



## COLLEGE OF HEALTH & HUMAN SERVICES OCCUPATIONAL THERAPY DOCTORATE PROGRAM

### Manual for Level I and Level II Fieldwork

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*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.*

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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/hhs/ot/>

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## **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).

It is the responsibility of the occupational therapy program to design experiences that will encourage reflective practice, clinical reasoning, enable ethical decision-making by instilling moral values and beliefs, and develop qualities of competence and professionalism within its students (ACOTE, 2012). Supervised fieldwork experience is also 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.

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 public.

## **LEVELS OF FIELDWORK**

**Level I Fieldwork.** The Accreditation Council for Occupational Therapy Education (ACOTE) Standards and Interpretative Guidelines (2018) 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 emerging 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 and Professional Development 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 and Level I Fieldwork is completed. Level I fieldwork cannot be substituted for any part of the Level II fieldwork. The goal of Level II fieldwork is to help transition occupational therapy students from their role as a student to the role of a practitioner and to allow students to apply theoretical concepts learned in the classroom to actual patients in real practice settings. (Brzykcy, Geraci, Ortega, Trenary, & McWilliams, 2016). During Level II fieldwork, students progressively assume responsibility for the delivery of occupational therapy services to 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.

Students in the program complete two 12-week fieldwork experiences at full-time capacity in two different fieldwork settings. Exceptions to this are decided on a case-by-case basis. In the case of an exception, the fieldwork placement may be completed on a part-time basis, as defined by the fieldwork placement in accordance with the fieldwork placement's usual and customary personnel policies, as long as it is at least 50% of a full-time employee at that site. The 2018 Standards established guidelines for Level II fieldwork include the following:

- a minimum 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 2018 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 is 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 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 curricular design of 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 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. 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. For all affiliation agreements, the students 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. Grenier (2015) found that fieldwork educators who demonstrated well-developed interpersonal skills, demonstrated qualities of professionalism, and had realistic expectations of the students had a positive influence on the student learning process. 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](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 no 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.

**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:  
<https://www.utoledo.edu/graduate/files/Graduate%20Student%20Handbook%202018-2019.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 initiated 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. You will receive your Level II fieldwork dates in your Fieldwork and Professional Development course series.

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 1<sup>st</sup> year Level I experiences; Appendix C for the 2<sup>nd</sup> 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 UToledo 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 V, OCCT8360 Level II Fieldwork, and OCCT8370 Level II Fieldwork.

## References

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## 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 ("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 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. 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 University. Affiliate is responsible for communicating and working with 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 Nondiscrimination: 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. Parties are subject to University inclusiveness policies found at <http://www.utoledo.edu/policies/administration/diversity/>.

1.4 Affiliate will designate a liaison to coordinate implementation of the Program with University ("Program Coordinator"). 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 University.

2. **Placement and Removal.** The placement and number of Students in the Program with Affiliate will be determined jointly by Affiliate and 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 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 University in accordance with University policies and procedures.

3. **Student Health Requirements.** University will ensure that each assigned Student has met University's health requirements required of all Students participating in the learning experiences hereunder.

4. **Student Injury.** To the extent available, 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 resulting from participation in the learning experience hereunder.

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. 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. **Care Services.** Affiliate will permit Students to provide, participate in, or assist in the provision of care and related services to the appropriate people 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 University and Affiliate acknowledge and agree that Student records are provided to Affiliate for purposes of Affiliate performing a business function or providing an educational experience on behalf of University (a function that University normally would perform itself). The purpose, scope and duration of the services or experience provided by Affiliate for which Student records are disclosed and the specific Student records to be disclosed are set forth in this Agreement. Affiliate agrees that it will use personally identifiable information from Student records only to meet the purpose or purposes of the services or experience as stated in this Agreement. Affiliate agrees to conduct the services or experience in a manner that does not permit personal identification of Students by anyone other than employees and contractors of Affiliate who need to know such information for purposes of performing the services or experiences hereunder.

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 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. University will provide certificates of insurance or other documents evidencing the insurance coverage upon request.

8.3 Affiliate agrees to notify 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 University or Affiliate for any purposes as a result of their participation in the Program. 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 University:           The University of Toledo  
                                  Attn: Dean Christopher Ingersoll, Mail Stop #119  
                                  2801 West Bancroft Street  
                                  Toledo, Ohio 43606

To Affiliate:             Affiliate Name  
                                  Attn:  
                                  Address  
                                  City, State, Zip  
                                  Phone

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 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 University of such event. Upon any such sanction, debarment, exclusion, or ineligibility, 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 thereby 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**

**INSERT AFFILIATE NAME**

By: \_\_\_\_\_  
Signature

By: \_\_\_\_\_  
Signature

Name: \_\_\_\_\_  
Christopher D. Ingersoll

Name: \_\_\_\_\_

Title: \_\_\_\_\_  
Dean

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

**APPENDIX B**  
**THE UNIVERSITY OF TOLEDO**  
**OCCUPATIONAL THERAPY DOCTORATE PROGRAM**  
**LEVEL I FIELDWORK EVALUATION (1<sup>ST</sup> 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

<b>Professional skill or ability</b>	<b>S</b>	<b>NI</b>	<b>N/A</b>	<b>Comments</b>
1. Did the student communicate appropriately with the fieldwork supervisor (both verbal and nonverbal)?				
2. Did the student communicate appropriately with other employees and staff (both verbal and nonverbal)?				
3. Did the student communicate appropriately with clients and/or caregivers (both verbal and nonverbal)?				
4. Did the student participate in the fieldwork experience with enthusiasm?				
5. Was the student punctual and prepared for fieldwork sessions?				
6. Was the student dressed/groomed appropriately?				
7. Did the student manage his/her emotions and behaviors professionally?				

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 C**  
**THE UNIVERSITY OF TOLEDO**  
**OCCUPATIONAL THERAPY DOCTORATE PROGRAM**  
**LEVEL I FIELDWORK EVALUATION (2<sup>ND</sup> 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

<b>Professional skill or ability</b>	<b>S</b>	<b>NI</b>	<b>N/A</b>	<b>Comments</b>
1. Did the student communicate appropriately with the fieldwork supervisor (both verbal and nonverbal)?				
2. Did the student communicate appropriately with other employees and staff (both verbal and nonverbal)?				
3. Did the student communicate appropriately with clients and/or caregivers (both verbal and nonverbal)?				
4. Did the student participate in the supervisory relationship?				
5. Did the student orally report client data and observations accurately and appropriately?				
6. When assigned, did the student provide written documentation that was clear and used appropriate terminology?				
7. Was the student able to identify occupational performance deficits/diagnostic categories?				
8. If assessments were performed, was the student able to select and administer appropriately?				
9. Did the student recognize the occupational therapy service that could be provided to the client?				
10. Did the student understand the theoretical framework for intervention?				

11. If the student provided therapy for the client, did he/she carry out the therapy satisfactorily?				
--	--	--	--	--

Professional skill or ability	S	NI	N/A	Comments
12. Did the student participate in the fieldwork experience with enthusiasm?				
13. Did the student assume responsibility for self-directed learning?				
14. Was the student punctual and prepared for fieldwork sessions?				
15. Was the student dressed/groomed appropriately?				
16. Did the student respect client rights and maintain confidentiality?				
17. Did the student take initiative for learning time management?				
18. Did the student respond appropriately and modify his or her behavior in response to supervisor feedback?				
19. Did the student accept responsibility for completing assignments in a timely, professional manner?				
20. Did the student manage his/her emotions and behaviors professionally?				
21. Did the student share relevant classroom and research information?				

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**

**THE UNIVERSITY OF TOLEDO  
OCCUPATIONAL THERAPY DOCTORATE PROGRAM**

**FIELDWORK SITE VISIT FORM**

\_\_\_\_\_  
**Student**

\_\_\_\_\_  
**Faculty Member**

\_\_\_\_\_  
**Fieldwork Site**

\_\_\_\_\_  
**Fieldwork Educator**

\_\_\_\_\_  
**Date**

**Please circle level of fieldwork:**

Level I Fieldwork (1<sup>st</sup> year)    F, Su, Sp

Level I Fieldwork (2<sup>nd</sup> year)    F, Su, Sp

Level II Fieldwork (3<sup>rd</sup> year)    1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>

**Fieldwork Educator Feedback:**

<b>Item</b>	<b>Comments</b>
1. Safety	
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	
9. Delegation/ Use of Support Personnel	
10. Time Management and Follow Through	

**Academic Preparation (assessed by Fieldwork Educator and student):**

1. Curricular Strengths:

2. Curricular Weaknesses:

**Student Feedback:**

<b>Item</b>	<b>Appropriate</b>	<b>Inappropriate</b>	<b>Comments</b>
1. Self-Assessment of Performance			
2. Level of Supervision			
3. Timing, Frequency and Appropriateness of Feedback			
4. Caseload (variety, number, etc.)			

**Additional Comments:**

**Faculty Comments:**

\_\_\_\_\_ No concerns at this time. Progressing as expected.

\_\_\_\_\_ Follow-up required (describe)

**APPENDIX E**

**THE UNIVERSITY OF TOLEDO**

**COLLEGE OF HEALTH AND HUMAN SERVICES  
OCCUPATIONAL THERAPY PROGRAM**

<b>STUDENT EVALUATION OF LEVEL I FIELDWORK EXPERIENCE</b>
---

Student: \_\_\_\_\_

Date: \_\_\_\_\_

Facility: \_\_\_\_\_

Supervisor: \_\_\_\_\_

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

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

**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!**