

**NEOTEC Inc., Level II Fieldwork Site Specific Objectives Checklist for use with:
The AOTA Fieldwork Performance Evaluation
for the Occupational Therapy Assistant Student**

Site: _____
Date: _____
Contact Person: _____
Phone #: _____

Email: _____
Website: _____

Introduction: Thank you for supporting occupational therapy education. The purpose of this form is to ensure that the occupational therapy assistant student coming to your program has a clear understanding of the expectations and learning objectives of OT practice in your fieldwork location. This form is a tool to help our program document the criteria and process for complying with all site requirements, maintaining site objectives and site data, and communicating this information to students prior to the start of the fieldwork experience.

Instructions: Please check any boxes below that apply to occupational therapy assistant fieldwork in your practice. Once completed, our OTA program will retain this document for future student fieldwork placements with your organization.

FUNDAMENTALS OF PRACTICE:

FWPE #1: Adheres to the American Occupational Therapy Association’s Code of Ethics and all federal, state, and facility regulations. (Examples: Medicare, Medicaid, client privacy, social media, human subject research)

The OTA student will:

- | | |
|---|---|
| <input type="checkbox"/> Demonstrate concern for well-being & safety of recipients of services (beneficence) | <input type="checkbox"/> Provide comprehensive, accurate, & objective information when representing profession and foster an understanding of such information (veracity) |
| <input type="checkbox"/> Intentionally refrain from actions that cause harm (nonmaleficence) | <input type="checkbox"/> Treat colleagues & other professionals with respect, fairness, discretion, & integrity (fidelity) |
| <input type="checkbox"/> Respect the right of individuals to self-rule (autonomy) | <input type="checkbox"/> Adhere to and follow HIPAA and FERPA guidelines |
| <input type="checkbox"/> Provide services in fair & equitable manner (justice) | <input type="checkbox"/> All communication via social media is congruent with Code of Ethics principle #3 (autonomy) |
| <input type="checkbox"/> Comply with institutional rules, local, state, federal, international laws & AOTA documents applicable to the profession of occupational therapy (justice) | <input type="checkbox"/> Other: _____ |

FWPE #2: Adheres to safety regulations and reports/documents incidents appropriately. (Examples: fire safety, OSHA regulations, body substance precautions, emergency procedures)

The OTA student will demonstrate competency of:

- | | |
|---|--|
| <input type="checkbox"/> Record review | <input type="checkbox"/> Ambulation status |
| <input type="checkbox"/> OSHA/BBP | <input type="checkbox"/> Trach/Ventilator monitoring |
| <input type="checkbox"/> Medication side effects | <input type="checkbox"/> Behavioral system/privilege level |
| <input type="checkbox"/> I.V./lines | <input type="checkbox"/> Fire/Evacuation/Lockdown (e.g., locked area/unit, on grounds) |
| <input type="checkbox"/> Post-surgical precautions | <input type="checkbox"/> CPR certification |
| <input type="checkbox"/> ER codes/protocols | <input type="checkbox"/> 1:1 for personal safety/suicide precautions |
| <input type="checkbox"/> Infection control | <input type="checkbox"/> Communication re: change in status |
| <input type="checkbox"/> Restraint reduction | <input type="checkbox"/> Sharps count |
| <input type="checkbox"/> Fall prevention | <input type="checkbox"/> Environment set up (no clutter, spills, unsafe items, etc.,) |
| <input type="checkbox"/> HIPAA/FERPA | <input type="checkbox"/> Appropriate utilization of facility incident report protocol, if applicable |
| <input type="checkbox"/> Swallowing | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> w/c locks/bedrails/call button | |
| <input type="checkbox"/> Food allergies | |
| <input type="checkbox"/> Vital signs (BP, HR, O2) | |

FWPE #3: Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents. (Examples: body mechanics, medical safety, equipment safety, client specific precautions, contraindications, community safety)

The OTA student will demonstrate:

- | | |
|---|--|
| <input type="checkbox"/> Ability to review routine MD orders | <input type="checkbox"/> Effective group leadership (planning, protocols, time management) |
| <input type="checkbox"/> Proper body mechanics for lifting & transfers | <input type="checkbox"/> Confirmation that parent agreement has been obtained for services per IDEA |
| <input type="checkbox"/> Adherence to ambulation/functional mobility protocols | <input type="checkbox"/> Ability to stay alert to client's needs |
| <input type="checkbox"/> Utilization of gait belt and appropriate level of assistance with transfers | <input type="checkbox"/> Ability to recognize potential hazards, identify solutions, & address resolutions |
| <input type="checkbox"/> Proper transfer techniques | <input type="checkbox"/> Intervention planning with acute awareness of safety protocols |
| <input type="checkbox"/> Proper wheelchair positioning (e.g., footrests, cushions, trays) | <input type="checkbox"/> Intervention planning with thorough consideration of client-specific precautions |
| <input type="checkbox"/> Ability to monitor correct splinting use by client | <input type="checkbox"/> Self-awareness skills, including asking for assistance when needed |
| <input type="checkbox"/> Proper positioning of patient in chair/bed adhering to facility safety protocols | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Use of all equipment properly | |
| <input type="checkbox"/> Effective use of self-disclosure (boundaries) | |
| <input type="checkbox"/> Ability to limit set | |

BASIC TENETS:

FWPE #4: Articulates the values, beliefs, and distinct perspective of the occupational therapy profession to clients and other relevant parties clearly, confidently, and accurately. (Examples: families, caregivers, colleagues, service providers, administration, the public)

The OTA student will:

- | | |
|---|---|
| <input type="checkbox"/> Clearly and correctly define the distinct perspective of occupational therapy, identifying the values and beliefs relevant to all stakeholders | <input type="checkbox"/> 3rd party payers, <input type="checkbox"/> regulatory bodies, <input type="checkbox"/> general public (e.g., via promotional materials/activities such as brochures, flyers/press releases, in-services) |
| <input type="checkbox"/> Confidently explain the profession's values & beliefs, and distinct perspective using examples and language appropriate to the setting to the following: | <input type="checkbox"/> Integrate occupational therapy values, beliefs, and distinct perspective into intervention development and execution |
| <input type="checkbox"/> client, <input type="checkbox"/> families/significant others, <input type="checkbox"/> OT, <input type="checkbox"/> PT, | <input type="checkbox"/> Demonstrate an awareness and understanding of the Occupational Therapy Practice Framework: Domain and Process |
| <input type="checkbox"/> SLP, <input type="checkbox"/> Teacher, <input type="checkbox"/> Aides, <input type="checkbox"/> MD, <input type="checkbox"/> Nursing, <input type="checkbox"/> SW, <input type="checkbox"/> Psychologist, <input type="checkbox"/> RT, <input type="checkbox"/> CRC, <input type="checkbox"/> AT, <input type="checkbox"/> MT, | <input type="checkbox"/> Other: _____ |

FWPE #5: Articulates the value of occupation as a method and desired outcome of occupational therapy to clients and other relevant parties clearly, confidently, and accurately. (Examples: families, caregivers, colleagues, service providers, administration, the public)

The OTA student will:

- Explain the value, purpose, and rationale for occupational therapy services to:
 - clients, families, caregivers,
 - colleagues, service providers,
 - administration, the public
- Articulate the desired outcome of identified intervention to all stakeholders using appropriate language and terminology
- Educate others about occupational therapy
- Advocate for occupational therapy services for potential clients
- Design and facilitate occupation-based interventions
- Other: _____

FWPE #6: Articulates the role of occupational therapy practitioners to clients and other relevant parties clearly, confidently, and accurately. (Examples: families, caregivers, colleagues, service providers, administration, the public)

The OTA student will clearly, confidently and accurately:

- Identify self as an OTA student
- Verbally articulate &/or communicate via written material the OT/OTA roles as a collaborative team according to State Laws/Practice Acts to the following:
 - client, families/significant others, OT, PT, SLP, Teacher, Aides, MD, Nursing, SW, Psychologist, RT, CRC,
 - AT, MT, 3rd party payers, regulatory bodies, general public (e.g., via promotional materials/activities such as brochures, flyers/press releases, in-services)
- Demonstrate an awareness of guidelines and regulations of OT/OTA supervision
- Other: _____

SCREENING AND EVALUATION:

FWPE #7: Obtains sufficient and necessary information about factors that support and hinder occupational performance from relevant sources throughout the evaluation process. (Examples: record or chart reviews, client, family, caregivers, service providers)

The OTA student will:

- Complete the occupational profile
- Separate relevant from irrelevant client information
- Identify client's interests, beliefs, & values, including spirituality
- Consistently collect daily or weekly data of clients
- Gather necessary data from all appropriate sources
- Report gathered data accurately, timely, and in an organized manner to fieldwork educator
- Other: _____

FWPE #8: Establishes service competency in assessment methods, in accordance with setting procedures and applicable laws, by administering assessments accurately and efficiently to ensure findings are valid, reliable, and timely. (Examples: record or chart reviews, observations, interviews, standardized and non-standardized assessments)

The OTA student will:

- Follow facility and State Practice Acts regarding the process of the OTA completing standardized and non-standardized assessments
- Complete accurate and thorough client record or chart reviews
- Correctly administer standardized and non-standardized assessments as per protocol to ensure valid, reliable, and timely findings
- Accurately communicate to fieldwork educator client observations during standardized and non-standardized assessments
- Other: _____

FWPE #9: Administers delegated assessments using appropriate procedures and protocols. (Examples: standardized and non-standardized assessments, interviews, and observations)

The OTA student will:

- Become familiar with assessments utilized at this facility
- Correctly administer standardized and

- non-standardized assessments as per protocol to ensure valid, reliable, accurate, and timely findings
- Other: _____

FWPE #10: Assists with interpreting information in relation to the client's needs, factors, and performance. (*Client factors:* Specific capacities, characteristics, or beliefs that reside within the person and that influence performance in occupations. Client factors include values, beliefs, and spirituality; body functions including psychological functions; and body structures). (Examples: record or chart reviews, observations, interviews, standardized and non-standardized assessments)

The OTA student will accurately and articulately share with fieldwork educator:

- Standardized assessment results
- Non-standardized assessment results
- Observations of client's performance
- Client's stated values, beliefs/motivations
- Inter/intrapersonal (subjective) impressions
- Client identified problems/needs

- Verbal reports of others (team, family/caregivers, etc.,)
- Information re: client contexts (personal, cultural, temporal, virtual, physical, social)
- Understanding of condition/dx
- Other: _____

FWPE #11: Reports results clearly, accurately, and concisely, reflecting the client's occupational performance. (Examples: standardized and non-standardized assessments, interviews, and observations)

The OTA student will:

- Complete standardized (and non-standardized) assessment data collection
- Accurately report standardized (and non-standardized) assessment data (raw scores/results) as applicable

- Report results of interview/observations
- Summarize material contained in history of client/chart review
- Other: _____

INTERVENTION:

FWPE #12: Articulates a clear and logical rationale for the intervention process based on the evaluation results and other relevant considerations. (Examples: contexts, theories, frames of reference, practice models, and evidence)

The OTA student will:

- Utilize all relevant resources including:
 - client interests, client 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),

- Frames of Reference, Practice Models, EBP
- Discuss with fieldwork educator the scope, sequence, and outcome of the intervention and modify as appropriate
- Other: _____

FWPE # 13: Under the supervision of and in cooperation with an occupational therapy practitioner, uses professional literature to make informed intervention decisions.

(Examples: textbooks, journal articles, other relevant and reliable informational resources)

The OTA student will:

- Utilize evidence from Critically Appraised Topics/Papers (CATs/CAPs) when designing interventions
- Identify articles from peer-reviewed journals (e.g., AJOT, OTJR, etc.) to support interventions
- Seek out and utilize materials found using EBP approach (e.g., PICO/PICOT question: Person,

Intervention, Comparison, Outcome, Timeframe) to search for relevant evidence

- Incorporate material previously learned via other sources (textbooks, OT coursework, conference workshops, website searches, conferences, etc.) during supervision sessions
- Other: _____

FWPE #14: Selects client-centered and occupation-based interventions that motivate and challenge the client to achieve established goals. Includes the consideration of all client centered components including psychosocial factors.

The OTA student will:

- Consistently incorporate the clients occupational needs and occupational interests in treatment planning
- Utilize information gathered through the evaluation process including the Occupational Profile, chart review, re-evaluations, as well as through daily/weekly client observations
- Utilize information gathered through research to guide treatment selection

Respectfully engage in discussion with client/family/caregivers, occupational therapist, and others

- Demonstrate the ability to modify intervention plans based on client's changing needs and interests
- Other: _____

FWPE #15: Implements client-centered and occupation-based intervention plans. Includes the consideration of all client centered components including psychosocial factors.

The OTA student will:

- Utilize information gathered through the evaluation process including the Occupational Profile, chart review, re-evaluations, as well as through daily/weekly client observations
- Respectfully engage in discussion with

client/family/caregivers, occupational therapist, and relevant stakeholders

- Demonstrate the ability to modify intervention plans based on client's changing needs and interests
- Other: _____

FWPE #16: Modifies the task and/or environment to maximize the client's performance. (Examples: upgrades/downgrades task; arranges client's workspace for optimal performance)

The OTA student will:

- Adapt sequence of activity & objects used
- Alter length/frequency/timing of sessions
- Increase/decrease sensory input
- Increase/decrease cognitive demand
- Increase/decrease visual/verbal/tactile cues
- Increase/decrease physical requirements
- Increase/decrease amount of physical assistance provided or presence of adaptive equipment

Increase/decrease social demand (1:1 vs. group, family vs. peer(s), rules/norms)

- Increase/decrease amount of emotional/behavioral support provided
- Promote safety (awareness, environmental modifications for fall prevention, removing, potential sources of self-injury, etc.)
- Review/revise expectations with client(s) relative to desired occupations, role(s) & context
- Other: _____

FWPE #17: Recommends modification or termination of intervention plan based on the client's status

The OTA student will:

- Advocate for the client proposing revision or discontinuation of intervention based on the client's status including the following factors:
 - fatigue, O2 sat/respiration rate, BP/heart rate, frustration tolerance, anxiety,
 - acuity, cultural sensitivity,

- cognitive status, pain,
- client distress/discomfort, inability to perform task, refusal to engage, concerns re: safety (please specify): _____
- Other: _____

FWPE #18: Documents the client's response to services in a manner that demonstrates the effectiveness of interventions.

The OTA student will:

- Complete computerized &/or hand-written documentation per setting protocols/formats
- Use approved institutional terminology/abbreviations
- Complete all documentation within expected time periods
- Write in a manner conducive to being read by recipients of services & other disciplines, free of jargon while retaining language consistent with current OTPF

- Demonstrate the ability to justify OT services by appropriately and accurately communicating measurable client progress
- Use technology when available to check work (grammar, spelling)
- Use strategies such as proof reading, reading aloud, checking against template, asking colleague/peer to proof if feasible
- Other: _____

MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES:

FWPE #19: Demonstrates through practice or discussion the ability to collaborate with and assign appropriate tasks to, as indicated, the occupational therapy aide or others to whom responsibilities might be assigned. (Examples: paraprofessionals, nurses' aides, volunteers)

The OTA student will:

- Demonstrate an understanding of the varied roles of OT personnel and facility personnel
- Demonstrate the ability to work collaboratively with others

- Understand what tasks are appropriate to delegate to others
- Other: _____

FWPE #20: Demonstrates through practice or discussion an understanding of costs and funding systems related to occupational therapy services, such as federal, state, third party, and private payers. (Examples: billing for OT services, inventory and ordering of supplies for OT services, and options for client procurement of adaptive equipment)

The OTA student will:

- Become familiar with facility specific billing practices as well as federal, state, third party, and private payer regulations
- Utilize appropriate and ethical billing for OT services in compliance with federal, state, third party, and private payer regulations
- Identify the process of inventory management and

- ordering of supplies for OT services
- Provide education and options to clients in regard to procurement of adaptive equipment in relationship to payer rules and regulations
- Other: _____

FWPE #21: Demonstrates knowledge about the organization. (Examples: mission and vision, accreditation status, licensing, specialty certifications)

The OTA student will:

- Articulate the mission and vision of the facility/organization
- Identify the accreditation status, licensing bodies of the facility/organization

- Discuss with fieldwork educator opportunities for specialty certifications available to support professional growth for licensed professionals at the facility
- Other: _____

FWPE #22: Meets productivity standards or volume of work expected of occupational therapy assistant students.

The OTA student will:

- Meet the productivity standard at this site
- Meet the productivity standard at 4 weeks
- Meet the productivity standard at 8 weeks

- Identify specific productivity requirements at 4 weeks _____ at 8 weeks _____
- Other: _____

COMMUNICATION AND PROFESSIONAL BEHAVIORS:

FWPE #23: Communicates clearly and effectively, both verbally and non-verbally. (Examples: clients, families, caregivers, colleagues, service providers, administration, the public)

The OTA student will:

- Use language appropriate to the level of understanding of person with whom communicating
- Utilize examples to illustrate meaning/intent
- Use active listening strategies (restating/paraphrasing) to ensure that both parties have shared understanding of information/plan
- Use multiple modes of communication (verbal, written, nonverbal)
- Make eye contact when appropriate

- Attend to physical boundaries/body space
- Demonstrate professional presentation/demeanor in facial expression, posture, grooming, affect, & attire
- Utilize setting's services for translators or translation of written materials when indicated/available
- Demonstrate the ability to modify methods of communication to respect a person's cultural beliefs/values
- Other: _____

FWPE #24: Produces clear and accurate documentation. (Examples: legibility, spelling, punctuation, grammar, adherence to electronic health documentation requirements)

The OTA student will:

- Complete computerized &/or hand-written documentation per setting protocols/formats
- Use approved institutional terminology/abbreviations
- Complete all documentation within expected time periods
- Write in a manner conducive to being read by recipients of services & other disciplines, free of jargon while retaining language consistent with current OTPF

- Demonstrate the ability to justify OT services by appropriately and accurately communicating measurable client progress
- Use technology when available to check work (grammar, spelling)
- Use strategies such as proof reading, reading aloud, checking against template, asking colleague/peer to proof if feasible
- Other: _____

FWPE #25: Collaborates with fieldwork educator(s) to maximize the learning experience. (Examples: initiates communication, asks for feedback about performance, identifies own strengths and challenges)

The OTA student will:

- Take initiative in identifying strengths, challenges and share plans to address needs with fieldwork educator
- Communicate treatment ideas with fieldwork educator
- Demonstrate intellectual curiosity
- Identify and share resources with fieldwork educator, and other team members
- Utilize available time to shadow or co-treat with other disciplines
- Propose projects to augment the fieldwork experience
- Other: _____

FWPE #26: Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with fieldwork educator(s) and others.

The OTA student will:

- Take responsibility for professional growth by communicating needs, concerns, and insight regarding performance and professional skills
- Seek out opportunities within the facility
- Avail oneself to opportunities that exist within the facility and the profession
- Pursue professional development opportunities complementary to the specific fieldwork setting
- Other: _____

FWPE #27: Responds constructively to feedback in a timely manner.

The OTA student will:

- Engage in mutual feedback exchange (e.g., listens, clarifies, acknowledges the feedback &/or redirection, provides examples, asks "How can I improve?", discusses ways to make active changes, identifies what would be helpful, discusses options)
- Demonstrate commitment to learning by identifying specific goals/actions to improve behavior/performance based on feedback in collaboration with fieldwork educator
- Process feedback & seek support from fieldwork educator within context of fieldwork educatory relationship & learning opportunity
- Utilize tools to reflect on own performance or variables affecting performance (e.g., self-assessment on FWPE, journaling, Fieldwork Experience Assessment Tool)
- Other: _____

FWPE #28: Demonstrates consistent and acceptable work behaviors. (Examples: punctuality, initiative, preparedness, flexibility, dependability, professional appearance)

The OTA Student will:

- Take initiative to address workload management
- Demonstrate consistent work behaviors in task & interpersonal interactions
- Attend to site cleanliness, safety, & maintenance of supplies as appropriate to role
- Share ideas/plans with fieldwork educator & others
- Demonstrate the ability to adapt to unanticipated changes (e.g., scheduling conflicts)
- Be prepared for meetings/sessions
- Take responsibility to address areas of personal/professional growth
- Ask 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(s) if indicated)
- Other: _____

FWPE #29: Demonstrates effective time management. (Examples: plans ahead, adheres to schedules, completes work in expected timeframe)

The OTA student will:

- Maintain own schedule
- Develop an agenda and materials to facilitate organized meetings and sessions
- Arrive on time to work, meetings, & client sessions
- Complete documentation/paperwork in timely manner
- Other: _____

FWPE #30: Manages relationships effectively through therapeutic use of self and adjusts approach to meet the needs of clients and others.

The OTA student will:

- Interact professionally with peers & colleagues
- Communicate to address concerns using first person language (e.g., "I statement")
- Provide clear and concise instructions
- Provide timely and specific feedback
- Acknowledge and respond to client needs in a timely manner to foster trust
- Remain calm and respectful when conveying point of view
- Compromise as needed to facilitate therapeutic alliance
- Demonstrate ongoing awareness of impact of own behavior on others
- Display positive regard for others, genuine in client interaction
- Utilize own strengths and personality to establish rapport & motivate clients
- Provide encouraging and empathetic responses to maximize client's participation & occupational performance
- Set limits to allow for positive performance in therapeutic process
- Other: _____

FWPE #31: Demonstrates respect for diversity factors of others. (Examples: culture, socioeconomic status, beliefs, identity)

The OTA student will:

- Demonstrate an awareness of own background & sensitivity to worldviews of clients, family, colleagues
- Refrain from imposing one's own beliefs & values on others
- Treat everyone with dignity & respect
- Gather information about clients' cultural values &/or spiritual beliefs
- Incorporate clients' values & beliefs into therapeutic interactions & interventions when feasible
- Utilize opportunities that arise to promote cultural competence and provide education to others
- Consider clients' socioeconomic & community resources & lifestyle when designing intervention plans & discharge planning
- Demonstrate tolerance for differences in others & willingness to work with all clients
- Other: _____