The information in this manual should be read carefully and retained for future reference. You will be expected to understand and follow the fieldwork policies and procedures listed in this manual. This manual is based on the Guide to Fieldwork Education (1994) and the Accreditation Council for Occupational Therapy Education (ACOTE) Standards and Interpretive Guide (2011). Both documents are on file in the Occupational Therapy Program in the College of Health and Human Services at The University of Toledo and are available for review upon request.

Rev. 8/17
This Manual provides fieldwork educators and students with information regarding the policies and procedures related to Level I and Level II Fieldwork education in the Occupational Therapy Doctorate (OTD) Program at The University of Toledo (UT). The information herein is subject to periodic change. This manual is copyrighted by the Occupational Therapy Doctorate Program at The University of Toledo. It should be viewed as an adjunct to the Occupational Therapy Doctorate Program Description, which is available through our website at:
http://www.utoledo.edu/healthsciences/depts/rehab_sciences/ot/.

**TABLE OF CONTENTS**

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose of Fieldwork</td>
<td>3</td>
</tr>
<tr>
<td>Levels of Fieldwork</td>
<td>3</td>
</tr>
<tr>
<td>Fieldwork Site Selection Guidelines</td>
<td>5</td>
</tr>
<tr>
<td>Roles and Responsibilities</td>
<td>5</td>
</tr>
<tr>
<td>Fieldwork Policies, Guidelines, and Procedures</td>
<td>8</td>
</tr>
<tr>
<td>Appendix A College of Health &amp; Human Services</td>
<td>15</td>
</tr>
<tr>
<td>Academic Affiliation Agreement</td>
<td></td>
</tr>
<tr>
<td>Appendix B Level I Fieldwork Evaluation (1st year)</td>
<td>19</td>
</tr>
<tr>
<td>Appendix C Level I Fieldwork Evaluation (2nd year)</td>
<td>20</td>
</tr>
<tr>
<td>Appendix D AOTA Fieldwork Performance Evaluation for the Occupational Therapy Student</td>
<td>21</td>
</tr>
<tr>
<td>Appendix E Fieldwork Site Visit Form</td>
<td>29</td>
</tr>
<tr>
<td>Appendix F Student Evaluation of Level I Fieldwork Experience</td>
<td>31</td>
</tr>
</tbody>
</table>
PURPOSE OF FIELDWORK

Supervised fieldwork experience in occupational therapy is an integral part of both the educational process and professional preparation. It is intended to complement academic preparation by offering additional opportunities for growth, for learning to apply knowledge, for developing and testing clinical skills, and for validating and consolidating those functions that comprise professional competence (Fidler, 1966). In keeping with the OTD Program’s curriculum design, fieldwork will be directed toward meeting the goals of education for practice, advocacy, research and autonomous decision making.

The purpose of the fieldwork experience is to provide occupational therapy students with the opportunity to integrate academic knowledge with application skills at progressively higher levels of performance and responsibility (Costa & Burkhardt, 2004). The unique contributions of the fieldwork experience include the opportunity to apply the theories and practice skills learned in academic study and to refine skills through client interaction under the supervision of qualified personnel. Fieldwork also provides opportunities for students to develop skills that are essential to productive working relationships, including advocacy, leadership, managerial, and interpersonal skills (AOTA, 2009; Snow & Mitchell, 1982).

Supervised fieldwork experience is designed to complement academic preparation of the occupational therapy student and, as such, adds an important dimension to the educational process. While the academic setting emphasizes the acquisition of knowledge and cognitive growth of the student, the clinical setting emphasizes the direct application of this knowledge through supervised intervention with patients/clients (Costa & Burkhardt, 2004). Effective clinical practice requires not only a sound knowledge base, but also effective interpersonal behavioral characteristics. The value of both the academic and clinical components of the educational process must be acknowledged. If there is to be a productive collaboration between the two settings, there must be mutual respect for each other’s contributions and needs.

Carefully selected and implemented fieldwork experiences enhance the curriculum’s overall integrity (Cohn & Crist, 1995). Faculty, students, and fieldwork educators collaborate to form a tight educational partnership. Fieldwork experiences progress from clinical observations in structured settings during the first semester to those experiences in less defined settings later in the curriculum. Students begin by observing and analyzing elements of models of practice and progress to those experiences where they advocate for a model of practice and project occupational therapy’s role in less traditional settings. Fieldwork demands increasing levels of student autonomy, which culminates entry-level competency. Following successful Level II Fieldwork experiences, students complete a Capstone Experience. The Capstone Experience is individually planned with the guidance of faculty and site mentors. It results in advanced practice skills in an area of student choice and a major integrative project is completed and presented to the publics of interest.

LEVELS OF FIELDWORK

Level I Fieldwork. The Accreditation Council for Occupational Therapy Education (ACOTE) Standards and Interpretative Guidelines (2011) require two levels of fieldwork in entry-level occupational therapy education. Level I fieldwork experiences are designed to enrich course work through directed observation and application of basic academic material. Level I fieldwork sites may include both traditional medical model environments and contemporary practice areas such as adult day care centers, assisted living environments, group homes, and wellness programs.

Level I fieldwork placements begin during the first semester of study and continue through each didactic semester of the curriculum. As a participant-observer, students experience practice settings in conjunction with the Model of Practice courses. Assignments during the fieldwork experiences provide a forum for analysis of the Occupational Therapy Practice Framework and multiple models of practice. Level I fieldwork placements are accompanied by a weekly fieldwork seminar course where students discuss and integrate skills that will enable them to be proficient therapists.
Objectives for each Level I fieldwork are developed in conjunction with the academic course work into which they are integrated. These objectives are found in the respective course syllabus. Feedback from the fieldwork sites, as well as the faculty, is used in developing the objectives, which are appropriate to the fieldwork experiences.

In the beginning fieldwork experiences, the emphasis is not on independent performance, but rather on the incorporation of professional modes of behaving, communicating, thinking, and problem solving through directed observation and participation. As the experiences progress, the students begin to take on more independent and self-directed learning tasks. For example, during the fall semester of the second year, students have an opportunity to begin observing and participating at a pediatric fieldwork site that has occupational therapists on staff. During the spring semester of the second year, students have the opportunity for participation in a 40-hour Level I experience at a traditional medical model site. It is this combination of Level I experiences that provides the students with the ability to develop clinical reasoning skills consistent with the philosophy of the OTD Program.

**Level II Fieldwork.** The second level of fieldwork occurs after the academic course work is completed. The goal is for the student to integrate academic knowledge with clinical practice skills during the transition from the role of the student to that of entry-level practitioner (AOTA, 2009). During Level II fieldwork, students progressively assume responsibility for the delivery of occupational therapy services to patients/clients. It is important to note that in addition to developing entry-level practice skills, the fieldwork experience will promote the other core areas of the curriculum: advocacy, research, and autonomous decision making. The means will vary from site to site and will depend on the length of the fieldwork, the site’s resources, and the student’s interests/abilities. The development of clinical reasoning skills and professional attitudes and behaviors is stressed.

The 2011 Standards established guidelines for Level II fieldwork include the following:

- a minimum of the equivalent of 24 weeks full-time Level II fieldwork that may be completed on a full-time or part-time basis, but may not be less than half-time as defined by the fieldwork site;
- completion of Level II fieldwork in a minimum of one setting and maximum of four different settings; and
- direct supervision provided by a registered occupational therapist with at least one year of experience.

Please see the 2011 Standards for additional requirements pertaining to fieldwork outside of the United States.

If a student requests a fieldwork site that does not offer occupational therapy services or where there is no occupational therapy practitioner on site, The University of Toledo Occupational Therapy Doctorate program will attempt to execute a memorandum of understanding with the site and attempt to locate an occupational therapist who is initially certified by NBCOT, holds an Ohio license and has at least 3 years of clinical experience to supervise the student. The occupational therapist will be assigned to the site for a minimum of eight hours per week and will be readily available for communication and consultation through email or phone contact during work hours. Initially supervision will be direct and then may be decreased to less direct supervision as appropriate for the setting, the client’s needs, and the ability of the student. An on-site supervisor, who has documented expertise in the area of service at the fieldwork site, will be assigned while the occupational therapy supervisor employed by the OT program is off site.

Student requests to be placed in a site as described above will be considered on a case by case basis by the Coordinator of Fieldwork Education and Professional Development. Once a formal memorandum of understanding is complete, the same procedural processes used with traditional level II fieldwork sites will be completed. Only those sites in Northwest Ohio and its surrounding areas will be considered at this time.
**Capstone Experience.** For information on the OTD Capstone Experience, please refer to the Manual for the Capstone Experience which is available from the Occupational Therapy Doctorate Program.

**FIELDWORK SITE SELECTION GUIDELINES**

Level I and Level II sites are carefully screened and selected to facilitate achievement of the program’s goals for Practice, Advocacy, Research, and Autonomous Decision Making. Sites are located in Ohio as well as other areas of the United States. Every attempt is made to collaborate with each student to provide fieldwork experiences that meet his/her personal and professional needs. In order to maintain the quality of the fieldwork experiences, the Coordinator of Fieldwork Education and Professional Development makes the final determination of Level I and Level II fieldwork placements. In Level I and Level II experiences, academic and clinical faculty work collaboratively to maintain the scholarly rigor that is the tradition of the College of Graduate Studies at The University of Toledo.

If a site meets the objectives and needs of the OTD Program, a formal agreement will be made (see Contract Renewal/Approval Procedure). Students will be placed only in those sites which have a written Academic Affiliation Agreement with The University of Toledo specifying the responsibilities of both programs. Students are required to read and understand the agreement (see Appendix A for a copy of the standard agreement). At times, agreements other than the standard agreement are used. If an agreement other than the standard agreement is used, the student will be required to sign off that they have read and understand the agreement prior to participating in fieldwork at that setting. Academic Affiliation Agreements are used in both Level I and Level II fieldwork settings.

**ROLES AND RESPONSIBILITIES**

**Director of Clinical and Educational Programming.** The Director of Clinical and Educational Programming is responsible for monitoring the program’s compliance with ACOTE Standards Section C: Fieldwork Education and Doctoral Experiential Component and to coordinate the development of Capstone Proposals for the Capstone Experiences which may be one of seven different Dissemination projects (case study, program development plan, program modification plan, course development plan, advocacy through a professional journal, advocacy at the organizational level, or research). Students develop individual Capstone Proposals in the spring semester of their second year that includes specific site information, goals, objectives, methods, mentor information, student performance evaluation, timeline, student evaluation of capstone experience, and annotations of literature identified as relevant to Capstone Mentored Studies. Each student chooses their site(s), faculty mentor(s) and site mentor(s). Student choice is based on their topic of interest and expertise mentors can offer to guide students through the Capstone semester. The student’s mentors are responsible for mentorship, guidance, advisement, and assessing the student’s final Dissemination project. See the Manual for the Capstone Experience for more specific details of the Capstone Experience process.

**Coordinator of Fieldwork Education and Professional Development.** The Coordinator of Fieldwork Education and Professional Development is the primary representative of The University of Toledo for Level I and Level II Fieldwork. The main responsibilities of the coordinator are to plan, organize and monitor the implementation of Level I and Level II fieldwork experiences, ensuring that these comply with the educational standards established by the Accreditation Council for Occupational Therapy Education ("ACOTE") and the objectives of the curriculum. Within this framework, the coordinator is expected to:
• identify, evaluate and develop appropriate fieldwork sites for fieldwork experiences;
• establish and maintain ongoing communications with each fieldwork site;
• collaborate with fieldwork sites in the development of fieldwork experiences;
• assign students to fieldwork sites;
• notify each fieldwork site and identified fieldwork educator in a timely manner regarding the schedule of student assignment;
• monitor student performance and assist in the identification and resolution of problems as they arise;
• work with the student to assure understanding of and compliance with all rules, regulations and expectations of the American Occupational Therapy Association, ACOTE, UT and the fieldwork site;
• maintain accurate, updated files on all fieldwork sites and supervisors;
• conduct ongoing evaluation of fieldwork sites;
• participate in teaching, scholarly, and service activities consistent with the mission and goals of the program, the College of Health and Human Services and The University of Toledo;
• generate and monitor new and renewal contracts with fieldwork sites;
• monitor student submission of clinical education materials including health forms and related immunizations/lab results, CPR certification, personal data sheets, etc.;
• manage fieldwork site files for student review, including notifying students of contracts other than our “standard” and requiring them to review and verify by signature that they have read the contract and any other special requirements of that particular facility;
• create and manage database for fieldwork sites;
• compile information for email correspondence and/or mailings to fieldwork sites including student packets for fieldwork assignments, manual updates, requests for fieldwork site information, and requests for fieldwork education slots; and
• carry out other duties as assigned by the Occupational Therapy Program Director.

**Fieldwork Educator.** Fieldwork educators, also called clinical educators, fieldwork supervisors, or student supervisors, are those individuals responsible for student education and supervision at the fieldwork site(s). The fieldwork educator acts as a professional role model and should demonstrate an awareness of the impact of this role on students. The two major responsibilities for having a fieldwork program are the administrative functions and direct day-to-day supervision of students. Each site has its own arrangement on how the site’s fieldwork program fulfills these responsibilities. The administrative responsibilities may be delegated to one individual, usually entitled student fieldwork coordinator, who then assigns all students to individual supervisors. The day-to-day supervisory functions may be carried out by the coordinator or other delegated therapists. The **administrative functions** include, but are not limited to:

• collaborating with the UT Coordinator of Fieldwork Education and Professional Development in developing fieldwork programs that meet the needs of both parties;
• preparing, maintaining, and sending to the UT Coordinator of Fieldwork Education and Professional Development updated information regarding the facility and education program;
• scheduling students in collaboration with the UT Coordinator of Fieldwork Education and Professional Development;
• establishing a philosophy of fieldwork education as well as objectives of the fieldwork experience in collaboration with the UT Coordinator of Fieldwork Education and Professional Development;
• being familiar with the fieldwork policies set forth by the UT (see section entitled Fieldwork Policies);
• periodically reviewing the contractual agreement;
• providing regular and periodic supervision of students; and
• contributing to the evaluation of each student at midpoint and/or completion of the experience. Evaluations must be signed and submitted either in paper or electronically.

The day to day supervisory responsibilities include, but are not limited to:
• providing orientation to the fieldwork site and to specific departmental policies and procedures;
• assigning patients and clients to the student;
• supervising the provision of student therapy services;
• assessing skill and knowledge level of the student;
• meeting with the student regularly to review the performance and to provide guidance;
• evaluating the student at midpoint and/or completion of the fieldwork experience;
• communicating with the UT Coordinator of Fieldwork Education and Professional Development regarding student performance concerns in a timely manner; and
• collaborating with the UT Coordinator of Fieldwork Education and Professional Development to resolve deficits in student performance.

Student. The student is expected to collaborate with the fieldwork educator and the UT Coordinator of Fieldwork Education and Professional Development to ensure compliance with fieldwork experience requirements. The students are representatives of The University of Toledo while on their fieldwork experiences and should present themselves in a responsible and professional manner at all times. Each student is also responsible for the following:
• adhering to the policies regarding health forms and insurance;
• reviewing information located in the clinical education files which is pertinent to the assigned clinical site;
• sending a letter confirming the fieldwork experience dates with the fieldwork educator one month in advance of the scheduled starting dates;
• reviewing the academic program’s College of Health and Human Services Graduate Student Handbook, Occupational Therapy Doctoral Program Fieldwork Manual, and Bulletin and Handbook of the Health Science Campus Graduate Student;
• complying with all policy and procedures of the fieldwork education site and the academic program;
• fulfilling all duties and assignments made by the fieldwork educator and the UT Coordinator of Fieldwork Education and Professional Development;
• notifying the fieldwork education site and educational program of current address and telephone number;
• distributing available copies of the appropriate performance evaluation forms and student evaluation forms to Fieldwork Educators when necessary (several forms and additional information related to fieldwork education can be found at http://www.utoledo.edu/hhs/ot/Fieldwork_Education.html);
• maintaining copies of completed performance evaluation forms for future reference;
• maintaining copies of personal records at all times, including health records, CPR certification documentation, HIPAA training verification, and background check results;
• being an active participant in the supervisory process; and
• in an event of any problem related to fieldwork evaluation, following the chain of command at the fieldwork placement site.
FIELDWORK POLICIES, GUIDELINES, AND PROCEDURES

The following policies, guidelines, and procedures are to be followed by the Coordinator of Fieldwork Education and Professional Development and the student at all times. General student policies/guidelines are as follows. Students have access to the fieldwork files and are encouraged to use them to learn more about specific placements.

**Conduct.** The student is expected to conduct himself/herself in a professional manner at all times, and is to adhere to the professional behavior policies established by the facility and the AOTA Code of Ethics.

**Cell Phone Policy.** Faculty expect that students will use their cell phones in a way that is not disruptive to others in common areas, computer labs and classrooms. Students must turn off their cell phones or put them on “silent” mode during all classes and laboratories. Students cannot use cell phones at any time during examinations. Faculty may modify this policy as needed for individual classes. Students are not permitted to use their cell phones during fieldwork or capstone hours, except as approved by their fieldwork educator and capstone mentor.

**Fieldwork Dress Code.** While on fieldwork, students must dress professionally. You may check with the fieldwork site and ask specifically about dress code and what is allowed. Students will be asked to leave the fieldwork site if they are not dressed appropriately. Repeated violations of dress code will result in permanent removal from the site.

Clothing should be tasteful, clean and appropriate for the setting where the student will be performing his/her fieldwork. Students may wear dresses or skirts with length no shorter than the top of kneecap, or casual pants. Pants should fit loose enough that they do not reveal underwear lines but of appropriate fit to not show undergarments. Jeans and t-shirts are not permitted. Low necked, off the shoulder, and sleeveless blouses are unprofessional and may not be worn. When you reach into a cabinet or bend down, no cleavage should be exposed and there should be no bare skin exposed between the bottom of the shirt and the top of the pants.

Stockings or hosiery should be worn with appropriate walking shoes (no dress heels or sandals). Canvas street shoes and athletic shoes may be appropriate depending on the fieldwork site.

Hair/beards are to be neat, clean, and appropriate. Fingernails should not extend beyond the length of fingertips and artificial nails are not allowed. Jewelry is limited to rings, a watch, and lobe earrings. Dangling earrings and body piercing are not allowed. Tattoos should be covered at all times and not strong perfumes or colognes should be worn.

Uniforms, scrubs, or lab coats may be required at some facilities. An ID badge identifying oneself as a student must be worn at all times while at the fieldwork placement.

**Classroom Dress Code.** All of the above rules apply except that jeans, shorts, t-shirts, necklaces, bracelets, and all types of shoes may be worn in most classroom situations except when giving a professional presentation. Necklaces and bracelets are allowed during professional presentations.

**Attendance.** Attendance on all clinical days is required unless the student is ill or excused by the Coordinator of Fieldwork Education and Professional Development. The student is responsible for notifying the school immediately if a day (full or partial) is missed by emailing the Coordinator of Fieldwork Education and Professional Development. A schedule for making up the time missed due to absence must be acceptable to the facility and approved by the Coordinator of Fieldwork Education and Professional Development and/or assigned faculty.

**Liability Insurance.** The occupational therapy students are covered for professional liability insurance under The University of Toledo Medical Assurance Company for $1 million per occurrence/3 million aggregate (Policy #SPUTMAC000100-12).
**Health Insurance.** The University of Toledo requires all students enrolled in a degree and/or certificate program to have health insurance. All students must enroll in, and will be charged for, the UT-Sponsored Health Insurance Plan unless they request and are granted an approved waiver prior to each Fall Academic Session. For more information, see The University of Toledo’s Bulletin & Handbook of the Health Science Campus Graduate Student online at: [http://www.utoledo.edu/graduate/files/Graduate%20Student%20Handbook%202015-2016.pdf](http://www.utoledo.edu/graduate/files/Graduate%20Student%20Handbook%202015-2016.pdf).

**Annual Physical Examination.** Each student is required to have a physical examination, immunizations, and tests as specified on the health form at the student’s own expense each year. The necessary forms will be provided to the student at the appropriate times and are to be completed and signed by the examining physician prior to matriculation of the program. The health form is required to be updated every 12 months; however, students will have 13 months from the date of their last physical examination to submit required paperwork. If the student fails to provide the necessary information by his/her yearly deadline, he/she will be suspended from all classes until the necessary information is provided. Fieldwork Sites may request that students send copies of the health forms, so it is imperative that students maintain good copies of their health records.

**CPR Certification.** Students will take the CPR course for both infants and adults during the first semester of the OTD program. Students will take the CPR renewal course during the spring semester of the second year, prior to the start of Level II Fieldwork. The student is responsible for keeping the CPR Certification active.

**Criminal Background Check/Prior Felonies.** Criminal record checks will be conducted on all students accepted for admission to the Occupational Therapy Doctorate Program, as well as each year enrolled in the program, at the student’s expense. The purpose of conducting criminal record checks is three-fold:

- To assure compliance with various fieldwork sites and regulatory or accrediting agencies that require such checks.
- To identify students engaged in training at The University of Toledo who have a criminal history that may preclude them from participating in the clinical training programs, including but not limited to, care of patients in vulnerable populations.
- To advise students with a criminal history that they may want to consult with respective licensing boards regarding the impact of the criminal history on their ability to obtain professional licensure.

There has been a significant increase in the number of sites requiring background checks that have to be completed within one year prior to the fieldwork placement. It is the student’s responsibility to keep a copy of the background check and provide it for the specific fieldwork sites.

**Drug Screens.** There has been a significant increase in the number of sites requiring drug screens. Drug screening is site specific so students will need to check with each fieldwork site individually to inquire if there is a drug screen requirement. Some sites want the drug screen completed within a week of the start date; whereas, others do not have a required time frame. Some sites request a 5-panel screen, while others require a 10-panel. Ultimately, all students are responsible for determining the additional requirements of each site and completing those requirements in a timely manner so that fieldwork placement is not delayed.

**Financial Responsibilities.** The student will be responsible for all expenses associated with the fieldwork experiences. Each student should anticipate additional costs for housing (if necessary), meals and transportation. While many facilities are local to the Toledo area (within a 60-mile radius), students are expected to travel outside the Toledo area for at least one (1) of their fieldwork experiences.
Non-discrimination. The student has the right to be treated fairly and not to be discriminated against in any selection of fieldwork sites or by any representative of the academic or fieldwork facility.

General fieldwork policies/guidelines are as follows:

**Student selection.** Selection of students for fieldwork experiences will be done by the Coordinator of Fieldwork Education and Professional Development. The student’s background and prior clinical experience will be considered, as well as personal factors which may necessitate placement in certain locales. The Coordinator of Fieldwork Education and Professional Development makes the final assignment based on the student’s preference, the coordinator’s knowledge of the facility, the academic and clinical needs of the student and the availability of the facility when coordinated with other student’s choices. Availability of appropriate sites dictates placement.

Because of the many variables that affect fieldwork experiences, it is possible that placements will be canceled. If placements are canceled, the Coordinator of Fieldwork Education and Professional Development will meet with the student to determine an alternate plan. It is possible that fieldwork placement will be delayed due to these cancellations.

If a student requires placement in an area where there are no contracted facilities, the coordinator will make a reasonable attempt to locate possible sites. **Students are not to make contact with any facilities on behalf of the OTD Program. Contacts are only to be made by the coordinator or an assigned representative.** There is no guarantee that placements will occur in geographical areas where we do not have contracted sites. When a student requests a fieldwork placement that will require updating or establishing a contract with the facility, we will expect that the student has:

- Confirmed that he/she has explored and will be able to secure housing for the placement.
- Confirmed that he/she has the budget to complete the fieldwork placement in the desired location.

It is expected that if a contract is effected for the fieldwork placement, then the student will accept and attend the placement. Canceling out of a confirmed placement is a serious step. It has implications for current and future students and, therefore, the only acceptable reason to cancel a placement would be a true emergency or life event that is deemed by the Program Director or his/her designee, to be acceptable. Students **cannot** change the assigned fieldwork placements except for approved circumstances. An example of an approved circumstance includes illness. Examples of circumstances that would not be approved include:

- Changing one’s mind about the placement.
- Wanting to go somewhere else, instead.
- Financial reasons.
- Relationship issues.

**Scheduling.** Scheduling will follow the academic calendar and the requirements of the course with which it is integrated for Level I experiences. Level II experiences will be scheduled in accordance with the completion of academic course work. The following dates for Level II fieldwork reflect suggested dates. In certain instances, modification of this schedule may be necessary.

June 26 – September 15, 2017 (Class of 2018)
September 25 – December 15, 2015 (Class of 2018)

July 2 – September 21, 2018 (Class of 2019)
October 1 – December 21, 2018 (Class of 2019)

July 1 – September 20, 2019 (OTD Class of 2020)
September 30 – December 20, 2019 (OTD Class of 2020)
The dates are determined by the UT Coordinator of Fieldwork Education and Professional Development and the fieldwork educator. At no time is the student to negotiate rescheduling of the dates without extenuating circumstances and prior permission of the UT Coordinator of Fieldwork Education and Professional Development. The student should understand that his/her request for a change in dates may not be accommodated.

**Evaluation and Grading of Student Performance.** Evaluation of student performance during fieldwork experiences is an ongoing process which occurs during supervisory sessions, both formal and informal, as well as during the processing of fieldwork in the academic course work. All Level I and II experiences are graded on a satisfactory/unsatisfactory basis. The Coordinator of Fieldwork Education and Professional Development will assign the grade for Level I and Level II experiences based on input from the fieldwork educator, which includes midterm and final written reports (see Appendix B for the evaluation for 1st year Level I experiences; Appendix C for the 2nd year Level I experiences; and Appendix D for the evaluation for Level II experiences). It is the student’s responsibility to review these evaluation forms and raise any questions regarding the expectations with the coordinator prior to beginning the fieldwork placement. Additional requirements for completing fieldwork requirements can be found on individual course syllabi.

**UT Fieldwork Assignments.** Students will be expected to do additional UT assignments while they are at their fieldwork sites. It is possible that the student will need to spend supplementary time on these assignments in addition to his/her scheduled clinical time. These assignments are intended to integrate current course content, theory and clinical practice. The assignments are developmental in nature with more complex assignments occurring later in the students’ training with the culminating assignment occurring during the students’ Level II placements.

**Monitoring and Site Visits.** Site visits and telephone monitoring are primarily made by the Coordinator of Fieldwork Education and Professional Development, but may be made by any member of the Occupational Therapy Doctorate Program or the Administrative Secretary. The purpose of the monitoring is multidimensional and may include, but is not limited to:

- student performance evaluation,
- clinical site evaluation,
- clinical instructor evaluation,
- collaboration for clinical education development,
- assistance with managing student performance problems, and
- clinical staff education and development.

The visit will be scheduled to meet with the student and the fieldwork educator both individually and together to discuss the types of learning experiences, strengths and weaknesses of the student’s performance and the strengths and weaknesses of the student’s academic preparation. The discussion will be documented on the Fieldwork Site Visit Form and filed in the student’s fieldwork education file (see Appendix E for form). Appropriate information from the discussion will be shared with the academic faculty.

**Clinical Performance Intervention Policy.** Students who fail Level II fieldwork placements often display poor problem solving skills, poor clinical reasoning skills, and have difficulty responding to constructive feedback from the fieldwork educator (James & Musselman, 2005). The purpose of this policy is to outline a sequential procedure for instructional and/or disciplinary interventions in the event of unsatisfactory student performance during fieldwork placements. The intent is to encourage early intervention with an emphasis on collaborative problem solving in order to ensure successful student clinical performance. This procedure outlines the instructional or disciplinary intervention. The procedure usually begins in sequence, but may vary depending upon the nature of the unsatisfactory performance. Certain behaviors (see #5 below) may be cause for immediate withdrawal from the
placement. This sequence may be ended at any time by the student’s successful completion of a remedial
action plan.

1. The fieldwork educator reports unsatisfactory performance to student upon identification. The
fieldwork educator counsels the student on corrective actions. The fieldwork educator and the
student may consult with the UT Coordinator of Fieldwork Education and Professional Development for
guidance if necessary.

2. The fieldwork educator notifies the UT Coordinator of Fieldwork Education and Professional
Development of non-resolving problem(s). The fieldwork educator and the UT Coordinator of Fieldwork
Education and Professional Development further counsel the student on corrective actions. At this time,
a supervisory site visit (or telephone visit) may be made by the UT Coordinator of Fieldwork Education
and Professional Development. On the visit, the UT Coordinator of Fieldwork Education and
Professional Development will gather information from all parties involved. If the student performance
appears unsatisfactory, the UT Coordinator of Fieldwork Education and Professional Development will
suggest strategies for resolution of conflict. This may include, but is not limited to, possible removal from
site and reassignment to another site. If the student’s performance is found to be unsatisfactory, step 3
will be followed.

3. A written development plan will be developed jointly by the student, the fieldwork educator
and the UT Coordinator of Fieldwork Education and Professional Development. The development plan
will include, but is not limited to: a description of the problem; suggested learning strategies; outcome
measures; time lines; and consequences of success or failure to meet requirements set forth in the plan.
The fieldwork educator monitors student progress and provides formal (written) and informal feedback
to the student and UT Coordinator of Fieldwork Education and Professional Development for the
duration of the placement.

4. Continued unsatisfactory performance will result in assignment of a grade of either
“withdrawal”, “incomplete” or “unsatisfactory” for that specific fieldwork placement. The grade will be
determined by the UT Coordinator of Fieldwork Education and Professional Development with input
from the fieldwork educator and other involved parties. If the student is assigned an incomplete grade,
the student must satisfactorily complete a remedial fieldwork placement. If the student is assigned an
unsatisfactory grade, the student must re-enroll for the fieldwork course and repeat a fieldwork
placement of the same length as the previously failed fieldwork placement. The student will be able to
repeat only one Level I or Level II fieldwork experience. The assignment of remedial or repeat clinical
placements will be made by the UT Coordinator of Fieldwork Education and Professional Development
based upon the student’s needs.

5. Failure to satisfactorily complete the repeated fieldwork placement will result in a
recommendation for dismissal from the program to the College of Graduate Studies, in accordance with
the Occupational Therapy Program retention policies.

Immediate removal (prior to the scheduled ending date) from the site and/or an unsatisfactory grade
may be given for any fieldwork placement for the following:

• violation of patients’ rights,
• violation of the rights of others,
• violation of the AOTA Code of Ethics,
• unprofessional behavior,
• unsafe practice,
• substance abuse that affects performance,
• failure to complete any of the specified requirements, and
• continued unsatisfactory performance.

Student Critique of Fieldwork Experience. Student feedback regarding experiences at
fieldwork sites is an important means of assisting students to develop the ability to critically analyze
situations in a professional manner. It also provides the facility and the academic program with
information on the program, the clientele, supervision, and the ability to integrate the required academic
material in a practical application. Student evaluation forms for Level I experiences should be completed by each student at the conclusion of each Level I experience (see Appendix F for form). The Student Evaluation of the Fieldwork Experience (SEFWE) for Level II Fieldwork will be completed by the student and submitted in an online format at the end of the Level II experience. The SEFWE should be completed by the student prior to receiving a final performance evaluation from his/her supervisor. Then, after the Fieldwork Educator has reviewed the results of the performance evaluation with the student, the student will review the contents of the SEFWE with his/her Fieldwork Educator.

**C.2.0 Doctoral Level Experiential Component.** The student must successfully complete all coursework and Level II fieldwork and pass a competency requirement prior to commencement of the doctoral experiential component.

The competency requirement for the Occupational Therapy Doctoral Students at The University of Toledo is the NBCOT Practice Examination. Instructions to complete the competency requirements are provided in the OCCT8350 Fieldwork and Professional Development Seminar V course.
References


APPENDIX A

ACADEMIC AFFILIATION AGREEMENT

THIS ACADEMIC AFFILIATION AGREEMENT (“Agreement”) effective the ___ day of ___, 20___ (the “Effective Date”) is made between The University of Toledo (the “University”), a state university created and authorized under Section 3364 of the Ohio Revised Code with an address of 2801 West Bancroft, Toledo, Ohio 43606-3390 and ________ (“Affiliate”) located at ________.

1. Student Learning Experience.

1.1 The University has accredited graduate and undergraduate allied health and related programs for the education of students enrolled within its College of Health and Human Services (“Students”) and requires supervised access to direct patient/client care. The University will design, implement, administer and develop goals and objectives for the learning experiences of Students, hereinafter the “Program”.

1.2 Affiliate and Affiliate employees with supervisory responsibility for the Students will comply with the obligations and requirements under this Agreement consistent with the goals and objectives for the learning experiences as determined by the University. Affiliate is responsible for communicating and working with the University to implement the Program curriculum, teach the Students, and to provide appropriate learning experiences. Affiliate will provide continual supervision to all Students in the Program under this Agreement and will retain ultimate responsibility for the services provided to patients/clients.

1.3 Neither party to this Agreement will discriminate in employment or educational programs on the basis of race, color, religion, sex, age, ancestry, national origin, sexual orientation, gender identity and expression, military or veteran status, disability, familial status, political affiliation, or participation in protected activity.

1.4 Affiliate will designate a liaison to coordinate implementation of the Program with the University (“Program Coordinator”). The University will address concerns regarding the Program with the Program Coordinator for mutual resolution.

1.5 Affiliate agrees to evaluate Students in a timely manner as reasonably required by the University.

2. Placement and Removal. The placement and number of Students in the Program with Affiliate will be determined jointly by Affiliate and the University based upon the educational requirements of the curriculum and available facilities used by Affiliate. Affiliate will have the right to refuse to accept for placement or to request the removal of any Students in the Program with Affiliate for cause upon written notification to the University, such notification setting forth, in detail, the basis for the refusal or request for removal. Any disciplinary proceedings against the Students will be conducted by the University in accordance with University policies and procedures.

3. Student Health Requirements. The University will ensure that each assigned Student has met the University’s health requirements required of all Students participating in clinical rotations.

4. Student Injury. Affiliate will provide immediate medical attention to a Student, at Student’s expense, in the event of a Student’s exposure to infectious or environmental hazards, or other occupational injuries as a result of a clinical assignment.
5. **Expenses of Program.** The Students participate in the Program with no expectation of reimbursement of any expense or expectation of any salary or other monetary consideration. The University and Affiliate agree that there are no expenses of the Program that are expected or anticipated to be paid by one party to the other party.

6. **Patient/Client Care Services.** Affiliate will permit Students to provide, participate in, or assist in the provision of care and related services to patients/clients of the Affiliate only (i) under supervision and with adequate mentoring; (ii) consistent with their training, experience and credentialing; (iii) consistent with all applicable laws, regulations, and accreditation requirements; and (iv) subject to patient/client choice and professional appropriateness.

7. **Records and Compliance.**
   
   7.1 For purposes of the Family Educational Rights and Privacy Act ("FERPA"), Affiliate is a service provider performing under a contract with the University, and accordingly Affiliate is designated as a University official. The University agrees that, for purposes of FERPA, Affiliate officials have a legitimate educational interest in having access to Students’ education records; Affiliate officials are performing services or functions that would otherwise be performed by University employees; Affiliate officials are under the direct control of the University with respect to the use and maintenance of educational records, that Affiliate is subject to FERPA requirements with respect to re-disclosure of personally identifiable information, and that Affiliate will not disclose personally identifiable information from a student record without the prior written consent of the eligible student and the University, unless the disclosure meets one of the exceptions recognized by FERPA.

   7.2 University will direct Students to comply with the policies and procedures of Affiliate, including those governing the use and disclosure of individually identifiable health information under federal law, specifically 45 CFR parts 160 and 164 (HIPAA Privacy). Solely for the purpose of defining their role in relation to the use and disclosure of Affiliate’s protected health information, Students are considered members of the Affiliate’s workforce, as that term is defined by 45 CFR 160.103, when engaged in activities pursuant to this Agreement. However, Students are not and will not be considered to be employees of the Affiliate.

   7.3 In the event Affiliate undertakes to bill for any services rendered by the Students in the Program, or for the services of other health care professionals, Affiliate is responsible for compliance with all applicable laws, and will maintain such records and documentation as may be required to demonstrate such compliance. Affiliate represents that this experience for Students is of an educational nature and is not replacing paid work of employees as prohibited under the Fair Labor Standards Act or other applicable law.

8. **Insurance Coverage.**
8.1 Affiliate will provide for itself, its facilities, and its employees general liability insurance of not less than $1 million coverage and professional liability insurance of not less than $1 million per occurrence and $3 million aggregate. Affiliate will provide certificates of insurance or other documents evidencing this insurance coverage upon request.

8.2 The University will provide, for itself, its employees and Students, the following: general liability insurance of not less than $1 million coverage and professional liability insurance of not less than $1 million per occurrence and $3 million aggregate. The University will provide certificates of insurance or other documents evidencing the insurance coverage upon request.

8.3 Affiliate agrees to notify the University of any and all actual, potential or alleged claims arising from the Student’s participation under this Agreement.

9. **Legal Status.** Students are not deemed or considered to be employees of the University or Affiliate for any purposes as a result of their participation in the Program. Except. It is mutually understood and agreed by the parties that Affiliate and its employees, contractors and agents are at all times acting and performing as independent contractors.

10. **Term and Termination.**

10.1 This Agreement will continue for a period of one (1) year from the Effective Date, unless terminated earlier as provided herein. This Agreement will automatically renew for four (4) successive terms of one (1) year each beginning on the anniversary of the Effective Date, unless terminated as provided for below.

10.2 Either party may terminate this Agreement at any time with or without cause or penalty by giving the other party written notice of termination at least one hundred and eighty (180) days prior to the end of the academic term. In the event of termination, the parties will make every effort to temporarily continue this Agreement or make substitute arrangements to allow the Students to continue their training and education with Affiliate for the balance of their rotation.

11. **Notices.** Any notice to either party hereunder must be in writing signed by the party giving it, and will be served personally or by registered or certified mail addressed as follows:

To the University: The University of Toledo  
Attn: Dean ____________________________, Mail Stop #-________  
2801 West Bancroft Street  
Toledo, Ohio 43606

To Affiliate:  
_________________________________  
_________________________________  
_________________________________

Or to such other addressee as may be hereafter designated by written notice. All such notices will be effective only when received by the addressee.

12. **Sanctions.** During the term of this Agreement, and thereafter if the matter relates to services provided to the University during the term of this Agreement, if Affiliate, an Affiliate employee, or Affiliate agent under this Agreement becomes the subject of an investigation relating to health care fraud, abuse, or misconduct, or should be sanctioned by or debarred or excluded from participation in any federal or state health care program, including Medicare and Medicaid, Affiliate agrees to immediately notify the
University of such event. Upon any such sanction, debarment, exclusion, or ineligibility, the University 
will have the right to immediately terminate this Agreement with Affiliate without penalty or cost 

13. **Miscellaneous.** This Agreement will be governed by and construed in accordance with the laws 
of the State of Ohio. This Agreement, including its exhibits, which are incorporated herein by reference, 
constitutes the entire agreement between the parties with respect to the subject matter hereof, supersedes 
all other communications, whether written or oral and is binding upon the parties' successors, heirs, 
executors, legal representatives, and permitted assigns. This Agreement cannot be amended or modified in 
any respect, unless such amendment or modification is evidenced by a written instrument executed by all 
parties hereto. Except as specifically permitted herein, neither this Agreement nor any rights or obligations 
hereunder may be transferred or assigned without the other party's prior written consent, and any attempt 
to the contrary will be void. In the event that any provision or portion of this Agreement will be determined 
to be invalid or unenforceable for any reason by final judgment of a court of competent jurisdiction, the 
remaining provisions or portions of this Agreement will be unaffected there by and will remain in full force 
and effect to the fullest extent permitted by law. Waiver of any provision hereof in one instance will not 
preclude enforcement thereof on future occasions. Any such waiver must be in writing in order to be 
effective, and no such waiver or waivers will serve to establish a course of performance between the parties 
contradictory to the terms hereof. Headings are for reference purposes only and have no substantive effect. 
Whenever the context of this Agreement requires, words used in the singular will be construed to mean and 
include the plural and vice versa, and pronouns of any gender will be deemed to include and designate the 
masculine, feminine, or neuter genders. This Agreement may be executed in counterparts, each of which 
will be deemed an original and all of which, when taken together, will constitute one agreement. 

IN WITNESS WHEREOF, the parties have caused this Agreement to be signed by their authorized 
representatives.

**THE UNIVERSITY OF TOLEDO**

By: ________________________________
Name: ________________________________
Title: ________________________________
Date: ________________________________

**INSERT AFFILIATE LEGAL NAME**

By: ________________________________
Name: ________________________________
Title: ________________________________
Date: ________________________________
APPENDIX B

THE UNIVERSITY OF TOLEDO
OCCUPATIONAL THERAPY DOCTORATE PROGRAM
LEVEL I FIELDWORK EVALUATION (1ST YEAR)

Student Name:__________________________________________
Facility Name:________________________________________________________________________
Facility Address:______________________________________________________________________
Type of Setting:_______________________________________________________________________ Dates of Assignment:__________________________
Total Number of Hours:______________________________

On the basis of your observation and interaction with the student, please indicate your rating by placing a check in the appropriate column. If the item is not applicable to the student’s experience, please mark N/A. Please comment or cite examples in the comments section.

S = Satisfactory  NI = Needs Improvement  N/A = Not applicable

<table>
<thead>
<tr>
<th>Professional skill or ability</th>
<th>S</th>
<th>NI</th>
<th>N/A</th>
<th>Comments</th>
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<tr>
<td>1. Did the student communicate appropriately with the fieldwork supervisor (both verbal and nonverbal)?</td>
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<td>2. Did the student communicate appropriately with other employees and staff (both verbal and nonverbal)?</td>
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<td>4. Did the student participate in the fieldwork experience with enthusiasm?</td>
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<td>5. Was the student punctual and prepared for fieldwork sessions?</td>
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<td>6. Was the student dressed/groomed appropriately?</td>
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<td>7. Did the student manage his/her emotions and behaviors professionally?</td>
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What are the student’s strengths?

In what area(s) does this student show need for continued growth or improvement?

Other comments?

________________________________________________________________________

Level I Fieldwork Supervisor Name | Title
____________________________________ | ___________________________

Signature | Date
___________________________________________ | _____________________________

I have read and have a copy of this report:

________________________________________________________________________

Level I Fieldwork Student Signature | Date
___________________________________________ | _____________________________
THE UNIVERSITY OF TOLEDO
OCCUPATIONAL THERAPY DOCTORATE PROGRAM
LEVEL I FIELDWORK EVALUATION (2ND YEAR)

Student Name:___________________________________________________________
Facility Name:___________________________________________________________
Facility Address:_________________________________________________________
Type of Setting:_________________________ Dates of Assignment:________________
Total Number of Hours:________________

On the basis of your observation and interaction with the student, please indicate your rating by placing a check in the appropriate column. If the item is not applicable to the student’s experience, please mark N/A. Please comment or cite examples in the comments section.
S = Satisfactory
NI = Needs Improvement
N/A = Not applicable

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<td>3. Did the student communicate appropriately with clients and/or caregivers (both verbal and nonverbal)?</td>
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<td>4. Did the student participate in the supervisory relationship?</td>
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<td>5. Did the student orally report client data and observations accurately and appropriately?</td>
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<td>6. When assigned, did the student provide written documentation that was clear and used appropriate terminology?</td>
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<td>7. Was the student able to identify occupational performance deficits/diagnostic categories?</td>
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<td>8. If assessments were performed, was the student able to select and administer appropriately?</td>
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<td>9. Did the student recognize the occupational therapy service that could be provided to the client?</td>
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<td>10. Did the student understand the theoretical framework for intervention?</td>
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<td>11. If the student provided therapy for the client, did he/she carry out the therapy satisfactorily?</td>
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<td>Professional skill or ability</td>
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<td>12. Did the student participate in the fieldwork experience with enthusiasm?</td>
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<td>13. Did the student assume responsibility for self-directed learning?</td>
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<td>14. Was the student punctual and prepared for fieldwork sessions?</td>
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<td>15. Was the student dressed/groomed appropriately?</td>
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<td>16. Did the student respect client rights and maintain confidentiality?</td>
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<td>17. Did the student take initiative for learning time management?</td>
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<td>18. Did the student respond appropriately and modify his or her behavior in response to supervisor feedback?</td>
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<td>19. Did the student accept responsibility for completing assignments in a timely, professional manner?</td>
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<td>20. Did the student manage his/her emotions and behaviors professionally?</td>
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<td>21. Did the student share relevant classroom and research information?</td>
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What are the student’s strengths?

In what area(s) does this student show need for continued growth or improvement?

Other comments?

________________________  __________________________  
Level I Fieldwork Supervisor Name  Title

________________________  __________________________  
Signature  Date

I have read and have a copy of this report:

________________________  __________________________  
Level I Fieldwork Student Signature  Date
APPENDIX D

AOTA © The American Occupational Therapy Association, Inc.

Fieldwork Performance Evaluation
For The Occupational Therapy Student

NAME: (LAST) (FIRST) (MIDDLE)

COLLEGE OR UNIVERSITY

FIELDWORK SETTING:

NAME OF ORGANIZATION/FACILITY

ADDRESS: (STREET OR PO BOX)

CITY STATE ZIP

TYPE OF FIELDWORK

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

FROM TO:

DATES OF PLACEMENT

NUMBER OF HOURS COMPLETED

FINAL SCORE

PASS: NO PASS:

SIGNATURES:
I HAVE READ THIS REPORT.

SIGNATURE OF STUDENT

NUMBER OF PERSONS CONTRIBUTING TO THIS REPORT

SIGNATURE OF RATER #1

PRINT NAME/CREDENTIALS/POSITION

SIGNATURE OF RATER #2 (IF APPLICABLE)

PRINT NAME/CREDENTIALS/POSITION

SUMMARY COMMENTS:
(ADDRESS ESSENTIAL CLINICAL COMPETENCE)

AOTA grants permission to photocopy the Fieldwork Performance Evaluation for the Occupational Therapy Student for training purposes only. Training purposes encompass

AOTA grants permission to photocopy the
Fieldwork Performance Evaluation
For The Occupational Therapy Student

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

PURPOSE

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

The evaluation is designed to measure the performance of the occupational therapy process and was not designed to measure the specific occupational therapy tasks in isolation. This evaluation reflects the 1985 Accreditation Council for Occupational Therapy Education Standards and the National Board for Certification in Occupational Therapy, Inc. Practice Analysis results. In addition, this evaluation allows students to evaluate their own strengths and weaknesses in relation to their performance as an occupational therapist.

USE OF THE FIELDWORK PERFORMANCE EVALUATION FOR THE OCCUPATIONAL THERAPY STUDENT

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

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

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

DIRECTIONS FOR RATING STUDENT PERFORMANCE

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

OVERALL MIDTERM SCORE

Satisfactory Performance .......... 90 and above
Unsatisfactory Performance .......... 89 and below

OVERALL FINAL SCORE

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

RATING SCALE FOR STUDENT PERFORMANCE

1 - Exceeding Standards: Performance highly resistant to change
   This rating is rarely given and would represent the top 5% of all the students you have supervised.

2 - Meets Standards: Performance is consistent with entry-level practice.
   This rating is frequently given at midterm and is a strong rating at final.

3 - Needs improvement: Performance is progressing but still needs improvement to meet entry-level practice. This is a realistic rating of performance at midterm and some ratings of 3 may be reasonable at final.

4 - Unsatisfactory: Performance is below standards and requires improvement for entry-level practice. This rating is given when there is a concern about performance.
### RATING SCALE FOR STUDENT PERFORMANCE

1. **Exceeds Standards:** Performance is highly skilled and well-received. This rating is rarely given and would represent the top 5% of all the students you have supervised.

2. **Meets Standards:** Performance is consistent with entry-level practice. This rating is infrequently given in mid-term and is a strong rating at final.

3. **Needs improvement:** Performance is progressing but still needs improvement for entry-level practice. This is a realistic rating of performance at mid-term, and some ratings of 2 may be reasonable at the final.

4. **Unsatisfactory:** Performance is below standards and requires development for entry-level practice. This rating is given when there is a concern about performance.

### I. FUNDAMENTALS OF PRACTICE:

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

1. **Adheres to ethics:** Adheres consistently to the American Occupational Therapy Association Code of Ethics and site’s policies and procedures including when relevant, those related to human subject research.
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

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

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

### II. BASIC TENETS:

4. **Clearly and confidently articulates the values and beliefs of the occupational therapy profession to clients, families, significant others, colleagues, service providers, and the public.**
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

5. **Clearly, confidently, and accurately articulates the value of occupation as a method and desired outcome of occupational therapy to clients, families, significant others, colleagues, service providers, and the public.**
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

6. **Clearly, confidently, and accurately communicates the roles of the occupational therapist and occupational therapy assistant to clients, families, significant others, colleagues, service providers, and the public.**
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

7. **Collaborates with client, family, and significant others throughout the occupational therapy process.**
   - Midterm: 1 2 3 4
   - Final: 1 2 3 4

### Comments on strengths and areas for improvement:

- **Midterm**
- **Final**

- **Final**
II. EVALUATION AND SCREENING

8. Articulates a clear and logical rationale for the evaluation process.
   \[\text{Midterm} \quad 1 \quad 2 \quad 3 \quad 4\]
   \[\text{Final} \quad 1 \quad 2 \quad 3 \quad 4\]

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

10. Determines client's occupational profile and performance through appropriate assessment methods.
    \[\text{Midterm} \quad 1 \quad 2 \quad 3 \quad 4\]
    \[\text{Final} \quad 1 \quad 2 \quad 3 \quad 4\]

11. Assesses client factors and context(s) that support or hinder occupational performance.
    \[\text{Midterm} \quad 1 \quad 2 \quad 3 \quad 4\]
    \[\text{Final} \quad 1 \quad 2 \quad 3 \quad 4\]

12. Obtains sufficient and necessary information from relevant resources such as client, families, significant others, service providers, and records prior to and during the evaluation process.
    \[\text{Midterm} \quad 1 \quad 2 \quad 3 \quad 4\]
    \[\text{Final} \quad 1 \quad 2 \quad 3 \quad 4\]

13. Administers assessments in a uniform manner to ensure findings are valid and reliable.
    \[\text{Midterm} \quad 1 \quad 2 \quad 3 \quad 4\]
    \[\text{Final} \quad 1 \quad 2 \quad 3 \quad 4\]

14. Adjusts/Modifies the assessment procedures based on client's needs, behaviors, and culture.
    \[\text{Midterm} \quad 1 \quad 2 \quad 3 \quad 4\]
    \[\text{Final} \quad 1 \quad 2 \quad 3 \quad 4\]

15. Interprets evaluation results to determine client's occupational performance strengths and challenges.
    \[\text{Midterm} \quad 1 \quad 2 \quad 3 \quad 4\]
    \[\text{Final} \quad 1 \quad 2 \quad 3 \quad 4\]

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

17. Documents the results of the evaluation process that demonstrates objective measurement of client's occupational performance.
    \[\text{Midterm} \quad 1 \quad 2 \quad 3 \quad 4\]
    \[\text{Final} \quad 1 \quad 2 \quad 3 \quad 4\]

Comments on strengths and areas for improvement:
   \[\text{Midterm} \quad 1 \quad 2 \quad 3 \quad 4\]
   \[\text{Final} \quad 1 \quad 2 \quad 3 \quad 4\]

IV. INTERVENTION

18. Articulates a clear and logical rationale for the Intervention process.
    \[\text{Midterm} \quad 1 \quad 2 \quad 3 \quad 4\]
    \[\text{Final} \quad 1 \quad 2 \quad 3 \quad 4\]

19. Utilizes evidence from published research and relevant resources to make informed intervention decisions.
    \[\text{Midterm} \quad 1 \quad 2 \quad 3 \quad 4\]
    \[\text{Final} \quad 1 \quad 2 \quad 3 \quad 4\]
### 20. Chooses occupations that motivate and challenge clients.

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

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</table>

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

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</table>

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

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

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<td>Final</td>
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</table>

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

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</table>

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

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</table>

### 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.

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

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</table>

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

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

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</table>

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

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<td>Final</td>
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</tbody>
</table>

**Comments on strengths and areas for improvement:**

- Midterm
- Final

- Final
RATINGS SCALE FOR STUDENT PERFORMANCE

- Excellent: Standards are met or exceeded. This rating is given to students who consistently show excellence in all aspects of the course.
- Meets Standards: Performance is consistent with entry-level practice. This rating is given to students who meet the standards of the course.
- Fairly Improves: Performance is progressing but still needs improvement for entry-level practice. This rating is given to students who are making progress but need continued improvement.
- Needs Improvement: Performance is not yet consistent with entry-level practice. This rating is given to students who are not meeting the standards of the course.

VI. COMMUNICATION

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

- Midterm: 2
- Final: 3

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

- Midterm: 3
- Final: 3

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

- Midterm: 4
- Final: 4

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

- Midterm: 4
- Final: 4

Comments on strengths and areas for improvement:

• Midterm

• Final

VII. PROFESSIONAL BEHAVIORS

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

- Midterm: 4
- Final: 4

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

- Midterm: 4
- Final: 4

38. Responds constructively to feedback.

- Midterm: 3
- Final: 4

39. Demonstrates consistent work behaviors including time management, dependability, and work site maintenance.

- Midterm: 4
- Final: 4

40. Demonstrates effective time management.

- Midterm: 4
- Final: 4

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

- Midterm: 4
- Final: 4

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

- Midterm: 4
- Final: 4

Comments on strengths and areas for improvement:

• Midterm

• Final
**PERFORMANCE RATING SUMMARY SHEET**

<table>
<thead>
<tr>
<th>Performance Items</th>
<th>Midterm Ratings</th>
<th>Final Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>I. FUNDAMENTALS OF PRACTICE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Adheres to ethics</td>
<td></td>
<td></td>
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<tr>
<td>2. Adheres to safety regulations</td>
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<tr>
<td>3. Uses judgment in safety</td>
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<tr>
<td><strong>II. BASIC TENETS OF OCCUPATIONAL THERAPY</strong></td>
<td></td>
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<tr>
<td>4. Articulates values and beliefs</td>
<td></td>
<td></td>
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<tr>
<td>5. Articulates value of occupation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Communicates role of occupational therapist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Collaborates with clients</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>III. EVALUATION AND SCREENING</strong></td>
<td></td>
<td></td>
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<tr>
<td>8. Articulates clear rationale for evaluation</td>
<td></td>
<td></td>
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<tr>
<td>9. Selects relevant methods</td>
<td></td>
<td></td>
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<tr>
<td>10. Determines occupational profile</td>
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<td></td>
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<tr>
<td>11. Assesses client and contextual factors</td>
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<tr>
<td>12. Obtains sufficient and necessary information</td>
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<tr>
<td>13. Administers assessments</td>
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<tr>
<td>14. Adjusts/modifies assessment procedures</td>
<td></td>
<td></td>
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<tr>
<td>15. Interprets evaluation results</td>
<td></td>
<td></td>
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<tr>
<td>16. Establishes accurate plan</td>
<td></td>
<td></td>
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<tr>
<td>17. Documents results of evaluation</td>
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<tr>
<td><strong>IV. INTERVENTION</strong></td>
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<tr>
<td>18. Articulates clear rationale for intervention</td>
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<td></td>
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<tr>
<td>19. Utilizes evidence to make informed decisions</td>
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<tr>
<td>20. Chooses occupations that motivate and challenge</td>
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<td></td>
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<tr>
<td>21. Selects relevant occupations</td>
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<td></td>
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<tr>
<td>22. Implements client-centered interventions</td>
<td></td>
<td></td>
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<tr>
<td>23. Implements occupation-based interventions</td>
<td></td>
<td></td>
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<tr>
<td>24. Modifies approach, occupation, and environment</td>
<td></td>
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<tr>
<td>25. Updates, modifies, or terminates intervention plan</td>
<td></td>
<td></td>
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<tr>
<td>26. Documents client's response</td>
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<tr>
<td><strong>V. MANAGEMENT OF OT SERVICES</strong></td>
<td></td>
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</tr>
<tr>
<td>27. Demonstrates ability to assign through practice or discussion</td>
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<tr>
<td>28. Demonstrates ability to collaborate through practice or discussion</td>
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<tr>
<td>29. Understands costs and funding</td>
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<tr>
<td>30. Accomplishes organizational goals</td>
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<tr>
<td>31. Produces work in expected time frame</td>
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<tr>
<td><strong>VI. COMMUNICATION</strong></td>
<td></td>
<td></td>
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<tr>
<td>32. Communicates verbally and nonverbally</td>
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<td></td>
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<tr>
<td>33. Produces clear documentation</td>
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<td></td>
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<tr>
<td>34. Written communication is legible</td>
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<tr>
<td>35. Uses language appropriate to recipient</td>
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<tr>
<td><strong>VII. PROFESSIONAL BEHAVIORS</strong></td>
<td></td>
<td></td>
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<tr>
<td>36. Collaborates with supervisor</td>
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<tr>
<td>37. Takes responsibility for professional competence</td>
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<td>38. Responds constructively to feedback</td>
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<tr>
<td>39. Demonstrates consistent work behaviors</td>
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<td>40. Demonstrates time management</td>
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<tr>
<td>41. Demonstrates positive interpersonal skills</td>
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<tr>
<td>42. Demonstrates respect for diversity</td>
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<tr>
<td><strong>TOTAL SCORE</strong></td>
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**MIDTERM:**
- Satisfactory Performance .......... 90 and above
- Unsatisfactory Performance .......... 60 and below

**FINAL:**
- Pass .................................. 122 points and above
- No Pass ................................. 121 points and below
REFERENCES


GLOSSARY

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

- body functions (a client factor, including physical, cognitive, psychosocial aspects)—"the physiological function of body systems (including psychological functions)" (WHC, 2001, p. 10);
- body structures—"anatomical parts of the body including organs, limbs, and their components that support body functions" (WHC, 2001, p. 10).

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

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

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

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

Context: Refers to a variety of interrelated conditions within and surrounding the client that influence performance. Contexts include cultural, physical, social, personal, spiritual, temporal and virtual.

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

Efficacy: Having the desired influence or outcome (from Nelstedt and Crepeau, eds. Willard & Spackman’s Occupational Therapy, 9th edition, 1980)


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

Occupation: Groups of activities and tasks of everyday life, named, organized, and given value and meaning by individuals and a culture; occupation is everything people do to occupy themselves, including looking after themselves (self-care), enjoying life (leisure), and contributing to the social and economic fabric of their communities (productivity); the set of constraints and the potentialities, means of occupational therapy. (Townsend, ed., 1997, Enabling Occupation: An Occupational Therapy Perspective, p. 18)

Occupational Performance: The result of a dynamic, interwoven relationship between persons, environment, and occupation over a person’s lifespan, the ability to choose, organize, and satisfactorily perform meaningful occupations that are culturally defined and are appropriate for looking after oneself, enjoying life, and contributing to the social and economic fabric of a community. (Townsend, ed., 1997, Enabling Occupation: An Occupational Therapy Perspective, p. 18)

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

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

Theory: "An organized way of thinking about given phenomena. In occupational therapy the phenomenon of concern is occupational health. Theory attempts to (1) define and explain the relationships between concepts or ideas related to the phenomenon of interest, (2) explain how these relationships can predict behavior or events, and (3) suggest ways that the phenomenon can be changed or controlled. Occupational therapy theory is concerned with four major concepts related to occupational health: person, environment, health, and occupation." (Nelstedt and Crepeau, eds. Willard & Spackman’s Occupational Therapy, 9th ed., 1988, p. 62)

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Published in the United States of America.
APPENDIX E

THE UNIVERSITY OF TOLEDO
OCCUPATIONAL THERAPY DOCTORATE PROGRAM

FIELDWORK SITE VISIT FORM

<table>
<thead>
<tr>
<th>Student</th>
<th>Faculty Member</th>
</tr>
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<tbody>
<tr>
<td>Fieldwork Site</td>
<td>Fieldwork Educator</td>
</tr>
<tr>
<td>Date</td>
<td><strong>Please circle level of fieldwork:</strong></td>
</tr>
</tbody>
</table>

| 1. Safety | **Comments** |
| 2. Professional Behaviors | |
| 3. Communication/ Interpersonal Skills | |
| 4. Documentation | |
| 5. Client Evaluation | |
| 6. Critical Thinking and Problem Solving | |
| 7. Intervention Planning and Implementation | |
| 8. Client/ Family Education | |
| 10. Time Management and Follow Through | |

Level I Fieldwork (1st year)  F, Su, Sp
Level I Fieldwork (2nd year)  F, Su, Sp
Level II Fieldwork (3rd year) 1st, 2nd, 3rd
**Academic Preparation (assessed by Fieldwork Educator and student):**

1. Curricular Strengths:

2. Curricular Weaknesses:

**Student Feedback:**

<table>
<thead>
<tr>
<th>Item</th>
<th>Appropriate</th>
<th>Inappropriate</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Self-Assessment of Performance</td>
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<tr>
<td>2. Level of Supervision</td>
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<tr>
<td>3. Timing, Frequency and Appropriateness of Feedback</td>
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<tr>
<td>4. Caseload (variety, number, etc.)</td>
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**Additional Comments:**

**Faculty Comments:**

_____  No concerns at this time. Progressing as expected.

_____  Follow-up required (describe)
**STUDENT EVALUATION OF LEVEL I FIELDWORK EXPERIENCE**

<table>
<thead>
<tr>
<th>Characteristics of Fieldwork Educator:</th>
<th>AGREE</th>
<th>DISAGREE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Was accessible to the student</td>
<td>1  2  3  4  5</td>
<td></td>
</tr>
<tr>
<td>Encouraged active participation</td>
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<tr>
<td>Provided structured opportunities to develop clinical skills</td>
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<td></td>
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<tr>
<td>Provided frequent feedback</td>
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<tr>
<td>Provided support and encouragement</td>
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<tr>
<td>Was an effective role model in:</td>
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<tr>
<td>Building rapport with clients</td>
<td>1  2  3  4  5</td>
<td></td>
</tr>
<tr>
<td>Defining client problems</td>
<td>1  2  3  4  5</td>
<td></td>
</tr>
<tr>
<td>Performing treatment</td>
<td>1  2  3  4  5</td>
<td></td>
</tr>
<tr>
<td>Working with other team members</td>
<td>1  2  3  4  5</td>
<td></td>
</tr>
<tr>
<td>Professional behavior and values</td>
<td>1  2  3  4  5</td>
<td></td>
</tr>
</tbody>
</table>

Please provide feedback about your Level I Fieldwork experience. This will help us improve the experiences offered. Your information will be kept confidential.
Characteristics of the setting

Were you able to participate at a comfortable pace? Was too much expected? Too little?

Did you have an opportunity to observe a variety of OT or other professional roles, types of service delivery, and/or team interaction?

Was this experience effective in enhancing classroom learning? Please describe.

From your perspective, what are the strengths of this facility for Level I fieldwork education?

Also from your perspective, what are the limitations of this facility as a site for fieldwork education?

What recommendations do you have to improve the quality of the fieldwork experience for others?

Would you recommend that we place students in this particular fieldwork setting again? Why or why not?

Please submit to the Coordinator of Fieldwork Education and Professional Development.

Thanks for your feedback!