COE Guidelines for an Occupational Therapy Fieldwork Experience - Level II

History and Purpose

The intent of this document is to describe the desired characteristics of a fieldwork placement for occupational therapy and occupational therapy assistant students in Level II Fieldwork Education. It is intended to be a reference document that articulates the desired attributes of a fieldwork setting to maximize students' learning in context. It is not a document of standards for fieldwork education and programs are not mandated to follow these guidelines.

This document was originally prepared by the Loma Linda Fieldwork Council at the request of the Commission on Education (COE) and approved by the COE on April 15, 1985. The document was revised by the AOTA Fieldwork Issues Committee in 1992, and by the COE in 2000 and 2012.

Definition

The ACOTE Standards (2012) describe fieldwork as "a crucial part of professional preparation." The goal of Level II Fieldwork is to develop competent, entry-level, generalist occupational therapists and occupational therapy assistants (AOTA, 2012).

I. The Fieldwork Experience

A. Description and Purpose:

The Level II Fieldwork experience, an integral part of OT education, should be designed to promote clinical reasoning and reflective practice, to support ethical practice through transmission of the values and beliefs of the profession, to communicate and model professionalism as a developmental process and a career responsibility, and to expand knowledge and application of a repertoire of occupational therapy assessments and interventions related to human occupation and performance. Through the fieldwork experience, students learn to apply theoretical and scientific principles learned in the didactic portion of the academic program to address actual client needs and develop a professional identity as an occupational therapy practitioner within an interdisciplinary context. The fieldwork experience shall meet requirements in accordance with the Standards for an Accredited Educational Program for the Occupational Therapist and/or the Standards for an Accredited Educational Program for the Occupational Therapy Assistant (AOTA, 2012).

i. 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 occupations. Throughout the fieldwork experience, the fieldwork educator should structure

opportunities for informal and formal reflection with the student regarding the OT process in action with the client population.

ii. The OT and OTA student should have the opportunity to develop increased knowledge, attitudes, and skills in advocacy, administration, management and scholarship.
    1. Skills in administration and management may be attained through the actual supervision of support staff, volunteers, or Level I Fieldwork students in certain tasks or work assignments and involvement in administrative/staff/team meetings.
    2. Scholarship may be enhanced as students learn to use evidence to inform their professional decision making and to generate new evidence through independent or collaborative research at the fieldwork site. This may be accomplished through investigation of the effectiveness of an intervention, the reliability, validity or utility of assessment tools, and publication or presentation of scholarly work.

iii. Inter-professional practice competencies should be encouraged throughout the fieldwork experience through engagement of OT and OTA students in interactive learning with students of different professions.

B. Outcomes Desired

The fieldwork placements should provide the student with experience with various groups across the life span, persons with various psychosocial and physical performance challenges, and various service delivery models reflective of current practice in the profession.

i. Within the required total of 16 weeks for the occupational therapy assistant student and 24 weeks for the occupational therapy student, there should be exposure to a variety of traditional and emerging practice settings and a variety of client ages and conditions. In all settings, psychosocial factors influencing engagement in occupation must be understood and integrated for the development of client-centered, occupation-based outcomes. What this means is that even if this is not a mental health placement, the fieldwork educator should assist the student in addressing any psychosocial issues the client may have. This will help to insure that the student will have developed some entry-level competencies in mental health practice even if they do not complete a fieldwork experience in a mental health setting. See link: http://www.aota.org/Practice/Manage/~/media/04748BEB6FEE4C7EBFB83DFB81E41E8F.ashx

C. Expectations of Fieldwork Students

Students are responsible for compliance with site requirements as specified in the fieldwork site student handbook developed by the fieldwork site and the affiliation agreement between the fieldwork site and the academic program. This typically includes completion of prerequisite requirements (health requirements, background checks, HIPAA training, orientation to site documentation system, etc.) and attention to state regulations impacting student provision of client services. In addition to providing the required occupational therapy services to clients, students are also

responsible for active participation in the supervision process, which includes the creation, review, and completion of learning objectives; completion of assigned learning activities and assignments; proactive and ongoing communication with the assigned fieldwork educator; continual self-assessment and reflection; and participation in formal and informal assessments directed by the fieldwork educator. By the end of the fieldwork experience, the student should demonstrate the attitudes and skills of an entry-level practitioner, including assumption of responsibility for independent learning.

D. Fieldwork Educator Preparation

Fieldwork educators responsible for supervising Level II Fieldwork occupational therapy students shall meet state and federal regulations governing practice, have a minimum 1 year of practice experience subsequent to initial certification, and be adequately prepared to serve as a fieldwork educator. If supervising in a role-emerging site where there is no on-site occupational therapy practitioner, the fieldwork educator should have a minimum of 3 years of practice experience after initial certification (see II.E.ix for more specific detail).

i. Initial and ongoing education supporting the fieldwork educator role should include attention to the following:

1. Principles and theories of adult education models, knowledge of learning styles, and diverse teaching approaches.
2. Administrative aspects, including relevant regulations and content for development and management of the fieldwork program.
3. The design of educational experiences supporting student development as an OT practitioner.
4. Adaptation of supervisor strategies in response to individual student learning style.
5. Enhancement of student clinical/professional reasoning through guided learning experiences.
6. Provision of formal and informal evaluation of student performance.

ii. Methods for becoming adequately prepared to serve as a fieldwork educator include but are not limited to the following:

1. Attendance at an AOTA Fieldwork Educator Certificate Program (preferred).
2. Completion of the Self-Assessment Tool for Fieldwork Educator Competency (SAFECOM).
3. Attendance at continuing education events on the topic of practice education.
4. Mentorship by an experienced fieldwork educator.
5. Completion of on-line training modules.
6. Documented readings of texts/papers on clinical/fieldwork education.

E. Fieldwork Models

There are a variety of fieldwork models that can be utilized, depending on the preferences of the fieldwork educator, the nature of the fieldwork site, and the learning needs of the students. Fieldwork models exist on a continuum from the traditional apprenticeship model in which one fieldwork educator has one student to a more collaborative approach in which a group of students work with one fieldwork educator. Each fieldwork model has an inherent theoretical approach to learning. The more collaborative the fieldwork model, the more active student learning occurs. Fieldwork models can also be classified as either role-established, which is a more traditional fieldwork site, or role-emerging, where occupational therapy services are being introduced and/or developed.

i. 1:1 – this is the traditional model of one student to one fieldwork educator, also known as the apprenticeship model.
ii. 1:2 – one fieldwork educator to two students.
iii. 2:1 – two fieldwork educators sharing one student.
iv. Multiple sites – a model where one fieldwork educator has a group of students spread out at several fieldwork sites, usually all the same type of setting.
v. Group – a model where one fieldwork educator has a group of students, but maintains the traditional "fieldwork educator as expert" role.
vi. Peer – a model in which students provide feedback to each other; this cannot be the sole form of supervision provided to students, as there must be an OT or OTA identified as the fieldwork educator.
vii. Off-site/role-emerging – a fieldwork model in which occupational therapy services are in the process of being developed; the occupational therapy practitioner setting this up may be employed by the agency or the educational program.
viii. Collaborative – a specific model of fieldwork education used with a group of students in which knowledge is constructed jointly between the fieldwork educator and the students. This is an active model of student learning that places more responsibility on the student for his/her own learning. The fieldwork educator does not function as the "expert" but more in the role of facilitator of learning.
ix. Role-emerging fieldwork sites are those at which the provision of occupational therapy services is being developed. The occupational therapy practitioner developing the services may be employed by the agency as a consultant, or may be employed by the academic program. When fieldwork placements occur in role-emerging practice settings, the occupational therapy fieldwork educator is typically only present on site for a limited amount of time. The ACOTE Standards require that the fieldwork educator provide a minimum of eight hours per week at the site (AOTA, 2012). In addition, the fieldwork educator must be easily accessible by a variety of means during the hours a student is at the site. Furthermore, the person serving as

the fieldwork educator must have a minimum of 3 years experience after initial certification, as this is considered advanced supervision.

x. International fieldwork occurs in another country and requires a great deal of advance planning from the academic program, student, and fieldwork educator as there are multiple issues involved. The Academic Fieldwork Coordinator should ensure that the fieldwork educator and fieldwork site staff are conversant with and in compliance with current ACOTE standards and that regular formal and informal communication is maintained during the fieldwork experience. The ACOTE Standards require that the individual serving as the fieldwork educator must be a graduate of a WFOT-approved educational program. Students cannot complete more than 12 weeks in an international placement. The reader is referred to the section of the AOTA Web site where there are multiple documents describing policies, procedures, and other issues related to international fieldwork.

II. Fieldwork Site Development

When developing a fieldwork experience for a new site, the preferred way to begin is by reaching out to the academic programs in the immediate area. The establishment of a contract between the fieldwork site and the academic program can take a very long time and so it is best to start with that process early. Students cannot be accepted until the contract has been signed by both parties. If there are several academic programs in the area, there is no reason why contracts cannot be initiated with all of them at once. During the contract development and approval process, the fieldwork educator can begin doing some of the other activities that will need to be in place before students are accepted. The reader is referred to the AOTA Web site for additional fieldwork educator resources, including "Steps to Starting a Fieldwork Program," located at the following link: http://www.aota.org/en/Education-Careers/Fieldwork/NewPrograms/Steps.aspx

A. The fieldwork site should meet all existing local, state, and/or federal safety and health requirements, and should provide adequate and efficient working conditions. The occupational therapy practitioner should comply with state regulations governing the scope of practice for OT services.

i. Adherence to standards of quality in regard to safety, health requirements, and working conditions may be verified through a review process by the University/ program using the center as a fieldwork site or by an established body such as the Joint Commission on Accreditation of Health Care Organizations, the Commission on Accreditation of Rehabilitation Facilities, or a state regulatory board.

ii. Adequate time should be available to supervising staff for student supervision activities.

iii. Space for client-related consultation, preparation, writing, in-service education and research activities by occupational therapists, practitioners, and students should be provided.

iv. The fieldwork educator and student should have access to current professional information, publications, texts, and Internet resources related to occupational therapy education and practice.
v. Client records should be available to the staff and students for intervention planning and practice.

B. Ideally, the fieldwork site will have a stated philosophy regarding service delivery which serves as a guide for the delivery of service, scholarly activities, and education for individuals and groups. Where occupational therapy services are already established, the occupational therapy philosophy/mission/vision regarding practice and education programs should be stated in writing, and should reflect the specific contribution occupational therapy makes to the overall agency. Where established, the occupational therapy philosophy/mission/vision guides the development of learning objectives for the fieldwork experience. Ideally, the established occupational therapy program will articulate a philosophy/mission/vision of service delivery reflective of best practices in the profession. Best practices in the profession result in services which are client-centered, occupation-based, and supported by research evidence. The partnering academic institution will work with the fieldwork site to provide resources to support best practice ideals.

i. Client-centered practice is evident when there are regular intervention planning/review meetings between the client and occupational therapy practitioner to ensure client participation in the evaluation and intervention process (Mortenson & Dyck, 2006).
    1. In situations where there is limited possibility for client participation in intervention planning/review meetings due to the nature or severity of the client's impairment, the occupational therapy practitioner should seek the perspectives of family members/significant others who would act in the client's best interest.
ii. Occupation-based practice is client centered and requires an understanding of the client's needs, wants and expectations. Interventions are meaningful to the client and include participation in occupations that are reflective of the client's lifestyle and context (Chisholm, Dolhi, & Schreiber, 2000).
iii. Evidence-based intervention includes the creation of "strategies and tools for practitioners to access, understand, and use the latest research knowledge to improve services for clients" (Law & MacDermid, 2008, p. 6).

C. The administrators of the fieldwork setting should articulate support for the fieldwork education program.

i. Since the occupational therapy fieldwork education experience exists within the philosophy and policies of the fieldwork agency, it is essential that the administration as well as the occupational therapy staff accept and support the education of future practitioners.

D. At fieldwork sites where occupational therapy services are already established, there should be occupational therapy representation in planning programs and formulating policies which would affect occupational therapy practice and services delivery or involvement.

i. The occupational therapy perspective should be represented at program-related conferences, in quality review processes, and in planning for occupational therapy services delivery. The profession of occupational therapy should be represented in policy-making groups at the fieldwork site.
ii. Consideration should be given to the occupational therapy department philosophy of service delivery in the planning of programs and the formation of policies influencing occupational therapists' service delivery at the fieldwork site.

E. The fieldwork agency should recognize that the primary objective of the fieldwork experience is to benefit the student's education.

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

F. Opportunities for continuing education and professional development of the occupational therapy staff and students should be encouraged to support life-long learning.

i. Attendance at workshops, institutes, conferences, courses, in-services and professional meetings should be encouraged.
ii. Financial support should be given for professional development whenever feasible within the budget of the fieldwork agency.
iii. Fieldwork students should be encouraged to participate in continuing education and be provided time to do so, when content is relevant to the fieldwork experience.
iv. State and National Association Membership is encouraged.

G. Collaboration with academic program - Both the ACOTE Standards and the Model Curriculum documents address the need for collaboration between the fieldwork site/fieldwork educator and the academic program. The ACOTE Standards require that the Academic Fieldwork Coordinator and the fieldwork educator collaborate when establishing fieldwork objectives, identifying fieldwork site requirements, and when communicating students' performance and progress during fieldwork (AOTA, 2012). The OT Model Curriculum documents describe how fieldwork experiences need to be planned in such a way that they are integrated into the academic program's mission and curriculum design. The reader is referred to the OT Model Curriculum, the OTA Model Curriculum and the ACOTE Standards for more information.

H. Supervision guidelines - There are multiple sources of supervision guidelines that are applicable to Level II fieldwork. The first source are state laws and state practice acts that govern the practice of occupational therapy. These documents will specify if there are any specific requirements for supervision that need to be upheld in that state. Another source of supervision guidelines are federal regulations such as Medicare that specify what type of supervision must be provided to fieldwork students in certain healthcare settings and with certain types of Medicare coverage. The AOTA Web site is a good source for the most up-to-date information on Medicare regulations for student supervision. The ACOTE Standards specify that during Level II fieldwork, students must be supervised by a licensed or credentialed occupational therapy practitioner with at least 1 year of experience who is adequately prepared to serve as a fieldwork educator. Further, the Standards state that supervision should initially be direct, and then progress to less direct supervision as is possible given the demands of the fieldwork site, the complexity of the client's condition being treated, and the abilities of the fieldwork student. The COE and Commission on Practice (COP) Fieldwork Level II position paper (COE/COP, 2012) additionally recommends that supervision of occupational therapy and occupational therapy assistant students in Fieldwork Level II settings will be of the quality and scope to ensure protection of consumers and provide opportunities for appropriate role modeling of occupational therapy practice, and that the supervising occupational therapist and/or occupational therapy assistant must recognize when direct versus indirect supervision is needed and ensure that supervision supports the student's current and developing levels of competence (COE/COP, 2012).

Specific to the role-emerging fieldwork placement, where the site does not employ an occupational therapist on staff and the fieldwork is designed to promote the development of occupational therapy services, supervision guidelines specify that students be supervised daily on site by another professional familiar with the role of occupational therapy and 8 hours of direct supervision should be provided weekly by an occupational therapist or occupational therapy assistant with at least three years of experience. It is recommended that the Academic Fieldwork Coordinator (AFWC), fieldwork educator (FWEd), the on-site coordinator (if identified) and student maintain regular formal and informal communication during the fieldwork experience (AOTA, 2001).

III. Student Engagement in the Learning Process

A. It is recommended that students collaborate with their fieldwork educator to develop learning objectives which stem from the site-specific learning objectives for the individual FW site. This may be accomplished through the use of learning contracts, which are both a teaching strategy and an assessment tool used to encourage self-directed learning. Learning contracts allow for shared responsibility in the planning of learning experiences offered in fieldwork. Pro-active learning contracts are an effective teaching strategy and encourage students to become intrinsically motivated to attain competence in the fieldwork experience.

i. The use of learning contracts is highly recommended. If used, learning contracts should be developed within 2weeks of initiating the FW experience. They should address individual student learning styles, needs and

interests, and should include specific learning objectives, resources and strategies, assessment, and target dates for completion. Learning contracts should be reviewed and updated regularly to reflect and communicate student progress towards the attainment of objectives.

ii. The student shall be evaluated and kept informed on an ongoing basis of his/her performance status.

1. The student will collaborate with fieldwork educator to determine the most effective supervision style and feedback methods.
2. Formative assessment shall be provided to students on a weekly basis and recorded in written format, providing specific recommendations addressing observable behaviors.
3. Supervision and feedback is intended to empower the student to change performance, facilitate student self-reflection and self-assessment, and guide the student regarding strengths and opportunities for growth-based on site-specific objectives.
4. AOTA's COE recommends the use of the AOTA Fieldwork Performance Evaluation for the Occupational Therapy Student (AOTA, 2002a) and the AOTA Fieldwork Performance Evaluation for the Occupational Therapy Assistant Student (AOTA, 2002b) as a rating tool. The student's performance should be evaluated formally at mid-term and at the completion of the FW experience.
5. The student should self-assess performance at mid-term using a copy of the AOTA Fieldwork Performance Evaluation (FWPE), and student evaluation and fieldwork educator evaluation scores should be compared and differences discussed.
6. Weekly supervision logs are a good way for both the supervisor and student to keep track of what was discussed in supervision sessions. It is important for both the fieldwork educator and student to sign and date each log to verify the supervision process.
7. When there are multiple supervisors, care should be taken to ensure that communication regarding student progress is shared among all supervisors and that all contribute to evaluation of the student's progress.

B. Learning Challenges on Fieldwork:

i. Fieldwork educators should monitor student progress, and match students' abilities with the demands of setting by providing the just-right challenges designed to maximize each student's individual learning needs.

ii. Structured forms of feedback, such as the Fieldwork Experience Assessment Tool (FEAT; AOTA, 2001), should be used to promote fieldwork educator and student communication.

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

iv. Fieldwork educators should initiate written remedial learning contracts with clear expectations and specific time frames for all students who are struggling to meet site-specific objectives.

IV. Continued Assessment and Refinement of the Fieldwork Program

A. Fieldwork experiences should be implemented and evaluated for their effectiveness by the educational institution and the fieldwork agency.

i. The Academic Fieldwork Coordinator representing the educational institution should regularly evaluate learning opportunities offered during fieldwork to ensure that settings are equipped to meet curricular goals and ensure student exposure to psychosocial factors, occupation-based outcomes and evidence-based practice.

1. This may be accomplished through regular communication (e.g., emails, phone calls, written correspondence, etc.) between the AFWC and faculty and ongoing communication regarding the academic program's curriculum design to the fieldwork site. In addition, the fieldwork site should have opportunity to inform the didactic program preparation.

ii. The fieldwork site should regularly evaluate the effectiveness of its fieldwork program to ensure that students are able to meet learning objectives and deliver ethical, evidence-based, and occupation-centered intervention to clients. The learning objectives should be reviewed regularly to maximize the effectiveness of the fieldwork experience and create new opportunities. Supervisors are encouraged to participate in routine evaluations of their effectiveness in the supervisory role.

1. Fieldwork site evaluation may occur through:
    a. AOTA Student Evaluation of Fieldwork Experience (SEFWE)
    b. Cumulative review of AOTA Fieldwork Performance Evaluations (FWPE) to determine student patterns of strength and weaknesses
    c. Fieldwork Experience Assessment Tool (FEAT)
    d. Review of the Self-Assessment Tool for Fieldwork Educator Competency (SAFECOM)

Resources

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