

Incorporating Site-Specific Objectives into Level II Student Evaluations

Promoting Student Success



[Objectives]

- Review key features of the AOTA Fieldwork Performance Evaluation form (FWPE)
- Discuss the importance of developing Site-Specific objectives
- Identify examples of Site-Specific objectives
- Begin developing your facility's Site-Specific objectives
- Identify resources available to fieldwork educators

[AOTA Fieldwork Performance Evaluation]

- AOTA Fieldwork Performance Evaluation (FWPE) measures entry-level competency
- It measures the student's ability to:
 - Effectively carrying out the OT process
 - Demonstrate intervention skills in a safe and ethical manner

[Key Features of the FWPE]

- Applies to all practice settings
- Provides feedback at midterm and at the end of fieldwork placement
- Added the need for Site-specific objectives

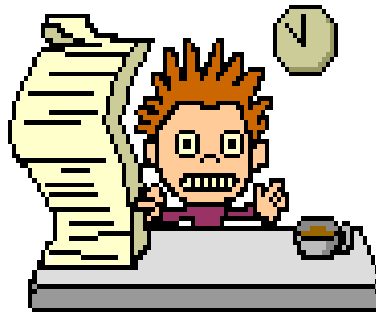


[Site Specific Objectives]

- Structures the learning experience in a specific setting
- Identifies particular skills and tasks that reflect entry-level competency at a specific site



“How do I do this?!!”



Examples of Site-Specific Objectives



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[OT/OTA FWPE Item 1]

- Ethics

Adheres consistently to the American Occupational Therapy Association's Code of Ethics and site's policies and procedures

[Example: Item 1]

- General Site-Specific Objective:
Demonstrates consistent adherence to
HIPAA regulations for patient confidentiality



[Example: Item 1]

- General Site-Specific Objective:
Demonstrates honesty in billing for treatment time
Obtains consent prior to treatment



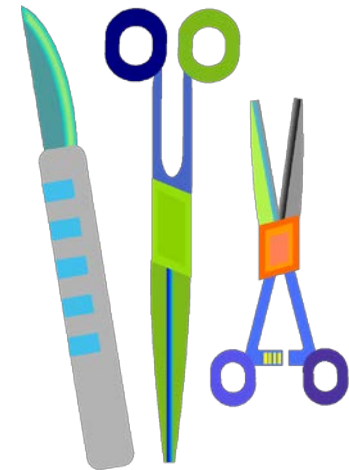
[OT/OTA FWPE Item 2]

- Safety

Adheres consistently to safety regulations. Anticipates potentially hazardous situations and takes steps to prevent accidents

Example: Site-Specific Objective

- Mental Health setting:
Monitors sharps at all times; counts sharps before and after each treatment session



[Example: Site-Specific Objective]

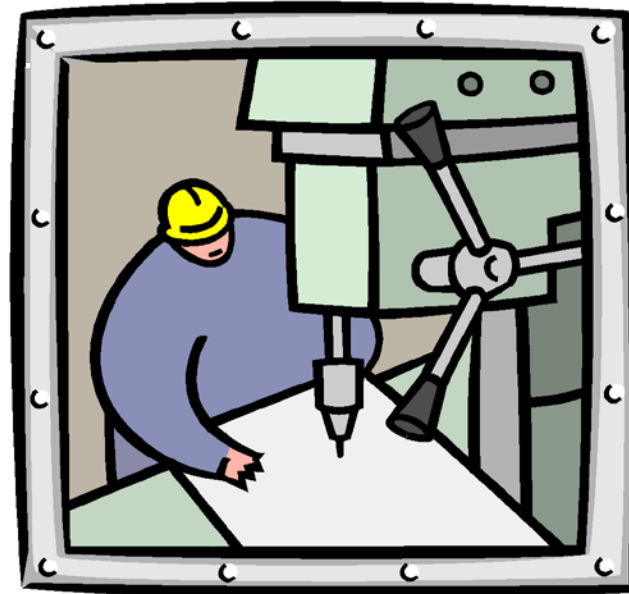
- Acute Care:
Consistently follows universal
precautions



Monitors client's vitals before, during
and after treatment

[Example: Site-Specific Objective]

- Work site:
Consistently follows health and safety regulations posted at all work sites



[OT/OTA FWPE Item 3]

- Safety

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



[Example: Site-Specific Objective]

- Mental Health facility:
Informs client of expectations for behavior and redirects inappropriate behavior when limits are exceeded



[Example: Site-Specific Objective]

- Rehabilitation Unit:

Consistently evaluates environment for safety before providing interventions with clients, such as transfer set up, shower safety, and level of environmental stimuli



[OTA FWPE Item 4]

- Occupational Therapy Philosophy
Clearly communicates the values and beliefs of occupational therapy, highlighting the use of occupation to clients, families, significant others, and services providers

[Example: Site-Specific Objective]

- General:
Explains the value of a selected activity with respect to client's own life activities/occupations



[OTA FWPE Item 5]

- OT/OTA Roles

Communicates the roles of the occupational therapist and occupational therapy assistant to clients, families, significant others, and services providers

[Example: Site-Specific Objective]

- Mental Health:

Able to articulate an understanding of the role delineation between the various levels of professional and paraprofessional staff, including psychiatrist, nursing, social worker, OT, OTA, and recreation therapist

[OTA FWPE Item 6]

- Evidence-based Practice

Makes informed practice decisions based on published research and relevant informational resources



[Example: Site-Specific Objective]

- General:
 - Able to articulate rationale for selection of activities
 - Uses sound clinical reasoning backed by published research and/or relevant resources to make informed intervention decisions

[OTA FWPE Item 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

[Example: Site-specific Objective]

- Mental Health facility:

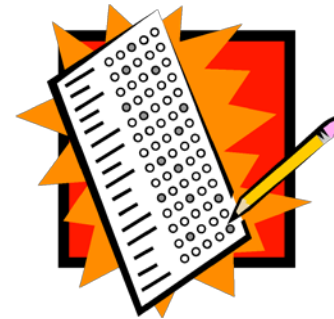
Accurately administers the Allen Cognitive Level Screen and the structured intake interview after establishment of service competency
Selects and administers assessments appropriate to psychiatric populations



[Example: Site-Specific Objective]

- Rehabilitation Unit:

Accurately completes an ADL evaluation using the FIM scale after establishment of service competency



[OTA FWPE Item 10]

- Reports

Reports results accurately in a clear, concise manner that reflects the client's status and goals

[Example: Site-Specific Objective]

- General:

Documents results of the assessment and reassessment following departmental policies and procedures



[Example: Site-Specific Objective]

- Physical Disabilities:

Contributes to the discharge plan in a manner that reflects an understanding of functional level at the time of the patient's discharge and the available environmental supports in the anticipated discharge setting



[OTA FWPE Item 11]

- Establish Goals

Develops client-centered and occupation-based goals in collaboration with the occupational therapist

Example: Site-Specific Objective

- General:

Recognizes the importance of client-centered practice and the involvement of family and caregivers in the treatment process

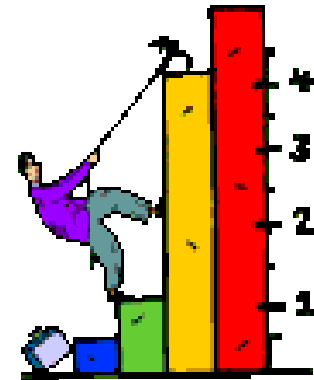


[OTA FWPE Item 14]

- Implements Interventions
Implements occupation-based interventions effectively in collaboration with clients, families, significant others, and service providers

Example: Site-Specific Objective

- General:
Grades and/or changes activity or method to achieve treatment goals



Example: Site-Specific Objective

- Physical Disabilities:
Demonstrates functional interventions for self-care performance components



[Example: Site-Specific Objective]

- Mental Health:

Participates in community re-entry outings



[OTA FWPE Item 16]

- Therapeutic Use of Self
Effectively interacts with clients
to facilitate accomplishment of
established goals

[Example: Site-Specific Objective]

- General:

Takes into account cultural differences and language barriers by providing printed materials in primary language



[Example: Site-Specific Objective]

- Pediatric:

Makes an effort to engage the child in different types of therapeutic play while engaging in an activity



[OTA FWPE Item 19]

- Written Communication

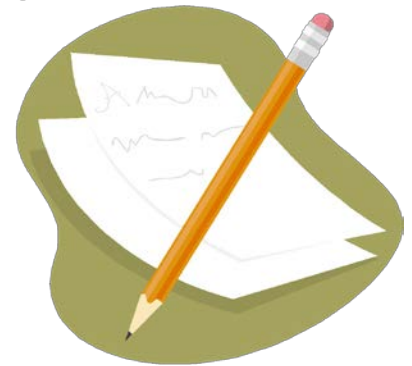
Produces clear and accurate documentation according to site requirements. All writing is legible, using proper spelling, punctuation, and grammar

[Example: Site-Specific Objective]

- General:

Progress notes are concise and reflect information on occupational performance

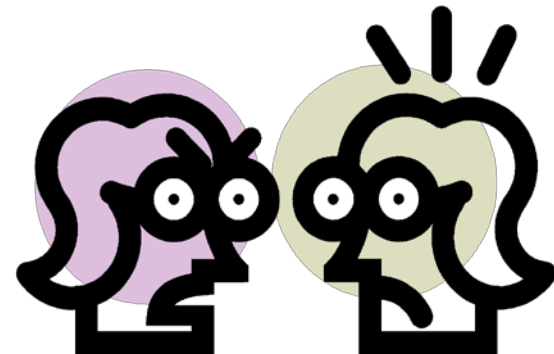
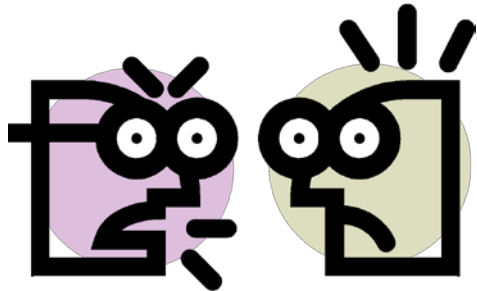
Reports unusual and/or critical information in writing



[OTA FWPE Item 21]

- Feedback

Responds constructively to feedback

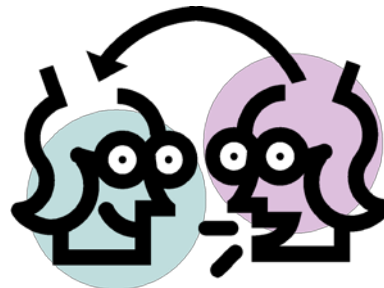


Example: Site-Specific Objective

- General:

Adjusts behavior in response to cues and direction from fieldwork educator, staff and environment

Uses feedback to determine strategies for improvement



[OTA FWPE Item 22]

- Work Behaviors

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

[Example: Site-Specific Objective]

- General:

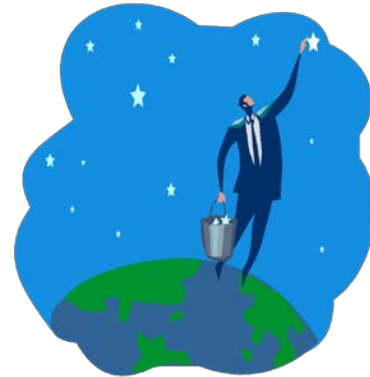
Arrives on time and consistently completes work assignments on time

Consistently maintains professional behaviors in the work place such as taking initiative, being prepared, and assuming a professional demeanor



[Summary]

- Fieldwork educators can utilize site-specific objectives to enhance clinical learning which offers students specific guidelines needed to complete their fieldwork successfully



[Resources]

Click on: <http://www.aota.org/education-careers/fieldwork/siteobj.aspx>



I. FUNDAMENTALS OF PRACTICE	Site-Specific Objectives	Methods
1. Adheres to ethics: Adheres consistently to American Occupational Therapy Association Code of Ethics and site's policies and procedures including, when relevant, those related to human subject research.	1. Adheres to the AOTA Code of Ethics. 2. Adheres to all departmental policies and procedures related to ethical practice, with attention to policies related to the acute care area of treatment. 3. Adheres to licensure requirements. 4. Adheres to all HIPAA procedural guidelines for confidentiality of patient records. 5. Recognizes personal strengths and limitations and use treatment modalities that are within level of ability and experience.	1. Read AOTA Code of Ethics and Standards of Practice. 2. Read policies and procedures relative to treatment area. 3. Read licensure requirements 4. Read departmental policies and procedures related to confidentiality. 5. Discuss strengths and weakness with clinical instructor.
3. Uses judgment in safety: Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.	1. Discusses strategies to be used to achieve established goals. 2. Selects appropriate modalities and techniques that facilitate patient response. 3. Ensures a therapeutic environment with adequate lighting and air appropriate for the patients needs and safety. 4. Identifies and adheres to precautions applicable to patient and staff. 5. Identifies dangers inherent in the use of modalities and adheres to safety precautions. 6. Demonstrates awareness of positioning techniques to prevent deformity and skin breakdown during patient care. 7. Demonstrates safe performance during all treatment endeavors.	

II. BASIC TENETS	Site-Specific Objectives	
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.	1. Communicates effectively to patients and caregivers the role of the occupational therapist and the occupational therapy assistant as it affects patient treatment. 2. Communicates effectively to colleagues and service providers the roles of the occupational therapist and the occupational therapy assistant in the treatment setting.	1. Participates in student seminar topic on the roles, responsibilities, and relationship between occupational therapy practitioners.

III. EVALUATION and SCREENING	Site-Specific Objectives	Methods
9. Selects relevant screening and assessment	1. Selects standardized and/or nonstandardized	

<p>methods while considering such factors as client’s priorities, context(s), theories, and evidence-based practice.</p>	<p>procedures relevant to patient's deficits.</p> <ol style="list-style-type: none"> 2. Sets priorities of sequence of evaluation procedures to be administered. 3. Selects appropriate evaluation report forms and evaluation tools available. 4. Identifies/adheres to precautions applicable to patient and diagnosis. 5. Explains rationale for choice of evaluation procedure(s). 6. Demonstrates ability to adapt/modify different techniques and evaluation tools in accordance with patient' deficits. 	
<p>12. Obtains sufficient and necessary information from relevant resources such as client, families, significant others, service providers, and records prior to and during the evaluation process.</p>	<ol style="list-style-type: none"> 1. Demonstrates ability to gather information from appropriate resources by utilizing patient, record, other professionals, and the patient and family. 2. Identifies the need for obtaining additional research or references. 3. Determines the priorities of information to be elicited by evaluation procedures. 4. Demonstrates knowledge of assessments to be performed for specific patients. 	
<p>14. Adjusts/modifies the assessment procedures based on client’s needs, behaviors, and culture.</p>	<ol style="list-style-type: none"> 1. Utilizes patient information as a basis for possible adaptation of assessment procedure. 2. Considers patient status changes and adapts assessment procedure as necessary. 3. Identifies/explains the effect patient’s mental and/or physical changes on outcome of an assessment. 4. Demonstrates ability to adjust/adapt methods based on the patient's response. 	<ol style="list-style-type: none"> 1. Review recommended assessment modifications, when available, prior to initiating assessment.
<p>17. Documents the results of the evaluation process that demonstrates objective measurement of client’s occupational performance.</p>	<ol style="list-style-type: none"> 1. Documentation and reporting of the treatment plan is complete according to institution requirements and clinical setting. 2. Documentation is concise and accurate and correlates with results of evaluation process. 3. Documentation is recorded within the time frames of the clinical setting. 4. Documentation is written in terms understandable to other disciplines using the data. 	

IV. INTERVENTION		
	Site-Specific Objectives	Methods
18. Articulates a clear and logical rationale for the intervention process	<ol style="list-style-type: none"> 1. States rationale for selected activities to be utilized in addressing patient’s goals and needs. 2. States understanding of concepts of “graded” activity and the rationale for sequencing a series of activities to meet patients goals and needs within a reasonable time frame. 	
19. Utilizes evidence from published research and relevant resources to make informed intervention decisions.	<ol style="list-style-type: none"> 1. Identifies material relative to treatment by stating references. 	
V. MANAGEMENT of OT SERVICES		
	Site-Specific Objectives	Methods
27. Demonstrates through practice or discussion the ability to assign appropriate responsibilities to the occupational therapy assistant and occupational therapy aide.	<ol style="list-style-type: none"> 1. Utilizes occupational therapy assistant and/or aide with respect to standards of practice and supervisory guidelines. 	<ol style="list-style-type: none"> 1. Participates in student seminar topic on the roles, responsibilities, and relationship between occupational therapy practitioners.
VI. COMMUNICATION		
	Site-Specific Objectives	Methods
32. Clearly and effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public.	<ol style="list-style-type: none"> 1. Communicates to colleagues and service providers the treatment activities and their rationale. 2. Uses clear and accurate language to explain assessment, treatment, and goals to patients and caregivers. 3. Understands and recognizes families’ need for reinforcement and additional instruction or demonstration and provide as needed. 4. Demonstrates genuine interest in patient and caregiver understanding of instructions 	
VII. PROFESSIONAL BEHAVIORS		
	Site-Specific Objectives	Methods
36. Collaborates with supervisor(s) to maximize the learning experience	<ol style="list-style-type: none"> 1. Performs required tasks as identified in supervisory sessions. 2. Discusses need for changes and modifies behaviors as identified in supervisory sessions. 3. Discriminates between supervisor’s suggestions and expectations for change. 4. Recognizes need for and seeks appropriate supervision. 5. Assumes a cooperative role in the supervisory relationship. 	
42. Demonstrates respect for diversity factors of others including, but not limited to sociocultural, socioeconomic, spiritual, and lifestyle choices.	<ol style="list-style-type: none"> 1. Demonstrates professional behavior respecting diversity of sociocultural, socioeconomic, spiritual, and lifestyle choices of patients. 	<ol style="list-style-type: none"> 1. Identifies factors of diversity that may affect patient evaluation, treatment, and discharge planning.

DETROIT RECEIVING HOSPITAL – ACUTE CARE SITE SPECIFIC OBJECTIVES

OCCUPATIONAL THERAPY ASSISTANT

I. FUNDAMENTALS OF PRACTICE	Site-Specific Objectives
<p>1. Adheres to ethics: Adheres consistently to American Occupational Therapy Association (AOTA) Code of Ethics and site's policies and procedures including, when relevant, those related to human subject research.</p>	<ol style="list-style-type: none"> 1. Adheres to the AOTA Code of Ethics 2. Adheres to all departmental policies and procedures related to ethical practice, with attention to policies related to the acute care area of treatment. 3. Adheres to licensure requirements. 4. Adheres to all HIPPA procedural guidelines for confidentiality of patient records. 5. Recognizes personal strengths and limitations and use treatment modalities that are within level of ability and experience.
<p>3. Uses judgment in safety: Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.</p>	<ol style="list-style-type: none"> 1. Discusses strategies to be used to achieve established goals. 2. Selects appropriate modalities and techniques that facilitate patient response. 3. Ensures a therapeutic environment with adequate lighting and air appropriate for the patient's needs and safety. 4. Identifies and adheres to precautions applicable to patient and staff. 5. Identifies dangers inherent in the use of modalities and adheres to safety precautions. 6. Demonstrates awareness of positioning techniques to prevent deformity and skin breakdown during patient care. 7. Demonstrates safe performance during all treatment endeavors.
II. BASIC TENETS	Site-Specific Objectives
<p>4. Clearly communicates the role of the occupational therapist and occupational therapy assistant to clients, families, significant others, colleagues, service providers, and the public.</p>	<ol style="list-style-type: none"> 1. Communicates effectively to patients and caregivers the role of the occupational therapist and the occupational therapy assistant as it affects patient treatment. 2. Communicates effectively to colleagues and service providers the roles of the occupational therapist and the occupational therapy assistant in the treatment setting.

**DETROIT RECEIVING HOSPITAL – ACUTE CARE SITE SPECIFIC OBJECTIVES
OCCUPATIONAL THERAPY ASSISTANT**

III. EVALUATION/SCREENING	Site-Specific Objectives
<p>6. 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.</p>	<ol style="list-style-type: none"> 1. Demonstrates ability to gather information from appropriate resources by utilizing patient, record, other professionals, and the patient and family. 2. Identifies the need for obtaining additional research or references. 3. Demonstrates knowledge of assessments to be performed for specific patients.
<p>7. 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.</p>	<ol style="list-style-type: none"> 1. Selects appropriate evaluation report forms and evaluation tools available. 2. Identifies/adheres to precautions applicable to patient and diagnosis. 3. Explains rationale for choice of evaluation procedure (s). 4. Demonstrates ability to adapt/modify different techniques and evaluation tools in accordance with patient' deficits.
<p>10. Reports results accurately in a clear, concise manner that reflects the client's status and goals.</p>	<ol style="list-style-type: none"> 1. Documentation and reporting of the treatment plan, in cooperation with the occupational therapist, is complete according to institution requirements and clinical setting. 2. Documentation is concise and accurate and correlates with results of evaluation process. 3. Documentation is recorded within the time frames of the clinical setting. 4. Documentation is written in terms understandable to other disciplines using the data.
IV. INTERVENTION	Site-Specific Objectives
<p>17. Monitors the client's status in order to update, change, or terminate the intervention plan in collaboration with the occupational therapist.</p>	<ol style="list-style-type: none"> 1. States rationale for selected activities to be utilized in addressing patient's goals and needs. 2. States understanding of concepts of "graded" activity and the rationale for sequencing a series of activities to meet patient's goals and needs. 3. Identifies material relative to treatment by stating evidence-based references.

**DETROIT RECEIVING HOSPITAL – ACUTE CARE SITE SPECIFIC OBJECTIVES
OCCUPATIONAL THERAPY ASSISTANT**

VI. COMMUNICATION	Site-Specific Objectives
<p>18. Clearly and effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public.</p>	<ol style="list-style-type: none"> 1. Communicates to colleagues and service providers the treatment activities and their rationale. 2. Uses clear and accurate language to explain assessment, treatment, and goals to patients and caregivers. 3. Understands and recognizes families' need for reinforcement and additional instruction or demonstration and provide as needed. 4. Demonstrates genuine interest in patient and caregiver understanding of instructions.
VII. PROFESSIONAL BEHAVIORS	Site-Specific Objectives
<p>20 Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisor(s) and others.</p>	<ol style="list-style-type: none"> 1. Performs required tasks as identified in supervisory sessions. 2. Discusses need for changes and modifies behaviors as identified in supervisory sessions. 3. Discriminates between supervisor's suggestions and expectations for change. 4. Recognizes need for and seeks appropriate supervision. 5. Assumes a cooperative role in the supervisory relationship.
<p>25. Demonstrates respect for diversity factors of others including, but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices.</p>	<ol style="list-style-type: none"> 1. Demonstrates professional behavior respecting diversity of sociocultural, socioeconomic, spiritual, and lifestyle choices of patients.

I have read and understand the expectations of this facility.

Student (Print Name) _____

Student Signature/Date _____

Fieldwork Educator/Date _____

I. FUNDAMENTALS OF PRACTICE	Site-Specific Objectives	Methods
<p>2. Adheres to safety regulations: Adheres consistently to safety regulations. Anticipates potentially hazardous situations and takes steps to prevent accidents.</p>	<ol style="list-style-type: none"> 1. The student will consistently adhere to all departmental policies and procedures related to safety, with attention to policies related to the areas of treatment. 2. The student will consistently adhere to licensure requirements. 	<ol style="list-style-type: none"> 1. The student will review policies and procedures relative to treatment area within week one. 2. The student will identify guidelines for cleaning and maintaining clinical areas in treatment area within two weeks. 3. The student will read policies related to emergency situations and identify appropriate personnel to notify in the event of such situations within 2 weeks. 4. The student will read licensure requirements.
II. BASIC TENETS	Site-Specific Objectives	Methods
<p>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.</p>	<ol style="list-style-type: none"> 1. The student will effectively communicate the values and beliefs of the occupational therapy profession to patients and caregivers by week 6 to week 12. 2. The student will effectively communicate the values and beliefs of the occupational therapy profession to colleagues and other service providers by week 6 to week 12. 	<ol style="list-style-type: none"> 1. The student will identify the core values of the occupational therapy profession within 1 to 2 weeks. 2. The student will identify at least three rapport-building tactics within 1 to 2 weeks. 3. The student will actively demonstrate articulation of occupational therapy values and beliefs during all interactions within 2 weeks.
III. EVALUATION and SCREENING	Site-Specific Objectives	Methods
<p>8. Articulates a clear and logical rationale for the evaluation process.</p>	<ol style="list-style-type: none"> 1. The student will demonstrate the ability to independently explain the occupational therapy evaluation process within 4 to 6 weeks. 	<ol style="list-style-type: none"> 1. The student will observe clinical instructor explaining occupational therapy evaluation procedures within 1 week. 2. The student will participate in preparing patients for occupational therapy evaluation within 2 weeks. 3. The student will actively demonstrate the ability to justify the occupational therapy evaluation process within 4 weeks.

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.	1. The student will demonstrate the ability to formulate accurate and appropriate occupational therapy plans for intervention in the arena of physical dysfunction by week 6 to week 12.	1. The student will appreciate the need for integrating multiple factors into treatment planning by week 2. 2. The student will participate in active treatment planning by week 2 to 4. 3. The student will formulate patient specific treatment plans with assistance from clinical instructor by week 4 to 6. 4. The student will be independent in treatment planning for resolution of physical dysfunction by week 6 through 12.
IV. INTERVENTION	Site-Specific Objectives	Methods
21. Selects relevant occupations to facilitate clients meeting established goals.	1. The student will demonstrate the ability to utilize occupations meaningful to the patient in order to facilitate meeting treatment goals by week 6 to week 12.	1. The student will be able to use an occupational profile to determine relevant treatment methods and strategies by week 2 to 4. 2. The student will identify occupations to meet individual patient needs without cueing by week 4 to 6.
V. MANAGEMENT of OT SERVICES	Site-Specific Objectives	Methods
28. Demonstrates through practice or discussion the ability to actively collaborate with the occupational therapy assistant.	1. The student will demonstrate the ability to actively collaborate with the occupational therapy assistant by week 6 to week 12.	1. The student will demonstrate an understanding of the need for active collaboration between occupational therapists and occupational therapy assistants by week 2. 2. The student will observe therapist/assistant collaboration as modeled in clinical settings within 2 to 4 weeks. 3. The student will identify at least three ways in which to collaborate and communicate with occupational therapy assistants by week 4 to 6. 4. The student will demonstrate the ability to build collaboration into patient interactions as needed by week 6 to 12.

VI. COMMUNICATION	Site-Specific Objectives	Methods
33. Produces clear and accurate documentation according to site requirements.	1. The student will demonstrate independence in treatment area documentation by week 6 to 8.	1. The clinical instructor will outline outpatient documentation requirements and methods within 2 weeks. 2. The student will become familiar with approved UTMB abbreviations for use in the medical record within two weeks. 3. The student will become familiar with the UTMB prohibited abbreviations and will eliminate them from all documentation by week 3 to 4. 4. The student will demonstrate independence in writing evaluation/re-evaluation reports, progress notes, and discharge summaries from week 6 until week 12.
VII. PROFESSIONAL BEHAVIORS	Site-Specific Objectives	Methods
37. Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisor(s) and others.	1. The student will demonstrate an awareness of the need to take responsibility for his/her own professional development by week 6 through 8.	1. The student will seek out learning opportunities without cueing by week 2 to 3. 2. The student will obtain information from all available resources in order to develop professional competence by week 6 to 8. 3. The student will complete entry-level competency checklist specific to treatment areas by week 12.
38. Responds constructively to feedback.	1. The student will respond appropriately to all feedback regarding clinical performance by week 6 to week 12.	1. The clinical instructor will offer constructive feedback regarding all interactions beginning week 1 until week 12. 2. The student will ask for feedback as needed and will offer feedback to clarify learning needs by week 2. 3. The student will modify all behaviors in response to feedback given week 1 until week 12.

**Henry Ford Macomb Health Center - Outpatient
Specific Site Objectives
Occupational Therapy Assistant Students**

I. FUNDAMENTALS OF PRACTICE

1. **Adhering to Code of Ethics:** Adheres consistently to the American Occupational Therapy Association Code of Ethics and site's policies and procedures.
 - Adheres to AOTA Code of Ethics
 - Confidentiality of patients is strictly adhered to at all times
 - Interactions among families, patients and other coworkers is professional and respectful
 - Establishes and maintains a therapeutic relationship with the patient and their needs
 - Maintains quality patient care and patient satisfaction as guidelines for professional and responsible behavior
 - Follows all rules, policies, procedures and regulations of the facility
2. **Safety:** Safety regulations are adhered to. Anticipates and prepares oneself for potentially dangerous/hazardous situations and takes steps to prevent accidents among patients and employees.
 - Utilizes universal infection control precautions and procedures
 - Contributes to cleanliness of work area and maintains a safe environment for patients and staff
 - Adheres to facility policies to emergency code or drill situations
 - Reports potential safety hazards and unusual occurrences to supervisor
 - Follows program procedures for client and staff safety
3. **Safety:** Uses sound judgment in regard to safety of self and others during all fieldwork related activities.
 - Safe supervision is provided of patients during all activities
 - Refrains from use of equipment or procedures unless trained properly on how to use equipment
 - Seeks and is receptive to supervision to ensure patient safety
 - Follows procedures of safe transfers, uses gait belt for clients with mobility and balance issues during transferring and/or activities.
 - Identifies and reports safety concerns to supervisor and/or appropriate clinical staff
 - Assesses own ability to provide safe treatment and identifies situations that require further knowledge and/or assistance.
 - Demonstrates willingness to function within constraints of site policies and procedures
 - Never leaves a child unattended
 - Identifies changes in client status and the environment which may impact client or staff safety

II. BASIC TENETS

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.
 - Explains the role of OT/OTA within the practice setting, in terms and language that are clearly understood by the recipient
 - Explains how and why occupation is used as a means to an end
 - Explains how and why occupational therapy practitioners are client-centered
 - Thoroughly instructs other disciplines in carrying out treatment procedures initiated by OT
 - Selects activities that reflect an understanding of the patient's interests and occupational values
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.
 - Verbalizes the differences in role delineation for an OT, OTA, and Rehab Technician within the practice setting
 - Able to communicate clearly the rationale for occupational therapy interventions provided to the patients, families, and the treatment team
6. **Evidence-based Practice:** Makes informed practice decisions based on published research and relevant informational resources.
 - Able to articulate rationale for selection of activities
 - Uses sound clinical reasoning backed by published research and/or relevant resources such as test books to make informed intervention decisions

III. EVALUATION AND SCREENING

7. **Gathers Data:** Under the supervision of and in cooperation with the occupational therapist, accurately gathers relevant information regarding a client's occupations of self care, productivity, leisure, and the factors that support and hinder occupational performance.
 - Identifies conditions and precautions associated with apparent deficits of assigned patients
 - Demonstrates an understanding of diagnoses and its impact on occupational performance
 - Reads the client's clinical chart prior to each treatment session, and verbalizes an understanding of the client's premorbid occupational performance
 - Listens to input from other team members
 - Teams with other professionals to discuss needs, progress and program of the patient
 - Contributes to the development and updates of the OT plan of care and goals with patient, family, caregivers, etc.

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.
 - Reads the client's clinical chart prior to each treatment session, and verbalizes an understanding of the client's premorbid occupational performance or stage of development
 - Utilizes correct procedures for assessing individual performance areas
 - Interviews patient or caregiver to obtain relevant information
 - Listens to input from other team members
 - Maintains objectivity in observing and assessing areas where standardization is not an option
 - Alters methods to accommodate limitations in cognition or communication, as needed
 - Alters methods of assessing performance areas where medical complications or restrictions exist
 - Accepts responsibility and is aware of the importance of accurate assessment
 - Observes standardized techniques in using standardized assessment tools
 - Determines which assessments are appropriate for a specific patient
 - Gathers and prepares materials and equipment required for the assessment
9. **Interprets:** Assists with interpreting assessments in relation to the client's performance and goal in collaboration with the occupational therapist.
 - Able to locate and use norms for assessment tools
 - Able to objectively analyze and select pertinent data from assessment to develop an accurate profile of the patient's strengths and weaknesses
 - Interprets data objectively and according to standardized or non-standardized method
 - Uses clinical reasoning
 - Relates assessment findings to functional performance
10. **Reports:** Reports results accurately in a clear, concise manner that reflects the client's status and goals.
 - Identifies functional limitations affecting performance
 - Documents results of the assessment and reassessment following department policies and procedures
 - Reports verbally and/or in writing unusual or critical information gathered during the assessment to the appropriate staff members
 - Reports performance data objectively
11. **Establishes Goals:** Develops client-centered and occupation-based goals in collaboration with the occupational therapist.
 - Incorporates patient goals and priorities into the plan of care
 - Develop appropriate goals based on patient performance
 - Recognizes the importance of client-centered practice and the involvement of family and caregivers in the treatment process
 - Demonstrates clinical reasoning skills to identify steps to solve problems in patient treatment and to establish goals
 - Grades and/or adapts activities or method to achieve treatment goals

IV. INTERVENTION

12. **Planning Interventions:** 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.
 - Discusses basis for intervention decisions with supervisor
 - Identifies correlation between problem areas and activity selected for intervention
 - Recognizes which treatment activities may facilitate or enhance the patient's program and goals
 - Collaborates with the occupational therapist to prioritize problem areas and addresses foundation skills needed for treatment progression
 - Considers a variety of activities and goals identified by other team members to reinforce and incorporate during intervention
 - Considers home environment and family responsibilities or routines when developing home programs
 - Prioritizes problem areas and addresses foundation skills needed for treatment progression
 - Prepares several alternative activities in case the child rejects the planned activity
13. **Selecting Interventions:** Selects and sequences relevant interventions that promote the client's ability to engage in occupations.
 - Recognizes the value in using the most effective strategy to achieve individual goals and maximizes the patient's interest in the treatment program
 - Demonstrates functional-based interventions for self care performance components
 - Directs patient performance in areas of ADLs/IADLs as functional level allows
14. **Implements Intervention:** Implements occupation-based interventions effectively in collaborations with clients, families, significant others, and service providers.
 - Perform appropriate interventions that will enhance the patient's level of participation
 - Demonstrates functional-based interventions for self-care performance components
 - Utilizes purposeful activities during treatment sessions
 - Selects activities that are meaningful and relevant to the patient
 - Demonstrates awareness of the patient's various life roles in selecting and implementing activities
 - Considers age level and capabilities when directing all patient care activities
15. **Activity Analysis:** Grades activities to motivate and challenge clients in order to facilitate progress.
 - Grades and modifies treatment activities to provide effective treatment for the patient's current status
 - Selects activities considering patient abilities to promote progress without undue frustration
 - Selects activities by taking into account patient preferences, values, and age
 - Demonstrates the ability to identify more than one appropriate strategy for a given problem area or variations of a strategy

16. **Therapeutic Use of Self:** Effectively interacts with clients to facilitate accomplishment of established goals.
 - Develops and maintains rapport with patients, families, and/or significant others that enhance the therapeutic relationship
 - Maintains an atmosphere conducive to positive interactions
 - Demonstrates positive working relationships with all patients, family, caregivers, and fellow staff members
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.
 - Recognizes changes in the patient's physical, emotional, or cognitive status and adjusts the plan to promote optimal progress
 - Identifies appropriate goals to address underlying factors that impede functional progress, and be flexible as needed
 - Demonstrates the ability to be flexible with intervention plans and adapting to changes in a timely manner
 - Update plan at required intervals or appropriate times due to any changes

V. COMMUNICATION

18. **Verbal/Nonverbal Communications:** Clearly and effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public.
 - Develops and maintains rapport with patient's, families, and/or significant others that enhances the therapeutic relationship
 - Communicates appropriate information to interdisciplinary treatment team in a professional manner
 - Communicates with other disciplines regarding goals and methods of treatment to be reinforced
 - Demonstrates active listening skills during interactions
 - Communicates on a technical level with other OTs and medical professionals as needed
19. **Written Communication:** Produces clear and accurate documentation according to site requirements. All writing is legible, using proper spelling, punctuation, and grammar.
 - Completes accurate documentation for reimbursement
 - Completes daily patient notes according to facility standards
 - Completes all required documentation in charts according to facility standards
 - Completes progress notes or discharge summaries in conjunction with this facilities policies

VI. PROFESSIONAL BEHAVIORS

20. **Self-Responsibility:** Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisor(s) and others.
 - Notifies supervisor of unusual occurrences or circumstances
 - Identifies, communicates, and uses own optimal learning methods and styles

- Recognizes communication styles of self and supervisor; adjusts style as needed to promote optimal communication with supervisor
- Uses discretion in wording and timing of questions asked of supervisor
- Attends regularly scheduled staff meetings and in-service opportunities in practice area
- Utilizes free time to read current journals, review videotapes, books, etc.
- Defines personal expectations and goals for the affiliation
- Seeks out answers to questions and takes initiative in acquiring knowledge

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

- Demonstrates receptiveness to feedback and input from supervisor(s)
- Actively seeks feedback on performance
- Adjusts behavior in response to cues and direction from supervisor, staff, and the environment
- Incorporates suggested changes in treatment or approach immediately, as directed by supervisor
- Responds to constructive feedback with openness and willingness to hear feedback

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

- Consistently maintains professional behaviors in the workplace. This includes, but is not limited to, taking initiative, and being prepared and dependable
- Arrives on time and consistently completes work assignments on time
- Be prepared in uniform, with writing materials, and any other essentials
- Be prepared for patient treatment as directed by your supervisor
- Review patients' charts prior to working with them
- Stays organized

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

- Arrives on time
- Completes written documentation within timelines specified by the supervisor (i.e., daily notes, progress note completion, etc.)
- Organizes treatment and non-treatment responsibilities in order to ensure that responsibilities are completed in a timely and professional manner
- Develops an efficient schedule for assigned workload

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

- Consistently maintains professional behaviors in the workplace, including, but not limited to, professional appearance, showing respect for other professionals, and presenting in a professional and confident manner
- Establishes rapport and maintains an atmosphere conducive to positive interactions

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

- Respectful and open to diverse backgrounds and ideas in the treatment setting. Seeks to understand the patient's or family's perspective and context when collaborating in treatment. Careful to not impose one's own beliefs and values on patients
- Do not judge, and do not assume
- Able to access translation services as needed

OTA Student (Print Name)

OTA Student Signature / Date

Fieldwork Educator (Print Name)

Fieldwork Educator Signature / Date

Collaboratively written by:
Danielle Masching, Suzie Dailey, OTRL, CHT, and Christina McCauley, OTRL
March 7, 2014

<i>Fieldwork Performance Evaluation for the Occupational Therapy Student</i>			
I. FUNDAMENTALS OF PRACTICE	Site-Specific Objectives	Learning Activities	Completion
1. Adheres to ethics: Adheres consistently to the American Occupational Therapy Association Code of Ethics and site's policies and procedures including, when relevant, those related to human subject research.	<p>Adheres to the AOTA Code of Ethics.</p> <p>Adheres to state licensure requirements.</p> <p>Follows organizational policies and procedures of the facility.</p> <p>Follows procedural safeguards in regards to confidentiality.</p>		
2. Adheres to safety regulations: Adheres consistently to safety regulations. Anticipates potentially hazardous situations and takes steps to prevent accidents.	<p>Follow universal precautions for infection control.</p> <p>Follows program procedures for client and staff safety (i.e., caretaker must be present, awareness of personal safety in the environment).</p> <p>Follows program procedures for reporting injuries.</p> <p>Reports potential safety hazards and unusual occurrences to supervisor.</p> <p>Assists with maintenance of equipment in working order.</p> <p>Contributes to cleanliness of work area and maintains a safe environment.</p> <p>Explains fire extinguisher use and fire procedures within the building.</p>		
3. Uses judgment in safety: Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.	<p>Removes possible harmful objects from working environment.</p> <p>Observes proper precautions for each child.</p> <p>Follows procedures for safe transfers.</p> <p>Never leaves a child unattended.</p> <p>Identifies changes in client status and the environment, which may impact client and staff safety.</p> <p>Seeks assistance when activity or child's behavior is beyond the own level of experience, knowledge, or student's control.</p>		

II. BASIC TENETS	Site-Specific Objectives	Learning Activities	Completion
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.	Articulates the values and beliefs of the occupational therapy profession as it relates in the ECI setting to clients, families, etc.		
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.	Articulates the value of occupational performance in the child’s naturalistic environment. Articulates best OT practice in the ECI environment.		
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.	Articulates the role of the OT and OTA in the ECI setting to supervisor, families, etc.		
7. Collaborates with client, family, and significant others throughout the occupational therapy process.	Contributes to the development and updates of the IFSP with families and team members. Teams with other professionals to discuss needs and progress of the client or program. Shares information and community resources with the family and team members. Recommends OT assessments contributing overall to the teams’ evaluation process.		

III. EVALUATION AND SCREENING	Site-Specific Objectives	Learning Activities	Completion
8. Articulates a clear and logical rationale for the evaluation process.	Explains the evaluation process within the ECI program. Explains the focus and purpose of evaluation process. Articulates relevance of evaluation information within the context of the child’s natural environment.		
9. Selects relevant screening and assessment methods while considering such factors as client’s priorities, context(s), theories, and evidence-based practice.	Demonstrates knowledge of the various assessments available for use. Determines which assessments are appropriate for a specific child or situation. Discusses rationale for evaluation selection with supervisor.		
10. Determines client's occupational profile and performance through appropriate assessment methods.	Identifies areas of concern in relation the child’s and family’s occupational history, patterns of daily living, interests, values, and needs. Describes the expectations of the child in the natural environment.		
11. Assesses client factors and context(s) that support or hinder occupational performance.	Identifies the strengths and concerns of the child or family and the affect on performance.		
12. Obtains sufficient and necessary information from relevant resources such as client, families, significant others, and service providers, and records prior to and during the evaluation process.	Observes the child in his or her natural environment. Gathers pertinent information from the child’s folder, parents, other staff, and community resources, including previous service received. Obtains relevant information from various team members. Identifies contraindications and precautions. Obtains information on the child’s diagnosis or medical condition. Explains the importance or relevance of the information gathered. Identifies the need for additional or supplementary information.		
13. Administers assessments in a uniform manner so as to ensure findings are valid and reliable.	Follows the procedures for administering the evaluation accurately. Gathers and prepares materials and equipment required by the assessment.		

13. (Continued)	<p>Makes accurate, objective observations, during the evaluation process.</p> <p>Accurately records evaluation information.</p>		
14. Adjusts/modifies the assessment procedures based on client’s needs, behaviors and culture.	<p>Changes approach and method of data-gathering according to child’s (parents’) needs.</p> <p>Modifies approach in response to child’s behavior, fatigue, and emotional factors.</p> <p>Modifies the environment to obtain best response from the child as needed.</p> <p>Adjusts child’s positioning or seating as necessary.</p> <p>Distinguishes between actual fatigue, uncooperative behavior, and manipulation, and modifies approach as indicated.</p>		
15. Interprets evaluation results to determine client’s occupational performance strengths and challenges.	<p>Convert raw scores into meaningful information where applicable.</p> <p>Relates assessment findings to functional performance.</p> <p>Identify strengths and concerns based on evaluation data.</p>		
16. Establishes an accurate and appropriate plan based on the evaluation results, through integrating multiple factors such as client’s priorities, context(s), theories, and evidence-based practice.	<p>Based on evaluation results, identifies appropriate outcomes, criteria, and strategies that affect child and family needs.</p> <p>Collaborates with team members to incorporate outcome and strategies into the child’s IFSP.</p> <p>Identifies ways to incorporate the IFSP strategies into family routines.</p> <p>Includes time, frequency, duration, and location of OT services and recommendations.</p>		

<p>17. Documents the results of the evaluation process that demonstrates objective measurement of client’s occupational performance.</p>	<p>Completes appropriate protocols required by the programs (i.e., standardized developmental profile, specific OT or PT protocol as indicated).</p> <p>Contributes to the part of the IFSP summary that includes developmental or clinical information.</p> <p>Collaborates with team to identify strengths and concerns.</p> <p>Collaborates with team to develop outcomes, criteria, and strategies, including service frequency, duration, and intensity.</p> <p>Documents time, frequency, duration, and location of OT services and recommendations in the IFSP.</p> <p>Documents results using appropriate, family-friendly language.</p>		
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IV. INTERVENTION	Site-Specific Objectives	Learning Activities	Completion
18. Articulates a clear and logical rationale for the intervention process.	<p>Discusses basis for intervention decisions with supervisor.</p> <p>Identifies correlation between areas of concern and strategies selected for intervention.</p> <p>Identifies which treatment strategies may facilitate or enhance the child’s plan.</p> <p>Articulates how activities selected relate to the occupational performance of the child in context of family needs/routines.</p>		
19. Utilizes evidence from published research and relevant resources to make informed intervention decisions.	<p>Researches evidence-based interventions that could be used in the early intervention environment.</p> <p>Articulates how to apply evidence from published research and therapist’s expertise to specific children receiving services.</p>		
20. Chooses occupations that motivate and challenge clients.	<p>Considers child’s preferences that will motivate and challenge him or her.</p> <p>Considers a variety of activities and goals identified by other team members to reinforce and incorporate during intervention.</p> <p>Considers home environment and family needs and routines when suggesting activities.</p> <p>Identifies a variety of treatment activities to accomplish a goal.</p>		
21. Selects relevant occupations to facilitate clients meeting established goals.	<p>Identifies activities, that will help the child and family accomplish their outcomes.</p> <p>Identifies and uses activities designed to improve child’s performance in the home environment.</p> <p>Explains how the activity selected will facilitate the child’s functional performance.</p>		

<p>22. Implements intervention plans that are client-centered.</p>	<p>Identifies options to assist family with service coordination needs identified in the child’s IFSP.</p> <p>Uses appropriate frame of reference in the development of the treatment plan and in discussion with supervisor.</p> <p>Demonstrates sequential plan of treatment activities, taking into consideration the functional and emotional needs of the child and family, within the allotted time.</p> <p>Prepares several alternative activities in case the child rejects the planned activity.</p> <p>Demonstrates flexibility to change from one activity to another when the child’s environment, behavior, or emotional response changes.</p> <p>Adapts activities to meet physical, cognitive, and/or behavioral limitations.</p>		
<p>23. Implements intervention plans that are occupation-based.</p>	<p>Implements a plan of treatment that facilitates the child’s functional performance in his natural environment.</p> <p>Implements a plan of treatment that considers family needs and routines for maximized learning opportunities.</p> <p>Utilizes materials available in the home environment to maximize learning opportunities throughout family routines.</p>		
<p>24. Modifies task approach, occupations, and the environment to maximize client performance.</p>	<p>Makes recommendations to supervisor regarding treatment approach in response to changes in child’s condition.</p> <p>Changes treatment approach based on improvement or regression in child’s condition.</p> <p>Effectively intervenes with child’s inappropriate behavior.</p> <p>Praises student for appropriate behavior, thus optimizing student’s performance.</p> <p>Changes treatment approach with consideration to the environment and outcomes being addressed.</p>		

<p>25. Updates, modifies, or terminates the intervention plan based upon careful monitoring of the client’s status.</p>	<p>In the role of service coordinator, updates, and modifies options, as needs change, to assist the family with service coordination needs identified in the child’s IFSP.</p> <p>Updates plan and participates in required review process.</p> <p>Gathers data in preparation for annual review.</p> <p>Consults with the team members and family regarding child’s progress, parent concerns, and potential for change in services.</p> <p>Recommends changes in strategies to supervisor based on improvement or regression in child’s condition or behavior.</p> <p>Recognizes a plateau in therapy and recommends to the IFSP committee and suggests changes in the child’s intervention plan.</p> <p>Prepare the child, family, and team members regarding discontinuation of services.</p>		
<p>26. Documents client’s response to services in a manner that demonstrates the efficacy of interventions.</p>	<p>Completes therapy notes on child following each treatment session.</p> <p>Reports child’s progress to supervisor on an ongoing basis.</p>		

V. MANAGEMENT of OT SERVICES	Site-Specific Objectives	Learning Activities	Completion
27. Demonstrates through practice or discussion the ability to assign appropriate responsibilities to the occupational therapy assistant and occupational therapy aide.	Discusses with supervisor and articulates the role of the occupational therapy assistant in the area of early intervention.		
28. Demonstrates through practice or discussion the ability to actively collaborate with the occupational therapy assistant.	Teams with the occupational therapy assistant for treatment, special projects, or adaptive equipment. Discusses with supervisor various situations that might occur in the early intervention setting appropriate for occupational therapy assistants’ services.		
29. Demonstrates understanding of the costs and funding related to occupational therapy services at this site.	Understands the funding for occupational therapy services in early intervention (i.e., Medicaid, Federal, State, Local allotments). Accurately completes progress notes with correct billing codes for program reimbursement.		
30. Accomplishes organizational goals by establishing priorities, developing strategies, and meeting deadlines.	Demonstrates appropriate prioritizing of job responsibilities in this practice area, accommodating for varying caseloads and changes in schedule. Follows ECI program priorities.		
31. Produces the volume of work required in the expected time frame.	Delivers services expected by the program at a level commensurate with an entry-level therapist.		

VI. COMMUNICATION	Site-Specific Objectives	Learning Activities	Completion
<p>32. Clearly and effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public.</p>	<p>In the role of service coordinator, communicates options as needs change to assist the family with service coordination needs identified in the child’s IFSP.</p> <p>Demonstrates active listening skills during interactions.</p> <p>Communicates with other disciplines regarding outcomes and strategies to be reinforced.</p> <p>Refers questions beyond the scope of OT to the appropriate source.</p> <p>Communicates with other team members frequently regarding the child’s progress.</p> <p>Communicates effectively with parents or caregivers.</p> <p>Communicates effectively with program and community personnel.</p> <p>Communicates effectively on a technical level with other OTs and medical professionals.</p>		
<p>33. Produces clear and accurate documentation according to site requirements.</p>	<p>Completes accurate written documentation required by the program (progress notes, tracking systems, caseload updates, etc.).</p> <p>Completes accurate documentation for program reimbursement.</p>		
<p>34. All written communication is legible, using proper spelling, punctuation, and grammar.</p>	<p>Produces legible handwritten and or computer-generated documents using proper spelling, punctuation, and grammar.</p>		
<p>35. Uses language appropriate to the recipient of the information including, but not limited to, funding agencies and regulatory agencies.</p>	<p>Uses language appropriate to the family or caregiver.</p> <p>Uses language appropriate to program personnel.</p> <p>Uses language appropriate to other occupational therapists.</p> <p>Uses language appropriate to medical personnel.</p> <p>Uses language appropriate to outside agencies and community programs.</p>		

VII. PROFESSIONAL BEHAVIORS	Site-Specific Objectives	Learning Activities	Completion
<p>36. Collaborates with supervisor(s) to maximize the learning experience.</p>	<p>Comes prepared and participates in supervisory meetings.</p> <p>Informs supervisor of any changes in schedule.</p> <p>Informs supervisor of any changes or concerns in student performance.</p> <p>Volunteers to assist other school personnel when time permits or help is requested.</p> <p>Provides a journal of OT services to enhance learning opportunities during fieldwork, which may include caseload, accomplishments, and areas of personal growth.</p> <p>Collaborates with supervisor when ready to assume more responsibility, requiring less supervision.</p>		
<p>37. Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisor(s) and others.</p>	<p>Utilizes free time to read current journals, review videotapes, etc.</p> <p>Request information on areas other than those scheduled, to gain overall knowledge of the program.</p> <p>Takes initiative to independently arrange or seek out field trips and peer consultations.</p> <p>Seeks out answers to questions and takes initiative in acquiring knowledge.</p> <p>Seeks supervisor feedback on performance.</p>		
<p>38. Responds constructively to feedback.</p>	<p>Incorporates suggested changes in treatment or approach immediately, as directed by supervisor.</p> <p>Generalizes supervisor’s suggestions to other situations.</p> <p>Responds to constructive feedback with openness and willingness to hear feedback.</p>		

<p>39. Demonstrates consistent work behaviors including initiative, preparedness, dependability and work site maintenance.</p>	<p>Is prepared for home visits.</p> <p>Completes work as assigned.</p> <p>Follows regular schedule, maintaining punctuality.</p> <p>Meets commitments in a timely manner.</p> <p>Maintains work environment and returns item(s) to proper storage areas.</p>		
<p>40. Demonstrates effective time management</p>	<p>In the role of service coordinator, coordinates reviews according to program requirements.</p> <p>Completes written documentation within timelines specified by the supervisor or program (progress notes, tracking systems, caseload updates, etc.).</p> <p>Develops and efficient schedule for assigned workload.</p> <p>Utilizes free time constructively.</p> <p>Establishes priorities in workload.</p> <p>Requests additional responsibilities as free time becomes available.</p> <p>Arrives on time for meetings, treatment sessions, etc.</p>		
<p>41. Demonstrates positive interpersonal skills including but not limited to cooperation, flexibility, tact, and empathy.</p>	<p>Demonstrates positive interaction with all program personnel, including genuine praise.</p> <p>Demonstrates respect for parents and caregivers in their home environment by scheduling visits at times convenient and meaningful to family routines.</p> <p>Establishes rapport and maintains an atmosphere conducive to positive interactions.</p> <p>Demonstrates positive working relationships with all clients and families.</p> <p>Demonstrates flexibility with interactions and situations, without compromising the ECI program.</p>		

42. Demonstrates respect for diversity factors of others including but not limited to sociocultural, socioeconomic, spiritual, and lifestyle choices.	Demonstrates respect for children and families without prejudging or making assumptions about the family environment, culture, religion, etc. Demonstrates respect for program personnel without prejudging or making assumptions.		
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**Shepherd Center
Atlanta, Georgia
Occupational Therapy Student Program
Fieldwork Objectives**

I. FUNDAMENTALS OF PRACTICE

1. **Adheres to ethics:** Adheres consistently to the American Occupational Therapy Association Code of Ethics and site's policies and procedures including when relevant, those related to human subject research.
 - Maintains strict patient confidentiality
 - Interacts professionally and respectfully with patients, families, and staff.
 - Establishes and maintains a therapeutic relationship with the patient
 - Maintains quality patient care and patient satisfaction as guidelines for professional behavior
2. **Adheres to safety regulations:** Anticipates potentially hazardous situations and takes steps to prevent accidents.
 - Utilizes infection control precautions and procedures
 - Maintains clear and orderly work area by returning equipment and supplies
 - Follows facility policies in response to emergency code or drill situations
3. **Uses judgment in safety:** Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.
 - Provides safe supervision of patients during high-risk activities
 - Refrains from use of equipment or procedures unless trained
 - Seeks and is receptive to supervision to ensure patient safety
 - Demonstrates willingness to function within constraints of center policies and procedures

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.
 - Explains the role of OT within the practice setting, in terms and language that are clearly understood by the recipient
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.
 - Explains how and why occupation is used as a means to an end
 - Explains how and why occupational therapy practitioners are client-centered
 - Thoroughly instructs other disciplines in carrying out treatment procedures initiated by OT

**Shepherd Center
Atlanta, Georgia
Occupational Therapy Student Program
Fieldwork Objectives**

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.
 - Verbalizes the differences in role delineation for an OT, OTA, and Rehab Technician within the practice setting.
7. **Collaborates with** client, family, and significant others throughout the occupational therapy process.
 - Establishes treatment priorities after discussing goals with all concerned parties
 - Reviews progress with client, family, and significant others at regular intervals

III. EVALUATION AND SCREENING

8. **Articulates a clear and logical rationale** for the evaluation process.
 - States how and why a specific approach to the evaluation process is being used
9. **Selects relevant screening and assessment methods** while considering such factors as the client's priorities, context(s), theories, and evidence-based practice.
 - Identifies conditions and precautions associated with apparent deficits of assigned patients.
 - Selects appropriate component areas to assess, based on the center's practices and the patient's level of apparent deficits and secondary diagnoses and complications
10. **Determines client's occupational profile** and performance through appropriate assessment methods.
 - Reads the client's clinical evaluation prior to initiating evaluation, and verbalizes an understanding of the client's premorbid occupational performance.
11. **Assesses client factors and context(s)** that support or hinder occupational performance.
 - Utilizes correct procedures for assessing individual performance areas
 - Selects appropriate areas for further assessment
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.
 - Interviews patient or caregiver to obtain relevant information

**Shepherd Center
Atlanta, Georgia
Occupational Therapy Student Program
Fieldwork Objectives**

- Listens to input from other team members
13. **Administers assessments** in a uniform manner to ensure findings are valid and reliable.
- Maintains objectivity in observing and assessing areas where standardization is not an option
 - Demonstrates an understanding of FIM language and terminology to assess areas of self-care
14. **Adjusts/modifies the assessment procedures** based on client's needs, behaviors, and culture.
- Alters methods of instructing the patient to accommodate limitations in cognition/communication as needed
 - Alters methods of assessing performance areas where medical complications or restrictions exist
15. **Interprets evaluation results** to determine client's occupational performance strengths and challenges
- Determines correct neurological and functional levels based on evaluation results
 - Determines correct FIM levels for self-care levels of functioning
 - Determines correct DRS levels of functioning at admission and discharge (ABI only)
 - Determines correct ASIA levels on the initial assessment
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.
- Identifies functional limitations affecting self-care performance
 - Sets long-term goals that are attainable for the patient, based on diagnosis and realistic assessment of the client's strengths and limitations
 - Sets short-term goals in specific, objective, and measurable terms
 - Is able to prioritize interdisciplinary team goals
 - Incorporates patient goals and priorities into the plan of care.
17. **Documents the results of the evaluation** process that demonstrates objective measurement of client's occupational performance.
- Follows correct procedures for documenting evaluations accurately
 - Thoroughly addresses all problem areas
 - Summarizes evaluations clearly and concisely in note
 - Follows correct processes for recording goniometry, manual muscle testing, and ASIA results

**Shepherd Center
Atlanta, Georgia
Occupational Therapy Student Program
Fieldwork Objectives**

IV. INTERVENTION

18. **Articulates a clear and logical rationale** for the intervention process.
 - Completes thorough treatment plans for clients
 - Prioritizes problem areas and addresses foundation skills needed for treatment progressions
19. **Utilizes evidence** from published research and relevant resources to make informed intervention decisions.
20. **Chooses occupations** that motivate and challenge clients.
 - Facilitates self-care activities for eating, grooming, bathing, dressing, and toileting skills
 - Directs patient performance in areas of IADLs as the functional level allows
21. **Selects relevant occupations** to facilitate clients meeting established goals.
 - Demonstrates functional-based interventions for self-care performance components
 - Directs patient performance in areas of IADLs as functional level allows
 - Participates in community re-entry outings
 - Refers and implements group-based participation to address problem areas
22. **Implements intervention plans that are client-centered.**
 - Incorporates patient priorities into established goals
 - Schedules and performs ADLs/AM programs appropriate to the patient's level of participation
 - Considers age level when directing all patient care activities
23. **Implements intervention plans that are occupation-based.**
 - Directs self-care remediation
 - Utilizes purposeful activities during treatment sessions
 - Demonstrates awareness of the patient's various life roles in selecting activities
 - Selects activities that are meaningful and relevant to the patient
24. **Modifies task approach, occupations, and the environment** to maximize client performance.
 - Identifies and addresses underlying problems and prerequisite skills to promote gains in higher-level functional skills

**Shepherd Center
Atlanta, Georgia
Occupational Therapy Student Program
Fieldwork Objectives**

- Grades and modifies treatment activities to provide effective treatment for the patient's current status
 - Selects activities considering patient abilities to promote progress without undue frustration
 - Selects activities by taking into account patient preferences, values, and age
25. **Updates, modifies, or terminates the intervention plan** based upon careful monitoring of the client's status.
- Identifies appropriate goals to address underlying factors that impede functional progress
 - Recognizes changes in the patient's physical, emotional, or cognitive status and adjusts the program to promote optimal progress
26. **Documents client's response** to services in a manner that demonstrates the efficacy of interventions.
- Accurately documents patient FIM scores and outcomes for self-care
 - Updates status of goals; short term goals do not continue for more than two reporting periods if not met
 - Problem-solves with patient and team members to establish goals that are realistic and incorporate the potential discharge situation
 - Uses correct terminology to describe treatments and interventions

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.
- Directs therapy technicians in performing patient care activities within the scope of SC practice standards
28. **Demonstrates through practice or discussion the ability to actively collaborate** with the occupational therapy assistant.
- Verbalizes process for collaboration with the OTA within the specific practice setting
29. **Demonstrates understanding of the costs and funding** related to occupational therapy services at this site.
- Ensures that patient care time is used productively
 - Notifies supervisor of charges for supplies, equipment, and time
 - Verbalizes an understanding of costs for purchasing adaptive equipment or devices, or DME within the practice setting

**Shepherd Center
Atlanta, Georgia
Occupational Therapy Student Program
Fieldwork Objectives**

30. **Accomplishes organizational goals** by establishing priorities, developing strategies, and meeting deadlines.
- Arrives promptly to scheduled meetings and treatment sessions.
 - Completes assignments by scheduled deadlines
 - Schedules patient treatments to make optimal use of treatment time given current assignment and caseload
 - Utilizes unscheduled time to increase learning
 - Maintains personal schedules and lists to ensure timely completion of responsibilities
 - Prepares in advance for meetings and treatments
 - Notifies supervisor and OT educator when problems arise
31. **Produces the volume of work** required in the expected time frame.
- Adjusts work pace to accommodate increased workload
 - Provides assistance to other staff members when able
 - Recognizes when current workload prohibits helping others

VI. COMMUNICATION

32. **Clearly and effectively communicates verbally and nonverbally** with clients, families, significant others, colleagues, service providers, and the public.
33. **Produces clear and accurate documentation** according to site requirements.
- Completes written treatment or care plans as assigned by supervisor for review
 - Complies with SC policy for approved abbreviations
 - Follows SC policies and procedures for documentation
34. **All written communication is legible**, using proper spelling, punctuation, and grammar.
- Complies with SC policy for approved abbreviations
35. **Uses language appropriate to the recipient** of the information, including, but not limited to funding agencies and regulatory agencies.

VII. PROFESSIONAL BEHAVIORS

36. **Collaborates with supervisor(s)** to maximize the learning experience.
- Asks questions when uncertain
 - Notifies supervisor of unusual occurrences or circumstances
 - Identifies, communicates, and uses own optimal learning methods and styles

**Shepherd Center
Atlanta, Georgia
Occupational Therapy Student Program
Fieldwork Objectives**

- Recognizes communication styles of self and supervisor; adjusts style as needed to promote optimal communication with supervisor
 - Uses discretion in wording and timing of questions asked of supervisor
 - Demonstrates receptiveness to feedback and input from supervisors
 - Actively seeks feedback on performance
37. **Takes responsibility for attaining professional competence** by seeking out learning opportunities and interactions with supervisor(s) and others.
- Attends regularly scheduled staff meetings and in-service opportunities in practice area
 - Collaborates with OT educator to participate in additional learning opportunities and observations center-wide
38. **Responds constructively to feedback.**
39. **Demonstrates consistent work behaviors** including initiative, preparedness, dependability, and work site maintenance.
40. **Demonstrates effective time management.**
41. **Demonstrates positive interpersonal skills** including but not limited to cooperation, flexibility, tact, and empathy.
42. **Demonstrates respect for diversity factors** of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices.

**Henry Ford Macomb Hospital - Macomb Center
Occupational Therapy Department**

**Level II Fieldwork Site-Specific Objectives - Inpatient Rehabilitation
Occupational Therapy Assistant Student**

I. FUNDAMENTALS OF PRACTICE

- 1. Ethics:** Adheres consistently to the American Occupational Therapy Association Code of Ethics and site's policies and procedures.
 - Demonstrates work behaviors that reflect an understanding of professional standards and code of ethics appropriate to the practice environment.
 - Recognizes and appreciates that professional standards and code of ethics are an integral component of being a professional.
 - Identifies and addresses ethical concerns in the context of clinical supervision.
 - Establishes and maintains a therapeutic relationship with the patient.

- 2. Safety:** Adheres consistently to safety regulations. Anticipates potentially hazardous situations and takes steps to prevent accidents.
 - Reviews chart and/or seeks to understand information from appropriate sources to attend to changes in status; asks questions when in doubt.
 - Utilizes infection control precautions and procedures.
 - Maintains clear and orderly work area by returning equipment and supplies.
 - Follows facility policies to emergency code or drill situations.

- 3. Safety:** Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.
 - Provides safe supervision of patients during high-risk activities.
 - Refrains from use of equipment or procedures unless trained.
 - Seeks and is receptive to supervision to ensure patient safety.
 - Utilizes appropriate body mechanics in working with patients.
 - Identifies and reports safety concerns to supervisor and/or appropriate clinical staff.
 - Assesses own ability to provide safe treatment and identifies situations that require further knowledge and/or assistance.

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.
 - Able to explain occupational therapy at a level consistent with level of understanding.
 - Able to articulate the role of occupational therapy to staff during treatment team meetings and when planning milieu activities.
 - Selects activities that reflect an understanding of the patient's interests and occupational values.
 - Sign off on hard chart, explaining occupational therapy in terms that are clearly understood by the patient and/or family members.

- 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.
 - Able to communicate clearly the rationale for occupational therapy interventions provided to the patients, families, and the treatment team.

- 6. Evidence-based Practice:** Makes informed practice decisions based on published research and relevant informational resources.
 - Able to articulate rationale for selection of activities.
 - Uses sound clinical reasoning backed by published research and/or relevant resources to make informed intervention decisions.

III. EVALUATION/SCREENING

- 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.
 - Accepts responsibility and is aware of the importance of thorough data gathering.
 - Demonstrates an understanding of diagnoses and its impact on occupational performance.
 - Selects and filters relevant and important information from all data collected.

- 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.
- Accepts responsibility and is aware of the importance of accurate assessment.
 - Observes standardized techniques in using standardized assessment tools.
 - Demonstrates an understanding of Functional Independent Measure (FIM) language and terminology to assess areas of self-care.
 - Adjusts/modifies the assessment procedures based on the clients' needs, behaviors, and culture.
- 9. Interprets:** Assists with interpreting assessments in relation to the client's performance and goals in collaboration with the occupational therapist.
- Able to objectively analyze and select pertinent data from assessment to develop an accurate profile of the patient's strengths and weaknesses.
 - Interprets data objectively and according to standardized or non-standardized method.
 - Uses sound clinical reasoning.
 - Determines correct FIM levels for self-care levels of functioning.
- 10. Reports:** Reports results accurately in a clear, concise manner that reflects the client's status and goals.
- Documents results of the assessment and reassessment following department policies and procedures.
 - Reports verbally and/or in writing unusual or critical information gathered during the assessment to the appropriate staff members.
 - Reports performance data objectively.
 - Contributes to the discharge plan in a manner that reflects an understanding of functional level at the time of the patient's discharge and the available environmental supports in the anticipated discharge setting.
 - Identifies functional limitations affecting self-care performance.
 - Incorporates patient goals and priorities into the plan of care.
- 11. Establish Goals:** Develops client-centered and occupation-based goals in collaboration with the occupational therapist.
- Recognizes the importance of client-centered practice and the involvement of family and caregivers in the treatment process.

- Demonstrates clinical reasoning skills to identify steps to solve problems in patient treatment and to establish goals.
- Grades and/or changes activity or method to achieve treatment goals.

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.
 - Chooses graded activities and/or preparatory activities that will be most effective in maximizing the patient's occupational performance and allows for on-going assessment of the patient's functional capacity and readiness for discharge.
 - Prioritizes problem areas and addresses foundation skills needed for treatment progression.
 - Facilitates self-care activities for eating, grooming, bathing, dressing, and toileting skills.

13. **Selects Intervention:** Selects and sequences relevant interventions that promote the client's ability to engage in occupations.
 - Recognizes the value in using the most effective strategy to achieve individual goals and maximizes the patient's interest in the treatment program.
 - Demonstrates functional-based interventions for self-care performance components.
 - Directs patient performance in areas of IADLs as functional level allows.
 - Participates in community re-entry outings.

14. **Implements Intervention:** Implements occupation-based interventions effectively in collaboration with clients, families, significant others, and services providers.
 - Offers occupations (occupation-based activity, purposeful activity, preparatory methods) that match the patient's performance skills, patterns, context, activity demands, and patient factors.
 - Schedules and performs ADLs appropriate to the patient's level of participation.
 - Considers age level when directing all patient care activities.
 - Utilizes purposeful activities during treatment sessions.
 - Selects activities that are meaningful and relevant to the patient.

- 15. Activity Analysis:** Grades activities to motivate and challenge clients in order to facilitate progress.
- Demonstrates the ability to identify more than one appropriate strategy for a given problem area.
 - Appropriately revises and adjusts selected activities to adapt to a change in the patient's condition.
 - Grades and modifies treatment activities to provide effective treatment for the patient's current status.
 - Selects activities considering patient abilities to promote progress without undue frustration.
 - Selects activities by taking into account patient's preferences, values, and age.
- 16. Therapeutic Use of Self:** Effectively interacts with clients to facilitate accomplishment of established goals.
- Develops and maintains rapport with patients, families, and/or significant others that enhances the therapeutic relationship.
 - Develops and maintains rapport with patients that enhances the therapeutic relationship.
- 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.
- Demonstrates the ability to be flexible with intervention plans and adapting to changes in the milieu or patients in a timely manner.
 - Recognizes changes in the patient's physical, emotional, or cognitive status and adjusts the program to promote optimal progress.

V. COMMUNICATION

- 18. Verbal/Nonverbal Communication:** Clearly and effectively communicates verbally and nonverbally with clients, families, and/or significant others, colleagues, service providers, and the public.
- Develops and maintains rapport with patients, families, and/or significant others that enhances the therapeutic relationship.
 - Communicates appropriate information to interdisciplinary treatment team in a professional manner.

- 19. Written Communication:** Produces clear and accurate documentation according to site requirements. All writing is legible, using proper spelling, punctuation, and grammar.
- Progress notes are concise and reflect information on occupational performance.
 - Reports unusual and/or critical information in writing.
 - Accurately documents patient FIM scores and outcomes for self-care.
 - Uses correct terminology to describe treatments and interventions.
 - Complies with Henry Ford Health System's policy for approved abbreviations.
 - Follows Henry Ford Health System's policies and procedures for documentation.

VI. PROFESSIONAL BEHAVIORS

- 20. Self-Responsibility:** Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisor(s) and others.
- Defines personal expectations and goals for the affiliation.
 - Self-directed in determining learning strengths and challenges.
 - Asks questions when uncertain.
 - Notifies fieldwork educator of unusual occurrences or circumstances.
 - Identifies, communicates, and uses own optimal learning methods and styles.
 - Recognizes communication styles of self and supervisor and adjusts style as needed to promote optimal communication with fieldwork educator.
 - Uses discretion in wording and timing of questions asked of supervisor,
- 21. Responds to Feedback:** Responds constructively to feedback.
- Adjusts behavior in response to cues and direction from supervisor, staff, and the environment.
 - Demonstrates receptiveness to feedback and input from fieldwork educator.
- 22. Work Behaviors:** Demonstrates consistent work behaviors including initiative, preparedness, dependability, and work site maintenance.
- Consistently maintains professional behaviors in the workplace. This includes, but is not limited to, taking initiative, being prepared and dependable, and assuming a professional demeanor.
 - Arrives on time and consistently completes work assignments on time.

- Attends regularly scheduled staff meetings and in-service opportunities.
- Collaborates with fieldwork educator to participate in additional learning opportunities and observations center-wide.

23. Time Management: Demonstrates effective time management.

- Organizes treatment and non-treatment responsibilities in order to ensure that responsibilities are completed in a timely and professional manner.
- Schedules patients and collaborates with other staff members to accommodate overages or shortages.

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

- Consistently maintains professional behaviors in the workplace, including but not limited to, professional appearance, showing respect for other professionals, and presenting in a professional and confident manner.

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

- Respectful and open to diverse backgrounds and ideas in the treatment setting. Seeks to understand the patient's perspective and context when collaborating in treatment. Careful to not impose one's own beliefs and values on clients.
- Able to access translation services as needed.

I have read and understand the expectations of this fieldwork site.

OTA Student Signature / Date

Fieldwork Educator Signature / Date

BUTLER HOSPITAL
LEVEL II FIELDWORK SITE-SPECIFIC OBJECTIVES

I. FUNDAMENTALS OF PRACTICE

1. **Adheres to ethics:** Adheres consistently to the American Occupational Therapy Association Code of Ethics and site's policies and procedures including when relevant, those related to human subject research.
 - Demonstrates work behaviors that reflect an understanding of professional standards and code of ethics appropriate to the practice environment.
 - Maintains appropriate boundaries.
 - Observes federal and state regulations relating to confidentiality.
 - Recognizes and appreciates that professional standards and code of ethics are an integral component of being a professional.
 - Identifies and addresses ethical concerns in the context of clinical supervision.
2. **Adheres to safety regulations:** Adheres consistently to safety regulations. Anticipates potentially hazardous situations and takes steps to prevent accidents.
 - Demonstrates awareness and understanding of observation levels.
 - Reviews chart and/or seeks to understand information from appropriate sources to attend to changes in status; asks questions when in doubt.
 - Maintains sharps count.
 - Maintains an awareness of and adheres to all pertinent hospital safety policies and procedures.
3. **Uses judgment in safety:** Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.
 - Aware of role during restraint and seclusions on the unit.
 - Demonstrates the ability to de-escalate patients.
 - Utilizes appropriate body mechanics in working with patients.
 - Identifies and reports safety concerns to supervisor and/or appropriate clinical staff.
 - Assesses own ability to provide safe treatment and identifies situations that require further knowledge and/or assistance.

II. BASICS 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.
 - Demonstrates the ability to effectively articulate and translate the importance, values, and beliefs of occupational therapy in the client's overall treatment plan at a level that client, family, significant other, colleagues, service providers, and the public are able to understand.

BUTLER HOSPITAL
LEVEL II FIELDWORK SITE-SPECIFIC OBJECTIVES

- Selects activities that reflect an understanding of the patient's interests and occupational values.
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.
- Demonstrates the ability to effectively articulate, translate, and use occupation as a primary method in the person's overall intervention plan.
 - Able to articulate to patients and staff the rationale behind a selected activity.
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.
- Able to communicate clearly the rationale for occupational therapy assessment and interventions provided to patients, families, and the treatment team.
7. **Collaborates with** client, family, and significant others throughout the occupational therapy process.
- Able to collaboratively discuss and set goals with patients in the context of both individual and group interactions that reflect a logical sequence of goal attainment.
 - Recognizes the importance of involving the patient/family/team members/significant others in goal setting and intervention process.
 - Follows through with plans made with the patient/family/significant others by ordering or providing equipment and/or making arrangements for out-patient therapy or a home program.

III. EVALUATION AND SCREENING

8. **Articulates a clear and logical rationale** for the evaluation process.
- Demonstrates the ability to effectively articulate a logical rationale for evaluation to the patient/family/significant other/staff.
 - Able to understand and utilize the Cognitive Disabilities Frame of Reference to assess patient function during task group and milieu activities.
9. **Selects relevant screening and assessment methods** while considering such factors as client's priorities, context(s), theories, and evidence-based practice.
- Understands the use of a specific tool in relationship to identified patient's condition.

BUTLER HOSPITAL
LEVEL II FIELDWORK SITE-SPECIFIC OBJECTIVES

10. **Determines client's occupational profile** and performance through appropriate assessment methods.
 - Demonstrates familiarity with and comfort when interviewing patients.
11. **Assess client factors and context(s)** that support or hinder occupational performance.
 - Assessment tools may include: OTAPS, Bruininks, VMI, TVPS, mobility assessments, Sensory Profile, and group observations.
 - Screening tools may include: OTTOAS, observations during task groups.
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.
 - Accepts responsibility and is aware of the importance of thorough data gathering.
 - Demonstrates an understanding of psychiatric diagnosis and its impact on occupational performance.
 - Selects and filters relevant and important information from all data collected.
13. **Administers assessments** in a uniform manner to ensure findings are valid and reliable.
 - Accepts responsibility and is aware of the importance of accurate assessment.
 - Observes standardized techniques in using standardized assessment tools.
 - Able to articulate the value of selected standard assessment tools and able to describe the relationship between methodology and data gathering.
14. **Adjusts/modifies the assessment procedures** based on client's needs, behaviors, and culture.
 - Able to adapt the assessment process according to patient's individual needs.
15. **Interprets evaluation results** to determine client's occupational performance strengths and challenges.
 - Able to objectively analyze and select pertinent data from assessment to develop an accurate profile of the patient's strengths and weaknesses.
 - Interprets data objectively and according to standardized or non-standardized method.
 - Uses sound clinical reasoning.

BUTLER HOSPITAL
LEVEL II FIELDWORK SITE-SPECIFIC OBJECTIVES

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.
- Able to utilize the evaluation process to determine what the patient's needs will be as they progress to a lower level of care.
 - Able to identify continued treatment needs and compensatory strategies for the patient to be successfully discharged from the acute hospital setting.
17. **Documents the results of the evaluation process** that demonstrates objective measurements of client's occupational performance.
- Documents results of the assessment and reassessment following department policies and procedures.
 - Reports verbally and/or in writing unusual or critical information gathered during the assessment to the appropriate staff members.
 - Reports performance data objectively.
 - Contributes to the discharge plan in a manner that reflects an understanding of functional level at the time of the patient's discharge and the available environmental supports in the anticipated discharge setting.

IV. INTERVENTION

18. **Articulates a clear and logical rationale** for the intervention process.
- Uses sound clinical reasoning in discussing the intervention plan with the supervisor/patient/family/staff.
 - Communicates clearly and concisely.
 - Varies language depending on audience.
 - Demonstrates flexibility in utilizing alternative educational methods when standard methods are ineffective.
19. **Utilizes evidence** from published research and relevant resources to make informed intervention decisions.
- Uses sound clinical reasoning backed by published research and/or relevant resources to make informed intervention decisions.
 - Reviews assigned articles during supervision.
20. **Chooses occupations** that motivate and challenge clients.
- Uses occupations and/or activities based on the appropriate theoretical model that will be most effective in maximizing the patient's occupational performance and achieving established goals.
 - Uses preparatory activities that support occupation-based performance.
 - Uses goal-oriented occupations and/or activities that are meaningful to the patient.

BUTLER HOSPITAL
LEVEL II FIELDWORK SITE-SPECIFIC OBJECTIVES

21. **Selects relevant occupations** to facilitate clients meeting established goals.
- Chooses graded activities and/or preparatory activities that will be most effective in maximizing the patient's occupational performance and allows for ongoing assessment of the patient's functional capacity and readiness for discharge.
22. **Implements intervention plans that are client-centered.**
- Recognizes importance of client-centered practice and involvement of family and caregivers in the treatment process.
23. **Implements intervention plans that are occupation-based.**
- Offers occupations (occupation-based activity, purposeful activity, preparatory methods) that match the patient's performance skills, patterns, context, activity demands, and patient factors.
 - Recognizes the value in using the most effective strategy to achieve individual goals and maximizes the patient's interest in the treatment program.
24. **Modifies task approach, occupations, and the environment** to maximize client performance.
- Demonstrates the ability to identify more than one appropriate strategy for a given problem area.
 - Appropriately revises and adjusts selected activities to adapt to a change in the patient's condition.
25. **Updates, modifies, or terminates the intervention plan** based upon careful monitoring of the client's status.
- Demonstrates clinical reasoning skills to identify steps to solve problems in patient treatment and establish goals.
 - Selects and synthesizes available data when making decisions about treatment.
 - Grades and/or changes activity or method to achieve treatment goals.
26. **Documents client's response** to services in a manner that demonstrates the efficacy of interventions.
- Writes progress notes to clearly indicate measurable behavioral response to treatment.
 - Uses correct grammar and spelling and follows facility format for documentation to assure reimbursement.
 - Discriminates between relevant and irrelevant material.
 - Accepts responsibility for timely written documentation and initiates oral reports independently.

**BUTLER HOSPITAL
LEVEL II FIELDWORK SITE-SPECIFIC OBJECTIVES**

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.
 - Able to articulate an understanding of the role delineation between the various levels of professional and paraprofessional staff, including OTAs and activity therapists.
 - Works collaboratively with interns, activity therapists, and nursing staff to plan successful treatment and milieu management strategies.
28. **Demonstrates through practice or discussion the ability to actively collaborate** with the occupational therapy assistant.
 - Articulates an understanding of the role of the OTA in the behavioral health care setting in a manner that reflects a value and appreciation for the contribution of the OTA.
 - Collaborates with the OTA or other relevant personnel to plan strategies based on accurate analyses of the activity demands and context of the intervention.
29. **Demonstrates understanding of the costs and funding** related to occupational therapy services at this site.
 - Monitors the use of supplies on the unit.
 - Follows department policy when requesting supplies from dietary services.
30. **Accomplishes organizational goals** by establishing priorities, developing strategies, and meeting deadlines.
 - Demonstrates flexibility in adjusting priorities to meet the established goals of the department.
 - Able to adjust pace and prioritize daily responsibilities.
31. **Produces the volume of work** required in the expected time frame.
 - Organizes treatment and nontreatment responsibilities in order to ensure that responsibilities are completed in a timely and professional manner.
 - Calculates the amount of time needed to complete a task and, if necessary, uses time outside of the clinic for task completion.
 - Differentiates the importance of each task and prioritizes tasks so that they are completed in a timely and professional manner.

**BUTLER HOSPITAL
LEVEL II FIELDWORK SITE-SPECIFIC OBJECTIVES**

VI. COMMUNICATION

32. **Clearly and effectively communicates verbally and nonverbally** with clients, families, significant others, colleagues, service providers, and the public.
 - Develops and maintains rapport with patients, families, and significant others that enhances the therapeutic relationship.
33. **Produces clear and accurate documentation** according to site requirements.
 - Progress notes are concise and reflect information on occupational performance.
 - Reports unusual and/or critical information in writing.
34. **All written communication is legible**, using proper spelling, punctuation, and grammar.
35. **Uses language appropriate to the recipient** of the information, including but not limited to funding agencies and regulatory agencies.
 - Able to use nontechnical terms to identify deficit areas and communicate treatment recommendations.
 - Adheres to Butler Hospital's policy regarding acceptable abbreviations.

VII. PROFESSIONAL BEHAVIORS

36. **Collaborates with supervisor(s)** to maximize the learning experience.
 - Accepts responsibility for initiating professional learning experiences.
 - Self-directed in determining learning strengths and challenges.
 - Collaborates with supervisor to structure optimal learning opportunities.
37. **Takes responsibility for attaining professional competence** by seeking out learning opportunities and interactions with supervisor(s) and others.
 - Defines personal expectations and goals for the affiliation including the desired amount of supervision and style of supervision that would enhance attainment of goals and would be conducive to individual learning styles.
 - Independently seeks and participates in opportunities for improving skills.

BUTLER HOSPITAL
LEVEL II FIELDWORK SITE-SPECIFIC OBJECTIVES

38. **Responds constructively to feedback.**
 - Adjusts behavior in response to cues and direction from supervisor, staff, and the environment.
39. **Demonstrates consistent work behaviors** including initiative, preparedness, dependability, and work site maintenance.
 - Consistently maintains professional behaviors in the workplace. This includes, but is not limited to, taking initiative, being prepared and dependable, and assuming a professional demeanor.
 - Arrives on time and consistently completes work assignments on time.
40. **Demonstrates effective time management.**
 - Organizes treatment and nontreatment responsibilities in order to ensure that responsibilities are completed in a timely and professional manner.
41. **Demonstrates positive interpersonal skills** including but not limited to cooperation, flexibility, tact, and empathy.
 - Consistently maintains professional behaviors in the workplace, including, but is not limited to, professional appearance, showing respect for other professionals, and presenting in a professional and confident manner.
 - Develops and maintains rapport with patients that enhances the therapeutic relationship.
42. **Demonstrates respect for diversity** factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices.
 - Respectful and open to diverse backgrounds and ideas in the treatment setting. Seeks to understand the patient's perspective and context when collaborating in treatment. Careful to not impose one's own beliefs and values on clients.
 - Able to access translation services as needed.

Reference: Walens & Garcia, 2004, *Behavioral Objectives for Fieldwork Performance Evaluation for the Occupational Therapy Student*.

Developed 8/04

BUTLER HOSPITAL
LEVEL II FIELDWORK SITE-SPECIFIC OBJECTIVES
FOR THE OCCUPATIONAL THERAPY ASSISTANT STUDENT

I. FUNDAMENTALS OF PRACTICE

1. **Ethics:** Adheres consistently to the American Occupational Therapy Association Code of Ethics and site's policies and procedures.
 - Demonstrates work behaviors that reflect an understanding of professional standards and code of ethics appropriate to the practice environment.
 - Maintains appropriate boundaries.
 - Observes federal and state regulations relating to confidentiality.
 - Recognizes and appreciates that professional standards and code of ethics are an integral component of being a professional.
 - Identifies and addresses ethical concerns in the context of clinical supervision.
2. **Safety:** Adheres consistently to safety regulations. Anticipates potentially hazardous situations and takes steps to prevent accidents.
 - Demonstrates awareness and understanding of observation levels.
 - Reviews chart and/or seeks to understand information from appropriate sources to attend to changes in status; asks questions when in doubt.
 - Maintains sharps count.
 - Maintains an awareness of and adheres to all pertinent hospital safety policies and procedures.
3. **Safety:** Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.
 - Aware of role during restraint and seclusions on the unit.
 - Demonstrates the ability to de-escalate patients.
 - Utilizes appropriate body mechanics in working with patients.
 - Identifies and reports safety concerns to supervisor and/or appropriate clinical staff.
 - Assesses own ability to provide safe treatment and identifies situations that require further knowledge and/or assistance.

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.
 - Able to explain occupational therapy at a level consistent with level of understanding.

- Able to articulate the role of occupational therapy to staff during treatment team meetings and when planning milieu activities.
 - Selects activities that reflect an understanding of the patient's interests and occupational values.
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.
- Able to communicate clearly the rationale for occupational therapy interventions provided to the patients, families, and the treatment team.
 - Articulates an understanding of the role of the OTA in the behavioral health care setting in a manner that reflects a value and appreciation for the contribution of the OTA.
 - Able to articulate an understanding of the role delineation between the various levels of professional and paraprofessional staff, including OTs, OTAs, and activity therapists.
6. **Evidence-based Practice:** Makes informed practice decisions based on published research and relevant informational resources.
- Able to discuss assigned readings in clinical supervision.
 - Able to articulate rationale for selection of activities.
 - Uses sound clinical reasoning backed by published research and/or relevant resources to make informed intervention decisions.

III. EVALUATION/SCREENING

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.
- Accepts responsibility and is aware of the importance of thorough data gathering.
 - Demonstrates an understanding of psychiatric diagnosis and its impact on occupational performance.
 - Selects and filters relevant and important information from all data collected.
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.
- Accepts responsibility and is aware of the importance of accurate assessment.

- Observes standardized techniques in using standardized assessment tools.
9. **Interprets:** Assists with interpreting assessments in relation to the client's performance and goals in collaboration with the occupational therapist.
- Able to objectively analyze and select pertinent data from assessment to develop an accurate profile of the patient's strengths and weaknesses.
 - Interprets data objectively and according to standardized or non-standardized method.
 - Uses sound clinical reasoning.
10. **Reports:** Reports results accurately in a clear, concise manner that reflects the client's status and goals.
- Documents results of the assessment and reassessment following department policies and procedures.
 - Reports verbally and/or in writing unusual or critical information gathered during the assessment to the appropriate staff members.
 - Reports performance data objectively.
 - Contributes to the discharge plan in a manner that reflects an understanding of functional level at the time of the patient's discharge and the available environmental supports in the anticipated discharge setting.
11. **Establish Goals:** Develops client-centered and occupation-based goals in collaboration with the occupational therapist.
- Recognizes the importance of client-centered practice and the involvement of family and caregivers in the treatment process.
 - Demonstrates clinical reasoning skills to identify steps to solve problems in patient treatment and to establish goals.
 - Grades and/or changes activity or method to achieve treatment goals.

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.
- Chooses graded activities and/or preparatory activities that will be most effective in maximizing the patient's occupational performance and allows for ongoing assessment of the patient's functional capacity and readiness for discharge.
13. **Selects Intervention:** Selects and sequences relevant interventions that promote the client's ability to engage in occupations.

- Recognizes the value in using the most effective strategy to achieve individual goals and maximizes the patient's interest in the treatment program.
14. **Implements Intervention:** Implements occupation-based interventions effectively in collaboration with clients, families, significant others, and services providers.
- Offers occupations (occupation-based activity, purposeful activity, preparatory methods) that match the patient's performance skills, patterns, context, activity demands, and patient factors.
15. **Activity Analysis:** Grades activities to motivate and challenge clients in order to facilitate progress.
- Demonstrates the ability to identify more than one appropriate strategy for a given problem area.
 - Appropriately revises and adjusts selected activities to adapt to a change in the patient's condition.
16. **Therapeutic Use of Self:** Effectively interacts with clients to facilitate accomplishment of established goals.
- Develops and maintains rapport with patients, families, and/or significant others that enhances the therapeutic relationship.
 - Develops and maintains rapport with patients that enhances the therapeutic relationship.
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.
- Demonstrates the ability to be flexible with intervention plans and adapting to changes in the milieu or patients in a timely manner.

V. COMMUNICATION

18. **Verbal/Nonverbal Communication:** Clearly and effectively communicates verbally and nonverbally with clients, families, and/or significant others, colleagues, service providers, and the public.
- Develops and maintains rapport with patients, families, and/or significant others that enhances the therapeutic relationship.
 - Communicates appropriate information to interdisciplinary treatment team in a professional manner.
19. **Written Communication:** Produces clear and accurate documentation according to site requirements. All writing is legible, using proper spelling, punctuation, and grammar.
- Progress notes are concise and reflect information on occupational performance.

- Reports unusual and/or critical information in writing.

VI. PROFESSIONAL BEHAVIORS

20. **Self-Responsibility:** Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisor(s) and others.
- Defines personal expectations and goals for the affiliation.
 - Self-directed in determining learning strengths and challenges.
21. **Responds to Feedback:** Responds constructively to feedback.
- Adjusts behavior in response to cues and direction from supervisor, staff, and the environment.
22. **Work Behaviors:** Demonstrates consistent work behaviors including initiative, preparedness, dependability, and work site maintenance.
- Consistently maintains professional behaviors in the workplace. This includes, but is not limited to, taking initiative, being prepared and dependable, and assuming a professional demeanor.
 - Arrives on time and consistently completes work assignments on time.
23. **Time Management:** Demonstrates effective time management.
- Organizes treatment and nontreatment responsibilities in order to ensure that responsibilities are completed in a timely and professional manner.
24. **Interpersonal Skills:** Demonstrates positive interpersonal skills including but not limited to cooperation, flexibility, tact, and empathy.
- Consistently maintains professional behaviors in the workplace, including, but not limited to, professional appearance, showing respect for other professionals, and presenting in a professional and confident manner.
25. **Cultural competence:** Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices.
- Respectful and open to diverse backgrounds and ideas in the treatment setting. Seeks to understand the patient's perspective and context when collaborating in treatment. Careful to not impose one's own beliefs and values on clients.
 - Able to access translation services as needed.

Metropolitan Occupational Therapy Education Council of NY / NJ
Sample Behavioral Objectives written by Practitioners at the Joint Clinical Council Day
December 3, 2003

Revised 4/12/04

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

Students will:

- Always keep documents in a secure area.
- Avoid holding confidential conversations in public areas.
- Select private areas to discuss patients' private information.
- Read and practice the patient's Bill of Rights and HIPAA policies.
- Review safety policies and procedures of the facility.
- Be familiar with who will be attending therapy with the child and what his/her relationship is with the given child.
- Adhere to the American Occupational Therapy Association's Code of Ethics.
- Review and set up the space for any/all safety issues.
- Never leave a child alone.
- Never talk about a child in front of others.
- Check with supervisor before sharing information with parents.
- Do not discuss patient diagnosis with other patients.
- Do not share personal information.
- Demonstrate the ability to adhere to children's rights including confidentiality.
- Do not discuss a child's case or conditions unless in privacy with OT supervisor or other team members directly involved with the treatment of the child.
- Demonstrate respectful manner when approaching clients to include identifying self and the purpose of her (his) session.
- Adhere to HIPAA policies and confidentiality.
- Treat all children equally.
- Be informed of updated information on practice.
- Be knowledgeable of site's safety precautions (i.e. first aid, fire drill).
- Makes sure all documentation and charts are kept in a private and secure place.
- Consistently obtain signed permission forms from parents after clearly explaining purpose of their child's participation.
- Consistently display safety within treatment setting.
- Demonstrate respect/sensitivity from client's space and cultural practice.
- Identify information that is relevant and acceptable in written documentation.
- Can consistently use "person-planning" principles for treatment planning
- Consistently uses person-centered principles to guide treatment.

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

Students will:

- I. Demonstrate an understanding of environmental factors affecting clients' safety at all times by:
- Consistently analyze evaluation/treatment space for potential safety hazards prior to bringing the client into the environment.
 1. Equipment is set-up beforehand.
 2. All nonessential items are put away.
 3. Treatment area is scanned for slip and fall prevention.

- 4. Is aware of potential hazards of equipment being used.
- 5. Aware of sharps at all times.
- Adhere to facility policy regarding use of modalities, use of sharps, and operating equipment in the OT clinic.
- Consistently set-up and clean-up of work environment in a manner that prevents injury.
- Chooses activities that are safe, age appropriate, and appropriate for cognitive/emotional/physical capabilities of clientele.
- Consistently follows equipment safety protocols.
- While evaluating and treating, the student should use judgment in safety.

II. Anticipate and prepare for potential difficulties in the community as demonstrated by:

- Selecting offsite/community activity that demonstrates sound judgment.
- States agencies off-premises safety/emergency protocol prior to engaging in community activities and/or home visits.
- Anticipates problems/possible solutions prior to and during home visit and/or community outings.

III. State universal precautions and will adhere to guidelines at all times.

IV. Adhere to facility policies and regulations and OSHA precautions.

V. Articulate facilities HIPAA regulations and will abide by them by end of first week.

VI. Seek out assistance whenever in doubt

Students will:

- Demonstrate safe set-up of transfer to all surfaces.
- Demonstrate proper body mechanics during therapy.
- Demonstrate safe use of equipment.
- Maintain a clutter free treatment environment and return all items to storage.
- Utilize ergonomically appropriate body mechanics.
- Assess environment prior to treatment and throughout treatment process.
- Continuously monitor patient's response to treatment (i.e. pain).

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.

Students will:

- Demonstrate the ability to effectively communicate the purpose of occupational therapy and specific activities to goals of interest to the child, the child's parents, teachers, and other professionals involved in the care and treatment of the child.
- Provide clear, effective, and efficient documentation of the child's involvement in functional and productive activities, progress towards goals, and expected outcomes according to the policies and procedures of the facility.
- Demonstrate the ability to communicate with family and other service providers, the child's activity program, and tasks required for carry-over to home and community function.
- Demonstrate the ability to link clinic and OT room activities to improved classroom functioning.

- Consistently address parent and child's concerns and goals within the intervention so that the connection is easily understood, motivation is maintained, and participation is consistent.
- Demonstrate the ability to teach the child, family, and others the value of participation in occupational therapy activities.
- Share the goals/purpose of occupation and OT and parents, teachers, music, and dance therapists for specific clients-with less jargon but tying it into OT.
- Talk to the child at his/her level of understanding and engage the child in activities at his/her level of need and ability, while working towards goals of improved functioning.
- Consistently collaborate with the team, which includes patient and patient's family, in order to develop a complete treatment plan.
- Demonstrate the ability to provide relevant seminar or in-service about an aspect of occupational therapy to consumers and consumer advocates.
- Administer assessments and evaluations according to standardized techniques and within appropriate tests and developmental criteria.
- Adjust administration of testing materials and protocols according to child's responses, while keeping within the parameters of standardization.
- Familiarize self with all test materials and standardized administration protocols prior to using tools with children.
- Demonstrate the ability to effectively and accurately interpret and document evaluation results with moderate assistance through midterm, and efficiently and independently by the ninth week.
- Demonstrate the ability to accurately engage a child in optimum performance with both standardized and criterion based assessment tools.
- Clearly articulate understanding of when and why to use specific evaluations/assessments to be used prior to administration with a child.

10. Determines client's occupational profile and performance through appropriate assessment methods.

Students will:

- Discuss child's perceived strengths and areas of weakness in areas of self-help, play, education, and social participation with parent or caregiver.
- Consistently use client-centered practice to gather a global understanding of client's needs.
- Gather all necessary information from prior evaluation, charts, client, client's parent to establish needs, values, interest, daily patterns, and history.
- Consistently and accurately identify client's values, interests, and needs through appropriate interview questions to guide further treatment and evaluation, within one week.
- Determine client's beliefs and goals using appropriate tools (i.e., COPM, interest checklist, PEDI).
- Communicate with parents via log, phone, etc. about their goals/priorities for the child within one week.
- Interview the child regarding goals.
- Gather information on child via parent/child/teacher interview, chart reading, etc (interests, needs, ADLs).
- Consult with teacher and parents, as well as other team members in determining goals for child.
- Consult and document teachers views of child's ability to function in classroom.
- Gather information regarding the child's siblings, pets, family members who have daily contact, and extended family members within the first two family sessions.

- Clearly articulate to supervisor who are the child's primary caregivers and what dynamics are observed in the relationship.
- Identify through clinical observation, parental report, and other clinicians reports child's preferences and dislikes.
- Involve patient's needs/wants/desires when determining goals and demonstrate client's agreement with goals of treatment.
- Interview family members as well as client regarding occupational barriers on a consistent basis.
- Demonstrate consistent knowledge of age and appropriate roles and patterns of using appropriate language (understandable to client and family) in communication.
- Utilize formal and informal assessments to determine occupational profile upon initial evaluation.
- Conduct client interview to determine client's occupational profile prior to beginning evaluation.

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.

Students will:

- Complete chart review before conducting evaluation.
- Speak with other therapists that work with child.
- Be aware of child's current level of functioning.
- Conduct a parent interview to gather relevant information about child.
- Review chart prior to administration of assessment.
- Obtain relevant background information from parent/caregiver.
- Assemble and review information input from teachers, parents, and chart prior to evaluating child.
- Elicit information from clients' interests, values, and culture, if indicated prior to and during evaluation.
- Review social history, past evaluations, and conduct parent/caregiver interview to gather relevant information to create an occupational profile prior to and during an evaluation.
- Obtain sufficient/necessary information including child/family/provider report prior to evaluation.
- Accurately record and report patient's personal and background information prior to administering evaluation/re-evaluation procedures.
- Obtain information from client to complete evaluation/activity.
- Rationalize use of assessment for specific client.
- Adequately obtain relevant information about client necessary to complete planned activity and/or evaluation.
- Demonstrate 90-100% accuracy in obtaining all relevant data/information prior to the evaluation.
- Collect and gather relevant data and information prior to evaluation to select appropriate assessment for clients.
- Obtain information regarding child's age, presentation concerns, developmental functioning, and context prior to choosing assessment tools
- Consistently elicits information regarding client's and families interests, values, and culture prior to the evaluation.
- Identify pertinent information prior to treatment or evaluation through methods including but not limited to:
 - other clinicians, clinical observation;
 - parent report, teacher report;
 - and social/educational/psychological evaluation.

13. Administers assessments in a uniform manner to ensure findings are valid and reliable.

Students will:

- Administers assessments according to test criteria—70% at midterm and 95% at final evaluation.
- Administers testing materials according to standardized protocol.
- Follow standardized assessment protocol with moderate assistance by midterm and independently at end of fieldwork.
- Follow instructions given in test manuals for standardized administration and written interpretation of assessment tools.
- Demonstrate understanding of the difference between standardized and criterion based assessment tools.
- Prepare and administer standardized procedures as defined by specific assessment tools to ensure valid and reliable findings during an evaluation.
- Follow instructions of standardized evaluation.
- Demonstrate difference between standardized and criterion referenced assessment.
- Follows standardized procedures and standards during evaluation for valid and reliable results.
- Properly identify appropriate evaluations/assessments to be used prior to administration.
- Demonstrate rationale for why a specific test was chosen and will be familiar with administration/scoring/validity/implications of results.
- Complete three observations of assessments and be prepared to independently administer three standardized assessment tools with 100% accuracy of data collection, data scoring, and 90% accuracy in data analysis (by midterm).

14. Adjusts/modifies the assessment procedures based on client's needs, behaviors, and culture.

Students will:

- Display ability to respond to input and modify approach when client can/will not perform.
- Successfully engage child to perform assessment task within allowable and reasonable parameters.
- Show ability to adapt assessments when needed in order to elicit evaluation information.
- Be sensitive to and recognize the need to modify an environment and assessment procedure to adapt to child's needs to encourage performance at best ability.
- Adjust/modify assessment procedure if/when needed based upon the child's needs to ensure child's best performance.
- Successfully engage child in performing assessment tasks within reasonable/allowable parameters.
- Successfully engage child in evaluation tasks within reasonable and allowable parameters of assessment guidelines.
- Adjust within the parameters of an evaluation tool to meet the needs of a client.
- Successfully engage child with resemble parameters to perform/participate in the evaluation process.
- Demonstrate the ability to adapt the evaluation tool if unable to administer it in the intended manner.
- Demonstrate the ability to change assessment procedures as needed to gain critical information, documenting modification as required (i.e. with standardized tests).
- Demonstrate the ability to observe, through clinical observation, the child's ability to participate and perform assessment.

- Grade increases or decreases, depending on the child's mood and success rate, in order to maintain child's ability to engage in treatment or evaluation.

18. Articulates clear and logical rationale for the intervention process.

Students will:

- Be able to explain reasons for specific activities being assigned to child.
- Include descriptions of activities to supervisor, which clearly and accurately demonstrate clinical reasoning when creating activity.
- Describe activities to perform in home environment and reasons why they are relevant to child's ability to increase functional performance.
- Be able to explain clearly to supervisor one's rationale for selected interventions.
- Be able to explain clearly to clients, families, and team member the rationale for selected interventions.
- Consistently communicate reasoning behind selection of activities to one's supervisor.
- Consistently communicate the rationale in understandable terms to client families, significant others, colleagues, service providers, and public as experiences arise.
- Explain clearly to supervisor the rationale for their interventions.
- Articulate clinical reasoning process of intervention to supervisor.
- Use simple and clear reasons for each activity and explain how it will help each individual.
- Articulate clear and logical rationale for choice of treatment approach, intervention strategy, and method for different problems of clients.
- When asked, be able to clearly and calmly explain the reasons for techniques, modalities/preparatory and how they tie into the play, educational, and/or self-care areas with relevance to the individuals
- Discuss intervention, rationale, and functional relevancy of activities of a session with parents.
- Clearly, confidently. and accurately explain the value of activities used to parents, staff, and team.
- Explain what the intervention is to teachers and why you are working on specific area.
- Describe how intervention process and specific activities relate to occupation of client.
- Demonstrate the ability to articulate the rationale for the intervention to the family, colleagues, and care providers with appropriate language for individuals.

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

Students will:

- Demonstrate ability to develop and maintain rapport with child.
- Make effort to engage child in different types of therapeutic play while engaging in an activity.
- Communicate clearly and effectively with other providers and families.
- Present at informal and formal groups of team members and colleagues.
- Demonstrate good observational skills when communicating with clients, adjusting instructions based on clients' reactions.
- Be aware of nonverbal communication and body language of clients, families, and colleagues.
- Be able to show appropriate emotion for appropriate articulations - through body language, facial expression, and verbal feedback
- Clearly and effectively give instructions, responds to behaviors and questions, give feedback, and give appropriate cues and assistance.

- Give clear and understandable instructions prior to therapeutic activities.
- Give appropriate cues and assistance during therapy session.
- Speak appropriately in team meeting.
- Give clear and understandable instructions. Respond to questions or behaviors in an appropriate manner.
- Give appropriate amount of cues/assistance for child to participate in activities.
- Take into account cultural differences and language barriers (providing handout and information to parents, relatives, etc, in first language).

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

Students will:

- Be an active part of supervision and feedback.
 - Take initiative to identify difficulties experienced during evaluation/treatment.
 - Take initiative to present plan of action to improve performance.
 - Use feedback provided to come up with strategies/plans for improvement.
 - Incorporate feedback from supervisor into treatment planning and intervention and discuss outcome.
-

38. Responds constructively to feedback.

Students will:

- Notice and respond to feedback in a way that would encourage an open exchange of ideas and develop entry-level skills in an effective way.
- “Hear” and act upon constructive feedback from supervisor by making suggestions as to what could have been or needs to be changed.
- Demonstrate an active and positive attitude evidenced by body language and use of voice.
- Verbalize understanding of feedback and develop effective and measurable goals for improvement as needed.
- Give ideas and respond to feedback on ways to improve by giving examples of what they would do in future situations.
- Demonstrate change in behavior that shows an understanding of feedback and a movement towards acquiring professional behaviors.
- Articulate positive feedback and strengths pointed out by supervisor.

Metropolitan Occupational Therapy Education Council of NY/NJ
Sample Behavioral Objectives written by Practitioners at the Joint Clinical Council Day
December 3, 2003

Revised 4/12/04

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

Students will:

- Demonstrate consistent adherence to professional ethics, codes and adherence to HIPAA regulations for patient confidentiality at all times, including in and out of the hospital setting.
- Maintain all patient related information in compliance with hospital policy on confidentiality.
- Respect patients' rights of privacy in all spoken communications (no corridor, elevator, cafeteria consultations).
- Consistently demonstrate respect for client confidentiality by protecting written documentation from other people's view and select private spaces to discuss client information with supervisor or other team members.
- Consistently display sensitivity to client's values (cultural, religious, social) and ask patients if there are any issues that may conflict with treatment procedures.
- Respect individual goals, wishes, and expectations of patient.
- Immediately report any abusive behavior toward a patient to the immediate supervisor and follow appropriate reporting procedures.
- Demonstrate honesty in billing for time/interventions.
- Demonstrate awareness of the need for assistance and/or seek assistance for supervision.
- Identify coding system for patients.
- Create and maintain a safe environment.
- Demonstrate professional behavior.
- Obtain consent prior to treatment.
- Maximize quality of life and respect privacy and will not misappropriate clients belongings.
- Demonstrate proper safety techniques during functional transfers and ROM testing. All equipment should be checked prior to transfer and set up according to the patients needs. During ROM, skin integrity, joint mechanics/integrity should be assessed prior to ROM testing.

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

Students will:

I. Demonstrate an understanding of environmental factors affecting clients' safety at all times by:

- Consistently analyze evaluation/treatment space for potential safety hazards prior to bringing the client into the environment.
 1. Equipment is set-up beforehand.
 2. All nonessential items are put away.
 3. Treatment area is scanned for slip and fall prevention.
 4. Is aware of potential hazards of equipment being used.
 5. Aware of sharps at all times.
- Adhere to facility policy regarding use of modalities, use of sharps, and operating equipment in the OT clinic.
- Consistently set-up and clean-up of work environment in a manner that prevents injury,

- Chooses activities that are safe, age appropriate, and appropriate for cognitive/emotional/physical capabilities of clientele.
- Consistently follows equipment safety protocols.
- While evaluating and treating, the student should use judgment in safety.

II. Anticipate and prepare for potential difficulties in the community as demonstrated by:

- Selecting offsite/community activity that demonstrates sound judgment.
- States agencies off-premises safety/emergency protocol prior to engaging in community activities and/or home visits.
- Anticipates problems/possible solutions prior to and during home visit and/or community outings.

III. State universal precautions and will adhere to guidelines at all times.

IV. Adhere to facility policies and regulations and OSHA precautions.

V. Articulate facilities HIPAA regulations and will abide by them by end of first week.

VI. Seek out assistance whenever in doubt.

Students will:

- Incorporate fall prevention program into all patient treatment plans.
- Ask for help during unsafe transfer to any functional surface.
- Adheres to safety precaution regarding medical equipment patient-pulse O2, IV, foley catheter, etc.
- Monitor vital signs.
- Demonstrate sound safety and judgment consistent with all patient contact (i.e. transfers to secure surfaces, ROM treatment, activities, obstacles in environment, physical barriers IV poles, catheters, IV's, monitoring devices, adherence to MD orders regarding WB status, OOB, ROM, NPO, dressing change and splints).
- Ensure client's safety and comfort at all times especially when specialized equipment is involved (i.e., wheelchairs, computers, walkers).

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.

Students will:

- Clearly define the role of OT and relate it to the activity to the patients.
- Explain the value of activity chosen with respect to clients own life activities/occupations.
- Define the OT process in an effective manner that is understandable to clients, etc.
- Explain to client and family, value of returning to roles, responsibilities to a level of audience understanding.

10. Determines client's occupational profile and performance through appropriate assessment methods.

Students will:

- Obtain a thorough occupational profile through patient's interview, family interview, and review of medical chart documentation.
- Obtain clients role in society with the leisure activities initial evaluation.
- Students will ask client what areas are important to them.
- Interview family when unable to directly interview client about his/her occupational profile.

- Initiate and integrate patient's occupational profile into patient treatment focus.
- Investigate client's goals for self and assess relevant areas to help client achieve those goals.
- Demonstrate knowledge of age-specific and/or functional level performance/roles in maintaining and implementation of treatment program

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.

Students will:

- Utilize resources to find information.
- Perform chart review prior to evaluation and treatment planning.
- Be able to determine what extra information will be necessary.

13. Administers assessments in a uniform manner to ensure findings are valid and reliable.

Students will:

- Consult institution manuals and supervisor prior to the administration of standardized tests.
- Understand rationale for performing standardized tests.
- Choose appropriate standardized assessment for patient.

14. Adjusts/modifies the assessment procedures based on client's needs, behaviors, and culture.

Students will:

- Notice and respond to client feedback to accommodate assessment as needed.

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

Students will:

- Describe to the client the reason why the task is being performed in a manner that the client understands.
- Communicate the use of graded occupation as a means to support participation in BADL/IADL.
- Describe purpose of intervention at the client's level of understanding.
- Demonstrate purpose and goals to implement treatment plan and to carry out.

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

Students will:

- Interact, communicate, and share relevant information with all caretakers, families, and health care professionals.
- Clearly and effectively communicate verbally by stating clear goals and rationale of treatment to patients, family, and colleagues.
- Clearly and effectively communicate with patients, families, and team members to explain possible outcomes of OT.
- Give instructions for the treatment process that are effective, clear, concise, and understandable for each patient's developmental level and learning style.

- Respond appropriately to behaviors and questions, give feedback, appropriate cues, and the appropriate amount of assistance to enable patient to participate in activity.
- Take into account cultural differences and language barriers (providing handout and information in first language).
- Communicate/demonstrate effective communication skills to meet the needs of each patient.
- Demonstrate good observational skills when communicating with patients, adjusting instructions based on patient's reactions.
- Be aware of nonverbal communication and body language of patients, families, and colleagues.
- Learn to use and develop therapeutic use of self and maintain rapport with patient.
- Develop boundaries/ability to set appropriate limits with patients.
- Provide appropriate validation, support, and feedback to patients as needed.
- Accept constructive feedback and provide input as part of interpersonal communication.
- Contribute clear, accurate, and concise reports/feedback in team meetings regarding each patient's progress.
- Clearly and effectively write progress reports based upon and related to changes in a patient's progress and needs.

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

Students will:

- Be an active part of supervision and feedback.
 - Take initiative to identify difficulties experienced during evaluation/treatment.
 - Take initiative to present plan of action to improve performance.
 - Use feedback provided to come up with strategies/plans for improvement.
 - Incorporate feedback from supervisor into treatment planning and intervention and discuss outcome.
-

38. Responds constructively to feedback.

Students will:

- Notice and respond to feedback in a way that would encourage an open exchange of ideas and develop entry-level skills in an effective way.
- "Hear" and act upon constructive feedback from supervisor by making suggestions as to what could have been or needs to be changed.
- Demonstrate an active and positive attitude evidenced by body language and use of voice.
- Verbalize understanding of feedback and develop effective and measurable goals for improvement as needed.
- Give ideas and respond to feedback on ways to improve by giving examples of what they would do in future situations.
- Demonstrate change in behavior that shows an understanding of feedback and a movement towards acquiring professional behaviors.
- Articulate positive feedback and strengths pointed out by supervisor.

<i>Fieldwork Performance Evaluation for the Occupational Therapy Student</i>			
I. FUNDAMENTALS OF PRACTICE	Site-Specific Objectives	Learning Activities	Completion
1. Adheres to ethics: Adheres consistently to American Occupational Therapy Association Code of Ethics and site's policies and procedures including, when relevant, those related to human subject research.	Adheres to the AOTA Code of Ethics. Adheres to state licensure requirements. Follows organizational policies and procedures of the facility. Follows procedural safeguards in regards to confidentiality.		
2. Adheres to safety regulations: Adheres consistently to safety regulations. Anticipates potentially hazardous situations and takes steps to prevent accidents.	Follows universal precautions for infection control. Follows district procedures regarding student, faculty, and building safety. Follows district procedures for reporting injuries. Reports potential safety hazards and unusual occurrences to supervisor. Assists with the maintenance of equipment in working order. Contributes to cleanliness of work area and maintains a safe environment. Explains fire extinguisher use and fire procedures within the building.		
3. Uses judgment in safety: Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.	Removes possible harmful objects from working environment. Observes proper precautions for each student. Follows procedures of safe transfers. Never leaves a child unattended. Identifies changes in client status and the environment which may impact client or staff safety. Seeks assistance when activity or student's behavior is beyond the level of own experience, knowledge, or student role.		

II. BASIC TENETS	Site-Specific Objectives	Learning Activities	Completion
4. Clearly and confidently articulates the values and beliefs of the occupational therapy profession to students, families, significant others, colleagues, service providers, and the public.	Articulates the values and beliefs of the occupational therapy profession, as it relates to school-based practice, students, families, etc.		
5. Clearly, confidently, and accurately articulates the value of occupation as a method and desired outcome of occupational therapy to students, families, significant others, colleagues, service providers, and the public.	Articulates the value of occupational performance as it applies in the student's school environment and the student's educational plan. Articulates best OT practice in the school environment.		
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.	Articulates the role of the OT and OTA in the school environment to supervisor, students, families, etc.		
7. Collaborates with client, family, and significant others throughout the occupational therapy process.	<p>Recommends OT assessments contributing overall to the team's evaluation process.</p> <p>Contributes to the development and updates of the educational plan and goals with student, family, teachers, etc.</p> <p>Teams with other professionals to discuss needs, progress and program of the student.</p> <p>Consults with classroom teacher following sessions to discuss student progress and makes recommendations as needed.</p> <p>Incorporates teacher's requests related to student performance in the classroom.</p> <p>Informs team if needs of the students are beyond the scope of OT practice in the school environment.</p>		

III. EVALUATION AND SCREENING	Site-Specific Objectives	Learning Activities	Completion
8. Articulates a clear and logical rationale for the evaluation process.	<p>Explains the evaluation process within the school district’s program.</p> <p>Explains the focus and purpose of evaluation process.</p> <p>Articulates relevance of evaluation information within the context of the student’s educational program and school environment.</p>		
9. Selects relevant screening and assessment methods while considering such factors as student’s priorities, context(s), theories, and evidence-based practice.	<p>Demonstrates knowledge of the various assessments available for use.</p> <p>Determines which assessments are appropriate for a specific student or program.</p> <p>Demonstrates an understanding of the differences among screening, consult, and evaluation.</p> <p>Discusses rationale for evaluation selection with supervisor.</p>		
10. Determines client's occupational profile and performance through appropriate assessment methods.	<p>Identifies areas of concern related to the student’s occupational history, patterns of daily living, interests, values, and needs in the school environment.</p> <p>Describes the expectations of the student in the school environment.</p>		
11. Assesses client factors and context(s) that support or hinder occupational performance.	<p>Identifies student strengths and concerns and the impact on academic performance.</p>		
12. Obtains sufficient and necessary information from relevant resources such as client, families, significant others, service providers, and records prior to and during the evaluation process.	<p>Observes the student in the school environment.</p> <p>Gathers pertinent information from the student’s folder, parents, other staff, and community resources, including previous service received.</p> <p>Obtains relevant information from various team members.</p> <p>Identifies contraindications and precautions.</p> <p>Obtains information on student’s diagnosis or medical condition.</p>		

(12. continued)	Explains the importance or relevance of the information gathered. Identifies the need for additional or supplementary information.		
13. Administers assessments in a uniform manner so as to ensure findings are valid and reliable.	Follows the procedures for administering the evaluation accurately. Gathers and prepares materials and equipment required by the assessment. Makes accurate, objective observations during the evaluation process. Accurately records evaluation information.		
14. Adjusts or modifies the assessment procedures based on client’s needs, behaviors, and culture.	Changes approach and method of data-gathering according to student’s needs. Modifies approach in response to student’s behavior, fatigue, and emotional factors. Modifies the environment to obtain best response from the student as needed. Adjusts student’s positioning or seating as necessary. Distinguishes between actual fatigue, uncooperative behavior, and or manipulation and modifies approach as indicated.		
15. Interprets evaluation results to determine client’s occupational performance strengths and challenges.	Convert raw scores into meaningful information, according to assessment guidelines. Relates assessment findings to functional performance. Identifies present level of performance and challenges based on evaluation data.		

<p>16. Establishes an accurate and appropriate plan based on the evaluation results, through integrating multiple factors such as client's priorities, context(s), theories, and evidence-based practice.</p>	<p>Based on evaluation results, identifies measurable outcomes and short-term objectives to facilitate participation and learning.</p> <p>Discusses with supervisor evaluation results and recommended goals.</p> <p>Collaborates with classroom teacher, incorporating objectives into student's IEP.</p> <p>Identifies ways to incorporate IEP goals into the classroom schedule/routines.</p>		
<p>17. Documents the results of the evaluation process that demonstrates objective measurement of client's occupational performance.</p>	<p>Accurately summarizes evaluation data into a formal document according to facility's program making note of any modification to evaluation procedure.</p> <p>Identifies specific problem areas.</p> <p>Documents time, frequency, duration, and location of OT services in recommendations.</p> <p>Documents evaluation results using terminology appropriate to the recipient.</p>		

IV. INTERVENTION	Site-Specific Objectives	Learning Activities	Completion
18. Articulates a clear and logical rationale for the intervention process	<p>Discusses basis for intervention decisions with supervisor.</p> <p>Identifies correlation between problem areas and activity selected for intervention.</p> <p>Articulates how activities selected relate to the occupational performance of the student in the context of the school environment.</p> <p>Recognizes which treatment activities may facilitate or enhance the student’s program and goals.</p>		
19. Utilizes evidence from published research and relevant resources to make informed intervention decisions.	<p>Researches evidence-based interventions that could be used in the school environment.</p> <p>Articulates how to apply evidence from published research and therapist’s expertise to specific students receiving OT services.</p>		
20. Chooses occupations that motivate and challenge clients.	<p>Considers student’s preferences that will motivate and challenge him or her.</p> <p>Considers a variety of activities and goals identified by other team members to reinforce and incorporate during intervention.</p> <p>Considers home environment and family responsibilities or routines when developing home programs.</p> <p>Considers classroom or school routines when developing intervention programs.</p> <p>Identifies a variety of treatment activities to accomplish a goal.</p>		
21. Selects relevant occupations to facilitate clients meeting established goals.	<p>Identifies activities to help the student accomplish goals.</p> <p>Identifies and uses activities designed to improve student’s performance in the educational setting.</p> <p>Verbalizes how the activity selected will facilitate the student’s ability to benefit from education.</p>		

<p>22. Implements intervention plans that are client-centered.</p>	<p>Uses appropriate frame of reference in the development of treatment plan and in discussions with supervisor.</p> <p>Demonstrates a sequential and timely plan of treatment activities, taking into consideration the functional and emotional needs of the student.</p> <p>Prepares several alternative activities in case the student rejects the planned activity.</p> <p>Demonstrates flexibility to change from one activity to another when the student's environment, behavior, or emotional response changes.</p> <p>Adapts the activities to meet the student's physical, cognitive, or behavioral limitations.</p>		
<p>23. Implements intervention plans that are occupation-based.</p>	<p>Implements a plan of treatment that facilitates participation and learning within school environment.</p> <p>Provides services within the student's natural environment, such as the classroom, bathroom, cafeteria, playground, etc.</p> <p>Utilizes materials available in the natural school environment, so that activities can be incorporated into the student's daily routines.</p>		
<p>24. Modifies task approach, occupations, and the environment to maximize client performance.</p>	<p>Makes recommendations to supervisor regarding treatment approach in response to changes in student's condition.</p> <p>Changes treatment approach based on improvement or regression in student's condition.</p> <p>Changes treatment approach considering the environment and goal being addressed.</p> <p>Effectively intervenes with student's inappropriate behavior.</p> <p>Praises student for appropriate behavior, thus optimizing student's performance.</p>		

<p>25. Updates, modifies or terminates the intervention plan based upon careful monitoring of the client’s status.</p>	<p>Updates plan at required intervals.</p> <p>Gathers data in preparation for staff and annual meetings.</p> <p>Consults with the team members regarding student’s progress, concerns, and potential for change in services.</p> <p>Recommends changes in goals to supervisor based on improvement or regression in student’s condition/behavior.</p> <p>Recognizes a plateau in therapy and suggests changes in the student’s intervention plan.</p> <p>Prepares student and team members regarding discontinuation of therapy.</p>		
<p>26. Documents client’s response to services in a manner that demonstrates the efficacy of interventions.</p>	<p>Completes therapy notes on student following each treatment session.</p> <p>Reports student’s progress to supervisor on an ongoing basis.</p>		

V. MANAGEMENT of OT SERVICES	Site-Specific Objectives	Learning Activities	Completion
27. Demonstrates through practice or discussion the ability to assign appropriate responsibilities to the occupational therapy assistant and occupational therapy aide.	Discusses with supervisor and articulates the role of the occupational therapy assistance in the area of school-based practice.		
28. Demonstrates through practice or discussion the ability to actively collaborate with the occupational therapy assistant.	Teams with the occupational therapy assistants for treatment, special projects, or adaptive equipment. Discusses with supervisor various situations that might occur in school-based practice appropriate for occupational therapy assistant’s services.		
29. Demonstrates understanding of the costs and funding related to occupational therapy services at this site.	Understands the funding for occupational therapy services in school-based setting (i.e., Medicaid, federal, state, or local allotments). Completes accurate documentation for payment of services. Plans an equipment budget with justification as it relates to the student’s goals.		
30. Accomplishes organizational goals by establishing priorities, developing strategies, and meeting deadlines.	Demonstrates appropriate priorities of the practice area, accommodating for varying caseloads and changes in schedules Follows district priorities.		
31. Produces the volume of work required in the expected time frame.	Delivers services expected by the program at a level commensurate to an entry-level therapist.		

VI. COMMUNICATION	Site-Specific Objectives	Learning Activities	Completion
32. Clearly and effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public.	Communicates with other disciplines regarding goals and methods of treatment to be reinforced. Demonstrates active listening skills during interactions. Refers questions beyond the scope of OT to the appropriate source. Communicates with other team members frequently regarding the student's progress. Communicates effectively with students, parents, or caregivers. Communicates effectively with school personnel. Communicates on a technical level with other OTs and medical professionals.		
33. Produces clear and accurate documentation according to site requirements.	Completes accurate documentation for student attendance. Completes progress note for each session. Completes evaluation reports according to district's guidelines. Produces measurable IEP goals according to district guidelines. Completes accurate documentation for district reimbursement.		
34. All written communication is legible , using proper spelling, punctuation, and grammar.	Produces legible handwritten and computer-generated documents using proper spelling, punctuation, and grammar.		

35. Uses language appropriate to the recipient of the information including, but not limited to, funding agencies and regulatory agencies.	Uses language appropriate to the student. Uses language appropriate to the parent or caregiver. Uses language appropriate to school personnel. Uses language appropriate to other occupational therapists. Uses language appropriate to medical personnel. Uses language appropriate to outside agencies and community programs.		
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VII. PROFESSIONAL BEHAVIORS	Site-Specific Objectives	Learning Activities	Completion
36. Collaborates with supervisor(s) to maximize the learning experience.	<p>Informs supervisor of any changes or concerns in student performance.</p> <p>Informs supervisor of any changes in schedule.</p> <p>Volunteers to assist other school personnel when time permits or help is requested.</p> <p>Provides a journal of OT services to enhance learning opportunities in fieldwork, which may include caseload, accomplishments, and areas of personal growth.</p> <p>Collaborates with supervisor when ready to assume more responsibility, requiring less supervision.</p> <p>Comes prepared and participates in supervisory meetings.</p>		
37. Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisor(s) and others.	<p>Utilizes free time to read current journals, review videotapes, etc.</p> <p>Request information on areas other than those scheduled to gain overall knowledge of the program.</p> <p>Takes initiative to independently arrange or seek out field trips and peer consultations.</p> <p>Seeks out answers to questions and takes initiative in acquiring knowledge.</p> <p>Seeks supervisor feedback on performance.</p>		
38. Responds constructively to feedback.	<p>Incorporates suggested changes in treatment or approach immediately, as directed by supervisor.</p> <p>Generalizes supervisor’s suggestions to other situations.</p> <p>Responds to constructive feedback with openness and willingness to hear feedback.</p>		
39. Demonstrates consistent work behaviors including initiative, preparedness, dependability, and work site maintenance.	<p>Is prepared for student sessions.</p> <p>Completes work as assigned.</p>		

39. (Continued)	<p>Follows regular schedule, maintaining punctuality.</p> <p>Meets commitments in a timely manner.</p> <p>Maintains work environment and returns items to storage areas.</p>		
40. Demonstrates effective time management.	<p>Completes written documentation within timelines specified by the supervisor (i.e., progress notes, attendance, updates, evaluation completion, annual meeting preparation, etc.)</p> <p>Develops and efficient schedule for assigned workload.</p> <p>Uses free time constructively.</p> <p>Establishes priorities in workload.</p> <p>Requests additional responsibilities as free time becomes available.</p> <p>Arrives on time for meetings, treatment sessions, etc.</p>		
41. Demonstrates positive interpersonal skills including, but not limited, to cooperation, flexibility, tact, and empathy.	<p>Demonstrates positive interaction with all school personnel by giving genuine praise.</p> <p>Demonstrates respect for teachers while in their classroom by following classroom rules and schedules.</p> <p>Demonstrates flexibility with interactions and situations without compromising the student program.</p> <p>Establishes rapport and maintains an atmosphere conducive to positive interactions.</p> <p>Demonstrates positive working relationships with all students.</p>		

42. Demonstrates respect for diversity factors of others including, but not limited to, sociocultural, socioeconomic, spiritual, and lifestyle choices.	Demonstrates respect for students and families without prejudging or making assumptions about the family environment, culture, religion, etc. Demonstrates respect for school personnel without prejudging or making assumptions.		
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Lapeer County Intermediate School District Occupational Therapy Assistant Student Site Specific Objectives

I. FUNDAMENTALS OF PRACTICE

1. Adheres to ethics: Adheres consistently to the American Occupational Therapy Association Code of Ethics and its policies and procedures.

- Adheres to AOTA Code of Ethics
- Maintains strict student confidentiality
- Interacts professionally and respectfully with students, staff, family, and other interdisciplinary team
- Established and maintains a therapeutic relationship with the student
- Maintains quality student care and satisfaction as guidelines for professional behavior
- Adheres to licensure requirements
- Follows organizational policies and procedures of the facility

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

- Utilizes universal infection control precautions and procedures
- Contributes to cleanliness of work area and maintains a safe environment
- Follows facility policies in response to emergency code or drill situations
- Reports potential safety hazards and unusual occurrences to supervisors and interdisciplinary team
- Follows district procedures regarding student, faculty, and building safety.
- Follows district procedures for reporting injuries.

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

- Provides safe supervision of students during all activities
- Refrains from use of equipment or procedures unless trained
- Follows procedures of safe transfers
- Observes proper precautions for each student
- Identifies and reports safety concerns to supervisory and/ or appropriate faculty
- Assess own ability to provide safe treatment and identifies situations that require further knowledge and/ or assistance
- Never leaves student unattended
- Identifies changes in student status and environment which may impact student or faculty safety

Lapeer County Intermediate School District

Occupational Therapy Assistant Student

Site Specific Objectives

II BASIC TENETS

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

- Explains the role of OT/OTA within the practice setting, in terms and language that are clearly understood by the recipient
- Articulates the value of occupational performance as it applies in the student's school environment and the student's educational plan.
- Articulates best OT/OTA practice in the school environment
- Explains how and why occupational therapist are client-centered
- Thoroughly instructs other disciplines in carrying out treatment procedures initiated by OT/OTA
- Selects activities that reflect an understanding of the patient's interests, meeting IEP goals, and occupational values

5. Occupational Therapist/Occupational Therapy Assistant Roles: Communicates the roles of the occupational therapist and occupational therapy assistant to faculty, students, families, significant others, and service providers.

- Articulates the role of the OT and OTA in the school environment to supervisor, students, families, etc.
- Able to communicate clearly the rationale for occupational therapy interventions provided to supervisor, students, families, families, and treatment team

6. Evidence - based Practice: Makes informed practice decisions based on published research and relevant informational resources.

- Able to articulate rationale for selection of activities.
- Uses sound clinical reasoning backed by published research and/or relevant resources such as test books to make informed intervention decisions

7. Collaborates: With client, family, and significant others throughout the occupational therapy process.

- Recommends OT assessments contributing overall to the team's evaluation process
- Contributes to the development and updates of the educational plan and goals with students, family, teachers, etc.
- Teams with other professionals to discuss needs, progress and program of the student
- Consults with classroom teacher following sessions to discuss student progress and makes recommendations as needed.
- Incorporates teachers' requests related to student performance in the classroom.

Lapeer County Intermediate School District

Occupational Therapy Assistant Student

Site Specific Objectives

III. EVALUATION AND SCREENING

7. Gathers Data: Under the supervision of and in cooperation with the occupational therapist, accurately gathers relevant information regarding a client's occupations and the factors that support and hinder occupational performance.

- Articulates relevance of evaluation information within the context of the student's educational program and school environment
- Identifies conditions and precautions associated with apparent deficits of assigned students.
- Demonstrates an understanding of diagnoses and its impact on occupational performance
- Reads the students chart/information prior to treatment session and verbalizes an understanding of student's IEP goals and premorbid occupational performance.
- Listens to input from other team members
- Teams with other professionals to discuss needs, progress and program of the student.
- Contributes to the development and updates of the OT plan of care and IEP goals with student, family, team members, and caregivers.

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.

- Demonstrates knowledge of various assessments available for use.
- Determines which assessments are appropriate for a specific student or program
- Listens to input from other team members
- Maintains objectivity in observing and assessing areas where standardization is not an option
- Alters methods of assessing performance areas where medical complications or restrictions exist
- Alters methods to accommodate limitations in cognition or communication as needed
- Demonstrates an understanding of differences among screening, consult, and evaluation
- Accepts responsibility and is aware of the importance of accurate assessment
- Observes standardized techniques in using standardized assessment tools
- Gathers and prepares materials and equipment required for the assessment
- Observes the student in school environment
- Gather's patient information from student's folder, parents, other staff, and community resources, including previous service received
- Distinguishes between actual fatigue, uncooperative behavior, and or manipulation and modifies approach as indicated.

Lapeer County Intermediate School District

Occupational Therapy Assistant Student

Site Specific Objectives

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

- Convert raw scores into meaningful information, according to assessment guidelines
- Able to locate and use norms for assessment tools
- Interprets data objectivity and according to standardized or non-standardized method
- Uses clinical reasoning
- Relates assessment findings to functional performance

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

- Based on assessment results, identifies measurable outcomes and short term objectives to facilitate participation and learning
- Discusses with supervisor evaluation results and recommended goals
- Collaborates with classroom teacher, incorporating objectives into student's IEP
- Documents results of the assessment and reassessment following department policies and procedures
- Reports verbally and/or in writing unusual or critical information gathered during the assessment to the appropriate staff member

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

- Incorporates patient goals and priorities into the plan of care/ IEP
- Consider student's preferences that will motivate and challenge him or her
- Consider home environment and family responsibility/routines when developing home programs.
- Identifies a variety of treatment activities to accomplish goal
- Grades and/or adapts activities or method to achieve treatment goals
- Recognizes the importance of client-centered practice and the involvement of teachers, team members, family and caregivers in treatment process.

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.

- Discusses basis for intervention decisions with supervisor
- Identifies correlation between problem areas and activity selected

Lapeer County Intermediate School District

Occupational Therapy Assistant Student

Site Specific Objectives

- Prepares several alternative activities in case the student rejects the planned activity.
- Recognize which treatment activities may facilitate or enhance the patient's program and goals
- Collaborates with the occupational therapists to prioritize problem areas and addresses foundation skills needed for treatment progression
- Adapts the activities to meet the student's physical, cognitive, or behavioral limitations
- Implements a plan of treatment that facilitates participation and learning within school environment
- Provides services within the student's natural environment, such as the classroom, bathroom, cafeteria, playground, etc.
- Utilizes materials available in the natural school environment so that activities can be incorporated into the student's daily routines

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

- Recognizes the value in using the most effective strategy to achieve individual goals and maximizes the student's interest in the treatment program
- Demonstrates functional-based interventions for self care performance and IEP performance components
- Directs student performance in areas of ADLs/IADLs as functional level allows

14. Implements Intervention: Implements occupation-based interventions effectively in collaborations with students, families, team members, and service providers.

- Implements a plan of treatment that facilitates participation and learning within school environment
- Provides services within the student's natural environment, such as the classroom, bathroom, cafeteria, playground, etc.
- Utilizes materials available in the natural school environment so that activities can be incorporated into the student's daily routines
- Utilizes purposeful activities during treatment sessions
- Considers age level and capabilities when directing all student care activities

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

- Grades and modifies treatment activities to provide effective treatment for the student's current status

Lapeer County Intermediate School District

Occupational Therapy Assistant Student

Site Specific Objectives

- Selects activities considering student's abilities to promote progress without undue frustration
- Demonstrates the ability to identify more than one appropriate strategy for a given problem area or variations of a strategy

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

- Develops and maintains rapport with student's, families, teachers, team members that enhance the therapeutic relationship
- Maintains an atmosphere conducive to positive interactions
- Demonstrates positive working relationship with all students, teachers, team members, family/caregivers, and fellow staff

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.

- Makes recommendations to supervisor regarding treatment approach in response to changes in student's condition
- Changes treatment approach based on improvement or regression in student's condition
- Changes treatment approach considering the environment and goal being addressed
- Effectively intervenes with student's inappropriate behavior
- Demonstrates active listening skills during interactions
- Praises student for appropriate behavior, thus optimizing student's performance
- Updates plan at require intervals or appropriate times due to any changes, gathers data in preparation for staff and annual meetings
- Consults with team members regarding student's progress, concerns, and potential for change in services
- Recognizes a plateau in therapy and suggests changes in the student's intervention plan

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

- Completes therapy notes on student following each treatment session
- Reports student's progress to supervisory on an ongoing basis

Lapeer County Intermediate School District

Occupational Therapy Assistant Student

Site Specific Objectives

VI. COMMUNICATION

19. Verbal/Nonverbal Communication: Clearly and effectively communicates verbally and nonverbally with the students, families, team members, significant others, colleagues, service providers, and the public.

- Communicates with other disciplines regarding goals and methods of treatment to be reinforced
- Demonstrates active listening skills during interactions
- Communicates with other team members frequently regarding the student's progress
- Communicates effectively with students, parents, and caregivers, school personnel, and team members
- Communicates on the technical level with other OT's and medical professionals as needed
- Use language appropriate to the student, parent, school personnel, OT, medical personnel, and public

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

- Completes accurate documentation for district reimbursement and student attendance
- Completes progress note for each session
- Produces measurable IEP goals according to district guidelines

VII. PROFESSIONAL BEHAVIORS

21. Self Responsibility: Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisors and others

- Notifies supervisor of unusual occurrences or circumstances
- Identifies, communicates, and uses own optimal learning methods and styles
- Recognizes communication styles of self and supervisor; adjusts style as needed to promote optimal communication with supervisor
- Attends regularly scheduled staff meetings and in-service opportunities in practice area
- Seeks out answers to question and takes initiative in acquiring knowledge
- Collaborates with supervisors when ready to assume more responsibility, requiring less supervision
- Comes prepared and seeks supervisor feedback on performance

Lapeer County Intermediate School District

Occupational Therapy Assistant Student

Site Specific Objectives

21. Responds to Feedback: Responds constructively to feedback.

- Demonstrates receptiveness to feedback and input from supervisor(s)
- Actively seeks feedback on performance
- Adjusts behavior in response to cues and direction from supervisor, staff, and the environment
- Incorporates suggested changes in treatment or approach immediately, as directed by supervisor
- Responds to constructive feedback with openness and willingness to hear feedback

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

- Consistently maintains professional behaviors in the workplace. This includes, but is not limited to, taking initiative, and being prepared and dependable
- Arrives on time, consistently completes work assignment on time and follows regular schedule
- Be prepared in dress code, with writing materials, and any other essentials
- Be prepared for patient treatment as directed by your supervisor

23. Time Management: Demonstrates effective time management.

- Arrives on time
- Completes written documentation within timelines specified by the supervisor
- Develops an efficient schedule for assigned workload
- Uses free time constructively
- Organizes treatment and non-treatment responsibilities in order to ensure that responsibilities are completed in timely and professional manner

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

- Consistently maintains professional behaviors in the workplace, including, but not limited to professional appearance, showing respect for other professionals, and presenting in a professional and confident manner
- Demonstrates respect for teachers while in their classrooms by following classroom rules and schedules
- Demonstrates flexibility with interactions and situations without compromising the student program
- Demonstrates positive interaction with all school personnel by giving genuine praise

Lapeer County Intermediate School District Occupational Therapy Assistant Student Site Specific Objectives

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

- Respectful and open to diverse backgrounds and ideas in the treatment setting. Seeks to understand the student's or family's perspective on context and collaborating in treatment. Careful to not impose one's own beliefs and values on students
- Demonstrates respect for school personnel without prejudging or making assumptions
- Able to access translation services as needed

I have read and understand the expectations of this fieldwork site.

OTA Student (Print Name)

OTA Student Signature/ Date

Fieldwork Educator (Print Name)

Fieldwork Educator Signature/Date

Metropolitan Occupational Therapy Education Council of NY/NJ
Sample Behavioral Objectives written by Practitioners at the Joint Clinical Council Day
December 3, 2003

Revised 4/12/04

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

Students will:

I. Demonstrate an understanding of environmental factors affecting clients' safety at all times by:

- Consistently analyze evaluation/treatment space for potential safety hazards prior to bringing the client into the environment.
 1. Equipment is set-up beforehand.
 2. All nonessential items are put away.
 3. Treatment area is scanned for slip and fall prevention.
 4. Is aware of potential hazards of equipment being used.
 5. Aware of sharps at all times.
- Adhere to facility policy regarding use of modalities, use of sharps, and operating equipment in the OT clinic.
- Consistently set-up and clean-up of work environment in a manner that prevents injury.
- Chooses activities that are safe, age appropriate, and appropriate for cognitive/emotional/physical capabilities of clientele.
- Consistently follows equipment safety protocols.
- While evaluating and treating, the student should use judgment in safety.

II. Anticipate and prepare for potential difficulties in the community as demonstrated by:

- Selecting offsite/community activity that demonstrates sound judgment.
- States agency off-premises safety/emergency protocol prior to engaging in community activities and/or home visits.
- Anticipates problems/possible solutions prior to and during home visit and/or community outings.

III. State universal precautions and will adhere to guidelines at all times.

IV. Adhere to facility policies and regulations and OSHA precautions.

V. Articulate facility HIPAA regulations and will abide by them by end of first week.

VI. Seek out assistance whenever in doubt

Students will:

- Demonstrate safe set-up of transfer to all surfaces.
- Demonstrate proper body mechanics during therapy.
- Demonstrate safe use of equipment.
- Maintain a clutter free treatment environment and return all items to storage.
- Utilize ergonomically appropriate body mechanics.
- Assess environment prior to treatment and throughout treatment process.
- Continuously monitor patient's response to treatment (i.e. pain).

10. Determines client's occupational profile and performance through appropriate assessment methods.

Students will:

- Identify patient's roles through interview with client family.

- Identify cultural/religious factors through interview.
- Interview patient, family to gather information of client's history of occupation, lifestyle and also should read medical charts for medical history and information.
- Utilize assessment process that respects clients/patients cultural values/physical abilities/interests.

18. Articulates clear and logical rationale for the intervention process.

Students will:

- Demonstrate, during group treatments, recognition of responses from clients and adapt to changes.
- Explain the expected outcome of individual interventions during treatment session.

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

Students will:

- Interact, communicate, and share relevant information with all caretakers, families, and health care professionals.
- Clearly and effectively communicate verbally by stating clear goals and rationale of treatment to patients, family, and colleagues.
- Clearly and effectively communicate with patients, families, and team members to explain possible outcomes of OT.
- Give instructions for the treatment process that are effective, clear, concise, and understandable for each patient's developmental level and learning style.
- Respond appropriately to behaviors and questions, give feedback, appropriate cues, and the appropriate amount of assistance to enable patient to participate in activity.
- Take into account cultural differences and language barriers (providing handout and information in first language).
- Communicate/demonstrate effective communication skills to meet the needs of each patient.
- Demonstrate good observational skills when communicating with patients, adjusting instructions based on patient's reactions.
- Be aware of nonverbal communication and body language of patients, families, and colleagues.
- Learn to use and develop therapeutic use of self and maintain rapport with patient.
- Develop boundaries/ability to set appropriate limits with patients.
- Provide appropriate validation, support, and feedback to patients as needed.
- Accept constructive feedback and provide input as part of interpersonal communication.
- Contribute clear, accurate, and concise reports/feedback in team meetings regarding each patient's progress.
- Clearly and effectively write progress reports based upon and related to changes in a patient's progress and needs.

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

Students will:

- Be an active part of supervision and feedback.
 - Take initiative to identify difficulties experienced during evaluation/treatment.
 - Take initiative to present plan of action to improve performance.
 - Use feedback provided to come up with strategies/plans for improvement.
 - Incorporate feedback from supervisor into treatment planning and intervention and discuss outcome.
-

38. Responds constructively to feedback.

Students will:

- Notice and respond to feedback in a way that would encourage an open exchange of ideas and develop entry-level skills in an effective way.
- “Hear” and act upon constructive feedback from supervisor by making suggestions as to what could have been or needs to be changed.
- Demonstrate an active and positive attitude evidenced by body language and use of voice.
- Verbalize understanding of feedback and develop effective and measurable goals for improvement as needed.
- Give ideas and respond to feedback on ways to improve by giving examples of what they would do in future situations.
- Demonstrate change in behavior that shows an understanding of feedback and a movement towards acquiring professional behaviors.
- Articulate positive feedback and strengths pointed out by supervisor.

Heartland Health Care Center - Bloomfield Hills

Level II Fieldwork Site-Specific Objectives Occupational Therapy Assistant Student

I. FUNDAMENTALS OF PRACTICE

1. **Ethics:** Adheres consistently to the American Occupational Therapy Association Code of Ethics and site's policies and procedures.
 - Demonstrates work behaviors that reflect an understanding of professional standards and code of ethics appropriate to the practice environment.
 - Recognizes and appreciates that professional standards and code of ethics are an integral component of being a professional.
 - Identifies and addresses ethical concerns in the context of clinical supervision.
 - Establishes and maintains a therapeutic relationship with the patient.
2. **Safety:** Adheres consistently to safety regulations. Anticipates potentially hazardous situations and takes steps to prevent accidents.
 - Reviews chart and/or seeks to understand information from appropriate sources to attend to changes in status; asks questions when in doubt.
 - Utilizes infection control precautions and procedures.
 - Maintains clear and orderly work area by returning equipment and supplies.
 - Follows facility policies to emergency code or drill situations.
3. **Safety:** Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.
 - Provides safe supervision of patients during high-risk activities.
 - Refrains from use of equipment or procedures unless trained.
 - Seeks and is receptive to supervision to ensure patient safety.
 - Utilizes appropriate body mechanics in working with patients.
 - Identifies and reports safety concerns to supervisor and/or appropriate clinical staff.
 - Assesses own ability to provide safe treatment and identifies situations that require further knowledge and/or assistance.

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.
 - Able to explain occupational therapy at a level consistent with level of understanding.
 - Able to articulate the role of occupational therapy to staff during treatment team meetings and when planning interventions.
 - Selects activities that reflect an understanding of the patient's interests and occupational values.
 - Explains occupational therapy in terms that are clearly understood by the patient and/or family members.

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.
 - Able to communicate clearly the rationale for occupational therapy interventions provided to the patients, families, and the treatment team.
6. **Evidence-based Practice:** Makes informed practice decisions based on published research and relevant informational resources.
 - Able to articulate rationale for selection of activities.
 - Uses sound clinical reasoning based on published research and/or relevant resources to make informed intervention decisions.

III. EVALUATION/SCREENING

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.
 - Accepts responsibility and is aware of the importance of thorough data gathering.
 - Demonstrates an understanding of diagnoses and its impact on occupational performance.
 - Selects and filters relevant and important information from all data collected.
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.
 - Accepts responsibility and is aware of the importance of accurate assessment.
 - Observes standardized techniques in using standardized assessment tools.
 - Adjusts/modifies the assessment procedures based on the patient's needs, behaviors, and culture.
9. **Interprets:** Assists with interpreting assessments in relation to the client's performance and goals in collaboration with the occupational therapist.
 - Able to objectively analyze and select pertinent data from assessment to develop an accurate profile of the patient's strengths and weaknesses.
 - Interprets data objectively and according to standardized or non-standardized methods.
 - Uses sound clinical reasoning.
10. **Reports:** Reports results accurately in a clear, concise manner that reflects the client's status and goals.
 - Documents results of the assessment and reassessment following department policies and procedures.
 - Reports verbally and/or in writing unusual or critical information gathered during the assessment to the fieldwork educator or appropriate staff members.
 - Reports performance data objectively.

- Contributes to the discharge plan in a manner that reflects an understanding of functional level at the time of the patient's discharge and the available environmental supports in the anticipated discharge setting.
 - Identifies functional limitations affecting self-care performance.
 - Incorporates patient goals and priorities into the plan of care.
- 11. Establish Goals:** Develops client-centered and occupation-based goals in collaboration with the occupational therapist.
- Recognizes the importance of client-centered practice and the involvement of family and caregivers in the treatment process.
 - Demonstrates clinical reasoning skills to identify steps to solve problems in patient treatment and to establish goals.
 - Grades and/or changes activity or method to achieve treatment goals.

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.
- Chooses graded activities and/or preparatory activities that will be most effective in maximizing the patient's occupational performance
 - Allows for on-going assessment of the patient's functional performance and readiness for discharge.
 - Prioritizes problem areas and addresses foundation skills needed for treatment progression.
 - Facilitates self-care activities for eating, grooming, bathing, dressing, and toileting skills.
- 13. Selects Intervention:** Selects and sequences relevant interventions that promote the client's ability to engage in occupations.
- Recognizes the value in using the most effective strategy to achieve individual goals and maximizes the patient's interest in the treatment program.
 - Demonstrates functional-based interventions for self-care performance components.
 - Directs patient performance in areas of IADLs as functional level allows.
- 14. Implements Intervention:** Implements occupation-based interventions effectively in collaboration with clients, families, significant others, and services providers.
- Offers occupations (occupation-based activity, purposeful activity, preparatory methods) that match the patient's performance skills, patterns, context, activity demands, and patient factors.
 - Schedules and performs ADLs appropriate to the patient's level of participation.
 - Considers age level when directing all patient care activities.
 - Utilizes purposeful activities during treatment sessions.
 - Selects activities that are meaningful and relevant to the patient.

15. **Activity Analysis:** Grades activities to motivate and challenge clients in order to facilitate progress.
 - Demonstrates the ability to identify more than one appropriate strategy for a given problem area.
 - Appropriately revises and adjusts selected activities to adapt to a change in the patient's condition.
 - Grades and modifies treatment activities to provide effective treatment for the patient's current status.
 - Selects activities considering patient abilities to promote progress in a safe and efficient manner.
 - Selects activities by taking into account patient's preferences, values, and age.
16. **Therapeutic Use of Self:** Effectively interacts with clients to facilitate accomplishment of established goals.
 - Develops and maintains rapport with patients, families, and/or significant others that enhances the therapeutic relationship.
 - Develops and maintains rapport with patients that enhances the therapeutic relationship.
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.
 - Demonstrates the ability to be flexible with intervention plans and adapting to changes in a timely manner.
 - Recognizes changes in the patient's physical, emotional, or cognitive status and adjusts the program to promote optimal progress.

V. COMMUNICATION

18. **Verbal/Nonverbal Communication:** Clearly and effectively communicates verbally and nonverbally with clients, families, and/or significant others, colleagues, service providers, and the public.
 - Develops and maintains rapport with patients, families, and/or significant others that enhances the therapeutic relationship.
 - Communicates appropriate information to interdisciplinary treatment team in a professional manner.
19. **Written Communication:** Produces clear and accurate documentation according to site requirements. All writing is legible, using proper spelling, punctuation, and grammar.
 - Writes progress notes that are concise and reflect information on occupational performance.
 - Reports unusual and/or critical information in writing.
 - Uses correct terminology to describe treatments and interventions.
 - Complies with facility's policy for approved abbreviations.
 - Follows facility's policies and procedures for documentation.

VI. PROFESSIONAL BEHAVIORS

- 20. Self-Responsibility:** Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisor(s) and others.
- Defines personal expectations and goals for the affiliation.
 - Demonstrates self-directed behaviors in determining learning strengths and challenges.
 - Asks questions when uncertain.
 - Notifies fieldwork educator of unusual occurrences or circumstances.
 - Identifies, communicates, and uses own optimal learning methods and styles.
 - Recognizes communication styles of self and supervisor and adjusts style as needed to promote optimal communication with fieldwork educator.
 - Uses discretion in wording and timing of questions asked of fieldwork educator.
- 21. Responds to Feedback:** Responds constructively to feedback.
- Adjusts behavior in response to cues and direction from fieldwork educator, staff, and the environment.
 - Demonstrates receptiveness to feedback and input from fieldwork educator.
- 22. Work Behaviors:** Demonstrates consistent work behaviors including initiative, preparedness, dependability, and work site maintenance.
- Consistently maintains professional behaviors in the workplace. This includes, but is not limited to, taking initiative, being prepared and dependable, and assuming a professional demeanor.
 - Arrives on time and consistently completes work assignments on time.
 - Attends regularly scheduled staff meetings and in-service opportunities.
 - Collaborates with fieldwork educator to participate in additional learning opportunities.
- 23. Time Management:** Demonstrates effective time management.
- Organizes treatment and non-treatment responsibilities in order to assure that responsibilities are completed in a timely and professional manner.
 - Schedules patients and collaborates with other staff members to accommodate department caseloads/needs.
- 24. Interpersonal Skills:** Demonstrates positive interpersonal skills including but not limited to cooperation, flexibility, tact, and empathy.
- Consistently maintains professional behaviors in the workplace, including but not limited to, professional appearance, showing respect for other professionals, and presenting in a professional and confident manner.
- 25. Cultural competence:** Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices.
- Respectful and open to diverse backgrounds and ideas in the treatment setting. Seeks to understand the patient's perspective and context when collaborating in treatment. Careful to not impose one's own beliefs and values on patients.
 - Able to access translation services as needed.

I have read the Site Specific Objectives and am aware of the performance expectations of this facility during my fieldwork placement. I understand that these objectives correlate to the AOTA Evaluation Form to provide a clearer understanding of entry level competency for Occupational Therapy Assistant students.

Student Name/Print: _____

Student Signature/date: _____

Fieldwork Educator Name/Print: _____

Fieldwork Educator Signature/Date: _____

Site-Specific Objectives - Resources

- Writing Site-Specific Objectives for the FWPE Forms - *ppt, 106 kb*
- Handout - Site-Specific Objectives for the FWPE Forms - *pdf, 22 kb*
- Sample Adult Acute Care Setting - *doc, 110 kb*
- Sample Adult Outpatient Setting - *doc, 125 kb*
- Sample Adult Rehab Setting - *doc, 70 kb*
- Sample Early Childhood Intervention Setting - *doc, 124 kb*
- Sample Geriatrics Setting - *doc, 44 kb*
- Sample Mental Health Setting - *doc, 56 kb*
- Sample Mental Health Setting (OT) - *doc, 170 kb*
- Sample Mental Health Setting (OTA) - *doc, 146 kb*
- Sample Pediatrics Setting - *doc, 72 kb*
- Sample Physical Disabilities Setting - *doc, 54 kb*
- Sample School Setting - *doc, 115 kb*

- See more at: <http://www.aota.org/education-careers/fieldwork/siteobj.aspx#sthash.D1StNgss.dpuf>