

**Augusta University Occupational Therapy Level II Fieldwork Learning Objectives
And Sample Weekly Timelines and Expectations**

Based on and in Accordance with the Fieldwork Performance Evaluation Tool for the Occupational
Therapy Student

By Laurie Vera, MHS, OTR/L and Sharon Swift, Ed.D, OTR/L, ATP

By accepting a Level II student, the site agrees to meet these objectives and remain theoretically aligned with the associated expectations related to performance, values, roles, and ethics. If your site is able to currently fulfill these objectives and your program's design is consistent with the curriculum model of Augusta University's Master of Health Science in Occupational Therapy, please indicate your agreement by signing and dating the end of the document. Please submit the signed and dated copy to augustaotfw@augusta.edu. If you would like for site-specific learning objectives to be considered for approval, please contact augustaotfw@augusta.edu for further guidance. Objectives will be considered as agreed upon for two years from the date of the signature, or unless one party expresses a change or update. Weekly timelines and expectations may be modified to meet the needs of the site and student, as long as learning objectives are considered. Thank you for your professional partnership in the education of future occupational therapy practitioners!

FUNDAMENTALS OF PRACTICE

1. Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations

- Abides by the AOTA Code of Ethics
- Follows the facility's organizational policies and procedures
- Follows all policies, procedures, and safeguards related to client confidentiality
- Demonstrates work behaviors that reflect an understanding of professional standards
- Maintains boundaries
- Works within HIPAA guidelines

2. Adheres to safety regulations

- Reports and documents any incidents appropriately
- Considers fire safety, OSHA regulations, body substance precautions, emergency procedures, etc.
- Considers the safety needs of the client, staff, building and property, and self to prevent injuries and avoid exacerbating illness
- Reports potential safety hazards and any unusual occurrences via the appropriate channels
- Ensures that all equipment is in working order, and assists in maintenance and cleaning
- Contributes to the cleanliness and organization of the work area
- Maintains safe treating and working areas
- Works withn diagnosis-specific surgical and safety precautions

3. Ensures the safety of self and others during all fieldwork related activities

- Anticipates potentially unsafe situations
- Takes steps to prevent accidents
- Considers body mechanics, medical safety, equipment safety, client-specific precautions, contraindications, and community safety

BASIC TENETS

4. Articulates the values, beliefs, and distinct perspective of the occupational therapy profession
 - Considers families, caregivers, colleagues, service providers, administration, the public, etc.
 - Does so in a clear and concise manner
 - Is clear, confident, and accurate
 - Selects evaluation and intervention activities that reflect an understanding of the client's occupations, interests, and values
5. Articulates the value of occupation as a method and desired outcome
 - Considers families, caregivers, colleagues, service providers, administration, the public, etc.
 - Does so in a clear and concise manner to all parties
 - Is clear, confident, and accurate
6. Articulates the role of occupational therapy practitioners to clients and other relevant parties
 - Considers families, caregivers, colleagues, service providers, administration, the public, etc.
 - Collaborates with all relevant parties
 - Does so in a clear and concise manner
 - Is clear, confident, and accurate

SCREENING AND EVALUATION

7. Articulates a clear and logical rationale for the evaluation process
 - Considers client information, contexts, theories, frames of reference, and/or practice models
 - Explains the focus and purpose of the evaluation process
8. Obtains sufficient and necessary information from relevant sources through the evaluation process
 - Uses information from the client record, chart reviews, the client, family and caregivers, and other service providers
9. Selects relevant screening and assessment tools based on various factors
 - Considers psychosocial factors, client priorities, needs and concerns about occupational performance and participation, theoretical support, evidence, practice context, funding sources, cultural relevance etc.
 - Determines which assessments are appropriate
 - Uses valid and reliable assessments with demonstrated psychometric properties useful for the assessment need
10. Determines the client's occupational profile and occupational performance through interview and other appropriate evaluation methods
 - Demonstrates effective interviewing skills to gather appropriate information
 - Identifies areas of concern related to occupational history, patterns of daily living, interests, values, and needs
 - Thinks critically and uses clinical reasoning in determining the occupational profile and performance
11. Evaluates and analyzes client factors and contexts
 - Identifies strengths and concerns, and considers those that support or hinder occupational performance
 - Considers all client-centered components including psychosocial factors

- Uses screening and assessment tools to gather information
- Considers cultural, personal, temporal, and virtual contexts and their effects on client factors

12. Administers standardized and non-standardized assessments and surveys accurately and efficiently to ensure findings are valid and reliable

- Follows assessment protocols in a uniform manner
- Uses tools, manuals, and forms correctly

13. Modifies evaluation procedures based on client factors and contexts

- Selects and filters relevant information from all data and sources
- Works within the diagnoses, medical conditions, contraindications, and precautions

14. Interprets evaluation results to determine the client's occupational performance strengths and challenges

- Converts scores into meaningful information
- Relates assessment findings to functional performance
- Objectively analyzes and selects pertinent data to develop the occupational profile
- Uses clinical reasoning
- Identifies measurable and occupational long-term and short-term goals
- Conveys results to and collaborates with appropriate team members

15. Synthesizes and documents the results of the evaluation process

- Does so clearly, accurately, and concisely
- Uses systematic methods to record the client's occupational performance
- Completes all components thoroughly and accurately
- Conveys results to and collaborates with appropriate team members
- Critical thinking and clinical reasoning are evident

INTERVENTION

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

- Integrates the evaluation results, contexts, theories, frames of reference, practice models, and evidence
- Identifies the correlation between problem areas, occupational performance, and selected activities

17. Establishes and accurate and appropriate client-centered plan

- Bases the plan on the evaluation results, contexts, theories, frames of reference, and/or practice models
- Creates relevant and measurable goals in collaboration with the client and/or family/caregivers
- Recommends additional consultation and referrals

18. Uses evidence from research and relevant resources to make informed intervention decisions

- Searches for and selects valid and relevant research evidence to support evidenced-based interventions to be incorporated to meet client needs
- Articulates how to apply evidence to client care based on context and need

19. Selects client-centered and occupation-based interventions

- Motivates and challenges the client
 - Works to achieve established goals that support targeted outcomes
 - Includes the consideration of all client-centered components, including psychosocial factors
20. Implements client-centered and occupation-based intervention plans
- Includes the consideration of all client-centered components, including psychosocial factors
 - Demonstrates a sequential and timely plan of treatment activities, taking functional and psychosocial needs into consideration
 - Demonstrates flexibility to alter plans as needed based on client response
 - Adapts to change
21. Chooses and modifies intervention approaches to achieve established goals that support targeted outcomes
- Includes prevention, restoration, maintenance, promotion, and other approaches as applicable to the practice setting
 - Updates documentation in a timely manner to reflect any changes
 - Notifies team members of any changes
22. Modifies the task and/or environment to maximize the client's performance
- Upgrades/downgrades tasks successfully
 - Arranges the client's workspace for optimal performance
 - Considers adaptive equipment, energy conservation, and other techniques as applicable to the practice setting
23. Modifies the intervention plan, and determines the need for continuation or discontinuation of services based on the client's status
- Recognizes plateaus and makes changes accordingly
 - Prepares the client and team for discontinuation of therapy
24. Documents the client's responses to services in a manner that demonstrates the effectiveness of interventions
- Completes documentation according to site standards
 - Documents thoroughly
 - Uses correct grammar, spelling, and terminology
 - Reports client progress to supervisor as instructed
 - Accepts responsibility for documentation, written and verbally

MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES

25. Demonstrates through practice or discussion the ability to collaborate with and assign appropriate tasks to the occupational therapy assistant, occupational therapy aide, or others to whom responsibilities might be assigned, while remaining responsible for all aspects of treatment
- Collaborates with OTAs, paraprofessionals, nurses' aides, staff, volunteers, and whomever is engaged in client care in the setting
 - Seeks collaboration opportunities to maximize the client's experience and to learn from other disciplines
 - Applies collaborative knowledge to evaluation, intervention, and other programming opportunities

26. Demonstrates through practice or discussion an understanding of costs and funding systems related to occupational therapy services, such as federal, state, third party, and private payers

- Addresses billing for OT services, inventory and ordering of supplies for OT services, and options for client procurement of adaptive equipment

27. Demonstrates knowledge about the organization

- Shows awareness and consideration of mission and vision, accreditation status, licensing, specialty certifications, etc.

28. Meets productivity standards or volume of work expected of occupational therapy students

- Demonstrates ability to organize and prioritize responsibilities to ensure that requirements are completed fully, and in a timely and professional manner

COMMUNICATION AND PROFESSIONAL BEHAVIORS

29. Communicates clearly and effectively, both verbally and nonverbally

- Demonstrates clear and effective communication with clients, families, caregivers, colleagues, service providers, administration, other disciplines, and the public
- Demonstrates active listening skills, and is aware of body language and non-verbal communication
- Refers questions that are beyond knowledge or beyond the scope of OT to the appropriate source
- Communicates unusual or critical information to the appropriate personnel in a timely and accurate manner

30. Produces clear and accurate documentation

- Documentation is legible
- Documentation has corrected spelling, punctuation, grammar
- Documentation adheres to electronic health documentation requirements

31. Collaborates with fieldwork educator(s) to maximize the learning experience

- Initiates communication
- Asks for feedback about performance
- Identifies strengths and challenges

32. Takes responsibility for attaining professional competence

- Seeks learning opportunities and interactions with fieldwork educator(s) and others
- Defines personal expectations and goals for the experience and beyond
- Self-directed in determining performance strengths and challenges
- Collaborates with supervisors to ensure optimal learning opportunities

33. Responds constructively to feedback in a timely manner

- Demonstrates understanding of feedback by changing identified behaviors
- Generalizes supervisor suggestions to multiple situations and skills
- Responds to constructive feedback with openness and willingness
- Demonstrates a positive attitude through body language and verbalizations
- Verbalizes understanding of feedback, and initiates development of goals for improvement

34. Demonstrates consistent and acceptable work behaviors
 - Is punctual, prepared, flexible, dependable
 - Takes initiative
 - Has a professional appearance and behaviors
 - Is prepared
 - Completes work as assigned
 - Follows the schedule
 - Meets commitments in a timely manner
 - Maintains an organized and safe work area

35. Demonstrates effective time management
 - Plans ahead
 - Adheres to schedules and completes work in the expected timeframe
 - Uses free time constructively
 - Establishes priorities and executes actions accordingly

36. Manages relationships effectively
 - Utilizes therapeutic use of self
 - Adjusts the approach to meet the needs of clients and others
 - Demonstrates positive interactions, respect, and flexibility
 - Demonstrates positive working relationships with clients and staff

37. Demonstrates respect for diversity
 - Shows awareness of culture, socioeconomic status, beliefs, identity, etc.
 - Seeks to understand the perspective of others

Weekly Timelines and Expectations

The following are *sample* guidelines that can be used for setting timelines and expectations for students. Timelines and expectations will vary across sites, settings and students. Timelines and expectations should be adjusted to meet the needs of the site, setting, and student and should be discussed with the student during orientation, and referenced regularly during all educator and student meetings to ensure a timely progression.

SAMPLE ONE**WEEK ONE:**

- Orientation
- Clinical observation
- Complete chart reviews for clients on current caseload
- Assist in executing appropriate treatments under direction of the therapist

WEEK TWO:

- Plan and implement treatment session for one client per day
- Assist with documentation requirements for clients on caseload
- Manage time appropriately during treatment sessions
- Continue observation

WEEK THREE:

- Plan and implement treatment session for two clients per day
- Complete documentation requirements for clients on caseload
- Manage time appropriately during treatment sessions
- Continue observation

WEEK FOUR:

- Plan and implement treatment session for three clients per day
- Provide client/family education
- Complete and score standardized assessment for one client
- Complete documentation requirements for clients on caseload
- Manage time appropriately during treatment sessions
- Continue observation

WEEK FIVE:

- Plan and implement treatment session for 4-5 clients per day
- Complete re-evaluation for one client on caseload
- Discuss progress of clients on caseload with other disciplines involved in care
- Provide client/family education
- Manage time appropriately during treatment sessions
- Continue observation

WEEK SIX:

- Plan and implement treatment session for 5-6 clients per day
- Provide client/family education
- Complete all documentation requirements for clients on caseload
- Manage time appropriately during treatment sessions

- Continue observation
- Collaborate with educator for Midterm Fieldwork Performance Evaluation and Fieldwork Professionalism Evaluation

WEEK SEVEN:

- Plan and implement treatment session for 7-8 clients per day
- Complete evaluation for one new client
- Provide client/family education
- Complete all documentation requirements for clients on caseload
- Manage time appropriately during treatment sessions
- Continue observation

WEEK EIGHT:

- Assume full caseload
- Complete all documentation requirements for clients on caseload
- Provide client/family education
- Manage time appropriately during treatment sessions
- Continue observation

WEEK NINE:

- Present treatment student project
- Continue with full caseload

WEEK TEN:

- Continue with full caseload, client/family education, and documentation requirements

WEEK ELEVEN:

- Continue with full caseload, client/family education, and documentation requirements

WEEK TWELVE:

- Complete all necessary documentation and education to return caseload to full-time team
- Collaborate with educator for Final Fieldwork Performance Evaluation and Fieldwork Professionalism Evaluation
- Complete Student Evaluation of Fieldwork Experience

SAMPLE TWO**WEEK ONE:**

- Orientation
- Clinical observation
- Complete chart reviews for clients on current caseload
- Assist in planning for and executing 4-7 treatment sessions under direction of the therapist
- Assist in evaluation of 1-3 clients
- Complete and score standardized assessment for 1-3 clients

WEEK TWO:

- Plan and implement treatment session for 5-10 clients
- Complete documentation for clients on student caseload
- Assist with documentation requirements for clients on full caseload
- Manage time appropriately during treatment sessions
- Continue observation
- Observe other disciplines and services
- Complete one evaluation and associated documentation

WEEK THREE:

- Plan and implement treatment session for 8-12 clients
- Complete documentation requirements for clients on full caseload
- Manage time appropriately during treatment sessions
- Continue observation
- Complete 2-4 evaluations, re-evaluations, or discharge summaries and associated documentation
- Discuss progress of clients on caseload with other disciplines involved in care

WEEK FOUR:

- Plan and implement treatment session for 10-15 clients
- Provide client/family education
- Complete 3-5 evaluations, re-evaluations, or discharge summaries and associated documentation
- Complete documentation requirements for clients on full caseload
- Manage time appropriately during treatment sessions
- Continue observation

WEEK FIVE:

- Plan and implement treatment session for 12-16 clients
- Complete 4-6 evaluations, re-evaluations, or discharge summaries and associated documentation
- Provide client/family education
- Manage time appropriately during treatment sessions
- Continue observation

WEEK SIX:

- Plan and implement treatment sessions and evaluations for all clients; assume full caseload
- Assume responsibility for all evaluations, re-evaluations, and discharges
- Provide client/family education

- Complete all interdisciplinary communication
- Complete all documentation requirements
- Manage time appropriately during treatment sessions
- Continue observation
- Collaborate with educator for Midterm Fieldwork Performance Evaluation and Fieldwork Professionalism Evaluation

WEEK SEVEN THROUGH ELEVEN:

- Continue care for all clients on caseload, new and current
- Provide all client/family education and inter-disciplinary communication
- Complete all documentation requirements
- Manage time appropriately during treatment sessions
- Continue observation
- Present student projects and respond to feedback

WEEK TWELVE:

- Complete all necessary documentation and education to return caseload to full-time team
- Collaborate with educator for Final Fieldwork Performance Evaluation and Fieldwork Professionalism Evaluation
- Complete Student Evaluation of Fieldwork Experience

Agreement:

I have read the above learning objectives and sample weekly timelines and expectations. I agree to effectively foster opportunities for the learner to meet the above objectives. Our site will facilitate opportunities for Level II students to strive for competency in all areas of practice.

Name of Facility:

Fieldwork Educator's Name:

Fieldwork Educator's Signature:

Date:

References:

Atler, K. (2003). *Using the Fieldwork Performance Evaluation Forms: The Complete Guide*. AOTA Press. 2003.

Butler Hospital Level II Fieldwork Site-Specific Objectives (2004, August). American Occupational Therapy Association Site-Specific Objectives. <https://www.aota.org/Education-Careers/Fieldwork/SiteObj.aspx>

Metropolitan Occupational Therapy Education Council of NY/NJ (2003, December 3). *Sample Behavioral Objectives*, <https://www.aota.org/Education-Careers/Fieldwork/SiteObj.aspx>

Tucker, D & Honea, D. (2003, August 16). *Sample School Setting*. <https://www.aota.org/Education-Careers/Fieldwork/SiteObj.aspx>

University of Texas Medical Branch- Galveston. *Specific Behavioral Objective for Adult Outpatient*. <https://www.aota.org/Education-Careers/Fieldwork/SiteObj.aspx>