

Site: \_\_\_\_\_  
Contact Person: \_\_\_\_\_  
Email: \_\_\_\_\_  
Phone #: \_\_\_\_\_

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

**FUNDAMENTALS OF PRACTICE**

**Ethics (FWPE item #1 Adheres consistently to AOTA Code of Ethics & Ethics Standards (AOTA 2010, draft) & site's policies & procedures; including, when relevant, those related to human subject research) as stated below:**

- 1. Demonstrates concern for well-being & safety of recipients of services (**beneficence**)
  - 2. Intentionally refrains from actions that cause harm (**nonmaleficence**)
  - 3. Respects right of individual to self rule (**autonomy, confidentiality**)
  - 4. Provides services in fair & equitable manner (**social justice**)
  - 5. Complies with institutional rules, local, state, federal, international laws & AOTA documents applicable to profession of occupational therapy (**procedural justice**)
  - 6. Provides comprehensive, accurate, & objective information when representing profession (**veracity**)
  - 7. Treats colleagues & other professionals with respect, fairness, discretion, & integrity (**fidelity**)
- Other: \_\_\_\_\_

**Safety (FWPE item #2 Adheres consistently to safety regulations. Anticipates potentially hazardous situations & takes steps to prevent accidents) for all clients & staff members throughout all fieldwork related activities aeb:**

- |   |  |
|---|--|
| ___ record review   | ___ OSHA/BBP                           |
| ___ medication side effects   | ___ I.V./lines                         |
| ___ post-surgical   | ___ ER codes/protocols                 |
| ___ infection control   | ___ restraint reduction                |
| ___ fall prevention   | ___ HIPAA                              |
| ___ swallowing  | ___ w/c locks/bedrails/call button     |
| ___ food allergies  | ___ Vital signs (BP, O2)               |
| ___ ambulation status   | ___ Trach/Ventilator monitoring        |
| ___ behavioral system/privilege level<br>(e.g., locked area/unit, on grounds) | ___ Fire/Evacuation/Lockdown           |
| ___ 1:1 for personal safety/suicide precautions                               | ___ CPR certification                  |
| ___ sharps count  | ___ Communication re: change in status |
| ___ environment set up (no clutter, spills, unsafe items, etc.)               | ___ other: _____                       |
- Other: \_\_\_\_\_

**Judgment in Safety (FWPE item #3 Uses sound judgment in regards to safety of self & others during all fieldwork-related activities) aeb:**

- \_\_\_ proper body mechanics for lifting
  - \_\_\_ effective use of self-disclosure (boundaries)
  - \_\_\_ ability to limit set
  - \_\_\_ follows ambulation/functional mobility protocols
    - \_\_\_ gait belt
    - \_\_\_ contact guard
  - \_\_\_ proper transfer techniques
  - \_\_\_ proper wheelchair positioning (e.g., footrests, cushions, trays/poseys, etc.)
  - \_\_\_ effective group leadership (planning, protocols, time use)
  - \_\_\_ monitors correct Splinting use by client
    - \_\_\_ Static
    - \_\_\_ Dynamic
  - \_\_\_ proper positioning in chair/bed
  - \_\_\_ checks MD orders
  - \_\_\_ confirms parent agreement has been obtained for services per IDEA
- Other: \_\_\_\_\_

**BASIC TENETS**

**Occupational Therapy Philosophy (FWPE item #4 Clearly communicates values & beliefs of occupational therapy, highlighting use of occupation) aeb:**

Confidently explains profession’s values & beliefs, using examples appropriate to setting to:  
 client  families/significant others  OT  PT  SLP  Teacher  Aides  MDs  
 Nursing  LISCW  Psychologist  RT  CRC  AT  MT  3<sup>rd</sup> party payers  
 regulatory bodies  general public (e.g., via promotional materials/activities such as brochures, flyers/press releases, in-services)  
 Other: \_\_\_\_\_

**OT/OTA Roles (FWPE item #5 Communicates role of OT/OTA) as collaborative team according to state laws/practice acts**  verbally &/or  via written material provided to:

client  families/significant others  OT  PT  SLP  Teacher  Aides  MDs  
 Nursing  LISCW  Psychologist  RT  CRC  AT  MT  3<sup>rd</sup> party payers  
 regulatory bodies  general public (e.g., via promotional materials/activities such as brochures, flyers/press releases, in-services)  
 Other: \_\_\_\_\_

**Evidence-based practice (FWPE #6 Makes informed practice decisions using published research & relevant informational resources) using evidence from sources such as :**

summarized evidence from Critically Appraised Topics/Papers (CATs/CAPs)  
 articles from peer reviewed journals (e.g., AJOT, OTJR, etc.,)  
 discussion/sharing of material learned via other sources (textbooks, OT Practice, coursework, conference workshops, website searches, conferences, etc.,) in supervision  
 materials found using EBP approach (e.g., PICO question: Person, Intervention, Condition, Outcome) to search for relevant evidence  
 Other: \_\_\_\_\_

**EVALUATION & SCREENING**

**Gathers data (FWPE item #7 Under supervision of & in cooperation with OT/OTA, gathers relevant information re: clients' occupations of self care, productivity, leisure, & factors that support/hinder occupational performance) according to state law & to assessed level of competency via:**

record review  interview  observation in context  
 describing observed performance as per setting’s policies & procedures/scope of practice  
 gathering data using site sanctioned methods within expected time frame of: \_\_\_\_\_  
 completing expected number of screenings:  
      per day  per week  per month  
 completing expected number of evaluations:  
      per day  per week  per month  
 Other: \_\_\_\_\_

Theories/Frames of reference such as

<input type="checkbox"/>	PEO	<input type="checkbox"/>	Sensory Integrative
<input type="checkbox"/>	Biomechanical	<input type="checkbox"/>	NDT
<input type="checkbox"/>	Behavioral	<input type="checkbox"/>	Functional Group Model
<input type="checkbox"/>	Acquistional	<input type="checkbox"/>	MOHO
<input type="checkbox"/>	Psychodynamic	<input type="checkbox"/>	Occupational adaptation
<input type="checkbox"/>	Cognitive Behavioral	<input type="checkbox"/>	Ecology of Human Performance
<input type="checkbox"/>	DBT	<input type="checkbox"/>	Rehabilitation
<input type="checkbox"/>	Sensory Processing	<input type="checkbox"/>	Clinical Reasoning
<input type="checkbox"/>	Developmental	<input type="checkbox"/>	Cognitive/Cognitive Disability
<input type="checkbox"/>	Motor Learning	<input type="checkbox"/>	Other(s):
<input type="checkbox"/>	Other(s):	<input type="checkbox"/>	Other(s):

**Administers Assessments (FWPE item #8 Establishes service competency in assessment method including but not limited to interviews, observation assessment tools, & chart reviews within context of service delivery setting)**

**Assessment method:**

**\_\_\_ Facility Specific Evaluation addressing:**

\_\_\_ Occupational Performance in Areas of Occupation:

\_\_\_ ADL      \_\_\_ IADL      \_\_\_ Education      \_\_\_ Work      \_\_\_ Play/Leisure

\_\_\_ Social Participation      \_\_\_ Rest/Sleep

\_\_\_ Client factors      \_\_\_ Performance Skills/Patterns      \_\_\_ Activity Demands

\_\_\_ Quality of Life      \_\_\_ Role Competence      \_\_\_ Adaptation

\_\_\_ Self Advocacy      \_\_\_ Health Wellness      \_\_\_ Occupational Justice issues

**Informal methods:**

\_\_\_ Classroom Observations      \_\_\_ Activity Analysis      \_\_\_ Informal interview

\_\_\_ Other(s): \_\_\_\_\_

**Formal methods: (please indicate expectations for entry-level competency on attached list)**

**Interprets (FWPE item #9 Assists with interpreting assessment results in relation to client's occupational performance & goals in collaboration with occupational therapist) by sharing observations/information to assist occupational therapist re:**

\_\_\_ standardized assessment results      \_\_\_ observations of client's performance

\_\_\_ understanding of condition/dx      \_\_\_ client's stated values, beliefs/motivations

\_\_\_ inter/intrapersonal (subjective) impressions      \_\_\_ client identified problems/needs

\_\_\_ verbal reports of others (team, family/caretakers, etc.,)

\_\_\_ information re: client contexts (personal, cultural, temporal, virtual, physical, social)

\_\_\_ Other: \_\_\_\_\_

**Reports (FWPE item #10 Reports results accurately in a clear, concise manner that reflects client's status & goals):**

\_\_\_ completes standardized assessment data collection

\_\_\_ reports results of interview/observations

\_\_\_ summarizes material contained in history of client/chart review

\_\_\_ accurately reports standardized assessment data (raw scores/results) as applicable

\_\_\_ Other: \_\_\_\_\_

**Establishes Goals (FWPE item #11 Develops client centered & occupation based goals in collaboration with occupational therapist):**

\_\_\_ formulates specific, measurable, realistic, attainable, time-limited goals

\_\_\_ articulates suggestions for goals based on client problems/priorities, values/interests, needs/strengths, setting scope of practice

\_\_\_ Other: \_\_\_\_\_

#### **INTERVENTION**

**Plans (FWPE item # 12 In collaboration with OT, establishes methods, duration, & frequency of interventions that are client centered & occupation based, Intervention plans reflect context of setting) relative to clients needs demonstrating clinical/pragmatic reasoning based on:**

\_\_\_ client's interests      \_\_\_ clients beliefs & values

\_\_\_ current context & resources      \_\_\_ future context & resources

\_\_\_ intervention plan goals      \_\_\_ client status

\_\_\_ scope of practice      \_\_\_ regulatory guidelines (Medicaid, Medicare, IDEA, etc.,)

\_\_\_ length of stay      \_\_\_ resources (space/supplies/funding/time)

\_\_\_ Other: \_\_\_\_\_

**Selects (FWPE item #13 Selects & sequences relevant interventions that promote client's ability to engage in occupations) based on:**

- clients interests/roles
  - current context & resources
  - intervention plan goals
  - Other: \_\_\_\_\_
  - clients beliefs & values
  - future context & resources
  - client status/current performance
- 

**Implements (FWPE item # 14: Implements occupation-based interventions effectively in collaboration with clients, families, significant others, & service providers)**

- maintains open attitude re: clients' occupational performance needs/interests
- seeks & responds to feedback from clients, families, significant others, service providers
- respectfully engages in discussion with client/family/caregivers, occupational therapist, others
- provides written documentation of collaborative plan (e.g., home program)
- communication with others (documentation, at meetings, in letters or documents to other providers) incorporates examples of occupation-based interventions used and clients response.

**Activity analysis: (FWPE item #15 Grades activities to motivate/challenge client & facilitate progress) by:**

- adapting sequence of activity & objects used
  - changing length/frequency/timing of sessions
  - ↑↓ sensory input
  - ↑↓ cognitive demand
  - ↑↓ visual/verbal cues
  - ↑↓ physical requirements
  - ↑↓ amount of physical assistance provided
  - ↑↓ social demand (1:1 vs. group, family vs. peer(s), rules/norms)
  - ↑↓ amount of emotional/behavioral support provided
  - promoting ↑ safety (awareness, environmental modifications for fall prevention, removing potential sources of self injury, etc., )
  - reviewing/revising expectations with client(s) relative to desired occupations, role(s) & context
  - Other: \_\_\_\_\_
- 

**Therapeutic Use of Self: (FWPE item #16: Effectively interacts w/clients to facilitate accomplishment of established goals)**

- communicates to address concerns in 1<sup>st</sup> person manner (e.g., "I statements")
  - provides clear and concise instructions
  - provides timely and specific feedback
  - remains calm when conveying point of view
  - compromises as needed to facilitate therapeutic alliance
  - demonstrates ongoing awareness of impact of own behavior on others
  - displays positive regard for others; genuine in client interaction
  - utilizes own strengths and personality to establish rapport & motivate clients
  - provides encouraging and empathetic responses to maximize client's participation & occupational performance
  - sets limits to allow for positive performance in therapeutic process
  - Other: \_\_\_\_\_
- 

**Monitors client status to modify intervention plan as needed in collaboration with occupational therapist based on (FWPE item #17):**

- fatigue     O2 sat/respiration rate     BP/heart rate     frustration tolerance
  - anxiety     acuity     concerns re: safety (please specify): \_\_\_\_\_
  - cultural sensitivity     cognitive status     pain     client distress/discomfort
  - inability to perform task     refusal to engage
  - Other: \_\_\_\_\_
- 

**COMMUNICATION**

**Verbal & Nonverbal (FWPE item #18 Clearly & effectively communicates verbally & nonverbally with clients, families, significant others, colleagues, service providers, & the public)**

- uses language appropriate to the level of understanding of person with whom communicating
- utilizes examples to illustrate meaning/intent
- uses active listening strategies (restates/paraphrases) to ensure that both parties have shared understanding of information/plan
- uses multiple modes of communication (verbal, written, nonverbal)
- makes eye contact when appropriate
- attends to physical boundaries/body space
- demonstrates professional presentation/demeanor in facial expression, posture, grooming affect, & attire
- utilizes setting's services for translators or translation of written materials when indicated/available
- Other: \_\_\_\_\_

**Written (FWPE item #19 Produces clear & accurate documentation according to site requirements. All written communication is legible, using proper spelling, punctuation, & grammar)**

- completes computerized &/or hand-written documentation per setting protocols/formats
- uses approved institutional terminology/abbreviations
- completes all documentation within expected time periods
- writes in a manner conducive to being read by recipients of services & other disciplines, free of jargon while retaining language consistent with OTPF-Revised
- uses technology when available to check work (grammar, spelling)
- uses strategies such as proof reading, reading aloud, checking against template, asking colleague/peer to proof if feasible
- Other: \_\_\_\_\_

**PROFESSIONAL BEHAVIORS**

**Self-Responsibility (FWPE item #20 Takes responsibility for attaining professional competence by seeking out learning opportunities & interactions with supervisor(s) & others)**

- shares information about learning style with supervisor
- asks for help incorporating learning style in ways consistent with setting if needed
- comes to supervision with list of questions/concerns & possible options for how to address
- takes initiative to meet with other members of team to understand their role/perspective
- reviews testing materials/manuals on own prior to observing or administering
- seeks out, reviews & shares reading materials/articles on frames of reference/EBP, client conditions, public law/policy
- judges when choosing to attend in-services or other continuing education opportunities based on workload management & caseload focus
- asks for specific feedback
- consistently checks ins to clarify expectations
- utilizes structured methods in setting to support learning (e.g., student manual, readings, in-services, self-assessment, tracking own caseload/workload)
- assertive regarding need to meet for supervision
- openly discusses concerns & identifies possible avenues for changes or improvements
- able to discuss &/or negotiate needs for adjustments to supervisory relationship, expectations, caseload, environment to improve quality of experience
- Other: \_\_\_\_\_

**Feedback (FWPE item #21 Responds constructively to feedback):**

- engages in mutual feedback exchange (e.g., listens, clarifies, acknowledges the feedback &/or redirection, provides examples, asks "How can I improve?"; discusses ways make active changes, identifies what would be helpful, discusses options)
- demonstrates commitment to learning by identifying specific goals/actions to improve behavior/performance based on feedback in collaboration with supervisor
- processes feedback & seeks support from supervisor within context of supervisory

relationship & learning opportunity

\_\_\_ utilizes tools to reflect on own performance or variables affecting performance (e.g., self assessment on FWPE, journaling, Fieldwork Experience Assessment Tool)

Other: \_\_\_\_\_

**Work Behaviors (FWPE item #22 Demonstrates consistent work behaviors including initiative, preparedness, dependability, & work site maintenance)**

\_\_\_ takes initiative to address workload management

\_\_\_ demonstrates consistent work behaviors in task & interpersonal interactions

\_\_\_ attends to site cleanliness, safety & maintenance of supplies as appropriate to role

\_\_\_ has ideas/plans prepared for meetings/sessions

\_\_\_ takes responsibility to address areas of personal/professional growth

\_\_\_ asks for appropriate supports or accommodations in responsible manner consistent with

federal law & site resources (e.g., open in communication, provides appropriate documentation, requests reasonable accommodation if indicated)

Other: \_\_\_\_\_

**Time Management (FWPE item #23 Demonstrates effective time management)**

\_\_\_ maintains own schedule

\_\_\_ has agenda or materials organized for meetings, sessions

\_\_\_ arrives on time to work, meetings, client sessions

\_\_\_ completes documentation/paperwork in timely manner

Other: \_\_\_\_\_

**Interpersonal Skills (FWPE item #24 Demonstrates positive interpersonal skills including but not limited to cooperation, flexibility, tact, & empathy)**

\_\_\_ interacts professionally with peers & colleagues

\_\_\_ addresses concerns in 1<sup>st</sup> person manner (e.g., "I statements") at appropriate times

\_\_\_ compromises as needed when negotiating workload

\_\_\_ puts in necessary amount of effort to support own learning or department mission (e.g., willing to stay late if needed, etc.)

\_\_\_ collaborates with others to maximize the learning experience

\_\_\_ respectfully engages in discussion when conflict arises

Other: \_\_\_\_\_

**Cultural Competence (FWPE item #25 Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, & lifestyle choices)**

\_\_\_ demonstrates awareness of own background & sensitivity to worldviews of others (clients, family, colleagues)

\_\_\_ refrains from imposing one's own beliefs & values on others

\_\_\_ treats everyone with dignity & respect

\_\_\_ gathers information about clients' cultural values &/or spiritual beliefs

\_\_\_ incorporates clients' values & beliefs into therapeutic interactions & interventions when feasible

\_\_\_ considers clients socioeconomic & community resources & lifestyle when designing

intervention plans & discharge planning

\_\_\_ demonstrates tolerance for differences in others & willingness to work with all clients

**Other expectations not noted above:**

\_\_\_\_\_  
Signature