

1 GUIDELINES FOR AN OCCUPATIONAL THERAPY

2 LEVEL II FIELDWORK EXPERIENCE

3 The American Occupational Therapy Association, Inc.

4 Bethesda, Maryland

5 By:

6 Donna M. Costa, MS, OTR/L

7 Kelly Fischer, OTR/L

8 For

9 The Commission on Education

10 Linda S. Fazio, PhD, OTR/L, LPC, FAOTA, Chairperson

11 Brenda M. Coppard, PhD, OTR/L, Post-Professional Academic Educator

12 Donna M. Costa, MS, OTR/L, Academic Fieldwork Educator

13 Anne E. Dickerson, PhD, OTR/L, FAOTA, Professional Program Director

14 Kelly Fischer, OTR/L, Fieldwork Educator

15 David A. Haynes, MBA, OTR/L, OTA Program Director

16 Terrienne Jones, MA, OTR/L, OTA Academic Educator

17 Stacy Landau, OT Student, ASD Representative

18 Shirley Marino, COTA, AP, OTA Educator

19 Jaime Munoz, PhD, OTR, FAOTA, Professional Academic Educator

20 Rene Padilla, PhD, OTR/L, FAOTA, EDSIS Liaison

21 April 2006

22

23 **History and Purpose:**

24 The intent of this document is to describe the desired characteristics of a fieldwork
25 placement for occupational therapy and occupational therapy assistant students in Level
26 II fieldwork. It is not intended to be interpreted as a standard of performance or
27 requirement of a program, rather as a reference to be used in conjunction with the
28 ACOTE Standards for Fieldwork Education. It is for internal use by members of the
29 AOTA.

30 This document was originally prepared by the Loma Linda Fieldwork Council at the
31 request of the Commission on Education (COE) and approved by the COE on April 15,
32 1985. The document was revised by the AOTA Fieldwork Issues Committee in 1992,
33 revised by COE in June, 2000, and is now being revised again by the COE in 2006.

34 **Definition:**

35 The new Draft ACOTE Standards for an Accredited Educational Program for the
36 Occupational Therapist or Occupational Therapy Assistant (AOTA, 2006) describe
37 fieldwork as...”a crucial part of professional preparation”, and state the goal of Level II
38 Fieldwork as “to develop competent, entry-level, generalist occupational therapists and
39 occupational therapy assistants” (AOTA, 2006). Similar to Level I fieldwork, Level II
40 fieldwork must be integrated into the educational program’s curriculum design. The
41 Level II fieldwork experience provides students with the opportunity to integrate
42 academic knowledge with the application of skills in a practice setting through “an in-
43 depth experience in delivering occupational therapy services to clients, focusing on the
44 application of purposeful and meaningful occupation” (AOTA, 2006). For occupational

45 therapy students this experience also includes research, administration and managements
46 of occupational therapy services. Both OT and OTA students are to have Level II
47 fieldwork experiences in settings that expose them to a variety of clients, across the life
48 span, and in a variety of practice settings.

49 **RECOMMENDATIONS RELATED TO ACOTE STANDARDS FOR LEVEL II**

50 **FIELDWORK:**

51 **1.) Level II fieldwork shall be designed to promote clinical reasoning and reflective**
52 **practice, to transmit the values and beliefs that enable the application of ethics**
53 **related to the profession, to communicate and model professionalism as a**
54 **developmental process and a career responsibility, and to develop and expand a**
55 **repertoire of occupational therapy assessments and interventions related to human**
56 **occupation and performance. In all settings, psychosocial factors must be**
57 **understood and integrated for the development of client-centered, meaningful,**
58 **occupation-based outcomes.**

59 Level II fieldwork experience should include in-depth experience in delivering
60 occupational therapy services to clients, focusing on the application of purposeful
61 and meaningful occupation.

62 **2.) The fieldwork experience shall meet requirements in accordance with the**
63 **ACOTE Standards for an Accredited Educational Program for the Occupational**
64 **Therapist or the Occupational Therapy Assistant. Occupational therapy students**
65 **must complete at least 24 weeks of full-time Level II fieldwork, and occupational**
66 **therapy assistant students must complete 16 weeks of full-time Level II fieldwork**
67 **experiences. Students may complete fieldwork on a part-time basis, as long as it is**

68 **no less than 50% of the full-time equivalent at that fieldwork site. Students may**
69 **complete their required weeks of fieldwork in a minimum of one setting, if it is**
70 **reflective of more than one practice area. The occupational therapy student may**
71 **complete fieldwork in a maximum of four settings, and the occupational therapy**
72 **assistant student may complete fieldwork in a maximum of three practice settings.**

73 This standard is pretty straightforward, outlining the variations that may occur in
74 Level II fieldwork for OT and OTA students.

75 **3.) The student shall have the opportunity to develop increased knowledge,**
76 **attitudes, and skills in administration, research and professional relationships.**
77 **These should include experiences in collaboration between the occupational**
78 **therapist and occupational therapy assistant, other staff, clients, family members,**
79 **and/or significant others.**

80 Suggested ways to implement this guideline, for example, are actual supervision
81 of support staff, volunteers, or Level I Fieldwork students in certain tasks or work
82 assignments; involvement in research projects; and attendance at administrative
83 meetings. In settings where there are no opportunities for the student to observe
84 collaboration between the OT and OTA, then the fieldwork educator should
85 include learning experiences designed to expose the student to this area of
86 practice in order to measure the student's level of competency.

87 **4.) The fieldwork agency must be in compliance with standards by external review**
88 **bodies.**

89 This recommendation requires that the fieldwork site/agency/facility itself has
90 gone through some type of external review process (JCAHO, CARF, Department
91 of Health, etc.); it is not intended to be prescriptive in nature.

92

93 **5.) Representatives from the educational program should thoroughly review**
94 **fieldwork sites to ensure that they will be suitable for OT and OTA students to meet**
95 **the learning objectives.**

96 This objective can be met by visiting the site, which is preferred. However, when
97 this is not possible, the Fieldwork Data Form and a phone consultation with the
98 occupational therapist or occupational therapy assistant responsible for fieldwork
99 can suffice.

100 **6.) The fieldwork agency should have a stated mission or purpose.**

101 A stated mission or purpose of the fieldwork agency is a statement that reflects
102 principles underlying the agency's operation. This statement should serve as a
103 guide for the delivery of service for individuals and groups, the degree of
104 emphasis on research, and the commitment to education.

105 **7.) There should be evidence of teamwork and communication among staff and**
106 **students at the fieldwork site.**

107 In situations where there is little possibility for communication among staff due to
108 the nature of the fieldwork placement, the occupational therapist may
109 independently establish intervention plans and goals when providing consultation,
110 evaluation and treatment services.

111 **8.) There should be occupational therapy representation in planning programs and**
112 **formulating policies that would affect occupational therapy services or involvement.**

113 Occupational therapy representation may be through participation in program-
114 related conferences, quality review processes, or in groups in which planning and
115 policy-making may be carried out.

116 **9.) The staff of the fieldwork placement should understand the philosophy and**
117 **curriculum design of the occupational therapy education program and should**
118 **accept the responsibility for making it an integral part of their function, as required**
119 **by the new Draft ACOTE Standards for an Accredited Educational Program for the**
120 **Occupational Therapist or Occupational Therapy Assistant (AOTA, 2006).**

121 Since the occupational therapy fieldwork education experience exists within the
122 philosophy and policies of the fieldwork agency, it is essential that the staff
123 understand, accept and support the program.

124 **10.) The fieldwork agency recognizes that the primary objective of the fieldwork**
125 **experience is to benefit the student's education.**

126 The educational value of the student fieldwork experience should be of primary
127 importance, and the placement should not be used to extend services offered by
128 the fieldwork agency.

129 **11.) Opportunities for continuing education and professional development of the**
130 **occupational therapy students should be supported.**

131 A. Attendance at workshops, institutes, conferences, courses and professional
132 meetings should be encouraged when the content of the educational event is

133 relevant to the fieldwork assignment. Students should not be penalized for
134 attending conferences, and may be asked by the fieldwork site to present an in-
135 service to staff about the conference.

136 B. Financial support enhances a professional's ability to supervise a student.

137 C. In-service education programs should be developed and made available.

138 D. Fieldwork students should be encouraged to participate in continuing education
139 and be provided time to do so, when content is relevant to the fieldwork
140 experience.

141 **12.) Occupational therapists who supervise students should articulate the value of**
142 **active participation in occupational therapy associations and in occupational**
143 **therapy educational programs to students, and should serve as active participants**
144 **whenever possible.**

145 Occupational therapists and occupational therapy assistants serve as role models
146 and should be actively involved with national, state, and local occupational
147 therapy associations when possible. Occupational therapists and occupational
148 therapy assistants should be involved with the occupational therapy educational
149 programs from which they accept students on an ongoing basis. Such involvement
150 may include education council meetings, on-site visits, correspondence, telephone
151 calls, e-mail communication, etc.

152 **13.) There must be adequate resources to support the fieldwork placement.**

153 Resources can take many forms including space and time for students, sufficient
154 numbers/types of patients/clients to support learning objectives, and
155 administrative support of educating fieldwork students.

156 **14.) Client records should be available to the staff and students for intervention**
157 **planning and practice, educational, and research purposes. The fieldwork site must**
158 **be in full compliance with HIPAA/FERPA/IDEA regulations, and students shall be**
159 **instructed to comply with all HIPAA/FERPA/IDEA regulations to guarantee the**
160 **confidentiality of client's records.**

161 Students should review any site-specific guideline for confidentiality that the
162 fieldwork site has in place during their orientation to the fieldwork site, and sign
163 some form of documentation indicating their review and agreement to comply
164 with all regulations. Fieldwork educators should include in their Orientation
165 Manual a section on HIPAA/FERPA/IDEA as it relates to clinical documentation
166 and other forms of privileged communication. They should insure that students
167 understand the implications of the regulations and should instruct students not to
168 use the identifying information" when completing all required assignments.

169 **15.) The occupational therapy philosophy regarding practice and education**
170 **programs should be stated in writing. The written objectives of the program should**
171 **reflect the specific contribution occupational therapy makes to the overall agency**
172 **and program.**

173 The philosophy of the occupational therapy services should be written and should
174 include the following: purpose; responsibility to society, profession, staff, and
175 service recipients; degree of commitment to service recipients, education and
176 research; and attitude toward future growth. The objectives should be based on
177 the concepts, beliefs, and values established in the philosophy.

178 **16.) The occupational therapist and occupational therapy assistant should comply**
179 **with state regulations governing referrals from qualified referral sources and from**
180 **others seeking service in the medical, educational and broader human services**
181 **community. Occupational therapy staff should collaborate with duly licensed**
182 **providers in those instances where medical management is active, indicated or**
183 **required.**

184 This guideline requires that occupational therapists and occupational therapy
185 assistants who supervise Level II fieldwork must be aware of, and comply with
186 their state's licensure laws, policies and procedures with regard to referral, and
187 scope of practice.

188 **17.) Fieldwork educators responsible for educating Level II Fieldwork occupational**
189 **therapy students shall be occupational therapists. Fieldwork educators responsible**
190 **for educating Level II fieldwork occupational therapy assistant students shall be**
191 **occupational therapists or occupational therapy assistants. Both occupational**
192 **therapists and occupational therapy assistants who serve as fieldwork educators**
193 **must have at least one year of practice experience, and must be certified nationally.**
194 **They must be prepared for their role of fieldwork educator through training and/or**
195 **experience; fieldwork educators may be engaged by the fieldwork site or the**
196 **academic institution.**

197 Fieldwork educators must have one year of work experience following their
198 successfully taking the NBCOT certification examination. They must also have
199 some kind of training and/or experience in fieldwork education/clinical
200 supervision. There is no requirement prohibiting the use of academic faculty to

201 supervise fieldwork students as long as the fieldwork site is in agreement with
202 this.

203 **18.) The fieldwork educator should document their continuing competency in**
204 **providing effective supervision to students through assessment tools (such as the**
205 **Student Evaluation of Fieldwork Experience - SEFWE - or the Fieldwork**
206 **Experience Assessment Tool – FEAT), and should maintain documentation of their**
207 **continued learning on supervision theory/practice (articles/books that have been**
208 **read, courses/trainings that have been taken, etc).**

209 In an attempt to provide quality fieldwork education to students, fieldwork
210 educators need to engage in ongoing learning about clinical supervision/fieldwork
211 education. This can take the form of formalized coursework, and/ or reading
212 articles/books on the subject. Fieldwork educators can also engage in reflective
213 practice learning activities designed to measure their readiness and competence to
214 supervise students; two excellent resources are the SEWFE and FEAT that can be
215 used to get students feedback about their supervision. Another is the Self-
216 Assessment of Fieldwork Educator Competency.

217 **19.) The fieldwork agency's communication system should ensure accountability in**
218 **service provision and documentation.**

219 A. There should be regular procedures for communication among fieldwork
220 educators and students.

221 B. Adequate records and reports should be maintained in accordance with AOTA
222 standards and legal requirements. This must include a signed and dated
223 memorandum of understanding between the educational program and the

*Fieldwork
Contract*

224 fieldwork agency that is reviewed at least once every five years by both
225 parties.

*Fieldwork
data collection
Form*

226 C. Records should be maintained to provide sufficient data for quality
227 improvement. Records may include administrative, service and other data.

228 Administrative reports would include such information as numbers of persons
229 serviced, attendance records, schedules and budgets. Service records should
230 include such information as referral data, client assessments, intervention plan
231 progress notes and discharge summaries.

232 **20.) The fieldwork educator and student should have access to current professional**
233 **information, publications, texts, and/or Internet resources related to occupational**
234 **therapy and pertinent topics related to populations and systems being served, to**
235 **support evidence-based practice.**

236 This item is intended to support the utilization of evidence-based practice. Most
237 students on fieldwork continue to have remote access to their school's library
238 system; some schools are able to extend this courtesy to fieldwork educators in
239 order to increase utilization of evidence-based practice. Health care organizations
240 also usually have medical libraries that staff and sometimes students can access.

241 **21.) The educational program and the fieldwork placement should work**
242 **collaboratively to develop objectives in which the aims are compatible with those of**
243 **the educational program, and which reflect skills specific to the roles of**
244 **occupational therapists and occupational therapy assistants with populations served**
245 **at the fieldwork site. The objectives should be reviewed at least annually. These**

246 **objectives should be clearly defined for the student and continually evaluated to**
247 **determine the effectiveness of the fieldwork experience.**

248 The fieldwork experience is an extension of the educational program into the
249 clinical or community setting. The objectives should reflect both the curriculum
250 design of the educational program and the model of service delivery of the
251 fieldwork setting.

252 **22.) Adequate staff to provide occupational therapy services and educational**
253 **services should be maintained with supervisory and administrative responsibilities**
254 **clearly defined.**

255 A. The ratio of fieldwork educators considered adequate to carry out a fieldwork
256 experience is dependent upon the complexity of the services and the ability to
257 ensure proper supervision and frequent assessment in achieving fieldwork
258 objectives.

259 B. Administrative and staff responsibilities should be clearly defined.

260 **23.) The fieldwork educator should carry out and document an organized procedure**
261 **of orientation to the agency, services, and the fieldwork experience.**

262 There must be some kind of orientation procedures in place for the student at the
263 start of the fieldwork experience, but the type, length, and structure of that
264 orientation is left up to the facility. Some large health-care organizations require
265 students to attend the same orientation that new employees receive, while others
266 may simply have students read a Policy & Procedure manual. Whatever system is
267 appropriate to the setting is acceptable, as long as it is documented.

268 **24.) The fieldwork placements should provide the student with experience with**
269 **various populations and service delivery models reflective of current practice in the**
270 **profession.**

271 Within the required total of 16 weeks for the occupational therapy assistant
272 student and 24 weeks for the occupational therapy student, there should be
273 exposure to a variety of practice settings and a variety of client ages and
274 conditions.

275 **25.) The fieldwork educator shall provide ongoing supervision of the student, and**
276 **shall maintain records of supervisory sessions conducted with student.**

277 A. The student should be supervised in all aspects of his/her fieldwork experience
278 by adequate supervisory staff who should have full knowledge of and
279 responsibility for all aspects of the services being carried out by the student under
280 her or his guidance and protection.

281 The fieldwork educator should have full knowledge of the student's assigned
282 workload and responsibilities and how they are being handled and should be
283 available to the setting and to the needs of the student. This ensures that the
284 supervision provides protection of consumers.

285 B. Ongoing supervision should be provided daily and/or weekly as an essential
286 part of the fieldwork program. It should be flexible in accordance with the
287 interests, needs and abilities of the student. Supervision should initially be direct
288 and gradually decrease to less direct supervision as is appropriate for the setting,
289 the severity of the client's condition, and the ability of the student.

290 C. The ratio of fieldwork educators to students shall be such as to ensure

291 adequate supervision and frequent assessment in achieving fieldwork objectives.

292 D. In a setting where there is no occupational therapy practitioner on site,
293 ACOTE Standards requires a documented plan and a minimum of 8 hours of
294 supervision per week by an occupational therapist or occupational therapy
295 assistant who has a minimum of three years of professional experience. This
296 should include direct observation of client/student interaction, role modeling,
297 meetings with the student, review of student paperwork, consultation and
298 communication regarding the learning experience. The fieldwork educator may
299 work with students in groups, but should be aware of individual student needs and
300 respond accordingly. An occupational therapy supervisor must be available, via a
301 variety of means of contact, to the student during all working hours. In addition, a
302 designated on-site supervisor of another profession must be assigned while the
303 occupational therapy supervisor is off-site. A documented plan for provision of
304 occupational therapy services in accordance with state regulations and in
305 coordination with the educational program should be in place.

306 E. Students completing Level II fieldwork outside the United States must be
307 supervised by an occupational therapist who graduated from a World Federation
308 of Occupational Therapists (WFOT) accredited educational program, and who has
309 at least one year of experience in practice. Fieldwork experiences outside the
310 United States must not exceed 12 weeks for the occupational therapy student, and
311 8 weeks for the occupational therapy assistant student.

312 **26.) The student shall be evaluated and kept informed on an ongoing basis of her/his**
313 **performance status.**

314 A. A tool, such as the AOTA Fieldwork Performance Evaluation (FWPE) or
315 comparable instrument, should be used as a rating tool. The student should be
316 formally evaluated using this form at the mid-point of the fieldwork experience,
317 and again at the conclusion of the Level II fieldwork experience. Other structured
318 forms of feedback (such as the AOTA Fieldwork Experience Assessment Tool or
319 FEAT) that promote educator/student communication on the student's progress
320 may also be used on an ongoing basis.

321 B. The fieldwork experience should be evaluated by the student, using a tool such
322 as the AOTA Student Evaluation for Fieldwork Experience (SEFWE) form, and
323 should be reviewed by the fieldwork educator and the student at the conclusion of
324 the fieldwork experience. Other structured forms of feedback (such as the AOTA
325 Fieldwork Experience Assessment Tool or FEAT) that promote educator/student
326 communication on the learning experience may also be used on an ongoing basis.

327 C. If the student's performance is not satisfactory at mid-term or at any point in
328 the fieldwork experience, both the student and academic institution must be
329 notified immediately and documentation concerning the student's progress and
330 outcomes of interventions must be maintained.

331

332

333

334

335

336

337 **References:**

338 Accreditation Council for Occupational Therapy Education. (2006) Draft Standards for
339 an Accredited Educational Program for the Occupational Therapist or Occupational
340 Therapy Assistant.

341 American Occupational Therapy Association. (1999a). Standards for an accredited
342 educational program for the occupational therapist. *American Journal of Occupational*
343 *Therapy*, 53, 575-582.

344 American Occupational Therapy Association. (1999b). Standards for an accredited
345 educational program for the occupational therapy assistant. *American Journal of*
346 *Occupational Therapy*, 53, 583-591.

347 American Occupational Therapy Association. (1997). Purpose and Value of Occupational
348 Therapy Fieldwork Education. *American Journal of Occupational Therapy*, 50, 845.

349 ***AOTA Commission on Education and Fieldwork Issues Committee (FWIC)***

350 ***Amended and Approved by FWIC June 2000 and COE August 2000***

351 ***Updated 08/05/00***

352 ***Last updated 7/06***

353

354

355

356