who Can Supervise Students?

- Level II: Primary supervisor must be OT practitioner who meets state regulations & has a minimum of 1 year practice experience subsequent to initial certification
- OT Student: Occupational Therapist
- OTA Student: Occupational Therapist or Occupational Therapy Assistant
- Other professionals can participate in student supervision

Level I Fieldwork Goals

- Help students develop a basic comfort level with evaluating and treating the needs of clients.
- Offer **hands-on experience** before Level II Fieldwork.
- Enrich didactic coursework through directed observation and **participation** in selected aspects of the OT process.
- Objectives/projects vary by academic institution.

Level II Fieldwork Goals

- Develop competent, **entry-level, generalist** (OT and OTA) skills.
- Provide opportunities to integrate academic knowledge with the application of skills in a practice setting.
- Full-time placement:
 - OT: 12 weeks
 - OTA: 8 weeks

Navigating AOTA Website for Fieldwork Resources

- www.aota.org
- See handout





Starting A Fieldwork Program

Starting a Fieldwork Program

- Analyze/gain support at your facility.
- Collaborate with academic program(s).
- Establish a fieldwork contract/student placement agreement
- Develop student resources:
 - Fieldwork data form
 - Site specific learning objectives
 - Student manual
 - Schedule of weekly activities
 - Prepare a student orientation
 - Most schools will provide a timeline of suggested experiences for the fieldwork (Level I or II)



Fieldwork Manual Contents I

- Orientation Outline and checklist
- Assignments
- Safety Procedures/Codes
- Behavioral Objectives
- Week-by-Week Schedule of Responsibilities
- Patient Confidentiality Information (Patient Rights)
- Guidelines for Documentation (completed samples of forms, acceptable medical abbreviations, discharge plan, billing, dictation directions)
- The Occupational Therapy Practice Framework (4th Edition) reference

Fieldwork Manual Contents II

- Student Policies and Procedures
- OT Diagnosis Worksheet
- Evidence-based Practice Information for Students
- Articles/Resources on Student Supervision
- Weekly Meeting Forms
- Learning Contract Forms
- AOTA FWPE *Sample* Form
- Observation Opportunities List (dependent on size of institution)
- Red Flag List

Expectations Documents

- Site Specific Objectives:

- Week By Week Expectations:




Preparing to be a Fieldwork Educator (FWEEd)

- Have a desire to support the growth of future practitioners.
- Collaborate with academic program(s)
- Identify mentors within your facility or the profession
- Familiarize yourself with the objectives of the specific academic program & level of fieldwork.
- Familiarize yourself with the OT Practice Framework: Domain & Process (AOTA, 2014)

Continuing Education: Fieldwork Educator Role

- State conferences
- MOTEC Fieldwork Educator Days
- AOTA's National Conference
- Attend AOTA's Fieldwork Educator Certificate Workshop (\$225/members, \$359/nonmembers)



Role of the Academic Fieldwork Coordinator (AFWC)

- Responsible for the program's compliance with the fieldwork requirements
- Must be a licensed or credentialed occupational therapy practitioner
- Fieldwork sites must reflect the sequence, depth, focus, and scope of content in the *curriculum design*



Student Supervision

Examine Your Own Level II FW Experiences

- Positives: Can you recall some positive supervisory styles that your FW Educator used with you?
- Negatives: Can you recall some negative experiences or feelings that you felt your FW Educator could have facilitated better?

Factors Affecting Your Supervision Style


- Knowledge Base of student
 - Prior experience or knowledge in that task
 - Level I Fieldwork Experience
- Student Learning Style:
 - hands on vs. visual vs. audio
- Motivation Level:
 - Seek out what motivates this individual to succeed

Working with Different Types of Students

- Adult Learners
 - Expertise in other areas but now vulnerable as a novice
- Millennials
 - Like structure and feedback; use of technology
- Students with Disabilities
 - What types of accommodations are needed?
- Others?

MOTEC: Your Fieldwork Lifeline





Professional Behaviors: Fieldwork Students

Professional Behaviors

- Academic Institution Initiatives:
 - Formal self assessment
 - Formal feedback as part of didactic course
 - From instructor and/or peers
 - Informal feedback
 - Level I Fieldwork evaluations
 - Specific section on the AOTA FWPE for Level II Fieldwork

Professional Behavior Concerns I

- Poor Time Management (Lateness, Absence, Work, Etc.)
- Violation of Facility Policies (ex. smoking policy, personal use of computers, phone use, drug/alcohol use, relationships with clients, etc.)
- Failure to Complete Site Requirements
- Misuse of **Social Media** (Facebook, Twitter, etc.)
- Defensive Responses to Feedback

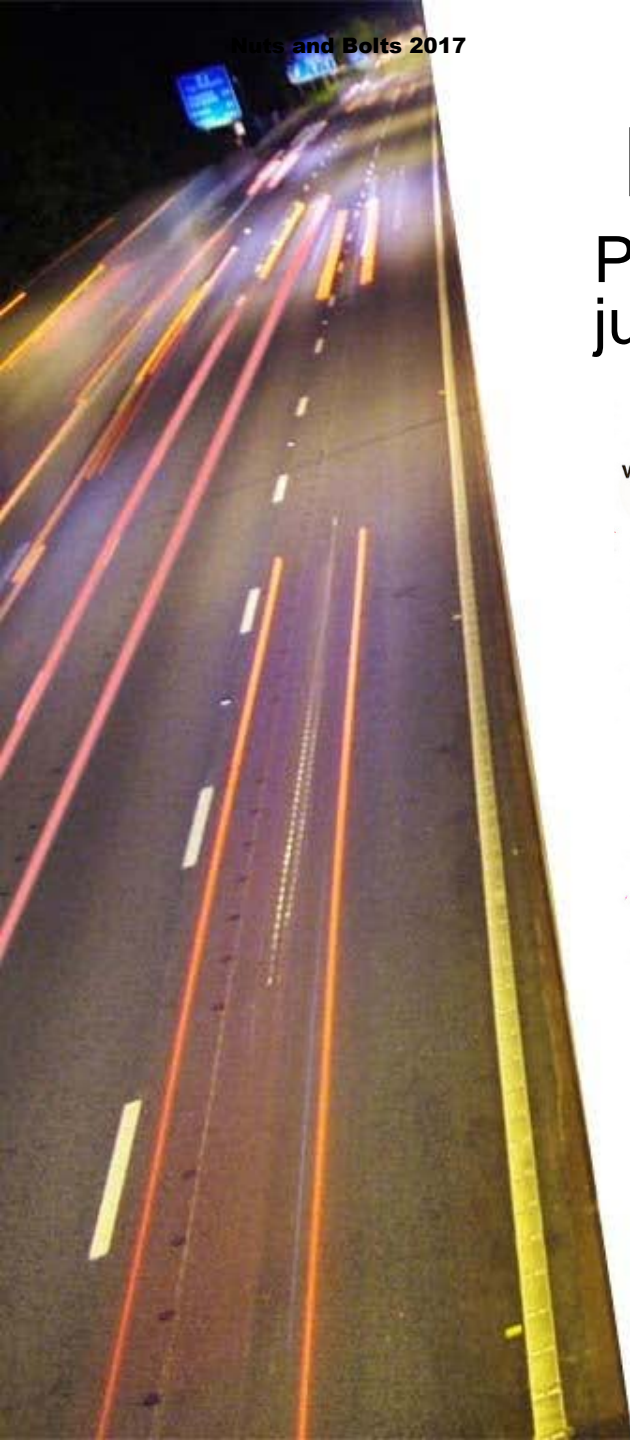
Professional Behavior Concerns II

- Failure to Follow FWEd Instructions
- Failure to Complete FW Assignments
- Poor Engagement/Initiative
- Blurred Professional and Personal Boundaries
- Unprofessional Language

Professional Behavior Policies

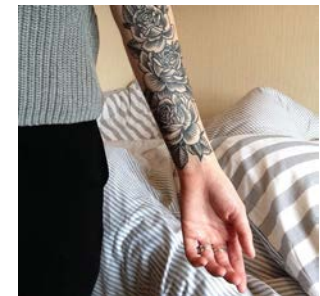
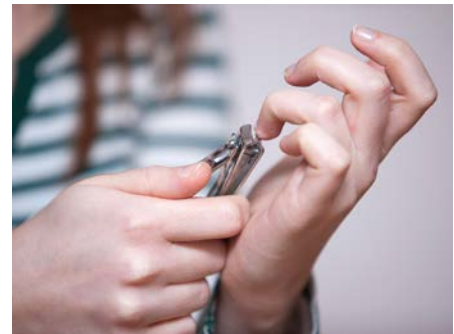
Include policies on the following in student manual & discuss during orientation:

- Professional Presentation (Dress Code)
- Cell Phone Use
- Social Media Use
- Confidentiality
- Others?



Professional Presentation

Professional presentation is more than just dress code. Consider the following:



Mature Professional Behaviors I

(GVSU Program Manual)

Attitude:


- Displays a friendly, positive attitude
- Open and receptive to new ideas
- Receives constructive feedback without defensiveness
- Handles change in expected routines professionally
- Displays an appropriate sense of humor
- Does not complain or display negative, indifferent, or arrogant attitude

Mature Professional Behaviors II

(GVSU Program Manual)

Personal/Professional Self:

- Displays emotional maturity
- Balances personal and professional obligations
- Reacts with restraint and constructive responses
- Recognizes and handles personal and professional frustrations
- Displays self composure
- Responsive to social cues



Literature: Improving Professional Behaviors I

- Canavan, C., Holtman, M., Richmond, M., Katsufakis, P. (2010). The quality of written comments on professional behaviors in a developmental multisource feedback program. *Academic Medicine*, 85 (10): 106-109.
 - Quality feedback = define **specific behavior** issue and define **specific strategy** to improve behavior
 - Avoid self-orientated feedback

Literature: Improving Professional Behaviors II

- Ginsburg, S., Regehr, G., Lingard, L. (2004). Basing the evaluation of professionalism on observable behaviors: a cautionary tale. *Academic Medicine*, 79(10): S1 – S4.
 - **Consider context, values, and motivation for behaviors**

Literature: Improving Professional Behaviors III

- Scheerer, C. (2003). Perceptions of effective professional behavior feedback: occupational therapy student voices. *American Journal of Occupational Therapy*, 57, 205 – 214.
 - **Many students feel feedback needs to be verbal in addition to a written/paper evaluation tool**
 - **Students appreciate collaborative discussions about professional behavior expectations**



Literature: Improving Professional Behaviors IV

- MacDonald, C., Cox, P., Bartlett, D., Houghton, P. (2002). Consensus on methods to foster physical therapy professional behaviors. *Journal of Physical Therapy Education*, 16(1): 27-36.
 - **Professional culture is learned by example**
 - **Provide interdependent and wide context relevance when giving feedback**



Literature: Improving Professional Behaviors - V

- Cullen, M. W., Reed, D. A., Halvorsen, A. J., Wittich, C. M., Kreuziger, L. M. B., Keddis, M. T., ...Beckman, T. J. (2011). Selection criteria for internal medicine residency applicants and professionalism ratings during internship. *Mayo Clinic Proceedings*, 86(3), 197+.
- **Lack of professionalism of students has long standing effects on future career**
- **Unprofessional behaviors were shown to predict disciplinary action by state medical licensing boards.**



Literature: Improving Professional Behaviors- VI

- Evenson, M. E., Roberts, M., Kaldenberg, J., Barnes, M. A., & Ozelie, R. (2015). National survey of fieldwork educators: implications for occupational therapy education. *AJOT: American Journal of Occupational Therapy*, 69(S2).
- **AFWC involvement is needed to address professional behavior issues**
 - Education prior to FW
 - Availability to discuss issues with FWE
 - Face to face meetings with AFWC, student, FWE

Addressing Professional Behavior Concerns

- Students need to understand the IMPACT factor
 - Assess awareness level
 - Ask if others have given them the same feedback and in what context
 - Make a “*teaching moment*”
 - *Define* small vs. big concern
 - *Collaborate* on alternatives
 - *Define consequences* for no change in behavior

Appropriate professional behaviors are critical to fieldwork and workplace success!





Student Feedback and Evaluation Tools

Suggestions for Providing Feedback I

- Begin positive
- Well-timed and expected: tell student when/how you will be giving them feedback
 - When: after each session, before lunch, end of day, end of week
 - How: verbally, written assessments, weekly logs



Suggestions for Providing Feedback II

- Be specific: based on first-hand or observed data, not another therapist, aide or front desk personnel
- Focus on behaviors not the person (changeable behaviors)

Suggestions for Providing Feedback III

- Use the **Behavior** words in the feedback (3rd person) Avoid “you” statements
 - Student’s natural personality is shy/timid: “The **“greeting”** of the patient was a little weak”
 - Student has decreased confidence for asserting oneself with the patient: “The **“transfer”** could have gone better. More verbal cueing would have been helpful.”
 - Student not connecting with “grading”: “The **“activity”** chosen was not appropriate for Mrs. Jones’ dynamic standing balance.”

Suggestions for Providing Feedback IV

- Be certain your motive is to be helpful
- Phrase in descriptive, nonjudgmental language (use “I” statements)
- Be immediate
- Be private
- Avoid assumptions
- Clarify the students’ perceptions

Suggestions for Providing Feedback V

- Suggested Statements
 - **Continue...** comment on aspects of performance that were effective. Be specific, and describe impact. Highlight things you would like to see be done in the future. Make clear your expectations. (Give examples)
 - **Start, or do more...** Identify behavior the student knows how to do , could do, or could do more often.

Suggestions for Providing Feedback VI

- **Consider...** Highlight a point of growth for the learner, a “doable” challenge for future interactions.
- **Stop, or do less...** Point out actions that were not helpful or could be harmful. Be specific, and indicate potential impact

Weekly Meeting Form

- Refer to Handout





Formal Evaluation



AOTA FWPE: *Fieldwork Performance Evaluation*

- BOOKLET or pdf purchased from AOTA: OTA and OT versions
- *Sample copy* provided with permission
- Content Area OT: 7 areas, 42 items
- Content Area OTA: 6 areas, 25 items
 - OT:
 - Fundamentals of Practice (research)
 - Management



FWPE Rating Scale

- 1 =
- 2 =
- 3 =
- 4 =

*****NO HALF SCORES

FWPE – Total Scores

- Mid-Term Score (Satisfactory)
 - OT: 90 and above
 - OTA: 54 and above
- Final Score (Pass)
 - OT: 122 and above
 - OTA 70 and above
- Please Note: Ratings for the **Safety and Ethics** items must be scored at **3 or above** on the Final Evaluation for student to PASS Fieldwork!

Scenarios for Scoring FWPE

- See sample FWPE



Learning Contracts

- Who writes them?
- Decide the “name” of the document
- Include:
 - dates, outcomes, measurements, resources,
 - processes/strategies, target date for completion,
 - signatures from Student and FW Educator, AFWC

References

- AOTA fieldwork education resources online:
<http://www.aota.org/Education-Careers/Fieldwork.aspx>
- NEOTEC:
<http://neotecouncil.org/>
 - Electronic Site-Specific Objectives template
 - Blank AOTA Fieldwork Data Form template

1. Home Page= www.aota.org

The screenshot shows the AOTA website home page in a Mozilla Firefox browser window. The browser title is "Home - AOTA - Mozilla Firefox". The address bar shows "www.aota.org". The page features a blue header with the AOTA logo and navigation links. The main content area includes a large banner for "STOP THE CAP" with a photo of the US Capitol building and a call to action. Below the banner are several navigation buttons: "Conference App", "Stop the Cap", "Best OT Job", "Early Identification", and "Podcast on Autism". The page also includes a "Most Visited" sidebar with links to "American Journal of Occupational Therapy (AJOT)", "Find a School", "Continuing Education", and "Online Store". At the bottom, there are sections for "Latest AOTA News" and "Upcoming Events".

Home - AOTA - Mozilla Firefox

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Home - AOTA

www.aota.org

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Practice Advocacy & Policy Education & Careers Conferences & Events Publications & News About Occupational Therapy

HOME

STOP THE CAP

Stop the Cap

Congress Strips Therapy Cap Repeal from Advancing Legislation. Please take action TODAY before its too late!

Conference App Stop the Cap Best OT Job Early Identification Podcast on Autism

@AOTAinc Hey #AOTA14 Presenters: Tell us about your session (topic, time, session #). We'll RT.

Latest AOTA News

- Licensure and Scope of Practice Measures Advance in Two States
- AOTA Alerts: Give Your Feedback on RA Motions & More AOTA News
- How to Respond When Media Get OT Wrong
- RA Spring Online Meeting
- Ten Things You Can Do To Celebrate Occupational Therapy Month

Upcoming Events

- OT Month 04/01/2014 - 04/30/2014
- Annual Conference & Expo 04/03/2014 - 04/06/2014
- Pediatric Chat: OT Toolkit for Autism Speaks 04/21/2014

Most Visited

- American Journal of Occupational Therapy (AJOT)
- Find a School
- Continuing Education
- Online Store

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2. Click on Tab= Education & Careers



The screenshot shows the AOTA website in a Mozilla Firefox browser window. The browser title is "Home - AOTA - Mozilla Firefox" and the address bar shows "www.aota.org". The website header includes the AOTA logo and navigation links: "About AOTA", "Shop AOTA", "OTJobLink", "OT Connections", and "Social Networking". A search bar and "JOIN AOTA" and "SIGN IN" buttons are also present.

The main navigation menu is highlighted, with "Education & Careers" selected. The dropdown menu for "Education & Careers" is open, listing the following items:

- Get/Maintain Your License
- Continuing Education
- Find a Job
- Find a School
- Considering an OT Career?
- Awards and Recognitions
- Advance Your Career
- New Practitioners and Recent Graduates
- Fieldwork
- Resources for Educators
- Accreditation
- NBCOT Exam Prep

Other visible content on the page includes a "Most Visited" section with links to "American Journal of Occupational Therapy (AJOT)", "Find a School", "Continuing Education", and "Online Store". There are also sections for "Latest AOTA News" and "Upcoming Events".

3. Click on “Fieldwork”



The screenshot shows the AOTA website in a Mozilla Firefox browser window. The browser's address bar displays 'www.aota.org'. The website's header includes the AOTA logo, navigation links (About AOTA, Shop AOTA, OTJobLink, OT Connections, Social Networking), a search bar, and 'JOIN AOTA' and 'SIGN IN' buttons. The main navigation menu is expanded, showing the following items: Practice, Advocacy & Policy, Education & Careers, Conferences & Events, Publications & News, and About Occupational Therapy. The 'Education & Careers' dropdown menu is open, listing: Get/Maintain Your License, Continuing Education, Find a Job, Find a School, Considering an OT Career?, Awards and Recognitions, Advance Your Career, New Practitioners and Recent Graduates, Fieldwork, Resources for Educators, Accreditation, and NBCOT Exam Prep. A black arrow points to the 'Fieldwork' link. The website also features a 'HOME' section with a banner for 'AOTA's 94th Annual Conference April 3-6, 2014' and a list of features for the mobile app. There are also sections for 'Latest AOTA News' and 'Upcoming Events'.

4. List of Fieldwork Resources

Fieldwork Education - AOTA - Mozilla Firefox

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Fieldwork Education - AOTA

www.aota.org/Education-Careers/Fieldwork.aspx

WMU Home CHHS Home CHHS IT Support GoWMU Login Webmail Plus Log In Google

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About AOTA Shop AOTA OTJobLink OT Connections Social Networking

AOTA The American Occupational Therapy Association, Inc.

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Practice Advocacy & Policy **Education & Careers** Conferences & Events Publications & News About Occupational Therapy

HOME > EDUCATION & CAREERS > FIELDWORK EDUCATION

-A +A Listen

Fieldwork Education - AOTA - Mozilla Firefox

Get/Maintain Your License

Continuing Education

Find a Job

Advance Your Career

New Practitioners and Recent Graduates

Find a School

Considering an OT Career?

Awards and Recognitions

Fieldwork

Resources for Academic Fieldwork Coordinators

Answers to Your Fieldwork Questions

Fieldwork Opportunities at AOTA

Level I Fieldwork

Level II Fieldwork

Site-Specific Objectives

Resources for Fieldwork Education

Fieldwork Educators Certificate Workshop

Student Supervision

AOTA Fieldwork Related Products

Resources for Educators

Fieldwork

In this section you can find resources about fieldwork education including Level I and Level II fieldwork, resources for new programs, and more.

Level I Fieldwork

Get Commission on Education (COE) guidelines for level I fieldwork and sample forms.

Level II Fieldwork

Get COE guidelines for level II fieldwork, sample forms, and an AOTA position paper.

Site-Specific Objectives

Forms for site objectives, and samples for a variety of settings.

Student Supervision

Medicare requirements for student supervision, practice advisory, and a student evaluation.

Fieldwork Educators Certificate Workshop

Advance your skills in this important area with our Fieldwork Educators Certificate Program

Answers to Your Fieldwork Questions

Students get answers about fieldwork requirements, supervision, grading, difficulties with supervisors, failing, unfair treatment, accommodations for a disability, and international fieldwork.

Resource for New Fieldwork Programs

- Steps to Starting a Fieldwork Program
- Recommended Content for a Student Fieldwork Manual
- Strategies for Creative Fieldwork Opportunities

Interested in fieldwork experience at AOTA?

Get information about fieldwork experiences at AOTA and find out how to apply.

Fieldwork Related Products

- The Essential Guide to Occupational Therapy Fieldwork Education
- Using the Fieldwork Performance Evaluation Forms: The Complete Guide
- Fieldwork Performance Evaluation for the OTA Student
- Fieldwork Performance Evaluation for the OT Student

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**Oak Tree Developmental Center
Weekly Goals & Expectations
Level II Fieldwork**

Week 1

(Days 1-3)

- Tour of facility and introduction to Oak Tree staff
- Introduction to sites policies/procedures and overview of clinical services offered at Oak Tree Developmental Center
- Participate in any required training and orientation for Oak Tree (i.e. documentation, evaluation process, caseload/client population/goal setting, safety, and equipment use)
- Review site expectations for student and discuss student's long term goals for fieldwork experience
- Review common therapy methods used at Oak Tree (i.e. ABA and DIR)
- Review evaluation tools commonly used at Oak Tree (i.e. Sensory Profile Checklist, VMI, BOT-2, and the Peabody)
- Participate in group sessions and one on one sessions
- Review therapist documentation for treatment sessions

(Days 4-5)

- Discuss possible ideas for student project
- Observe early intervention in two settings (home based and clinic based) and discuss the significance of practicing in the natural setting with fieldwork educator
- Receive first client from fieldwork educator's caseload to prepare and carry out treatment plan independently
- Perform documentation on session with feedback from fieldwork educator
- Participate in weekly discussion/feedback session with fieldwork educator (see attached form for guide)

Week 2

AOTA FWPE Item	Site-Specific Objectives
Basic Tenants	<ul style="list-style-type: none"> ▪ Communicate with and observe other disciplines' treatment sessions (i.e. PT and SLP) to better understand OT's role on the team
Evaluation and Screening	<ul style="list-style-type: none"> ▪ Observe OT evaluation process with at least <i>one</i> client ▪ Student will begin to assess client factors & contexts that support or hinder treatment goals for clients and discuss with fieldwork educator
Intervention	<ul style="list-style-type: none"> ▪ Prepare and carry out treatment plans for <i>2 clients</i> independently, including documentation for sessions ▪ Provide report on client's response to treatment sessions ▪ Provide a current research article supporting <i>one</i> treatment approach chosen to implement with clients and explain supporting evidence for practice to fieldwork educator ▪ Continue daily participation in all of Fieldwork Educator's clinical treatment sessions (individual and group)
Communication	<ul style="list-style-type: none"> • Provide education to <i>one</i> family at the end of one therapy session • Complete documentation treatment session independently
Management of Occupational Therapy Services	<ul style="list-style-type: none"> ▪ Attend any departmental meetings if applicable to learn more about the organizational goals of Oak Tree Developmental Center ▪ If site has Certified Occupational Therapy Assistants (COTAs); student will discuss the role of the OTR with fieldwork educator and observe interactions in order to get a better understanding of the relationship between the COTA and OTR
Professional Behaviors	<ul style="list-style-type: none"> ▪ Determine time line for student project and work with fieldwork educator to establish due dates ▪ Collaborate with Fieldwork Educator to participate in weekly discussion/feedback sessions (see attached form)

Week 3

AOTA FWPE Item	Site-Specific Objectives
Basic Tenants	<ul style="list-style-type: none"> ▪ Communicate with other disciplines (i.e. PT and SLP) to better understand OT's role on the team ▪ Clearly articulate the role of OT to families and other team members when applicable
Evaluation and Screening	<ul style="list-style-type: none"> ▪ Observe OT evaluation process with at least <i>one</i> client (if applicable) ▪ Student will assess client factors & contexts that support or hinder treatment goals for clients and discuss with fieldwork educator
Intervention	<ul style="list-style-type: none"> ▪ Prepare and carry out treatment plans for 3 clients independently, including documentation for sessions ▪ Provide report on clients' response to treatment sessions ▪ Provide a current research article supporting <i>one</i> treatment approach chosen to implement with clients and explain supporting evidence for practice to fieldwork educator ▪ Continue daily participation in all of Fieldwork Educator's clinical treatment sessions (individual and group)
Communication	<ul style="list-style-type: none"> • Provide education to 2 families at the end of therapy session • Complete documentation for treatment sessions independently
Management of Occupational Therapy Services	<ul style="list-style-type: none"> ▪ Attend any departmental meetings if applicable to learn more about the organizational goals of Oak Tree Developmental Center ▪ If site has Certified Occupational Therapy Assistants (COTAs); students will continue to observe interactions between the COTA and OTR in order to get a better understanding of the relationship
Professional Behaviors	<ul style="list-style-type: none"> ▪ Collaborate with other team members (i.e. SLP or PT) and co-lead at least <i>one</i> group therapy session with another discipline ▪ Collaborate with Fieldwork Educator to participate in weekly discussion/feedback sessions (see attached form)

Week 4

AOTA FWPE Item	Site-Specific Objectives
Basic Tenants	<ul style="list-style-type: none"> ▪ Daily communication with other disciplines (i.e. PT & SLP) in order to understand their roles and the OT's role on the team ▪ Clearly articulate the role of OT to families and other team members when applicable
Evaluation and Screening	<ul style="list-style-type: none"> ▪ Evaluate at least <i>one</i> client independently (if applicable) and complete appropriate documentation ▪ Student will assess client factors & contexts that support or hinder treatment goals for clients and discuss with fieldwork educator
Intervention Intervention Continued	<ul style="list-style-type: none"> ▪ Prepare and carry out treatment plans for 4 clients independently, including documentation for sessions ▪ Provide report on clients' response to treatment sessions ▪ Provide a current research article supporting <i>two</i> treatment approaches chosen to implement with clients and explain supporting evidence for practice to fieldwork educator ▪ Continue daily participation in all of Fieldwork Educator's clinical treatment sessions (individual and group)
Communication	<ul style="list-style-type: none"> • Provide education to 3 families at the end of therapy session • Complete documentation for treatment sessions independently (see above)

Management of Occupational Therapy Services	<ul style="list-style-type: none"> ▪ Attend any departmental meetings if applicable to learn more about the organizational goals of Oak Tree Developmental Center ▪ If site has Certified Occupational Therapy Assistants (COTAs); students will collaborate with the COTA daily and demonstrate awareness of an appropriate supervisory relationship between COTA and OTR, including knowledge of the roles and responsibilities of COTA
Professional Behaviors	<ul style="list-style-type: none"> ▪ Collaborate with other team members (i.e. SLP or PT) and co-lead at least <i>one</i> group therapy session with another discipline ▪ Collaborate with Fieldwork Educator to participate in weekly discussion/feedback sessions (see attached form)

Week 5

AOTA FWPE Item	Site-Specific Objectives
Basic Tenants	<ul style="list-style-type: none"> ▪ Daily communication with other disciplines (i.e. PT & SLP) ▪ Clearly articulate the role of OT to families and other team members when applicable
Evaluation and Screening	<ul style="list-style-type: none"> ▪ Evaluate at least <i>one</i> client independently (if applicable) and complete appropriate documentation ▪ Student will assess client factors & contexts that support or hinder treatment goals for clients and discuss with fieldwork educator
Intervention	<ul style="list-style-type: none"> ▪ Prepare and carry out treatment plans for 5-6 clients independently, including documentation for sessions ▪ Provide report on clients' response to treatment sessions ▪ Provide a current research article supporting <i>two</i> treatment approaches chosen to implement with clients and explain supporting evidence for practice to fieldwork educator ▪ Continue daily participation in all of Fieldwork Educator's clinical treatment sessions (individual and group)
Communication	<ul style="list-style-type: none"> • Provide education to 3-4 families at the end of therapy session • Complete documentation for treatment sessions independently (see above)
Management of Occupational Therapy Services	<ul style="list-style-type: none"> ▪ Attend any departmental meetings if applicable to learn more about the organizational goals of Oak Tree Developmental Center ▪ If site has Certified Occupational Therapy Assistants (COTAs); students will collaborate with the COTA daily and demonstrate awareness of an appropriate supervisory relationship between COTA and OTR, including knowledge of the roles and responsibilities of COTA ▪ Student Project Check In: Student will provide fieldwork educator with rough draft/outline of project
Professional Behaviors	<ul style="list-style-type: none"> ▪ Collaborate with other team members (i.e. SLP or PT) and co-lead at least <i>one</i> group therapy session with another discipline ▪ Collaborate with Fieldwork Educator to participate in weekly discussion/feedback sessions (see attached form)

Week 6

AOTA FWPE Item	Site-Specific Objectives
Basic Tenants	<ul style="list-style-type: none"> ▪ Daily communication with other disciplines (i.e. PT & SLP) ▪ Clearly articulate the role of OT to families and other team members when applicable
Evaluation and Screening	<ul style="list-style-type: none"> ▪ Evaluate any clients independently (if applicable) and complete appropriate documentation ▪ Student will assess client factors & contexts that support or hinder treatment goals for clients and discuss with fieldwork educator

Intervention	<ul style="list-style-type: none"> ▪ Prepare and carry out treatment plans for <i>full OT caseload</i> independently, including documentation for sessions ▪ Provide report on clients' response to treatment sessions ▪ Provide a current research article supporting <i>three</i> treatment approaches chosen to implement with clients and explain supporting evidence for practice to fieldwork educator
Communication	<ul style="list-style-type: none"> • Provide education to all families at the end of therapy sessions with fieldwork educator as an observer • Complete documentation for treatment sessions independently (see above)
Management of Occupational Therapy Services	<ul style="list-style-type: none"> ▪ Attend any departmental meetings if applicable to learn more about the organizational goals of Oak Tree Developmental Center ▪ If site has Certified Occupational Therapy Assistants (COTAs); students will collaborate with the COTA daily and demonstrate awareness of an appropriate supervisory relationship between COTA and OTR, including knowledge of the roles and responsibilities of COTA
Professional Behaviors	<ul style="list-style-type: none"> ▪ Collaborate with other team members (i.e. SLP or PT) and co-lead any group therapy sessions with other disciplines ▪ Collaborate with Fieldwork Educator to participate in weekly discussion/feedback sessions (see attached form) ▪ Complete mid-term evaluation with fieldwork educator

Week 7

AOTA FWPE Item	Site-Specific Objectives
Basic Tenants	<ul style="list-style-type: none"> ▪ Daily communication with other disciplines (i.e. PT & SLP) ▪ Clearly articulate the role of OT to families and other team members when applicable
Evaluation and Screening	<ul style="list-style-type: none"> ▪ Evaluate any clients independently (if applicable) and complete appropriate documentation ▪ Student will assess client factors & contexts that support or hinder treatment goals for clients and discuss with fieldwork educator
Intervention	<ul style="list-style-type: none"> ▪ Prepare and carry out treatment plans for <i>full OT caseload</i> independently, including documentation for sessions ▪ Provide report on clients' response to treatment sessions ▪ Provide a current research article supporting <i>three</i> treatment approaches chosen to implement with clients and explain supporting evidence for practice to fieldwork educator
Communication	<ul style="list-style-type: none"> • Provide education to all families at the end of therapy sessions with fieldwork educator as an observer • Complete documentation for treatment sessions independently (see above)
Management of Occupational Therapy Services	<ul style="list-style-type: none"> ▪ Attend any departmental meetings if applicable to learn more about the organizational goals of Oak Tree Developmental Center ▪ If site has Certified Occupational Therapy Assistants (COTAs); students will collaborate with the COTA daily and demonstrate awareness of an appropriate supervisory relationship between COTA and OTR, including knowledge of the roles and responsibilities of COTA
Professional Behaviors	<ul style="list-style-type: none"> ▪ Collaborate with other team members (i.e. SLP or PT) and co-lead any group therapy sessions with other disciplines ▪ Collaborate with Fieldwork Educator to participate in weekly discussion/feedback sessions (see attached form)

Week 8

AOTA FWPE Item	Site-specific Objectives
Basic Tenants	<ul style="list-style-type: none"> ▪ Daily communication with other disciplines (i.e. PT & SLP) ▪ Clearly articulate the role of OT to families and other team members when applicable
Evaluation and Screening	<ul style="list-style-type: none"> ▪ Evaluate any clients independently (if applicable) and complete appropriate documentation ▪ Student will assess client factors & contexts that support or hinder treatment goals for clients and discuss with fieldwork educator
Intervention	<ul style="list-style-type: none"> ▪ Prepare and carry out treatment plans for <i>full OT caseload</i> independently, including documentation for sessions ▪ Provide report on clients' response to treatment sessions
Communication	<ul style="list-style-type: none"> • Provide education to all families at the end of therapy sessions with fieldwork educator as an observer • Complete documentation for treatment sessions independently (see above)
Management of Occupational Therapy Services	<ul style="list-style-type: none"> ▪ Attend any departmental meetings if applicable to learn more about the organizational goals of Oak Tree Developmental Center ▪ If site has Certified Occupational Therapy Assistants (COTAs); students will collaborate with the COTA daily and demonstrate awareness of an appropriate supervisory relationship between COTA and OTR, including knowledge of the roles and responsibilities of COTA
Professional Behaviors	<ul style="list-style-type: none"> ▪ Collaborate with other team members (i.e. SLP or PT) and co-lead any group therapy sessions with other disciplines ▪ Collaborate with Fieldwork Educator to participate in weekly discussion/feedback sessions (see attached form)

Week 9

AOTA FWPE Item	Site-specific Objectives
Basic Tenants	<ul style="list-style-type: none"> ▪ Daily communication with other disciplines (i.e. PT & SLP) ▪ Clearly articulate the role of OT to families and other team members when applicable
Evaluation and Screening	<ul style="list-style-type: none"> ▪ Evaluate any clients independently (if applicable) and complete appropriate documentation ▪ Student will assess client factors & contexts that support or hinder treatment goals for clients and discuss with fieldwork educator
Intervention	<ul style="list-style-type: none"> ▪ Prepare and carry out treatment plans for <i>full OT caseload</i> independently, including documentation for sessions ▪ Provide report on clients' response to treatment sessions
Communication	<ul style="list-style-type: none"> • Provide education to all families at the end of therapy sessions with fieldwork educator as an observer • Complete documentation for treatment sessions independently (see above)
Management of Occupational Therapy Services	<ul style="list-style-type: none"> ▪ Attend any departmental meetings if applicable to learn more about the organizational goals of Oak Tree Developmental Center ▪ If site has Certified Occupational Therapy Assistants (COTAs); students will collaborate with the COTA daily and demonstrate awareness of an appropriate supervisory relationship between COTA and OTR, including knowledge of the roles and responsibilities of COTA
Professional Behaviors	<ul style="list-style-type: none"> ▪ Collaborate with other team members (i.e. SLP or PT) and co-lead any group therapy sessions with other disciplines ▪ Collaborate with Fieldwork Educator to participate in weekly discussion/feedback sessions (see attached form)

Week 10

AOTA FWPE Item	Site-specific Objectives
Basic Tenants	<ul style="list-style-type: none"> ▪ Daily communication with other disciplines (i.e. PT & SLP) ▪ Clearly articulate the role of OT to families and other team members when applicable
Evaluation and Screening	<ul style="list-style-type: none"> ▪ Evaluate any clients independently (if applicable) and complete appropriate documentation ▪ Student will assess client factors & contexts that support or hinder treatment goals for clients and discuss with fieldwork educator
Intervention	<ul style="list-style-type: none"> ▪ Prepare and carry out treatment plans for <i>full OT caseload</i> independently, including documentation for sessions ▪ Provide report on clients' response to treatment sessions
Communication	<ul style="list-style-type: none"> • Provide education to all families at the end of therapy sessions with fieldwork educator as an observer • Complete documentation for treatment sessions independently (see above)
Management of Occupational Therapy Services	<ul style="list-style-type: none"> ▪ Attend any departmental meetings if applicable to learn more about the organizational goals of Oak Tree Developmental Center ▪ If site has Certified Occupational Therapy Assistants (COTAs); students will collaborate with the COTA daily and demonstrate awareness of an appropriate supervisory relationship between COTA and OTR, including knowledge of the roles and responsibilities of COTA
Professional Behaviors	<ul style="list-style-type: none"> ▪ Collaborate with other team members (i.e. SLP or PT) and co-lead any group therapy sessions with other disciplines ▪ Collaborate with Fieldwork Educator to participate in weekly discussion/feedback sessions (see attached form)
Fieldtrip Opportunity	<ul style="list-style-type: none"> ▪

Week 11

AOTA FWPE Item	Site-specific Objectives
Basic Tenants	<ul style="list-style-type: none"> ▪ Daily communication with other disciplines (i.e. PT & SLP) ▪ Clearly articulate the role of OT to families and other team members when applicable
Evaluation and Screening	<ul style="list-style-type: none"> ▪ Evaluate any clients independently (if applicable) and complete appropriate documentation ▪ Student will assess client factors & contexts that support or hinder treatment goals for clients and discuss with fieldwork educator
Intervention	<ul style="list-style-type: none"> ▪ Prepare and carry out treatment plans for <i>full OT caseload</i> independently, including documentation for sessions ▪ Provide report on clients' response to treatment sessions
Communication	<ul style="list-style-type: none"> • Provide education to all families at the end of therapy sessions with fieldwork educator as an observer • Complete documentation for treatment sessions independently (see above)
Management of Occupational Therapy Services	<ul style="list-style-type: none"> ▪ Attend any departmental meetings if applicable to learn more about the organizational goals of Oak Tree Developmental Center ▪ If site has Certified Occupational Therapy Assistants (COTAs); students will collaborate with the COTA daily and demonstrate awareness of an appropriate supervisory relationship between COTA and OTR, including knowledge of the roles and responsibilities of COTA
Professional Behaviors	<ul style="list-style-type: none"> ▪ Collaborate with other team members (i.e. SLP or PT) and co-lead any group therapy sessions with other disciplines ▪ Student will present project ▪ Collaborate with Fieldwork Educator to participate in weekly

	discussion/feedback sessions (see attached form)
Fieldtrip Opportunity	

Week 12

AOTA FWPE Item	Site-specific Objectives
Basic Tenants	<ul style="list-style-type: none"> ▪ Daily communication with other disciplines (i.e. PT & SLP) ▪ Clearly articulate the role of OT to families and other team members when applicable
Evaluation and Screening	<ul style="list-style-type: none"> ▪ Evaluate any clients independently (if applicable) and complete appropriate documentation ▪ Student will assess client factors & contexts that support or hinder treatment goals for clients and discuss with fieldwork educator
Intervention	<ul style="list-style-type: none"> ▪ Prepare and carry out treatment plans for <i>full OT caseload</i> independently, including documentation for sessions ▪ Provide report on clients' response to treatment sessions
Communication	<ul style="list-style-type: none"> • Provide education to all families at the end of therapy sessions with fieldwork educator as an observer • Complete documentation for treatment sessions independently (see above)
Management of Occupational Therapy Services	<ul style="list-style-type: none"> ▪ Attend any departmental meetings if applicable to learn more about the organizational goals of Oak Tree Developmental Center ▪ If site has Certified Occupational Therapy Assistants (COTAs); students will collaborate with the COTA daily and demonstrate awareness of an appropriate supervisory relationship between COTA and OTR, including knowledge of the roles and responsibilities of COTA
Professional Behaviors	<ul style="list-style-type: none"> ▪ Collaborate with other team members (i.e. SLP or PT) and co-lead any group therapy sessions with other disciplines ▪ Collaborate with Fieldwork Educator to participate in weekly discussion/feedback sessions (see attached form) ▪ Complete final evaluation (AOTA FWPE)

IDEAS FOR STUDENT PROJECT:

IDEAS FOR STUDENT PRESENTATION:

Weekly Summary Form – Week Number _____

This form is to be filled out individually by the student and by the fieldwork supervisor, and then discussed.

Strengths and Achievements This Week:

Challenges/Areas for Student Growth and Development:

Aspects of Supervision That Were Helpful This Week:

Suggestions for How the Supervisor Can Help with Growth and Development This Week:

Goals for the Next Week:

Student Name:
Student Signature: _____ Date: _____

FW Educator Name:
FW Educator Signature: _____ Date: _____



Fieldwork Performance Evaluation For The Occupational Therapy Student

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

COLLEGE OR UNIVERSITY

FIELDWORK SETTING:

NAME OF ORGANIZATION/FACILITY

ADDRESS: (STREET OR PO BOX)

CITY STATE ZIP

TYPE OF FIELDWORK

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

FROM: TO:
DATES OF PLACEMENT

NUMBER OF HOURS COMPLETED

FINAL SCORE

PASS: _____ **NO PASS:** _____

SUMMARY COMMENTS:
(ADDRESSES STUDENT'S CLINICAL COMPETENCE)

SIGNATURES:
I HAVE READ THIS REPORT.

SIGNATURE OF STUDENT

NUMBER OF PERSONS CONTRIBUTING TO THIS REPORT

SIGNATURE OF RATER #1

PRINT NAME/CREDENTIALS/POSITION

SIGNATURE OF RATER #2 (IF APPLICABLE)

PRINT NAME/CREDENTIALS/POSITION

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

Fieldwork Performance Evaluation For The Occupational Therapy Student

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

PURPOSE

The primary purpose of the Fieldwork Performance Evaluation for the Occupational Therapy Student is to measure entry-level competence of the occupational therapy student. The evaluation is designed to differentiate the competent student from the incompetent student and is not designed to differentiate levels above entry level competence. For further clarification on entry-level competency refer to the Standards of Practice for Occupational Therapy¹.

The evaluation is designed to measure the performance of the occupational therapy process and was not designed to measure the specific occupational therapy tasks in isolation. This evaluation reflects the 1998 Accreditation Council for Occupational Therapy Education Standards² and the National Board for Certification in Occupational Therapy, Inc. Practice Analysis results³. In addition, this evaluation allows students to evaluate their own strengths and challenges in relation to their performance as an occupational therapist.

USE OF THE FIELDWORK PERFORMANCE EVALUATION FOR THE OCCUPATIONAL THERAPY STUDENT

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

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

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

DIRECTIONS FOR RATING STUDENT PERFORMANCE

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

OVERALL MIDTERM SCORE

Satisfactory Performance 90 and above
Unsatisfactory Performance 89 and below

OVERALL FINAL SCORE

Pass 122 points and above
No Pass 121 points and below

RATING SCALE FOR STUDENT PERFORMANCE

- 4 — **Exceeds Standards:** Performance is highly skilled and self-initiated. This rating is **rarely given** and **would represent the top 5% of all the students** you have supervised.
- 3 — **Meets Standards:** Performance is consistent with **entry-level** practice. This rating is **infrequently given at midterm** and is a **strong rating at final**.
- 2 — **Needs improvement:** Performance is **progressing but** still needs improvement for entry-level practice. This is a **realistic rating of performance at midterm**, and some ratings of 2 may be reasonable at the final.
- 1 — **Unsatisfactory:** Performance is **below standards** and requires development for entry-level practice. This rating is given when **there is a concern about performance**.

RATING SCALE FOR STUDENT PERFORMANCE

- 4 — **Exceeds Standards:** Performance is highly skilled and self-initiated. This rating is **rarely given** and **would represent the top 5% of all the students** you have supervised.
- 3 — **Meets Standards:** Performance is consistent with **entry-level** practice. This rating is **infrequently given at midterm** and is a **strong rating at final**.
- 2 — **Needs improvement:** Performance is **progressing but** still needs improvement for entry-level practice. This is a **realistic rating of performance at midterm**, and some ratings of 2 may be reasonable at the final.
- 1 — **Unsatisfactory:** Performance is **below standards** and requires development for entry-level practice. This rating is given when **there is a concern about performance**.

I. FUNDAMENTALS OF PRACTICE:

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

- 1. **Adheres to ethics:** Adheres consistently to the American Occupational Therapy Association Code of Ethics⁴ and site's policies and procedures including when relevant, those related to human subject research.

Midterm	1	2	3	4
Final	1	2	3	4

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

Midterm	1	2	3	4
Final	1	2	3	4

- 3. **Uses judgment in safety:** Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.

Midterm	1	2	3	4
Final	1	2	3	4

Comments on strengths and areas for improvement:

• Midterm

• Final

II. BASIC TENETS:

- 4. Clearly and confidently **articulates the values and beliefs** of the occupational therapy profession to clients, families, significant others, colleagues, service providers, and the public.

Midterm	1	2	3	4
Final	1	2	3	4

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

Midterm	1	2	3	4
Final	1	2	3	4

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

Midterm	1	2	3	4
Final	1	2	3	4

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

Midterm	1	2	3	4
Final	1	2	3	4

Comments on strengths and areas for improvement:

• Midterm

• Final

RATING SCALE FOR STUDENT PERFORMANCE

- 4 — **Exceeds Standards:** Performance is highly skilled and self-initiated. This rating is **rarely given** and **would represent the top 5% of all the students** you have supervised.
- 3 — **Meets Standards:** Performance is consistent with **entry-level** practice. This rating is **infrequently given at midterm** and is a **strong rating at final**.
- 2 — **Needs improvement:** Performance is **progressing but** still needs improvement for entry-level practice. This is a **realistic rating of performance at midterm**, and some ratings of 2 may be reasonable at the final.
- 1 — **Unsatisfactory:** Performance is **below standards** and requires development for entry-level practice. This rating is given when **there is a concern about performance**.

- 15. **Interprets evaluation results** to determine client's occupational performance strengths and challenges.

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

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

Midterm	1	2	3	4
Final	1	2	3	4

III. EVALUATION AND SCREENING:

- 8. **Articulates a clear and logical rationale** for the evaluation process.

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

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

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

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

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

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

Midterm	1	2	3	4
Final	1	2	3	4

Comments on strengths and areas for improvement:

• Midterm

• Final

IV. INTERVENTION:

- 18. **Articulates a clear and logical rationale** for the intervention process.

Midterm	1	2	3	4
Final	1	2	3	4
- 19. **Utilizes evidence** from published research and relevant resources to make informed intervention decisions.

Midterm	1	2	3	4
Final	1	2	3	4

20. **Chooses occupations** that motivate and challenge clients.

Midterm 1 2 3 4

Final 1 2 3 4

21. **Selects relevant occupations** to facilitate clients meeting established goals.

Midterm 1 2 3 4

Final 1 2 3 4

22. **Implements intervention plans that are client-centered.**

Midterm 1 2 3 4

Final 1 2 3 4

23. **Implements intervention plans that are occupation-based.**

Midterm 1 2 3 4

Final 1 2 3 4

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

Midterm 1 2 3 4

Final 1 2 3 4

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

Midterm 1 2 3 4

Final 1 2 3 4

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

Midterm 1 2 3 4

Final 1 2 3 4

Comments on strengths and areas for improvement:

- Midterm

- Final

V. MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES:

27. **Demonstrates through practice or discussion the ability to assign** appropriate responsibilities to the occupational therapy assistant and occupational therapy aide.

Midterm 1 2 3 4

Final 1 2 3 4

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

Midterm 1 2 3 4

Final 1 2 3 4

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

Midterm 1 2 3 4

Final 1 2 3 4

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

Midterm 1 2 3 4

Final 1 2 3 4

31. **Produces the volume of work** required in the expected time frame.

Midterm 1 2 3 4

Final 1 2 3 4

Comments on strengths and areas for improvement:

- Midterm

- Final

RATING SCALE FOR STUDENT PERFORMANCE

- 4 — **Exceeds Standards:** Performance is highly skilled and self-initiated. This rating is **rarely given** and **would represent the top 5% of all the students** you have supervised.
- 3 — **Meets Standards:** Performance is consistent with **entry-level** practice. This rating is **infrequently given at midterm** and is a **strong rating at final**.
- 2 — **Needs improvement:** Performance is **progressing but** still needs improvement for entry-level practice. This is a **realistic rating of performance at midterm**, and some ratings of 2 may be reasonable at the final.
- 1 — **Unsatisfactory:** Performance is **below standards** and requires development for entry-level practice. This rating is given when **there is a concern about performance**.

VI. COMMUNICATION:

32. **Clearly and effectively communicates verbally and nonverbally** with clients, families, significant others, colleagues, service providers, and the public.

Midterm	1	2	3	4
Final	1	2	3	4

33. **Produces clear and accurate documentation** according to site requirements.

Midterm	1	2	3	4
Final	1	2	3	4

34. **All written communication is legible**, using proper spelling, punctuation, and grammar.

Midterm	1	2	3	4
Final	1	2	3	4

35. **Uses language appropriate to the recipient** of the information, including but not limited to funding agencies and regulatory agencies.

Midterm	1	2	3	4
Final	1	2	3	4

Comments on strengths and areas for improvement:

- Midterm

- Final

VII. PROFESSIONAL BEHAVIORS:

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

Midterm	1	2	3	4
Final	1	2	3	4

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

Midterm	1	2	3	4
Final	1	2	3	4

38. **Responds constructively to feedback.**

Midterm	1	2	3	4
Final	1	2	3	4

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

Midterm	1	2	3	4
Final	1	2	3	4

40. **Demonstrates effective time management.**

Midterm	1	2	3	4
Final	1	2	3	4

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

Midterm	1	2	3	4
Final	1	2	3	4

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

Midterm	1	2	3	4
Final	1	2	3	4

Comments on strengths and areas for improvement:

- Midterm

- Final

PERFORMANCE RATING SUMMARY SHEET

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

MIDTERM:

Satisfactory Performance 90 and above
 Unsatisfactory Performance 89 and below

FINAL:

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

REFERENCES

1. American Occupational Therapy Association. (1998). Standards of practice for occupational therapy. *American Journal of Occupational Therapy*, 52, 866–869.
2. Accreditation Council for Occupational Therapy Education. (1999). Standards for an accredited educational program for the occupational therapist. *American Journal of Occupational Therapy*, 53, 575–582.
3. National Board for Certification in Occupational Therapy. (1997). *National Study of Occupational Therapy Practice, Executive Summary*.
4. American Occupational Therapy Association. (2000). Occupational therapy code of ethics (2000). *American Journal of Occupational Therapy*, 54, 614–616.
5. American Occupational Therapy Association (2002). Occupational therapy practice framework: Domain and process. *American Journal of Occupational Therapy*, 56, 606–639.

GLOSSARY

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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



Fieldwork Performance Evaluation For The Occupational Therapy Assistant Student

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

COLLEGE OR UNIVERSITY _____

FIELDWORK SETTING:

NAME OF ORGANIZATION/FACILITY _____

ADDRESS: (STREET OR PO BOX) _____

CITY STATE ZIP _____

TYPE OF FIELDWORK _____

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

FROM: _____ TO: _____
DATES OF PLACEMENT

NUMBER OF HOURS COMPLETED _____

FINAL SCORE _____

PASS: _____ NO PASS: _____

SIGNATURES:
I HAVE READ THIS REPORT. _____

SIGNATURE OF STUDENT _____

NUMBER OF PERSONS CONTRIBUTING TO THIS REPORT _____

SIGNATURE OF RATER #1 _____

PRINT NAME/CREDENTIALS/POSITION _____

SIGNATURE OF RATER #2 (IF APPLICABLE) _____

PRINT NAME/CREDENTIALS/POSITION _____

SUMMARY COMMENTS:
(ADDRESSES STUDENT'S CLINICAL COMPETENCE)

Fieldwork Performance Evaluation For The Occupational Therapy Assistant Student

This evaluation is a revision of the 1983 American Occupational Therapy Association, Inc. Fieldwork Evaluation Form for the Occupational Therapy Assistant and was produced by a committee of the Commission on Education.

PURPOSE

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

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

USE OF THE FIELDWORK PERFORMANCE EVALUATION FOR THE OCCUPATIONAL THERAPY STUDENT

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

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

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

DIRECTIONS FOR RATING STUDENT PERFORMANCE

- There are 25 performance items.
- Every item must be scored, using the one to four point rating scale (see below).
- **The rating scales should be carefully studied prior to using this evaluation.** Definitions of the scales are given at the top of each page.
- Circle the number that corresponds to the description that best describes the student's performance.
- **The ratings for the Ethics and Safety items must be scored at 3 or above on the final evaluation for the student to pass the fieldwork experience.** If the ratings are below 3, continue to complete the Fieldwork Performance Evaluation to provide feedback to the student on her/his performance.
- Record midterm and final ratings on the Performance Rating Summary Sheet.
- Compare overall midterm and final score to the scale below.

OVERALL MIDTERM SCORE

Satisfactory Performance. 54 and above
Unsatisfactory Performance. 53 and below

OVERALL FINAL SCORE

Pass 70 points and above
No Pass 69 points and below

RATING SCALE FOR STUDENT PERFORMANCE

- 4 — **Exceeds Standards:** Performance is highly skilled and self-initiated. This rating is rarely given and would represent the top 5% of all the students you have supervised.
- 3 — **Meets Standards:** Performance is consistent with entry-level practice. This rating is infrequently given at midterm and is a strong rating at final.
- 2 — **Needs improvement:** Performance is progressing but still needs improvement for entry-level practice. This is a realistic rating of performance at midterm, and some ratings of 2 may be reasonable at the final.
- 1 — **Unsatisfactory:** Performance is below standards and requires development for entry-level practice. This rating is given when there is a concern about performance.

RATING SCALE FOR STUDENT PERFORMANCE

- 4 — **Exceeds Standards:** Performance is highly skilled and self-initiated. This rating is rarely given and would represent the top 5% of all the students you have supervised.
- 3 — **Meets Standards:** Performance is consistent with entry-level practice. This rating is infrequently given at midterm and is a strong rating at final.
- 2 — **Needs improvement:** Performance is progressing but still needs improvement for entry-level practice. This is a realistic rating of performance at midterm, and some ratings of 2 may be reasonable at the final.
- 1 — **Unsatisfactory:** Performance is below standards and requires development for entry-level practice. This rating is given when there is a concern about performance.

I. FUNDAMENTALS OF PRACTICE:

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

- 1. **Ethics:** Adheres consistently to the American Occupational Therapy Association Code of Ethics (4) and site's policies and procedures.

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

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

Midterm	1	2	3	4
Final	1	2	3	4

Comments on strengths and areas for improvement

• Midterm

• Final

II. BASIC TENETS OF OCCUPATIONAL THERAPY

- 4. **Occupational Therapy Philosophy:** Clearly communicates the values and beliefs of occupational therapy, highlighting the use of occupation to clients, families, significant others, and service providers.

Midterm	1	2	3	4
Final	1	2	3	4
- 5. **Occupational Therapist/Occupational Therapy Assistant Roles:** Communicates the roles of the occupational therapist and occupational therapy assistant to clients, families, significant others, and service providers.

Midterm	1	2	3	4
Final	1	2	3	4
- 6. **Evidenced-based Practice:** Makes informed practice decisions based on published research and relevant informational resources.

Midterm	1	2	3	4
Final	1	2	3	4

Comments on strengths and areas for improvement

• Midterm

• Final

RATING SCALE FOR STUDENT PERFORMANCE

- 4 — **Exceeds Standards:** Performance is highly skilled and self-initiated. This rating is **rarely given** and **would represent the top 5% of all the students** you have supervised.
- 3 — **Meets Standards:** Performance is consistent with **entry-level practice**. This rating is **infrequently given at midterm** and is a **strong rating at final**.
- 2 — **Needs improvement:** Performance is **progressing but** still needs improvement for entry-level practice. This is a **realistic rating of performance at midterm**, and some ratings of 2 may be reasonable at the final.
- 1 — **Unsatisfactory:** Performance is **below standards** and requires development for entry-level practice. This rating is given when **there is a concern about performance**.

Comments on strengths and areas for improvement

• Midterm

III. EVALUATION/SCREENING

(Includes daily evaluation of interventions)

- 7. **Gathers Data:** Under the supervision of and in cooperation with the occupational therapist and/or occupational therapy assistant, accurately gathers relevant information regarding a client's occupations of self care, productivity, leisure, and the factors that support and hinder occupational performance.

Midterm	1	2	3	4
Final	1	2	3	4

- 8. **Administers Assessments:** Establishes service competency in assessment methods, including but not limited to interviews, observations, assessment tools, and chart reviews within the context of the service delivery setting.

Midterm	1	2	3	4
Final	1	2	3	4

- 9. **Interprets:** Assists with interpreting assessments in relation to the client's performance and goals in collaboration with the occupational therapist.

Midterm	1	2	3	4
Final	1	2	3	4

- 10. **Reports:** Reports results accurately in a clear, concise manner that reflects the client's status and goals.

Midterm	1	2	3	4
Final	1	2	3	4

- 11. **Establish Goals:** Develops client-centered and occupation-based goals in collaboration with the occupational therapist.

Midterm	1	2	3	4
Final	1	2	3	4

• Final

IV. INTERVENTION:

- 12. **Plans Intervention:** In collaboration with the occupational therapist, establishes methods, duration and frequency of interventions that are client-centered and occupation-based. Intervention plans reflect context of setting.

Midterm	1	2	3	4
Final	1	2	3	4

- 13. **Selects Intervention:** Selects and sequences relevant interventions that promote the client's ability to engage in occupations.

Midterm	1	2	3	4
Final	1	2	3	4

- 14. **Implements Intervention:** Implements occupation-based interventions effectively in collaboration with clients, families, significant others, and service providers.

Midterm	1	2	3	4
Final	1	2	3	4

15. **Activity Analysis:** Grades activities to motivate and challenge clients in order to facilitate progress.

Midterm 1 2 3 4

Final 1 2 3 4

16. **Therapeutic Use of Self:** Effectively interacts with clients to facilitate accomplishment of established goals.

Midterm 1 2 3 4

Final 1 2 3 4

17. **Modifies Intervention Plan:** Monitors the client's status in order to update, change, or terminate the intervention plan in collaboration with the occupational therapist.

Midterm 1 2 3 4

Final 1 2 3 4

Comments on strengths and areas for improvement

• Midterm

• Final

V. COMMUNICATION

18. **Verbal/Nonverbal Communication:** Clearly and effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public.

Midterm 1 2 3 4

Final 1 2 3 4

19. **Written Communication:** Produces clear and accurate documentation according to site requirements. All writing is legible, using proper spelling, punctuation, and grammar.

Midterm 1 2 3 4

Final 1 2 3 4

Comments on strengths and areas for improvement

• Midterm

• Final

RATING SCALE FOR STUDENT PERFORMANCE

Comments on strengths and areas for improvement

- 4 — **Exceeds Standards:** Performance is highly skilled and self-initiated. This rating is **rarely given** and **would represent the top 5% of all the students** you have supervised.
- 3 — **Meets Standards:** Performance is consistent with **entry-level** practice. This rating is **infrequently given at midterm** and is a **strong rating at final**.
- 2 — **Needs improvement:** Performance is **progressing but** still needs improvement for entry-level practice. This is a **realistic rating of performance at midterm**, and some ratings of 2 may be reasonable at the final.
- 1 — **Unsatisfactory:** Performance is **below standards** and requires development for entry-level practice. This rating is given when **there is a concern about performance**.

• Midterm

VI. PROFESSIONAL BEHAVIORS

20. **Self-Responsibility:** Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisor(s) and others.

Midterm	1	2	3	4
Final	1	2	3	4

21. **Responds to Feedback:** Responds constructively to feedback.

Midterm	1	2	3	4
Final	1	2	3	4

• Final

22. **Work Behaviors:** Demonstrates consistent work behaviors including initiative, preparedness, dependability, and work site maintenance.

Midterm	1	2	3	4
Final	1	2	3	4

23. **Time Management:** Demonstrates effective time management.

Midterm	1	2	3	4
Final	1	2	3	4

24. **Interpersonal Skills:** Demonstrates positive interpersonal skills including but not limited to cooperation, flexibility, tact, and empathy.

Midterm	1	2	3	4
Final	1	2	3	4

25. **Cultural Competence:** Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices.

Midterm	1	2	3	4
Final	1	2	3	4

PERFORMANCE RATING SUMMARY SHEET

Performance Items	Midterm Ratings	Final Ratings
I. FUNDAMENTALS OF PRACTICE		
1. Ethics		
2. Safety (adheres)		
3. Safety (judgement)		
II. BASIC TENETS OF OCCUPATIONAL THERAPY		
4. OT philosophy		
5. OT/OTA roles		
6. Evidenced-base practice		
III. EVALUATION/SCREENING (includes daily evaluation of interventions)		
7. Gathers data		
8. Administers assessments		
9. Interprets		
10. Reports		
11. Establishes goals		
IV. INTERVENTION		
12. Plans intervention		
13. Selects intervention		
14. Implements intervention		
15. Activity analysis		
16. Therapeutic use of self		
17. Modifies intervention plan		
V. COMMUNICATION		
18. Verbal/Nonverbal communication		
19. Written communication		
VI. PROFESSIONAL BEHAVIORS		
20. Self-responsibility		
21. Responds to feedback		
22. Work behaviors		
23. Time management		
24. Interpersonal skills		
25. Cultural competence		
TOTAL SCORE		

MIDTERM:

Satisfactory Performance. 54 and above
 Unsatisfactory Performance. 53 and below

FINAL:

Pass 70 points and above
 No Pass 69 points and below

REFERENCES

1. American Occupational Therapy Association. (1998). Standards of practice for occupational therapy. *American Journal of Occupational Therapy*, 52, 866–869.
2. Accreditation Council for Occupational Therapy Education. (1999). Standards for an accredited educational program for the occupational therapy assistant. *American Journal of Occupational Therapy*, 53, 583–589.
3. National Board for Certification in Occupational Therapy. (1997). *National Study of Occupational Therapy Practice, Executive Summary*.
4. American Occupational Therapy Association. (2000). Occupational therapy code of ethics (2000). *American Journal of Occupational Therapy*, 54, 614–616.
5. American Occupational Therapy Association (2002). Occupational therapy practice framework: Domain and process. *American Journal of Occupational Therapy*, 56, 606–639.

GLOSSARY

Activity Analysis: "A way of thinking used to understand activities, the performance components to do them and the cultural meanings typically ascribed to them." (Neistadt and Crepeau, 1998; *Willard and Spackman's Occupational Therapy*, 9th edition; p. 135)

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

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

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

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

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

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

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

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

AOTA Fieldwork Performance Evaluation Topics

FWPE ITEM	Site Specific Objective
<p>1. Adheres to ethics: Adheres consistently to the AOTA Code of Ethics and site's policies and procedures including when relevant, those related to human subject research.</p>	
<p>2. Adheres to safety regulations: Adheres consistently to safety regulations. Anticipates potentially hazardous situations and takes steps to prevent accidents.</p>	
<p>3. Uses judgment in safety: Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.</p>	

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Creating Congruence Between Identities as a Fieldwork Educator and a Practitioner

■ Patricia Stutz-Tanenbaum, MS, OTR, and
Barbara Hooper, PhD, OTR, FAOTA

When we, the authors, first became fieldwork educators, we identified ourselves primarily as occupational therapy practitioners who, secondarily, “took” Level I and Level II fieldwork students. Identifying ourselves primarily as practitioners over educators shaped what we imagined we were supposed to do when we “took” students. We were supposed to share our expertise in our particular practice area; demonstrate how to perform certain procedures; and observe, assess, and give feedback as students applied the knowledge they received from their academic education. But the more students we took, the more we came to see that being practitioners did not fully prepare us for being educators. We found that we increasingly wanted to become as knowledgeable about how to design good learning experiences as we were about occupational therapy; thus, new professional identities as educators began to emerge. Assuming stronger identities as educators reshaped what we imagined we were supposed to do with students. We weren’t necessarily supposed to make students competent in *our* skills, but rather create learning experiences that nurtured *their* skills, knowledge, and expertise.

Similar to our experience, Abreu (2006) described a portion of her career development as “a tale of two loves—clinician and educator” (p. 598). She created congruence between her two loves and discovered how each informed and changed how she performed the other. Peloquin (2006) also created congruence between her identities as an occupational therapy educator and a practitioner, stating “the best of my teaching has been like occupational therapy. And the best of occupational therapy [with clients] has felt like collaborative learning” (p. 239).

Most fieldwork educators wear at least two hats—the hat of being a practitioner and the hat of being a fieldwork educator. Sometimes, however, a fieldwork educator may naturally identify himself or herself more strongly as a practitioner than as an educator. Consequently, neither students nor fieldwork educators benefit as fully as they might from the student–educator relationship in the practice environment.

In this article, we propose that assuming a stronger identity as an educator can help fieldwork educators integrate multiple dimensions of the role and more fully engage students in deep personal and professional learning.

“Supervising” the Fieldwork Student: How and Who

Fieldwork education has been described as “supervising students.” *Supervising* is defined as “a critical watching and directing” (Merriam-Webster Online, n.d.). In occupational therapy, supervising students has involved directing them through increasingly more responsibility for clients over time. Fieldwork supervisors observe, assess, and give feedback based on the student’s competence with clients and related duties, such as documentation, time management, and professional communication (Crist, 1986). Supervisors are also expected to understand and implement well-designed teaching and learning experiences (American Occupational Therapy Association [AOTA], 1997; American Occupational Therapy Foundation, 2001; Costa, 2004, 2007). Yet the role of “supervisor” typically is not associated with applying instructional design principles to create powerful learning experiences. Thus, framing the role as “supervisor” can occlude from view the important dimension of intentional, systematic learning design.

In addition, the key questions we ask about the role can occlude from view the importance of instructional design principles in planning the fieldwork experience. The question most commonly asked in becoming a fieldwork educator is, “How?” (Palmer, 1998). How do we effectively supervise students? What methods, techniques, and skills are considered effective in clinical supervision? (e.g., AOTA, 1997; Christie, Joyce, & Moeller, 1985; Costa, 2007; Herkt, 2005; Illott, 1995; Johnson, Haynes, & Oppermann, 2007; Kautzmann, 1990; Quilligan, 2007). Of course, how to effectively supervise students is a very important question. But if “how” is presented as the primary question, it can overshadow the equally important, “Who?” Who is the self that supervises students? If one’s practitioner-self is the sole supervisor, then his or her knowledge and expertise in a particular practice area will be the central guiding force in the learning experience. If the educator-self and the practitioner-self are equally robust, then knowledge and expertise in instructional design will gain prominence.

Asking the “who” question (i.e., Who is the self that supervises students?) could help to address the disconnect that some supervisors experience between being a practitioner and being a fieldwork educator. Practitioners sometimes experience a disassociation between the roles, not because they lack skills in *how* to be a supervisor, but because they have not formed a sense of self as an educator who is fully integrated with a sense of self as a practitioner (Costa, 2007; Higgs & McAllister, 2005). Consequently, they may not have integrated strong instructional design into their role as much as they have integrated strong supervision skills.

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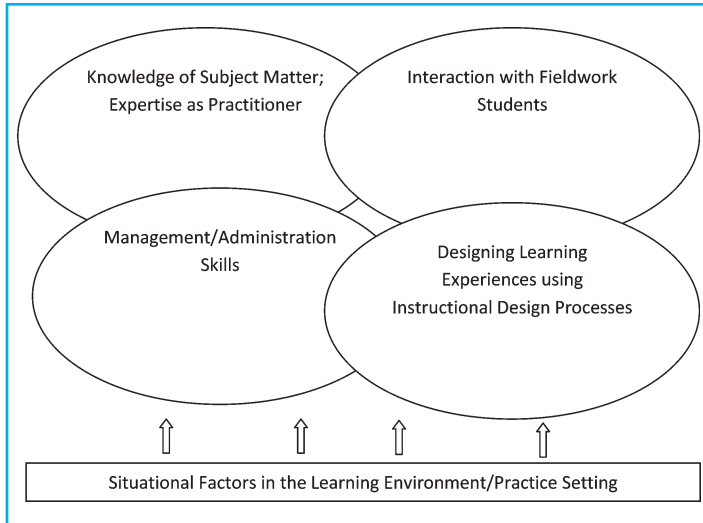


Figure 1. Four elements of quality learning experiences.

Note. Modified from Fink (2003).

Identity and Instructional Design in Fieldwork Education

According to Fink (2003), instructional design involves a dynamic interaction among four elements: (a) knowledge of the subject matter, (b) interaction with students, (c) management and administration skills, and (d) skills in designing learning experiences (see Figure 1). The degree to which all four elements are done well determines the quality of the student's learning experience. However, the degree to which all four elements are done well can hinge on how a practitioner sees himself or herself—as practitioner, as educator, or as both (Fink, 2003). For example, therapists whose primary identity rests in being a practitioner may not have in view the element of designing intentional learning experiences. They may have in view knowledge of the subject matter (e.g. passing on knowledge and expertise, assessing student performance in light of that knowledge and expertise), interaction with students (e.g. communicating clearly, giving feedback, observing, supporting), and management/administration skills (e.g. completing the fieldwork performance evaluation). From this view, which is focused on three of Fink's four elements, a learning experience is considered positive if the practitioner has a high degree of competence and has been able to communicate that competence well to the student (Fink, 2003). In such a scenario, a focused identity as a practitioner can keep the supervisor from seeing and attending

carefully to the fourth element of quality learning: designing learning experiences.

When an identity as educator emerges, it provides “an important central figure in a self-narrative or life story that provides coherence and meaning for everyday events” (Christiansen, 1999, p. 550). In addition to being a practitioner, an educator begins to see more clearly and adopts more consciously the previously under-regarded element of designing learning experiences.

Applying Instructional Design Principles to Fieldwork Education

As an identity as educator emerges, the supervisor may reinterpret the fieldwork placement as a “course” taught in the context of the practice setting and apply course design principles when anticipating a student. The steps of good course design include many components typically found in a fieldwork experience; however, one key difference is the upfront, intentional deliberation and design of the learning goals, the learning activities to meet the learning goals, and the plan for assessment and feedback.

Student learning goals go beyond the goals received from the academic program. The learning goals are site specific, building on the fieldwork educator's dreams for where this particular student will be at the end of this particular placement, given all the opportunities the setting offers, and the student's own dreams and learning styles. Table 1 on page 3 presents six areas of learning from which goals can be crafted. Deeper learning occurs when all six areas are covered (Fink, 2003). For example, a goal reflecting the human dimension in Table 1 might be as follows: “Student will demonstrate effective interview skills in order to establish the client's and family's occupational interests and priorities.” A goal reflecting the Integration dimension in Table 1 might be as follows: “Student will demonstrate narrative, procedural, and pragmatic reasoning while performing assessment and interventions and concurrently interacting with clients and families.”

The next step of selecting learning activities may seem redundant. Aren't the learning activities built into the everyday activities of the setting and based on the role of occupational therapy at the site? Yes, the setting provides opportunities for direct observation and real doing in an authentic practice context. A practitioner identity may lead one to focus on the current caseload and to assigning clients to the student that are believed to produce optimum learning. However, an educator identity expands that perspective somewhat. Educators intentionally will augment students' experiences with clients by asking them:

1. What information and data will you need to prepare for, or to process what happened in, experience X? The student decides and obtains the information through readings, talking to people, searching the Internet, and reviewing course materials.
2. What indirect experiences will help you to prepare for the real experience of X? The student decides what combination of indirect experiences, such as role plays, simulations, case studies, and observations, might help to prepare for a direct experience.
3. What do you anticipate will happen, or what do you think happened, during experience X? The student may verbally process anticipations or what happened. He or she also may write a 1-minute response on his or her anticipation or perception of the experience.
4. As a follow-up, what did you learn from experience X? How did having the experience change what the student knows, how the student feels, what the student cares about, and the student's self-perception as an emerging occupational therapy practitioner?

The selected learning activities should be sequenced carefully and plugged into a weekly schedule (Fink, 2003). With time, the plan is individualized to the student's needs.

Fieldwork assessment strategies often include observing the student's performance, having the student complete a weekly

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Chairperson: Jyothi Gupta
Editor: Ann Burkhardt
Production Editor: Laura Collins

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Table 1. Taxonomy of Goal Areas To Promote Significant Learning

Term	Definition
Application	Clinical reasoning, assessment, intervention, communication, use of self, and management skills that need to be applied.
Caring	Developing new feelings, interests, and values that support client-centered, evidence-based, and occupation-centered practice.
Foundational knowledge	Information and ideas that need to be remembered and understood.
Human dimension	Learning about self and others that enable the student to be more effective (abilities, limits, potentials, assumptions, feelings, responses, etc.)
Integration	Ideas, perspectives, people, resources, and skills that need to be combined to do a task well.
Learning to learn	Insights and skills that will enable the student to keep learning over the course of his or her career

Note. Modified from Fink (2003).

self-assessment on his or her progress, and conducting a weekly review of learning goals. The educator assesses learning by how the depth and breadth of the student's approach to clients grows with time. The educator's criteria for critical appraisal are based on how closely the student's performance resembles client-centered, evidenced-based, and occupation-centered practice rooted in current discourse in the profession.

Strengthening an Educator Identity

Identity is not a fixed state. Rather, individuals possess multiple identities that change over time through experiences and by how we ascribe meaning to those experiences. Identities can be developed through social engagement, emotional awareness, and a process of "selfing" to actively tie together the roles of practitioner and educator (Christiansen, 1999; McAdams, 1996; Peloquin, 2006).

Get Involved With a Supportive Group

According to Christiansen (1999), "identity is an overarching concept that shapes and is shaped by our relationship with others" (p. 548). Thus, we gain an identity through identification with others in a social group. However, Abreu (2006) noted that there are at least two modes by which our social engagements can shape our identities. One mode is through those whom we consider to be mentors, and the second is through those whom we consider to be our "symbolic others" (p. 596). Mentors are those groups and individuals who reflect to us who we hope to become. We all remember the exceptional educator to whom we listened with captivated attention to every word, and followed every therapeutic footstep awe-inspired by his or her magical way and eloquence. Symbolic others are groups or individuals with whom we do not identify (Abreu, 2006). They teach us through negative example how we do not want to be. We remember acutely the fieldwork educator intent on intimidation over collaboration. Mentors and symbolic others for fieldwork educators can be found among students, other fieldwork educators, past teachers, clients, and authors who write about fieldwork education and learning. Higgs and McAllister (2005) suggested that clinical educators regularly come together to share educational stories, including stories of mentors and symbolic others. Sharing educational stories and peer support can help to strengthen one's identity as educator.

Attend to Emotional Responses

Emerging identities also can be detected by paying careful attention to our internal responses as we go through experiences with students and clients. Whyte (2001) proposed that "paying close attention to an astonishing world and the way each of us is made differently and uniquely for that world" results in self-knowledge that can create

coherence between one's self and one's work (as cited in Peloquin, 2006, p. 236). We learn from our flashes of joy, anger, exasperation, and elation—all of which will be part of the fabric of feeling rightly related to educating students. Journals, meditation, and mindfulness can be tools to help with attending to emotional responses.

Tie the Roles Together

"Selfing" is a process by which we unify, integrate, and synthesize the various strands of our lives, such as the strand of educator and the strand of practitioner (Peloquin, 2006). Peloquin recommended tracing each strand backward in time, exploring how it emerged, became expressed over time, and still calls today. Selfing is similar to what Higgs and McAlister (2005) described as the process of creating "dynamic self-congruence" (p. 164) or living out who we are through what we do. Self-congruence, or a sense of self as educator, can be created by shared discussions, role playing, journaling, and videotaping experiences with students.

Opportunities To Develop a Stronger Identity as Educator

Academic programs, fieldwork education consortia, and fieldwork sites where there is a cluster of fieldwork educators can support the building of social networks. Also, for the first time in the history of occupational therapy, there is a voluntary, nationwide training program promoting the role of fieldwork educators. Regional trainers for the Fieldwork Educators Credentialing Program will offer workshops across the country and provide opportunities for educator communities to network and share their wisdom and experience. Watch for details about upcoming workshops in *OT Practice*. The new OT Connections Web site (www.otconnections.org) is another resource for networking,

Summary

This article explored how an identity as educator can help fieldwork educators integrate multiple dimensions of their role and more fully engage students in deep personal and professional learning. Overall, an identity as educator expands the clinical supervisor role to include designing learning experiences through which the student learns to care deeply about clients, be more aware of self, use evidence, stay tightly honed on the occupational needs of clients, engage in lifelong learning, and become an active member of the larger professional society.

The 2007 AOTA Ad Hoc Committee to Explore and Develop Resources for OT Fieldwork Educators concluded that "fieldwork education is a primary driver in transforming our current practice into meeting the 2017 Centennial Vision" (Commission on Education, p. 14). The committee named 2007 to 2017 as the "Decade of Fieldwork." We will shape identities as fieldwork educators through the meaning we ascribe to nurturing future occupational therapy practitioners. ■

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