DEPARTMENT OF OCCUPATIONAL THERAPY

FIELDWORK EDUCATOR MANUAL
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MEET THE FIELDWORK TEAM!

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Responsibilities:
Advises all students for Level I and Level II fieldwork experiences
Initiates contact with potential sites & establishes initial collaborative relationship
Manages site selection and
Collaborates with and advises fieldwork site administration, fieldwork coordinators and educators
Ensures support of curriculum design through fieldwork experiences
Evaluate quality of fieldwork program, fieldwork sites and educators
Supports fieldwork educators through education opportunities
Responsible for addressing any fieldwork and/or student issues

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Responsibilities:
Communicates with students regarding general Level I and Level II fieldwork information
Maintains fieldwork information in e*Value and all records related to fieldwork
Assists AFWC with obtaining and maintaining required fieldwork site documentation
Responsible for maintaining all fieldwork files (site and student)
Communicates with fieldwork site administration, fieldwork coordinator and educators regarding general fieldwork information

GLOSSARY OF TERMS

**Academic Fieldwork Coordinator (AFWC):** The AFWC is the academic faculty person within the occupational therapy program who has been designated to be responsible for the clinical education courses outlined in the program’s curriculum.

**Accreditation Council for Occupational Therapy Education (ACOTE):** ACOTE is the accrediting body that sets the standards for occupational therapy educational programs. ACOTE is located at ACOTE c/o Accreditation Department, American Occupational Therapy Association (AOTA) 4720 Montgomery Lane, Suite 200 Bethesda, MD 20814-3449, (URL: [www.acoteonline.org](http://www.acoteonline.org)).

**Affiliation Agreements:** Affiliation Agreements are contractual agreements between Clarkson University, the CU Occupational Therapy Program, and the clinical facilities. Prior to the start of students’ fieldwork education experience, an executed agreement must exist.

**American Occupational Therapy Association (AOTA):** AOTA is the organization that professionally represents occupational therapists in setting policy, procedures, standards, and serves as a governmental liaison. AOTA is located at 4720 Montgomery Lane, Suite 200 Bethesda, MD 20814-3449, (URL: [www.aota.org](http://www.aota.org)). Telephone: (301) 652-AOTA; Fax: (301) 652-7711.

**E*Value:** This is the software program Clarkson University utilizes to manage fieldwork data including affiliation sites, scheduling, communication, assessments and outcome measures.

**Fieldwork Coordinator (FWC):** The FWC is the person on staff within a facility who is designated to be responsible for the fieldwork education program. Their responsibilities include but are not limited to maintaining contracts, structuring students’ fieldwork education experiences, communicating with the AFWC the availability of fieldwork educators, monitoring the student while at the facility, providing guidance to the students and fieldwork educators as needed, and assuring that a learning-conducive environment is maintained. The FWC may serve as fieldwork educator.

**Fieldwork Data Form (FDF):** Document utilized to disclose each affiliating sites’ demographics (i.e. - scope of practice, practice setting, site-specific requirements, clinical staff) to the University. This document is updated annually.

**Fieldwork Educator (FWE):** Also referred to as Clinical Instructor (CI). The FWE is a staff member within the clinical setting who is responsible for the teaching and supervision of an assigned student. The FWE can also serve as the CC.

**Fieldwork Performance Evaluation (FWPE):** This standardized form is approved for use by ACOTE to assess the student’s performance on Level II Fieldwork at mid-term and at final. The rating scale used in this determines whether a student has been successful on fieldwork.
**National Board for Certification in Occupational Therapy (NBCOT):** NBCOT is the credentialing agency that provides certification for the occupational therapy profession. NBCOT serves the public interest by developing, administering and continually reviewing a certification process that reflects current standards of competent practice in occupational therapy. NBCOT is located at The Eugene B. Casey Building, 800 South Frederick Avenue, Suite 200, Gaithersburg, MD 20877-4150. Office: (301) 990-7979; Fax: (301) 869 8492; or web: www.nbcot.org.

**New York State Occupational Therapy Association (NYSOTA):** NYSOTA is the only professional organization for Occupational Therapy in New York State. Its mission is to promote the professional of occupational therapy practitioners who work and live in NYS. NYSOTA is located at PO Box 609, Glenmont, NY 12077. [www.nysota.org](http://www.nysota.org). Telephone (518) 301-9187.

**Professional Behaviors Rating Scale:** This document serves as the Level I student evaluation which is completed by the fieldwork educator on the last day of the clinical rotation. This student evaluation consists of 40 items addressing professional behaviors.

**Student Evaluation of the Fieldwork Experience (SEFWE):** This document provides information (objective and subjective data) from the student and their fieldwork supervisor regarding a specific fieldwork experience at an affiliating site.
OT PROGRAM OVERVIEW

The Clarkson University Department of Occupational Therapy program is committed to graduating therapists who are prepared to respond to both current and emerging societal needs that influence individuals' occupations. We integrate experiential learning to help students develop internalized working models for activating occupational therapy in culturally diverse, innovative practice settings. In addition, the program is committed to expanding the knowledge of the profession through inter-professional scholarship and practice. To meet objectives the OT program has established 5 curricular goals:

Goal 1: Design and deliver humanistic, ethical and high quality, individualized occupational therapy services to individual clients and their family/caregivers in both individual and group treatment.

Goal 2: Students will understand and be able to respond with occupation-based programs to contemporary and global issues affecting a health, well-being and disability, with specific focus on unmet and emerging needs in rural and underserved populations.

Goal 3: Integrate innovative, technological, imaginative art and educational resources into program planning, design, management and intervention.

Goal 4: Demonstrate the ability to reflect on science and technology, including their relationship to society, their impact on the environment and occupation, and demonstrate the capacity and commitment to grow both as an individual and a professional.

Goal 5: Collaborate skillfully with clients, inter-professional team members and non-professional colleagues, families and community members and demonstrate the important contribution of occupational therapy by doing good work.

To support the achievement of these 5 curricular goal, the Clarkson University Occupational Therapy academic program has five curricular threads interwoven throughout the curriculum. These 5 threads are as follows:

Thread 1: Professional Identity
Students will value and assume an identity of service and contribution, by promoting occupation and participation in multiple contexts through the identification of barriers to and providing supports for occupational roles and performance patterns.

Thread 2: Innovation
Students will develop the ability to meet the needs of local, regional, and global society, including a focus on rural communities, through research and scholarship.
Thread 3: Technology
Students will learn to engineer solutions through technology including telehealth, assistive technology, and virtual contexts.

Thread 4: Education & Research
Students will develop problem-solving abilities through science-driven practice and the use of practice-based evidence, with a focus on occupation as both intervention and outcome.

Thread 5: Inter-Professional Practice
Students will exhibit strong leadership and collaborative skills as they assume roles of advocacy and activism for both clients and the profession.

FIELDWORK EDUCATION AND CURRICULAR DESIGN
Fieldwork can be likened to the Thomas Edison of academia at Clarkson University’s Department of Occupational Therapy! It is a time where “light bulbs” go off as students begin to make connections between didactic instruction and occupational therapy practice. Fieldwork provides an opportunity for students to synthesize didactic coursework with clinical skills by applying theoretical and scientific constructs throughout the occupational therapy process, understanding and integrating the occupational needs of various client populations, refining clinical skills through evidence based practice and establishing professional collaborative relationships with supervisors and future colleagues.

In keeping the ACOTE Standards, fieldwork education is an integral component of the Clarkson University’s Department of Occupational Therapy curriculum. Fieldwork education at Clarkson University’s Department of Occupational Therapy provides an opportunity for students to synthesize didactic coursework with clinical skills by applying theoretical and scientific constructs throughout the occupational therapy process, understanding and integrating the occupational needs of various client populations, refining clinical skills through evidence based practice and establishing professional collaborative relationships with supervisors and future colleagues. As such, our curricular goals and threads are interwoven throughout all fieldwork experiences (ACOTE Standards C.1.0, C.1.1).

To promote integration of the curricular design into fieldwork education at Clarkson University all fieldwork educators are provided with the document Strategies for Reinforcing Curricular Threads in Fieldwork. Furthermore, fieldwork sites are required to indicate on the Fieldwork Data Form the extent their site specific fieldwork program provides opportunities to reinforce our curricular threads. For any site indicating no or limited opportunities for any particular thread this document is reviewed with the fieldwork educator to expand learning opportunities (ACOTE Standards C.1.0, C.1.1).
SELECTION OF FIELDWORK SITES
To ensure the fieldwork program reflects the sequence and scope of our curricular design, Level I and Level II fieldwork sites are selected based on the following criteria (ACOTE Standard C.1.2):

- Site provides experiences consistent with the Clarkson fieldwork objectives
- Site philosophy, model, and populations reflect the sequence, depth and focus of the Clarkson OT curricular design
- Site contributes to broadening the fieldwork opportunities in regards to practice area, populations, or geographic area
- Site provides experience that promotes critical thinking and clinical reasoning

In addition, at least one fieldwork experience (Level I or Level II) will focus primarily on psychosocial factors (ACOTE Standard C.1.7). A fieldwork site will meet Clarkson’s criteria for psychosocial focus if its programming (clinical, community-based, or role-emergent) addresses any of the following:

- The mental health – mental illness continuum
- Emotional or behavioral regulation
- Impairments in interpersonal or social skills
- Specific psychological/psychiatric diagnoses
- Socio-economic factors resulting in health disparities
- A focus on the body-mind-spirit relationship

Finally, students may not be placed at the same fieldwork site for both Level I and Level II experiences unless they are in significantly different settings such as adult rehabilitation and children’s hospital.

SITE MANAGEMENT
Clarkson University’s Department of Occupational Therapy utilizes the web-based program E*Value to coordinate and manage fieldwork information. The system has extensive capabilities and houses all fieldwork site data, communication, and site specific forms. The software allows fieldwork educators and students to complete and submit evaluations on-line in a confidential platform. Key Features of E*Value for Fieldwork Educators include:

- **Evaluations:** Generate evaluations and assessment forms for students, educators and fieldwork experiences. Fieldwork educators and sites can then generate reports to enhance the fieldwork program and skills as a fieldwork educator.

- **Scheduling:** Streamline fieldwork scheduling for student, fieldwork educator for all sites. Students are linked directly to fieldwork educators to allow for smooth collaboration and management of documents.
MEMORANDUM OF UNDERSTANDING
A fully executed memorandum of understanding (MOU) is maintained between Clarkson University and each agency providing fieldwork opportunities. Revisions to the standard Clarkson MOU must be reviewed and authorized by the Director of Clarkson’s Risk Management Department. Prior to the initiation of any fieldwork placement, the AFWC will ensure that a current MOU is in place and will not expire within the duration of the fieldwork experience (ACOTE Standards C.1.2, C.1.6).

1. An MOU must be renewed at least every five years, or more frequently if requested by the fieldwork site. All steps of the contract management process are documented in the Fieldwork Coordinator’s Notes portion of e*Value.
2. E*Value will automatically send an alert 3 months prior to MOU expiration. At this time, two copies of the Contract Amendment will be completed and mailed to the fieldwork site, extending the contract expiration date by no more than 5 years. Some sites may require a new contract, for which the above process will be repeated.

If one agency provides fieldwork opportunities in two or more distinctly different programs, one MOU is maintained for the agency and separate Fieldwork Site Data Forms are maintained for each program.

FIELDWORK SITE DATA FORM
Fieldwork Site Data Forms are required for all sites and students will not begin a fieldwork placement without a current data form on file. Clarkson’s Fieldwork Site Data Form has been modified from the AOTA Fieldwork Data Form to capture the language in the Occupational Therapy Practice Framework, include information related to traditional and role emergent fieldwork experiences/settings and programming focusing on psychosocial factors. It also includes a survey of opportunities to reinforce Clarkson University’s Department of Occupational Therapy curricular threads (ACOTE Standards C.1.1, C.1.7, C.1.8).

Each fieldwork site is required to review and update the Fieldwork Data Form annually to ensure information is current. An annual review notification is automatically generated via E*Value to all sites on January first. The Fieldwork Site Data Form is available on the Clarkson University Department of Occupational Therapy website under fieldwork>fieldwork educators.

SITE SPECIFIC OBJECTIVES
Level I Objectives: learning objectives are developed by Clarkson University’s Department of Occupational Therapy and are shared with each level I site. In order to comply with ACOTE Standards each site must addresses the students understanding of how psychosocial factors influence engagement in occupation to facilitate client-centered outcomes.
**Level II Objectives**: are site-specific student learning objectives and are required for Level II placements. Site specific objectives must reflect each site’s specific philosophy, model of service delivery, client needs and student education program. In order to comply with ACOTE Standards each site must have at least one objective that addresses the students understanding of how psychosocial factors influence engagement in occupation to facilitate client-centered outcomes.

Site specific objectives must be reviewed annually by the site to ensure they are reflective of current practice and the student fieldwork program. An annual site-specific objective review notification is automatically generated via E*Value on January first to all sites.

Sample site-specific student learning objectives can be found on the Clarkson University Department of Occupational Therapy website under fieldwork>fieldwork educators and on the AOTA website.

**SITE VISITS**

When possible, all Level I and Level II sites will be visited initially upon entering into a fieldwork affiliation agreement. Subsequently, Level I sites will be visited every 3 years or more often if deemed necessary by the fieldwork educator or AFWC. Level II site visits occur when requested by the site, the student, or if deemed necessary by the fieldwork coordinator.

**CONFIDENTIALITY**

Students must complete the HIPAA training as directed by the AFWC and pass the post-assessment with a minimum of 80% accuracy prior to initiating any fieldwork placement. It is the student’s responsibility to abide by HIPAA guidelines in all clinical settings, whether experiential learning as part of any course or in formal fieldwork settings. Students must not include any client’s identifying information in academic fieldwork assignments, such as case studies, discussion groups, or presentations. Documentation containing data protected under HIPAA must be maintained in a locked or secure location and shredded when no longer in use. *Students who violate HIPAA risk termination and failure of fieldwork placement.*

Likewise, students' personal health records are also protected under HIPAA guidelines. The AFWC may not share information about a student's health (beyond confirmation of meeting minimum health requirements) or disability status with a fieldwork site without obtaining written permission from a student. If a student has health considerations or a disability that he believes may impact performance at a fieldwork site, or may qualify for accommodations under the Rehabilitation Act of 1973, he is encouraged to self-disclose this information to the fieldwork educator at the beginning of the fieldwork placement.
The Family Educational Rights and privacy Act (FERPA) was enacted in 1974 and protects the privacy of information contained in the academic records of students. FERPA does allow some sharing of academic information between the AFWC and fieldwork educators without a student's permission when the information shared supports that student's successful completion of fieldwork. However, it is unethical to share irrelevant student information or information that could negatively bias fieldwork educators against a student. More information on FERPA and its relationship to fieldwork experiences is available at www.aota.org.

LEVEL I FIELDWORK (OT 700)

INTRODUCTION
According to the Accreditation Council for Occupational Therapy Education (ACOTE) 2011 Standards, the goal of Level I fieldwork is to introduce students to fieldwork, to apply knowledge to practice, and to develop understanding of client’s needs. Our Level I fieldwork program provides students with exposure to a variety of populations (both disabled and well) in a variety of practice settings through direct observation and participation in selected experiences. Through supervision of the fieldwork educator and course required course assignments, students begin to make connections between the didactic coursework to date and the occupational therapy process (ACOTE Standard C.1.8). Students will enhance their understanding of occupation across the lifespan and explore factors, including psycho-social, that influence occupational performance (ACOTE Standard C.1.7). Students begin to cultivate not only professionalism but their professional identity.

Level IA fieldwork experiences are a 2-week full-time rotation and begin following the student’s first full academic year. Level IB Fieldwork is embedded during the fall or spring semester of the second academic year to allow simultaneous classroom and clinical education opportunities. This fieldwork experience runs 1 day per week for 10 weeks. Level I fieldwork cannot be substituted for any part of the Level II fieldwork requirement (ACOTE Standard C.1.10). Examples of Level I placements may include a variety of settings including day care centers, special education classrooms, adult community centers, adult assisted living facilities, independent living centers, clinical or health settings and community-based programs such as camps, recreation, art or social programs.

LEVEL I FIELDWORK OBJECTIVES
Level I objectives are measured through the Professional Behaviors Rating Scale completed by fieldwork educators and through embedded didactic coursework.
1. Students will begin to develop professional identity by:
   a. Demonstrating an increased comfort and confidence when interacting with clients, colleagues and administrators within practice settings. (*Thread: Professional Identity*)
   b. Demonstrating empathy for client’s perception of quality of life, occupational roles, and intervention priorities, and demonstrate respect for the impact that social and cultural diversity have on beliefs, attitudes and values. (*Thread: Professional Identity*)
   c. Demonstrating an ability to accurately document observations of client behaviors. (*Thread: Professional Identity*)
   d. Demonstrating professional and ethical behavior, and responding appropriately to supervisory feedback. (*Thread: Professional Identity*)

2. Students will increase awareness of existing and potential occupational therapy roles by:
   a. Recognizing local or regional occupational needs that may benefit from innovative or technology-based interventions. (*Threads: Technology, Innovation*)
   b. Exploring the unique influence that a rural context has on occupational participation and performance. (*Thread: Innovation*)
   c. Identifying existing and potential inter-professional collaborations within their fieldwork setting. (*Thread: Inter-professional Collaboration*)

3. Students will develop basic clinical reasoning skills by:
   a. Reflecting upon service delivery systems, respecting setting-specific policies and procedures, and demonstrating a basic understanding of the assessment and intervention process. (*Thread: Professional Identity*)
   b. Recognizing the use of occupation as both an intervention and client-centered, meaningful outcome. (*Thread: Professional Identity*)
   c. Reflecting on how psycho-social factors influence engagement in occupation. (*Thread: Professional Identity*)

4. Students will begin to identify and integrate the OT program curricular threads into fieldwork experiences. (*Threads: All*)

Assignments in OT 700 are intended to reinforce concepts covered during the first year of didactic coursework as well as support curricular threads. Students complete an occupational profile during each level I fieldwork rotation and engage in asynchronous online discussion board posts facilitated and managed by the AFWC. These assignments are designed to deepen student’s understanding of individuals as occupational beings, how psychosocial factors influence engagement in occupation, the role of occupational therapy (or potential role for role
emergent settings), the dynamic nature of professional and inter-professional relationships, and enhancing student’s professional identity (ACOTE Standards C.1.0, C.1.1).

LEVEL I FIELDWORK ASSIGNMENT PROCEDURE

The Level I fieldwork assignment process begins in February of the second trimester. Students have the opportunity to review potential Level I fieldwork sites on the academic management website, E*Value. Students then complete and submit a Level I Fieldwork Placement Preference Form by the deadline provided. Clarkson University’s Department of Occupational Therapy does NOT guarantee placement in student preferred fieldwork sites however, preferences are taken into consideration to the extent possible when assigning fieldwork placements.

Students are notified of Level I fieldwork placements by the target date of March 30th in the spring trimester prior to OT 700. It is the responsibility of the student to make living and/or transportation arrangements to fulfill fieldwork obligations.

Once students are assigned, the AFWC sends confirmation to the fieldwork sites and to the student. The AFWC also provides the fieldwork site with the following information:

- student personal data (i.e. name, address, contact information)
- verification of insurance
- date of certified background check
- verification of HIPAA and infection control training
- verification of current CPR and First Aid training
- copy of Health Center’s Health and Immunization Verification form.

Upon confirmation, it is the student's responsibility to contact the site (and schedule an interview if required). Students must verify site requirements and provide all documentation and information required by the site in a timely manner. If the site has health or background check requirements above and beyond those required by the CUOT Program, it is the student's responsibility to cover the cost and provide required documentation.

LEVEL I ATTENDANCE

Students are expected to complete the entire fieldwork rotation (minimum of 70 hours) during the assigned dates, unless previously arranged with the AFWC and the fieldwork site. Work schedule will be provided by the fieldwork site educator and is not flexible. Tardiness or leaving early is unacceptable and reflects unprofessional behavior. Unscheduled absences are allowed only in the event of illness or emergency and are to be made up. In the case of an unscheduled
absence, the student must notify the fieldwork supervisor per the site’s policy. In addition, the student must contact the AFWC by phone or e-mail prior to the start of the scheduled workday.

LEVEL I FIELDWORK SUPERVISION

The Academic Fieldwork Coordinator must ensure supervision during Level I fieldwork placements is provided by qualified personnel, with a focus on enhancing opportunities for interprofessional collaboration, development of professional identity and professionalism (ACOTE Standard C.1.9). This may include, but is not limited to, currently licensed or otherwise regulated occupational therapists and occupational therapy assistants, or other relevant professionals such as teachers, social workers, psychologists, nurses, physical therapists, speech language pathologists, or community-based program staff (ACOTE Standard C.1.9). Qualifications of Level I fieldwork educators will be documented in E*Value.

All fieldwork educators are provided with Clarkson University’s Department of Occupational Therapy Fieldwork Educator’s Fieldwork Manual that includes an orientation to the Level I fieldwork process, objectives and resources to enhance student learning, and integration of our curricular threads to support them in their critical roles as supervisor and educator (ACOTE Standard C.1.1, C.1.3). The fieldwork educator will be responsible for verifying the completion of fieldwork, completing and reviewing the Professional Behaviors Rating Scale with the student, and returning the completed Professional Behaviors Rating Scale to the AFWC in a timely manner.

Students are required to complete the Level I Student Evaluation of Fieldwork Experience (SEFWE) form as a mechanism for student reflection on their learning experiences, the effectiveness of their fieldwork educator and supervision. Students complete this form following each level I rotation (ACOTE Standard C.1.2, C.1.10). It is then uploaded to E*Value and reviewed by the AFWC to ensure the site and supervision meets ACOTE’s and the Clarkson University’s Department of Occupational Therapy standards.

LEVEL I FIELDWORK GRADING

A Professional Behaviors Rating Scale was developed to integrate the professional behavior expectations of the Clarkson University Department of Occupational Therapy Program. Fieldwork educators and student receive notification by e-mail granting access to the Professional Behaviors Rating Scale through E*Value prior to the end of the Level I placement. The Professional Behaviors Rating Scale is completed individually by both the student (self-assessment) and the fieldwork educator and then reviewed together (ACOTE Standard C.1.10). The fieldwork educator and student each submit the Professional Behaviors Rating Scale to the AFWC electronically through E*Value within 3 days of completion of the fieldwork experience.
The *Professional Behaviors Rating Scale Form* is available on the Clarkson University Department of Occupational Therapy website under fieldwork>fieldwork educators.

Successful completion of Level I fieldwork is measured by a grade of C or better on course assignments (see syllabus) and a passing score of 100 out of 120 points on the *Professional Behaviors Rating Scale* for each fieldwork experience. Students who do not successfully complete OT 700 are required to repeat the course before proceeding to the next courses in the curriculum sequence. Students may repeat OT 700 once.

**LEVEL II FIELDWORK (OT 705 & 710)**

**INTRODUCTION**

Students are required to complete two 12-week full-time fieldwork experiences and occur at the end of all academic coursework (ACOTE Standard C.1.13). In keeping with ACOTE’s identified goal of Level II fieldwork, the Level II fieldwork program at Clarkson University Department of Occupational Therapy is designed to transition students out of the student role and into the role of an ethical entry-level generalist therapist by promoting practice skills reflective of current evidence and enhancing clinical reasoning skills (ACOTE Standard C.1.11). Fieldwork placements reflect the curricular threads of the Clarkson OT program and include experiences in traditional clinical settings as well as in innovative, role-emerging settings. The Academic Fieldwork Coordinator is responsible for ensuring that the sites are developmental in nature, provide a client-centered experience, and provide students with diverse experiences. Students have the opportunity to choose from a variety of settings serving individuals across the life span.

**LEVEL II FIELDWORK OBJECTIVES**

Level II fieldwork provides the opportunity for synthesis off all 5 curricular goals and threads as students flourish into competent entry level occupational therapists (ACOTE Standards C.1.0, C.1.1). Each fieldwork site develops its own learning objectives that depict its specific philosophy, model of service delivery and client needs. In addition, students are expected to meet the objectives established for Level II fieldwork by the Clarkson OT program which mirror and are measured by the AOTA Fieldwork Performance Evaluation. Level II programmatic fieldwork objectives are as follows:

1. Students will develop entry-level competencies in OT as demonstrated by achieving the minimal passing score on the AOTA Fieldwork Performance Evaluation.
2. Students will apply knowledge and skills obtained in the academic setting to the fieldwork setting, including all aspects of the OT Practice Framework.
3. Students will understand the impact of psychosocial factors on occupational engagement and integrate these factors into client-centered, meaningful, occupation-based outcomes (ACOTE Standard C.1.12)

4. Students will integrate all aspects of developmental, psychosocial, behavioral and physical functions into therapeutic intervention.

5. Students will demonstrate a science-driven practice through the analysis and use of related evidence.

6. Students will follow protocol and procedures during evaluation and intervention practice.

7. Students will demonstrate professional and ethical behaviors in relationships with clients, family members, colleagues and supervisor throughout the OT intervention and fieldwork education process (ACOTE Standard C.1.11).

8. Students will communicate the role and value of OT to clients, professionals, and the general public (ACOTE Standard C.1.11).

9. Students will demonstrate effective written communication skills through accurate, appropriate and timely documentation.

10. Students will demonstrate self-initiative in seeking new learning opportunities.

11. Students will demonstrate effective inter-professional collaboration to meet program and client needs.

12. Students will incorporate innovation, technology and scholarship, as they relate to their fieldwork setting and population.

**LEVEL II FIELDWORK ASSIGNMENT PROCEDURE**

Students are encouraged to take an active collaboration role in planning their Level II fieldwork experiences with the AFWC. Students have access to Fieldwork Site Data Forms and previous Student Evaluation of Fieldwork Experience Forms and any supplemental site information within E*Value. Previous student evaluations of the fieldwork site should be considered a subjective report of one individual's experience. Information about potential sites should be reviewed by students to gain insight into the practice setting, population, caseload, supervision format, and site expectations.

Diversity among fieldwork placements (i.e. setting, population, service delivery, practice area) is required and will be ensured by the AFWC using the Fieldwork Planning Matrix. Students can complete Level II fieldwork placements at one site provided the placements are reflective of more than one practice area or in a maximum of four different settings (ACOTE Standard C.1.12). In addition, Level II fieldwork can be completed on a part-time basis as long as it is at least 50% of a FTE per the site specific personnel policies (ACOTE Standard C.1.13). Final site placement is at
the professional discretion of the AFWC to ensure diversity in settings, populations and skills are achieved.

There are currently two time periods for the completion of Level II fieldwork: MSOT 705 during the summer trimester, and MSOT 710 during the fall trimester. The Level II fieldwork assignment process for both periods will begin during the fall semester of the second year of study.

1. In the fall trimester of the second year of study, students meet with the AFWC on an individual basis to review the Fieldwork Planning Matrix form. The AFWC ensures fieldwork settings preferences continue to represent a balance of clinical experiences with regards to settings, populations, and practice areas. The AFWC also verifies that at least one placement (Level I or Level II) focuses on psycho-social factors.

2. In December students begin reviewing potential Level II fieldwork sites on the academic management website, E*Value. Students then complete and submit the Level II Fieldwork Placement Preference Form by the deadline provided (January). Forms turned in late will be given lower priority when determining placements.

3. Level II Fieldwork Placement Preference Forms are reviewed by the AFWC and matched based on academic needs of the student and site availability. Clarkson University's Department of Occupational Therapy does NOT guarantee placement in student preferred fieldwork sites however, preferences are taken into consideration to the extent possible when assigning fieldwork placements.

4. The target date for student notification of Level II fieldwork site placements is January 31 in the spring trimester prior to OT 705 & OT 710.

5. Upon confirmation of placement, the AFWC sends confirmation to the site regarding the student placement.

6. By April 1st, the AFWC sends a letter to each site confirming: AOTA Personal Data Form, verification of insurance, date of certified background check, verification of HIPAA and infection control training, verification of current CPR and First Aid training, copy of Health Center’s Health and Immunization Verification form regarding current immunizations, PPD’s and physical.

7. Upon confirmation, it is the student's responsibility to contact the site to introduce themselves and send their completed AOTA Personal Data Form which is available via Moodle. Students must verify site requirements and provide all documentation and information required by the site in a timely manner. No student, nor family member, is to contact a Level II fieldwork site without receiving prior permission to do so from the Academic Fieldwork Coordinator. Students who do not adhere to this policy will jeopardize their placement and will move to the bottom of the placement list.
8. It is the responsibility of the student to make living and/or transportation arrangements to fulfill fieldwork obligations.

LEVEL II FIELDWORK DATES

Students may begin a Level II fieldwork affiliation once they have met the following requirements:

- All didactic courses must be completed with a minimum grade of C (73 or higher)
- Students have maintained an overall GPA of 3.0 or higher
- Satisfactory completion of Level I placements.

OT 705 affiliations will be scheduled for a 12-week period from May through August, while OT 710 affiliations will be scheduled for a 12-week period from August – December. Specific dates are determined by the site and may vary and, at times, fall outside the range of typical placement schedules. Students should not commit to any vacation plans prior to confirmation of fieldwork placement and dates. Time off during Level II fieldwork affiliations for vacation, service trips or study abroad is not permitted.

LEVEL II ATTENDANCE

Students are expected to complete 12 full weeks for each fieldwork assignment, in consecutive weeks unless previously arranged with the AFWC and the fieldwork site. Work schedule will be provided by the site’s fieldwork educator and is not negotiable. In sites where a work day is shorter (e.g. K-12 school settings), the student’s hours will reflect those of the site’s fieldwork educator. Tardiness or leaving early is unacceptable and reflects unprofessional behavior. Unscheduled absences are allowed only in the event of illness or emergency. In the case of an unscheduled absence, the student must notify the fieldwork supervisor by phone or e-mail prior to, or at the start of the scheduled workday. In addition, the student must contact the AFWC by phone or e-mail prior to the start of the scheduled workday. Any additional attendance policies of the fieldwork site must be followed. Absences must be made up at the discretion of the fieldwork educator.

Acceptable absences include:

- Medical illness that prevents student from doing duties
- Holidays recognized by the fieldwork site.
- Religious holidays occurring during affiliation (students must discuss with fieldwork educator prior to beginning the affiliation
- Family emergency
LEVEL II FIELDWORK SUPERVISION

Students completing Level II fieldwork in traditional settings (where there is a full-time OT onsite) will be supervised by a registered occupational therapist who has a minimum of one year clinical experience, NBCOT certification, and meets all state-specific regulatory criteria (ACOTE Standard C.1.14). In “role-emergent” fieldwork settings (those settings where an OT is not currently employed fulltime) supervision will be shared by an onsite, non-OT supervisor and a qualified occupational therapist with a minimum of 3 years of clinical experience. A minimum of 8 hours of supervision per week must be provided by the occupational therapist in role-emergent placements (ACOTE Standard C.1.17).

Fieldwork supervision can be provided in a variety of formats. This includes:

- One student to one fieldwork educator
- Multiple students to one fieldwork educator
- Multiple fieldwork educators to one student
- Multiple fieldwork educators to multiple students
- Role-enhancing/role-emerging supervision (supervision shared by fieldwork educator and onsite supervisor)

Ratio of students to fieldwork educators will not exceed 3:1; appropriate supervision ratio will be determined based on student and site needs, ensuring that learning objectives can be met and that students can perform their duties safely. If multiple fieldwork educators are assigned to a student, or students, it is recommended that one person assume the role and duties as the primary fieldwork educator.

The supervision process is designed to evolve as the students gain competence throughout the level II FW experiences. To maintain safety of all parties involved, the fieldwork educators' are instructed on the use of direct and less direct supervision which is appropriate for the setting, the severity of the client’s condition, and the ability of the student (ACOTE Standard C.1.16).

INTERNATIONAL FIELDWORK PLACEMENTS

Supervision for Level II fieldwork placements outside of the United States must be provided by an occupational therapist who graduated from an OT program approved by the World Federation of Occupational Therapists, with a minimum of 1 year of experience in practice or 3 years for a role-emergent setting (ACOTE Standard C.1.19.).
FIELDWORK SITE POLICIES
While on a Level II fieldwork experience, students must abide by the site’s established policies and procedures regarding dress and professional behavior. Use of cell phones for talking, texting, or checking e-mail is prohibited during work hours unless required in fulfillment of fieldwork duties and responsibilities.

EVALUATION OF STUDENT PERFORMANCE
Mid-Term Contact
The AFWC or designated faculty will initiate contact with the FWE and the student during the 6th or 7th week. Initial contact with the fieldwork educator may be by phone, e-mail or an on-site visit (ACOTE Standard C.1.3). Discussion at the midterm contact is documented in the student's records and addresses the following questions:

● How is the student’s overall performance to date?
● What are the student's strengths?
● What areas does the student need to focus on during the remaining weeks of the fieldwork placement?
● Does the fieldwork educator have any specific concerns?
● Does the fieldwork educator feel that the student has been adequately prepared for the Level II experience, or are there any questions regarding the Clarkson OT curriculum and/or supporting curricular threads?
● Does the student demonstrate an understanding and integration of psychosocial factors impacting occupational performance to develop client-centered intervention and outcomes?

Any additional questions or comments that result from this discussion.

The midterm contact with the student will take place following contact with the fieldwork educator (ACOTE Standard C.1.3). Strengths and areas for improvement based on fieldwork educator feedback will be shared with student and their feedback will be requested. They will also be asked to indicate if fieldwork supervision has been adequate. Students will be reminded that they are welcome to contact the AFWC at any time if questions or concerns arise. The midterm contact and response is documented in the student's records.

Mid-Term Evaluation
Fieldwork sites may assign site-specific learning activities during the course of a fieldwork experience, which students are obligated to complete. At mid-point of the Level II fieldwork experience (week 6), both the student and the fieldwork educator must complete the AOTA Fieldwork Performance Evaluation (FWPE) for the Occupational Therapy Student (ACOTE...
A sample of the **AOTA Fieldwork Performance Evaluation (FWPE) for the Occupational Therapy Student** is available on the Clarkson University Department of Occupational Therapy website under fieldwork>fieldwork educators. The purpose of this midterm evaluation is to help students identify strengths and weaknesses, and help direct focus during the second half of the fieldwork experience. Students and fieldwork educators must utilize the midterm scoring criteria as a point of reference for performance. **Satisfactory performance at midterm is set by AOTA at 90 points.** Scores that fall at or below 89 are unsatisfactory and must be reported immediately to the Academic Fieldwork Coordinator by the fieldwork educator. A score of "1" on Item 2 of the FWPE ("Adheres to Safety Regulations") is grounds for automatic failure of the current fieldwork assignment.

If a student is not meeting student objectives, is at risk for failing, or is at risk for termination from the fieldwork experience, the AFWC, fieldwork educator, and student will meet either in person or via conference call to develop a plan of action. This may include a learning contract in circumstances where a student has the opportunity to improve performance. A learning contract will be signed by all three and will include: purpose of contract, objectives and designated time-frame, criteria for measuring change, and consequences for not attaining objectives. Failure to comply with the learning contract or meeting fieldwork educator’s expectations may result in termination of Level II fieldwork experience. The **Fieldwork Experience Assessment Tool (FEAT)** may be offered at any time throughout the student’s fieldwork experience as a tool to promote open communication, enhance the supervisory experience and improve student success.

**Final Evaluation**

At the end of Level II fieldwork experience, the final **AOTA Fieldwork Performance Evaluation (FWPE) for the Occupational Therapy Student** must be completed by the fieldwork educator, reviewed with the student, and signed by both parties (ACOTE Standard C.1.18). The fieldwork educator will keep one copy of the evaluation and return the original to the Academic Fieldwork Coordinator. Students are entitled to request a copy of the evaluation from the fieldwork educator. A completed FWPE with a passing score must be received by the University before the fieldwork experience can be considered complete. Satisfactory (passing) completion of Level II fieldwork is dependent upon a **FWPE score of 122 or higher**, and with all items in "Fundamentals in Practice" scored at a 3 or above (meets standards).

Within the last week of each Level II fieldwork experience, students are required to complete the SEFWE. The SEFWE is to be reviewed and signed by both the student and the fieldwork educator. The SEFWE is to be returned to the AFWC within one week following completion of the Level II experience. SEFWEs are reviewed by the AFWC to assess the quality of the fieldwork experience,
student preparation, and fieldwork supervision. All SEFWEs will be uploaded into the e*Value system and available to subsequent students in the fieldwork site selection process.

A grade of “W” (withdrawal) will be given only in circumstances where an emergency interrupts the completion of the fieldwork experiences and student obtains written permission from the AFWC. Students wishing to withdraw from a fieldwork experience because they are not meeting performance expectations may receive a grade of “F” (failure). A student may receive a grade of “W” or “F” in only one Level II experience. In this case, students are required to repeat and repay for an additional fieldwork placement following the development of a revised educational plan and consultation with the AFWC, the student’s advisor, and the Department Chair. In the unlikely event that a student receives a grade of “W” or “F” a second time, he or she will be separated from the OT program. As per University policy, students have an opportunity to appeal their grade.

A passing grade for Level II fieldwork will be submitted to the registrar upon receipt of all required paperwork (FWPE and SEFE). Students must complete all Level II fieldwork requirements within one year after completion of the academic coursework. If circumstances arise and a student needs to complete fieldwork outside of the one-year timeline, students can petition and the case will be reviewed by the faculty. Approval is needed to extend fieldwork placements. This policy ensures timely student progression and matriculation. Once a student successfully completes all coursework, including the first Level II Fieldwork, they are eligible to submit an application for graduation. Upon graduation, the student is able to apply to take the NBCOT Certification Exam.

TERMINATION OF LEVEL II FIELDWORK
Communication between the Clarkson University OT department and clinical site is constant. It is the responsibility of the AFWC to intervene when a FWE reports that a student exhibits unsatisfactory behavior or a student’s potential for achieving entry-level competence by the end of the affiliation is in question. The AFWC and FWE may consult with the Clarkson University program director and other Clarkson University OT faculty when necessary. Decisions to terminate fieldwork assignments will be based on concrete information provided to the AFWC and when mutually agreed upon by both the AFWC and FWE. The decision will be based on feedback from the student, AFWC and FWE. However, since a facility’s participation in the fieldwork education of student is a privilege and not an obligation, the AFWC does not have the right to maintain a rotation assignment if the facility does not agree. The Clarkson University student may petition in writing to terminate a fieldwork rotation. The decision will require approval from the fieldwork site, the AFWC, the Clarkson University OT program director, and the respective college Dean prior to the student being released by the fieldwork site.
A grade of “F” will be given when the student does not successfully complete a Level II fieldwork due to any of the following circumstances:

- Student failed to meet established learning contract.
- Student demonstrated unsafe and/or unethical behavior.
- Student abandoned established responsibilities.
- Failure to meet minimum required final score of 122 on the Fieldwork Performance Evaluation.

**STUDENT GRIEVANCE**

A student who believes the fieldwork evaluation is inaccurate, should discuss the evaluation with the fieldwork educator. If the fieldwork issue remains unresolved, the student should contact the academic fieldwork coordinator. Most concerns are resolved this way. However, if it is not possible for the student to resolve the problem with the immediate fieldwork educator and/or the academic fieldwork coordinator, then the program director should be contacted. If the concern is not resolved by discussion with the program director then the student may request that the college Dean meet jointly with the student, academic fieldwork and/or the fieldwork educator/program director to resolve the complaint. The college Dean may involve others in resolving the matter if, in his or her discretion, it seems appropriate, including asking a panel to hear the concern. Additional information can be found in the Clarkson University Grievance Procedure in section VIII of the Clarkson Regulations 2016-2017.

http://www.clarkson.edu/studentaffairs/regulations/index.html

**STUDENT RESPONSIBILITIES**

**STUDENT READINESS**

Students must achieve a cumulative GPA of 3.0 and must consistently demonstrate appropriate professional behaviors and necessary competencies to be permitted to enroll in fieldwork courses. Lack of safe or ethical behavior in any academic or clinical environment may result in Department action, up to, and including, separation from the occupational therapy professional program. The safety requirement for clinical skills is 100%. Students must meet these safety requirements to continue into the next semester or clinical fieldwork assignments.

Students are expected to take an active role in the learning process whether in a traditional or emerging practice area. Students will participate through both guided observation and active participation in selected activities. Students must abide by site’s established policies and
procedures. Use of cell phones for talking, texting, or checking e-mail is prohibited during work hours unless required in fulfillment of fieldwork duties and responsibilities.

**STUDENT ORIENTATION TO FIELDWORK**

Orientation to fieldwork is embedded in the Profession Seminar Courses within the CUOT curriculum. Students receive an overview of the fieldwork program and the integration within the OT curriculum, are oriented to the syllabus and related assignments, the student evaluation process and evaluation tool and academic and fieldwork expectations are discussed. Emphasis is placed on students taking ownership of their learning, supervision, communication, and safety. In addition, the role of psychosocial factors and the impact on occupational engagement is reviewed and stressed as an important component of the fieldwork process. The student fieldwork manual is provided and reviewed with a signed acknowledgement of receipt and responsibly obtained from each student.

**HEALTH REQUIREMENTS**

Prior to every fieldwork placement, it is the student’s responsibility to ensure that their physical and all required immunizations are current and will remain current throughout the fieldwork experience. All student health records will be maintained by Clarkson Student Health Services. No electronic or hard copies of health records will be maintained within the OT Department, with the exception of a *Health and Immunization Verification* document signed by Student Health Services medical staff. A copy of this verification form will be available to the student through the e-Value website and provided to fieldwork sites upon assignment. The Department will take all reasonable measures to ensure security and privacy of this information. Upon assignment to a fieldwork placement, a copy of the Clarkson Student Health Center’s *Health and Immunization Verification* form is sent to the fieldwork site. Students are required to provide verification of the following:

**Upon Matriculation**
- Tetanus or Tdap, within the past 10 years of completion of final fieldwork
- MMR – Proof of immunization, documented evidence of having had the disease, or separate Measles, Mumps and Rubella titers demonstrating immunity
- Varicella titer or immunization
- Hepatitis B immunization or signed waiver

**Updated Annually**
- PPD (Mantoux) 2-step or 2 separate PPD's (not to expire during any fieldwork period)
- Annual physical exam (upon matriculation and renewed annually)
- Influenza vaccination is not required but strongly encouraged
CPR AND CERTIFICATIONS
A Health Care Provider CPR and First Aid certification is required prior to starting any fieldwork experience. Students must also complete training on OSHA Workplace Safety and infection Control, satisfactorily passing a post-test with a minimum score of 80%. A certificate of completion is then awarded and uploaded into the student's record in E*Value.

CRIMINAL BACKGROUND CHECK
A satisfactory criminal background check is required for admission to the Clarkson OT Program. The Clarkson University OT Program uses the services of Certified Background to complete this process and includes:

- 7 year US/county criminal records
- Residency history
- Social security trace
- National record indicator with sex offender registry
- National health care fraud
- Abuse scan

Student background reports are maintained by Certified Background and verification of student clearance is provided to the OT Department. In addition, some fieldwork sites may require an updated criminal background check or drug testing prior to beginning an affiliation. This information is available to students in E*Value during the site selection process, and should be confirmed by students prior to accepting a fieldwork assignment. Students are obligated and financially responsible to follow any established policies and procedures pertaining to health and safety screenings at assigned fieldwork sites.

PROFESSIONAL LIABILITY INSURANCE
All students are required to have liability insurance prior to initiating fieldwork assignments. This form of risk management minimizes risks to students and the University, while providing students opportunities to learn and develop during fieldwork experiences and assignments. Clarkson’s Office of Risk Management, in cooperation with its vendors, oversees student professional liability (malpractice) coverage and related issues. Students are covered by the Clarkson University Health Sciences’ umbrella policies for professional and general liability while engaged in fieldwork.

DRESS CODE
When students are representing Clarkson University, the Department of Occupational Therapy, business casual dress is expected per the student handbook. When at a clinical site, students are
expected to adhere to the higher standard of appearance. Students are expected to follow the dress code established per policy at each of their fieldwork placements. Nametags are required to be worn at all times in accordance with Federal law during fieldwork placements. The department provides an appropriate name tag during the first semester of the curriculum, or upon legal name change, at no charge. Fieldwork sites may require student to obtain and display an alternate form of identification (name tag, badge, etc.) which will take precedent over the CUOT nametag.

**ROLES AND RESPONSIBILITIES**

**FIELDWORK STUDENT**
Students are representatives of Clarkson University, are responsible for their own learning, and for maintaining the reputation of the Clarkson OT Program. Students are required to:

- Complete all fieldwork assignments, including those that are not graded
- Maintain confidentiality at all times
- Act within the scope of the student’s knowledge, training and expertise
- Demonstrate professional behavior at all times, including timeliness
- Comply with policies and procedures of the fieldwork site
- Actively participate in the supervisory and learning process
- Arrange for transportation and housing as required by assigned fieldwork placement
- Follow the OT Code of Ethics.

**ACADEMIC FIELDWORK COORDINATOR**
The AFWC at Clarkson University is Cindy Hammecker-McLean, MS, OTR/L. Assistance is provided to the AFWC by the Academic Support Assistant, Jennifer Zoanetti. The AFWC is responsible for overseeing all fieldwork program development and coordination, including:

- Research and identify potential fieldwork sites and opportunities
- Develop and maintain contracts with fieldwork sites
- Establish and maintain current fieldwork site data forms
- Ensure fieldwork agreements are sufficient in scope and number to allow completion of graduation requirements in a timely manner (ACOTE Standard C.1.5)
- Ensure variety of placement opportunities, including both traditional and role-emergent settings
- Ensure fieldwork program reflects the scope and content of the curriculum
- Assist fieldwork educators with the development of site-specific objectives (Level II)
- Ensure qualifications of fieldwork educators
• Ensure ration of fieldwork educators to students enables proper supervision and ability to provide adequate assessment of student performance and progress (ACOTE Standard C.1.5)
• Collaborate with, support, and train fieldwork educators
• Collaborate with students to identify fieldwork needs and preferences, and establish a “good fit” for fieldwork experiences
• Communicate with students regarding fieldwork placements, assignments and requirements
• Maintain ongoing communication with fieldwork educators and students to ensure adequate supervision, monitor student progress and performance, and provide support as needed
• Ensure at least one fieldwork experience has a focus on psycho-social factors
• Review student performance evaluations and assign grades
• Review Student Evaluation of Fieldwork Experience to assess effectiveness and appropriateness of fieldwork placement

FIELDWORK EDUCATOR
All fieldwork educators are enrolled by the AFWC into the e*Value system, where they have access to fieldwork resources, digital evaluations, and e-mail reminders for fieldwork assignments. Prior to the arrival of a student they receive a link to a pre-recorded fieldwork educator orientation, which includes information regarding the OT curriculum, fieldwork objectives, student expectations, and requirements of the fieldwork educator.

Fieldwork Educators are required to meet ACOTE standards and demonstrate the following minimum competencies:
• Demonstrate competency in professional knowledge, skills, and judgment
• Model professionalism and inter-professional collaboration
• Demonstrate OT practice that supports client engagement in meaningful occupation
• Facilitate the student's clinical reasoning and its application to entry-level practice
• Utilize a student-centered approach to fieldwork education with the objective of developing entry-level competencies
• Engage the student in client interaction
• Review student assignments and provide meaningful feedback
• Evaluate student performance objectively and fairly
• Develop and/or implements an organized fieldwork program consistent with legal and professional standards and environmental factors
• Maintain ongoing communication with the AFWC, student and others involved in the student’s fieldwork experience.

It is the responsibility of clinical sites to ensure compliance with Medicare and other payer requirements for student supervision. If requested, the AFWC can provide guidance regarding student supervision when available.

FIELDWORK EDUCATOR RIGHTS AND PRIVILEGES

The **rights** of fieldwork educators include, but are not limited to the following:

- To be treated fairly with dignity and without discrimination by all students and faculty/administration of the occupational therapy department
- To receive timely information regarding requests for student placements, upcoming student placements, changes in placement, the academic and clinical education curriculum and policies
- To request assistance from the academic program in handling fieldwork education or student issues that arise
- TO request onsite in-services related to clinical education, effective teaching strategies or clinically related topics by the AFWC or other faculty members

The **privileges** of fieldwork educators include, but are not limited to the following:

- Participation in fieldwork education workshops and OT related conferences;
- Utilization of the University library;
- Distribution of recruitment materials to students via the AFWC;
- Consideration to become a member of the CUOT Advisory Board;
- Collaboration with the CUOT faculty and AFWC;
- Link to valuable resources (i.e. FW, EBP) via CUOT website
- Receive CEU certificate for providing student supervision

The **benefits** of taking an OT student from Clarkson University’s OT program:

- Updated clinical knowledge
- A wealth of new ideas
- Energized practice environment
- Evidence-based practice support
- Opportunities for new learning
- Program development
- Technology and innovation driven
CLINICAL SUPERVISION

Clinical supervision of fieldwork students is considered a vital aspect of occupational therapy training. It is the fieldwork educator’s responsibility to create an environment that fosters learning, enhances clinical inquiry, and progresses students toward greater competency in their role as occupational therapists. The American Occupational Therapy Association (1994) defines supervision as: a process in which two or more people participate in a joint effort to promote, establish, maintain, and/or elevate a level of performance and service.

Supervision is a mutual undertaking between the supervisor and the supervisee that:

- fosters growth and development;
- assures appropriate utilization of training and potential;
- encourages creativity and innovation;
- provides guidance, support, encouragement, and respect while working toward a goal.

Supervision may vary per site based on the setting, severity of the clients’ condition and the ability level of the student. As students begin to transition from the role of a student to the role of an entry level occupational therapist the level of supervision is expected to evolve from direct to less direct supervision while ensuring the safety of all person’s involved and that the student learning objectives are met.

CHARACTERISTICS OF AN EFFECTIVE FIELDWORK EDUCATOR

Different approaches to supervision may be indicated for different students. Also, different supervisors may gravitate towards a particular style or approach. There is no single correct way to handle every problem or situation. Researches have been discussing and studying the characteristics of successful supervisors for decades. Here are a few to keep in mind as you embark on your journey as fieldwork educator:

1) **Good Communicator** - active listener; asks open ended questions; encourages problem solving; gives constructive, timely feedback, both verbally and written; open and honest.

2) **Supportive/Sensitive** - encourages questioning; enthusiastic; honest; objective; rewards good performance; empathetic; flexible; able to recognize students’ needs and adjusts structure to meet them.

3) **Guides the learning process** - from simple to complex, realistic assignments; willing to share knowledge and resources; able to explain clinical reasoning; encourages problem solving; motivates student to grow and learn; able to use diverse teaching strategies; recognizes different learning styles and adjusts accordingly.

4) **Organized** - objectives are clear and realistic; provides adequate structure; sets aside time for supervision and respects that time; prepares for supervision sessions.

5) **Competent clinician** - serves as a positive role model; knows limitations; reliable and prompt; keeps up-to-date by reading professional literature and attending workshops.
TIPS FOR SUCCESSFUL SUPERVISION
Clarkson University Department of Occupational Therapy

BE PREPARED!

- Fieldwork sites are strongly encouraged to develop a student manual. This provides structure for the student as well as the fieldwork educator to carry out an effective supervisory plan and support student success.
- Develop site-specific learning objectives and week by week expectations related to learning experiences, responsibilities, caseload expectations, documentation and billing, participation in team meetings or care planning. Documentation of these expectations guide a successful fieldwork experience for clients, the facility and for the student. These efforts allow for the student to realize the expectations and work toward accomplishment.
- Before assuming the role as fieldwork educator complete the *Self-Assessment Tool for the Fieldwork Educator*. It provides a mechanism to evaluate personal knowledge and skills related to competency in professional practice, education, supervision, evaluation, and administration.

GETT OFF ON THE RIGHT FOOT!

- Communication of expectations is an essential step of successful supervision.
- Ensure you have allotted adequate time on the students first day for orientation and mentoring. This helps create a calm, supportive atmosphere that promotes learning.
- Welcome student as a collaborator and team member.
- Reflect back to your first day of fieldwork, how you were feeling, what had positive impacts on your success, what do you wish happened differently?
- Grade learning experiences through observation, assisting, co-treating and role-modeling.

SUPERVISION STRATEGIES!

- Remember, as with client intervention plans, you should adapt educational and supervisory approaches to the student’s learning style to support optimum progress.
- Focus on feedback: is it timely but also given at the appropriate time, provide a balance between positive and constructive feedback, does it guide student’s clinical reasoning
- Devote time to student learning process
- Provide weekly formal supervisory meetings throughout the 12 week rotation
- Challenge student performance gradually by reducing direction, and asking probing questions to support progressively greater independence.
- Adapt your teaching style to student’s learning style and needs.
• Role model your thought process for solving clinical decision-making by saying it out loud
• Promote student independence through trial and error within reason to ensure client and student safety while you step slowly back as the student gains competence
• Let your colleagues know the student is coming and invite them to participate in the student’s learning experience by notifying you of potential opportunities and activities. Seek out resources for unique interventions and learning opportunities.
• Enjoy having a student and appreciate where they are in their learning process as a future OT!
WEEKLY SUPERVISION LOG

Clarkson University Department of Occupational Therapy

Week #: Student ____________________ Fieldwork Educator ____________________

STRENGTHS

AREAS FOR GROWTH

STRATEGIES USED TO ADDRESS PSYCHOSOCIAL FACTORS

GOALS FOR NEXT WEEK (refer to FW objectives and Site Specific objectives)

MEETINGS, ASSIGNMENTS DUE, ETC.
STUDENT/SUPERVISOR WEEKLY REVIEW
Clarkson University Department of Occupational Therapy

Student____________________ Fieldwork Educator:____________________ Week #:_______

Student completes grid below and reviews with fieldwork educator:

<table>
<thead>
<tr>
<th></th>
<th>1 Poor</th>
<th>2 Not Adequate</th>
<th>3 Adequate</th>
<th>4 Meets Needs</th>
<th>5 Exceeds Needs</th>
</tr>
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<tbody>
<tr>
<td>Level of supervision</td>
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<tr>
<td>My role in the supervisory process</td>
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<td>Level &amp; quality of feedback</td>
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<td>Caseload</td>
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<td>Confidence</td>
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STUDENT STRENGTHS

AREAS FOR GROWTH

STRATEGIES USED TO ADDRESS PSYCHOSOCIAL FACTORS

GOALS FOR NEXT WEEK

MEETINGS, ASSIGNMENTS DUE, ETC.

3/2017 CHM, 5/2017 CHM
TIPS FOR INTEGRATING PSYCHOSOCIAL FACTORS INTO THE FIELDWORK EXPERIENCE

According to the 2011 ACOTE Standard C.1.7, all master’s degree level educational programs for the occupational therapist must ensure that at least one fieldwork experience (either Level I or Level II) has as its focus psychological and social factors that influence engagement in occupation. In addition, Standard C.1.12 requires that in all level II settings psychosocial factors influencing engagement in occupation must be understood and integrated for the development of client-centered, meaningful, occupation-based outcomes. This tip sheet has been developed to support fieldwork educators in meeting these Standards.

Examples of Psychosocial Factors (not intended to be an exhaustive list)

<table>
<thead>
<tr>
<th>Depression</th>
<th>Anxiety</th>
<th>Isolation</th>
<th>Grief</th>
</tr>
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<tbody>
<tr>
<td>Social Skills</td>
<td>Behavior Regulation</td>
<td>Acute Stress</td>
<td>Fear</td>
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<tr>
<td>Post-traumatic Stress Disorder</td>
<td>Loss</td>
<td>Suicidal Ideation</td>
<td>Coping</td>
</tr>
<tr>
<td>Adjustment Disorder</td>
<td>Substance Abuse</td>
<td>Health Disparities</td>
<td>Control</td>
</tr>
<tr>
<td>Self-Efficacy</td>
<td>Mental Health Dx</td>
<td>Self-Esteem</td>
<td>Pain</td>
</tr>
</tbody>
</table>

Tips for the Fieldwork Educator

★ Site specific learning objectives include understanding of psychosocial factors impact on occupational performance
★ Encourage student to complete formal or informal assessments/interviews specifically designed to assess psychosocial function (ie. COPM, Life Satisfaction Questionnaire) as part of each individual’s occupational profile
★ Include psychosocial factors when discussing, or having student identify, individual’s strengths and weakness
★ Utilized Clarkson University’s Department of Occupational Therapy Weekly Supervision Log which included student implemented strategies to address psychosocial factors
★ Guide students in writing client-centered goals that are occupation-based
★ Engage in dialog with the student regarding the impact of psychosocial factors on occupational performance
★ Discuss with students barriers and resources for mitigating the impact of psychosocial factors on occupational performance
★ Remember all diagnoses labeled as physical disabilities or illnesses have an emotional health component that are frequently unaddressed. Teach students to identify and address the emotional health components of physical disabilities.
★ Provide opportunities for students to meet with other professionals to discuss how psychosocial factors impact occupational performance such as counselors, social workers, case managers, family members, care givers, etc.
★ Assign student readings regarding the impact of psychosocial factors on occupational engagement

**Tips for the Student**

★ Use your therapeutic use of self
★ Consider and integrate meaningful occupations into all aspects of service delivery
★ Empower the individuals you work with
★ Be sure all goals and interventions are client-centered
★ Include psychosocial factors while gathering information for the occupational profile
★ Do your research
★ Engage in conversations with your fieldwork educator about the impact of psychosocial factors on occupational performance
★ Engage in conversations with the individuals you are treating (or other appropriate individuals) about how psychosocial factors are impacting their occupational performance and include them in the treatment planning process

**AOTA Resources Related to Psychosocial Factors**

Dealing With Major Life Events and Transitions: A Systematic Literature Review on and Occupational Analysis of Spirituality  
http://ajot.aota.org/article.aspx?articleid=2525286&resultClick=1

Effectiveness of Interventions for Adults With Psychological or Emotional Impairment After Stroke: An Evidence-Based Review  http://ajot.aota.org/article.aspx?articleid=2087150


Engagement, Exploration, Empowerment  http://ajot.aota.org/article.aspx?articleid=2466844&resultClick=1

Improving Quality of Life and Depression After Stroke Through Telerehabilitation  http://ajot.aota.org/article.aspx?articleid=2110755

Intervention Strategies Used by Occupational Therapists Working in Mental Health and Their Theoretical Basis  http://ajot.aota.org/article.aspx?articleid=2582808&resultClick=1

Perspective of School-Based Occupational Therapy Practitioners in Addressing Students’ Mental Health Needs  http://ajot.aota.org/article.aspx?articleid=2582714&resultClick=1

Systematic Review of Yoga Interventions for Anxiety Reduction Among Children and Adolescents  http://ajot.aota.org/article.aspx?articleid=2469573&resultClick=1
Clarkson University Department of Occupational Therapy  
Strategies for Reinforcing Curricular Threads in Fieldwork

### Professional Identity
Student will value and assume an identity of service and contribution, by promoting occupation and participation in multiple contexts through the identification of barriers to and providing supports for occupational roles and performance patterns.
- Contributor, service
- Occupation and participation in multiple contexts
- Addressing barriers to and supports for occupational roles and performance patterns

**SAMPLE LEVEL I ACTIVITIES**
- Defines or describe role of OT to non-OT staff, clients, or caregivers at site.
- Describe how the unique context of fieldwork site contributes to occupational engagement.
- Identify simple changes at site that can increase occupational engagement.
- Interview clients to gain insight into the meaning and value of particular occupations.
- Interview clients to explore barriers to occupational engagement.

**SAMPLE LEVEL II ACTIVITIES**
- Define or describe role of OT to non-OT staff, clients, or caregivers at site.
- Inserviced for existing OT staff on the current OT Practice Framework.
- Inserviced for existing OT staff or administrators on emerging trends in OT practice.
- Engage in client-centered, evidence-based OT practice through either direct services, consulting, or promotion and education activities.
- Needs assessment of agency, community or population and identifies potential roles for existing or new OT services.

### Innovation
Students will develop the ability to meet the needs of local, regional, and global society, including a focus on rural communities, through research and scholarship.
- Meeting needs of local, regional and global society
- Research and scholarship
- Addressing needs of a rural environment

**SAMPLE LEVEL I ACTIVITIES**
- Use existing resources to learn about the site’s geographic region (i.e. population, socio-economics, health status, etc.).

**SAMPLE LEVEL II ACTIVITIES**
- Presentation on current trends in innovative OT practice.
<table>
<thead>
<tr>
<th>Education &amp; Research</th>
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<tr>
<td>Students will develop problem-solving abilities through science-driven practice and the use of practice-based evidence, with a focus on occupation as both intervention and outcome.</td>
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<td>• Science-driven practice</td>
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<td>• Practice-based evidence</td>
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<tr>
<td>• Problem solvers</td>
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<td>• Occupation as intervention and outcome</td>
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<tr>
<th>SAMPLE LEVEL I ACTIVITIES</th>
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<tr>
<td>★ Assist with collecting and compiling data on program outcomes.</td>
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<td>★ Assist staff in brainstorming potential solutions and resources to address existing challenges to client performance and engagement.</td>
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<td>★ Identify simple modifications or adaptations that may enhance client participation and engagement.</td>
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<td>★ Assist existing staff with study exploring outcomes of services.</td>
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<td>★ Develop manualized approach to interventions commonly used at site.</td>
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<td>★ Research and develop new resources for use by staff, therapists, or clients at fieldwork site.</td>
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<td>★ Provide inservice to existing staff on evidence-based practice</td>
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<td>★ Use access to University resources to obtain research articles to review and share with staff.</td>
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<td>Students will exhibit strong leadership and collaborative skills as they assume roles of advocacy and activism for both clients and the profession.</td>
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<tr>
<td>• Leadership</td>
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<td>• Collaboration</td>
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<td>• Advocacy and activism for both clients and the profession alike</td>
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SAMPLE LEVEL I ACTIVITIES
★ Actively learn about the background and roles of other professional and non-professional staff at the site
★ Identify an individual at the site who demonstrates strong leadership and reflect on their traits/characteristics.
★ Identify and reflect upon examples of effective collaboration among staff.
★ Describe the existing or potential role of OT within the current interprofessional team.

SAMPLE LEVEL II ACTIVITIES
★ Participate in interprofessional (multidisciplinary) team meetings.
★ Participate in collaborative assessments and interventions (co-treatment).
★ Articulate the unique roles that each interprofessional team member shares in meeting the needs of clients.
★ Partner with staff from other disciplines to develop new program, resource, or project to meet the needs of clients.
★ Partner with other professionals to complete needs assessment of program, clients, or community.

Technology
Students will learn to engineer solutions through technology including telehealth, assistive technology, and virtual contexts.
- Telehealth
- Assistive technology
- Virtual context
- Engineering solutions

SAMPLE LEVEL I ACTIVITIES
★ Explore ways in which technology can be leveraged to expand the reach of the agency’s program or services.
★ Define assistive technology and describe simple low-tech or readily available tech solutions to enhance participation and engagement of clients.
★ Explore the use of virtual contexts among clients (i.e. social media, texting, e-mail, online learning, gaming) and its relationship to client participation, engagement and outcomes.
★ Make simple adaptations to equipment or activities to enhance participation.

SAMPLE LEVEL II ACTIVITIES
★ Work with staff and clients to identify strategies for utilizing digital resources to establish networks for professional collaboration or client support.
★ Presentation on range of assistive technology solutions to staff.
★ Fabrication of low-tech AT solutions for the setting.
★ Presentation to staff on the role of OT in promoting participation in virtual contexts.
★ Presentation on the potential use of digital technology to provide follow-up, consulting and educational services to clients in a broad geographic area.
C.1.0: FIELDWORK EDUCATION
Fieldwork education is a crucial part of professional preparation and is best integrated as a component of the curriculum design. Fieldwork experiences should be implemented and evaluated for their effectiveness by the educational institution. The experience should provide the student with the opportunity to carry out professional responsibilities under supervision of a qualified occupational therapy practitioner serving as a role model. The academic fieldwork coordinator is responsible for the program’s compliance with fieldwork education requirements. The academic fieldwork coordinator will

C.1.1.
Ensure that the fieldwork program reflects the sequence and scope of content in the curriculum design in collaboration with faculty so that fieldwork experiences strengthen the ties between didactic and fieldwork education.

C.1.2.
Document the criteria and process for selecting fieldwork sites, to include maintaining memoranda of understanding, complying with all site requirements, maintaining site objectives and site data, and communicating this information to students.

C.1.3.
Demonstrate that academic and fieldwork educators collaborate in establishing fieldwork objectives and communicate with the student and fieldwork educator about progress and performance during fieldwork.

C.1.4.
Ensure that the ratio of fieldwork educators to students enables proper supervision and the ability to provide frequent assessment of student progress in achieving stated fieldwork objectives.

C.1.5.
Ensure that fieldwork agreements are sufficient in scope and number to allow completion of graduation requirements in a timely manner in accordance with the policy adopted by the program as required by Standard A.4.14.

C.1.6.
The program must have evidence of valid memoranda of understanding in effect and signed by both parties at the time the student is completing the Level I or Level II fieldwork experience. (Electronic memoranda of understanding and signatures are acceptable.) Responsibilities of the
sponsoring institution(s) and each fieldwork site must be clearly documented in the memorandum of understanding.

C.1.7.
Ensure that at least one fieldwork experience (either Level I or Level II) has as its focus psychological and social factors that influence engagement in occupation.

The goal of Level I fieldwork is to introduce students to the fieldwork experience, to apply knowledge to practice, and to develop understanding of the needs of clients. The program will

C.1.8.
Ensure that Level I fieldwork is integral to the program’s curriculum design and include experiences designed to enrich didactic coursework through directed observation and participation in selected aspects of the occupational therapy process.

C.1.9.
Ensure that qualified personnel supervise Level I fieldwork. Examples may include, but are not limited to, currently licensed or otherwise regulated occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, nurses, and physical therapists.

C.1.10.
Document all Level I fieldwork experiences that are provided to students, including mechanisms for formal evaluation of student performance. Ensure that Level I fieldwork is not substituted for any part of Level II fieldwork.

The goal of Level II fieldwork is to develop competent, entry-level, generalist occupational therapists. Level II fieldwork must be integral to the program’s curriculum design and must include an in-depth experience in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation and research, administration, and management of occupational therapy services. It is recommended that the student be exposed to a variety of clients across the lifespan and to a variety of settings. The program will

C.1.11.
Ensure that the fieldwork experience is designed to promote clinical reasoning and reflective practice, to transmit the values and beliefs that enable ethical practice, and to develop professionalism and competence in career responsibilities.

C.1.12.
Provide Level II fieldwork in traditional and/or emerging settings, consistent with the curriculum design. In all settings, psychosocial factors influencing engagement in occupation must be understood and integrated for the development of client-centered, meaningful, occupation-
based outcomes. The student can complete Level II fieldwork in a minimum of one setting if it is reflective of more than one practice area, or in a maximum of four different settings.

C.1.13. Require a minimum of 24 weeks’ full-time Level II fieldwork. This 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 an FTE at that site.

C.1.14. Ensure that the student is supervised by a currently licensed or otherwise regulated occupational therapist who has a minimum of 1 year full-time (or its equivalent) of practice experience subsequent to initial certification and who is adequately prepared to serve as a fieldwork educator. The supervising therapist may be engaged by the fieldwork site or by the educational program.

C.1.15. Document a mechanism for evaluating the effectiveness of supervision (e.g., student evaluation of fieldwork) and for providing resources for enhancing supervision (e.g., materials on supervisory skills, continuing education opportunities, articles on theory and practice).

C.1.16. Ensure that supervision provides protection of consumers and opportunities for appropriate role modeling of occupational therapy practice. Initially, supervision should be direct and then decrease to less direct supervision as appropriate for the setting, the severity of the client’s condition, and the ability of the student.

C.1.17. Ensure that supervision provided in a setting where no occupational therapy services exist includes a documented plan for provision of occupational therapy services and supervision by a currently licensed or otherwise regulated occupational therapist with at least 3 years’ full-time or its equivalent of professional experience. Supervision must include a minimum of 8 hours of direct supervision each week of the fieldwork experience. An occupational therapy supervisor must be available, via a variety of contact measures, to the student during all working hours. An on-site supervisor designee of another profession must be assigned while the occupational therapy supervisor is off site.

C.1.18. Document mechanisms for requiring formal evaluation of student performance on Level II fieldwork (e.g., the AOTA Fieldwork Performance Evaluation for the Occupational Therapy Student or equivalent).
C.1.19.
Ensure that students attending Level II fieldwork outside the United States are supervised by an occupational therapist who graduated from a program approved by the World Federation of Occupational Therapists and has 1 year of experience in practice.