Master of Occupational Therapy Program

FIELDWORK MANUAL

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Visit Fieldwork Pages/Forms on our website: www.samuelmerritt.edu>Occupational Therapy > Fieldwork to either Fieldwork Educator or prompt to Fieldwork students (password protected)
Reviewed/rewised: February 2014

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1.0 Introduction to Fieldwork
1.1 Purpose of Fieldwork
Fieldwork is an integral part of the training to become an occupational therapist. As stated by the American Occupational Therapy Association (AOTA), “the purpose of fieldwork education is to propel each generation of occupational therapy practitioners from the role of student to that of practitioner” (AOTA, 2009).

1.2 Overview of Fieldwork Courses at Samuel Merritt University
The required fieldwork courses are designed in accordance with the Accreditation Council for Occupational Therapy Education (ACOTE) Standards. Level I Fieldwork is completed during the summer between the first and second years of didactic coursework. Level II Fieldwork is completed after the second year of didactic classes. An optional Level III internship is also available.

- **1st Year Coursework**
  - **Level I Fieldwork**
    - OT 621L, 3 units
    - Summer semester

- **2nd Year Coursework**
  - **Level II Fieldwork**
    - OT 640L & OT 641L
    - 12 weeks each course = 24 weeks total
    - 6 units each course = 12 units total

- **Optional Level III Internship**
  - in specialty area
  - OT 642L
  - 2 units

Apply to take NBCOT exam
Level I Fieldwork, OT 621L - Introduction to Fieldwork (3 units)
Level I Fieldwork provides an introduction to clinical application of the didactic, theoretical learning from the classroom curriculum. The primary purpose is to allow “hands-on” experiences to translate theory into practice. Students are introduced to a variety of clinical settings and client populations with whom an occupational therapist might work. Through “directed observation and participation in selected aspects of the occupational therapy practice,” (ACOTE, 2006, p. 12) students develop their observational skills, professional behaviors and reasoning skills as future occupational therapists. Students must successfully complete all first-year didactic courses prior to beginning Level I Fieldwork.

According to ACOTE Standards, each educational program determines how to include Level I Fieldwork and the hours required. Samuel Merritt University requires students to complete a minimum of 60 hours in each of two required settings, psychosocial and adult physical disabilities. An optional 40-hour placement in pediatrics may be requested. Level I Fieldwork is completed during the summer session, between May 5 and July 18. Students must attend two mandatory full-day seminars during the summer semester. The first seminar is held in April prior to starting fieldwork, and the second seminar is held in August at the end of the summer semester. Successful completion of Level I Fieldwork is a prerequisite for initiating the second year of academic coursework.

Level II Fieldwork, OT 640L & OT 641L (6 units per course; total 12 units)
Level II Fieldwork is the final stage of professional education, designed to transition a student to the full responsibilities of an entry-level occupational therapist. This is a full-time internship whereby the student works in the capacity of a student occupational therapist under the supervision of a licensed occupational therapist.

Students are eligible to register for Level II Fieldwork after successful completion of all didactic coursework. Level II Fieldwork is usually completed in two consecutive 6-unit modules for 12 weeks each. Students must successfully complete OT 640L before they are eligible to register for OT 641L. After successful completion of the total 24 weeks or six months of Level II Fieldwork, students are eligible to sit for the certification exam administered by the National Board for Certification in Occupational Therapy (NBCOT).

ACOTE requires that fieldwork experiences “shall be provided with various groups across the life span, persons with both psychosocial and physical performance deficits, and various service delivery models reflective of current practice in the profession….The goal of Level II Fieldwork is to develop competent, entry-level, generalist occupational therapists” (ACOTE Standards, 2006). Therefore, it is the policy of Samuel Merritt University that Level II Fieldwork should be completed at two different types of practice settings in order to provide students with broad clinical experiences. For example it is considered that the greatest breadth of experience occurs when one site is primarily a physical disabilities setting and the other sites focuses on psychosocial disabilities.

The faculty highly recommends students complete one assignment in physical disabilities and one in psychosocial disabilities, although this is not required by ACOTE. Students may be assigned to two settings that are both physical disabilities, but the two sites must be quite different in terms of practice settings (such as acute versus long term care). If an assignment is
requested for pediatrics, it can only be for the second Level II assignment and must be preceded by an adult physical disabilities assignment. For those interested in hand therapy, there are limited sites that will accept a Level II student; a better option would be for students to consider an optional third post-professional internship in hand therapy.

Optional Post-Professional Level III Internship. OT 642L (2 units)
This is an optional internship for students to gain experience in a specialty area such as pediatrics, hand therapy, or dysphagia. The duration of this internship is dependent upon requirements of the fieldwork site; the usual duration is 12 weeks. Students are eligible to take this optional course after successful completion of the required Level II Fieldwork courses. A sample copy of the OT 642L course syllabus is provided in Appendix I.

This optional internship needs to be completed in a practice area that is different than where the student has been placed for the two required Level II Fieldwork experiences.

1.3 Fieldwork Participants
There are three primary participants in occupational therapy fieldwork:

Student
The student must be in good academic standing and enrolled in specific fieldwork courses. During fieldwork, the student is responsible for self-directed learning with guidance from the Fieldwork Educator and support from the Academic Fieldwork Coordinator. The student must assume an active role in collaborating with the Fieldwork Educator and the Academic Fieldwork Coordinator to maximize the benefits of this interactive component of OT education.

Fieldwork Educator (FE)
The Fieldwork Educator is the clinician who directly supervises a student during fieldwork. 

Level I Fieldwork Educator
In Level I Fieldwork, the FE is often an occupational therapist, although this is not an ACOTE requirement. The student could be supervised by an individual in another allied health profession (such as a recreation therapist, social worker, or nurse) for one of the two Level I placements. There is no minimum experience requirement for the supervising FE during Level I Fieldwork. The role of the Level I FE is to provide guided learning to increase the student's awareness of the clinical setting, client population and therapeutic interventions.
Level II Fieldwork Educator
ACOTE provides specific guidelines for Level II FEs. The supervising FE must be an occupational therapist who has been practicing for at least one year. The occupational therapist must provide onsite supervision at a minimum of 8 hours per week. Partial supervision may be provided by an occupational therapy assistant. The FE’s primary role is to provide an environment in which the student can bridge the gap between academic education and clinical application. The FE needs to remain aware of the student's learning style and pace, in order to keep the student gradually challenged until the student is able to handle the typical caseload of an entry-level therapist at the fieldwork site.

Academic Fieldwork Coordinator (AFWC)
The Academic Fieldwork Coordinator is the Samuel Merritt University faculty responsible for identifying and securing sites for fieldwork education; maintaining files on students and on fieldwork sites; and collaborating with Fieldwork Educators and students to provide appropriate student placements. The AFWC is responsible for ensuring that the university’s fieldwork program is in compliance with ACOTE fieldwork education requirements. The AFWC is responsible for maintaining a collaborative relationship between the academic and clinical settings. The AFWC assists and guides students in the selection of sites appropriate to their learning styles; assists sites in developing their fieldwork programs; plans continuing education related to fieldwork education; and facilitates fieldwork education support groups on behalf of the university. The AFWC is responsible for assigning each student’s academic grade for the fieldwork courses based on input from the FE. Once students are placed at fieldwork sites, the AFWC becomes the academic advisor, responsible to counsel and arbitrate with students and FEs.
2.0 Fieldwork Scheduling Process
2.1 Contracts Between Fieldwork Sites and Samuel Merritt University

All fieldwork sites must have a current, signed contract with Samuel Merritt University. The contract is an agreement that delineates the respective responsibilities of the University and the fieldwork site. A current contract is required for students’ liability and malpractice coverage to be in effect during fieldwork.

Each contract must be reviewed and signed by the university’s administrators and by the fieldwork site’s designated representatives. In general, this process can take from six months and up to a year for completion. Unexpected circumstances may further delay or prevent the contract completion process. The Occupational Therapy Department cannot guarantee that a contract being pursued to meet a specific student’s request will be completed, despite the AFWC’s timely request for the contract and ongoing efforts to facilitate its completion.

Students cannot be placed at a fieldwork site without the signed contract in place. Information about sites that have a current contract with Samuel Merritt University is available from the Academic Fieldwork Coordinator (AFWC).

2.2 Level I Fieldwork

The required hours for Level I Fieldwork at Samuel Merritt University are a minimum of 60 hours per site, at two different sites, one in psychosocial and one assignment in physical disabilities.

Students submit their geographic preferences in September of the first year of the MOT program and have an opportunity to update their preferences in January. In April, the Level I AFWC distributes site assignments to students based on their geographic preferences. After a student receives the site assignments, the student contacts the fieldwork sites to schedule the specific dates for fieldwork. Only fieldwork arranged between the site and the AFWC will fulfill the academic requirement for fieldwork.

2.3 Level II Fieldwork

<table>
<thead>
<tr>
<th>When</th>
<th>What</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Year of MOT Program</td>
<td></td>
</tr>
<tr>
<td>September</td>
<td>Students provide preliminary geographic preferences to the AFWC</td>
</tr>
<tr>
<td>January</td>
<td>Students may update their geographic preferences</td>
</tr>
<tr>
<td>April 15</td>
<td>Last day for students to update out-of-state requests</td>
</tr>
<tr>
<td>August 15</td>
<td>Last day for students to update requests within California</td>
</tr>
<tr>
<td>Second Year of MOT Program</td>
<td></td>
</tr>
<tr>
<td>November 15 (approximate)</td>
<td>AFWC notifies students of initial plans for site assignments</td>
</tr>
<tr>
<td></td>
<td>(Note that not all assignments may be made at this time due to</td>
</tr>
<tr>
<td></td>
<td>multiple issues including sites not ready to commit, versus others</td>
</tr>
<tr>
<td></td>
<td>requiring early interviews – thus varied times of actual completion</td>
</tr>
<tr>
<td></td>
<td>of assignments up to and including weeks prior to beginning Level</td>
</tr>
<tr>
<td></td>
<td>II fieldwork in May or June)</td>
</tr>
<tr>
<td>December 1 to December 15</td>
<td>Students may petition for changes in Level II Fieldwork site</td>
</tr>
<tr>
<td></td>
<td>assignments</td>
</tr>
</tbody>
</table>
The planning process for Level II Fieldwork begins during the first month of students’ enrollment at Samuel Merritt University. Early in the first semester of the MOT program, students provide preliminary information to the AFWC about geographic preferences and types of experiences desired. The AFWC will request input from students about their preferences for fieldwork several times over the course of the first school year. During the first year of the MOT program, students have the opportunity to modify their fieldwork requests up to April 15 for out-of-state requests and August 15 for requests in California. The AFWC then assigns students to specific sites.

Students are notified of their placements between about November 1 – November 15 of the second school year. Students can request changes in their site assignments up until December 15 by submitting a petition to the AFWC. The AFWC will respond to students’ petitions by January 15.

**Once a placement is confirmed, students cannot request changes after January 30.** If extenuating circumstances arise that preclude a student from the completing the assigned fieldwork, the student must contact the AFWC immediately. If the AFWC needs to find a different placement for a student after January 30 per the student’s request, **the start of fieldwork could be delayed as much as 3 months or more** due to the additional time required to secure another site.

**Important: Criteria for Assigning Students to Fieldwork Sites**

The primary consideration of the AFWC is to achieve the ACOTE mandate to ensure each student has a broad exposure to OT practice areas. The AFWC makes each student’s placement based on consideration of multiple criteria, which include:

- Student request regarding geographic location and type of setting
- Discussion with faculty about student’s learning needs
- Input from student about his/her learning style.

For each student, the AFWC considers factors such as whether the student would benefit from a slow versus fast paced environment, a large versus smaller facility, and a structured versus a less structured environment.

**Flexibility is Required from All Participants**

Flexibility from both the student and the AFWC is a necessary component of this placement process. Individual student’s needs are met as much as possible; however, **it may not be possible to accommodate all dimensions of a student's request.** In some instances, there are more student requests for a particular geographic location or a practice setting than available sites; therefore, the AFWC needs to assign fieldwork sites to ensure that there is equitable distribution among students. The AFWC reserves the right to implement a lottery process as needed to assign sites. Furthermore, there is the possibility of changes due to circumstances beyond Samuel Merritt University’s control (e.g., staffing changes at fieldwork sites, sites not completing contracts prior
to the student’s scheduled start date) which can affect the availability of specific sites. The AFWC will notify students if such changes occur in site availability, and will work with the student to identify alternative sites as needed.

2.4 Out-of-State Fieldwork Assignments
Students who wish to return to their home state are given priority for out-of-state assignments. If Samuel Merritt University already has a contract with a fieldwork site that is in a region requested by a student, that site will be used. If Samuel Merritt University is pursuing a new fieldwork site for a student, the student may be involved in the search for potential sites (done on individual basis in consultation with AFWC). If the student has some contacts for fieldwork sites, this information should be provided to the AFWC, who will then follow up to initiate contact.

There is no guarantee about the successful completion of contracts with out-of-state sites. It is important for students to have flexibility with locations, such as a broader geographic region or to remain in California for fieldwork. There is no guarantee of providing out-of-state placements to students, and the AFWC reserves the right to make the final decisions on placements based on availability of sites and ability to complete a contract.

2.5 Student Participation in the Scheduling Process
Students frequently ask if they might locate their own fieldwork placements. Though this interest to be more involved with selection process is understandable, this is possible only under a very limited set of circumstances, such as to locate out-of-state fieldwork sites. Potential new fieldwork sites must be willing to complete a contract with the University and to provide the AFWC with a detailed plan of their fieldwork program before it is possible to assign students to the site. Students may not contact sites to request fieldwork placements without prior consent from the AFWC. Unfortunately, the procurement of placements has become increasingly more competitive among schools while at the same time, several sites are becoming less available due to increased productivity requirements, thus forcing the sites to choose not to take students.

2.6 Optional Post-Professional Internship, OT 642L
Once a student has made the commitment to complete a post-professional Level III internship and the AFWC spends the time to assign a site, it is important that the student keeps this commitment. Students should give careful thought when making the choice to complete a Level III internship.

Students must first request the optional post-professional internship through the AFWC by October 1 prior to starting this elective internship. The AFWC then forwards the student’s request to the Registrar, and the student registers for the course.
## 2.7 Summary of the Processes and Timelines for Level I and Level II Fieldwork

<table>
<thead>
<tr>
<th>When</th>
<th>Task</th>
<th>Person Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>First Year of the MOT Program</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>September</td>
<td>Students complete requests for their geographic preferences for Level I and Level II Fieldwork</td>
<td>Students</td>
</tr>
<tr>
<td>September/October</td>
<td>AFWC sends out reservations requests to potential sites for Level I and Level II Fieldwork</td>
<td>AFWC</td>
</tr>
<tr>
<td>October</td>
<td>Begin monthly meetings with class to discuss fieldwork planning</td>
<td>AFWC and students</td>
</tr>
<tr>
<td>January</td>
<td>▪ Students submit updated geographic preferences for Level I and Level II Fieldwork to AFWC  &lt;br&gt; ▪ Begin firming up out of state Level II sites</td>
<td>▪ Students  &lt;br&gt; ▪ AFWC</td>
</tr>
<tr>
<td>January to March 15</td>
<td>In preparation for Level I Fieldwork:  &lt;br&gt; ▪ Obtain physical  &lt;br&gt; ▪ Update immunizations  &lt;br&gt; ▪ Obtain TB test  &lt;br&gt; ▪ Complete Blood Borne Pathogens certification  &lt;br&gt; ▪ Complete HIPAA certification  &lt;br&gt; ▪ Obtain/ renew CPR certification</td>
<td>Students</td>
</tr>
<tr>
<td>March</td>
<td>Begin organizing student handouts in preparation for Level I Fieldwork</td>
<td>AFWC</td>
</tr>
<tr>
<td>April 15</td>
<td>Last day to update requests for out-of-state Level II Fieldwork</td>
<td>Students</td>
</tr>
<tr>
<td>April</td>
<td>▪ Distribute Level I Fieldwork site assignments and information packets to students by mid April  &lt;br&gt; ▪ Mail confirmations to sites with names of students for Level I Fieldwork</td>
<td>AFWC</td>
</tr>
<tr>
<td>April/May</td>
<td>▪ <strong>MANDATORY</strong> full-day introductory seminar for Level I Fieldwork on Monday following finals week  &lt;br&gt; ▪ Students begin contacting Fieldwork Educators to schedule the two required Level I Fieldwork assignments, to be completed between May 5 and July 18  &lt;br&gt; ▪ Students complete background check and fingerprinting for Level I Fieldwork if required by sites</td>
<td>▪ AFWC and students  &lt;br&gt; ▪ Students</td>
</tr>
<tr>
<td>May to August 15</td>
<td>Students schedule to meet with the Level II AFWC to discuss Level II Fieldwork preferences</td>
<td>AFWC and students</td>
</tr>
<tr>
<td>August 15</td>
<td>Last day to update Level II Fieldwork requests for California sites</td>
<td>Students</td>
</tr>
<tr>
<td>August</td>
<td>Students meet with instructor on campus for <strong>MANDATORY</strong> Level I Fieldwork final seminar on Wednesday preceding the beginning of the fall semester</td>
<td>AFWC and students</td>
</tr>
</tbody>
</table>
**Second Year of the MOT Program**

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 15 (approximate)</td>
<td>Distribute Level II assignments to students – as noted, not all placements may be complete due to variability of potential placements to commit for following summer/fall at this time.</td>
<td>AFWC</td>
</tr>
<tr>
<td>December 15</td>
<td>Students may request changes to site assignments by submitting a written petition to the AFWC</td>
<td>Students</td>
</tr>
<tr>
<td>November-December</td>
<td>Students make initial contact with their Level II sites</td>
<td>Students</td>
</tr>
<tr>
<td>January 15</td>
<td>The AFWC responds to students’ petitions for changes in site assignments</td>
<td>AFWC</td>
</tr>
<tr>
<td>January 30</td>
<td>Students cannot request changes to Level II assignments after this date. If extenuating circumstances arise that preclude a student from completing the assigned fieldwork, the students must contact the AFWC immediately.</td>
<td>Students</td>
</tr>
</tbody>
</table>
| January to March 15   | In preparation for Level II Fieldwork:  
  - Complete and turn in Personal Data Sheets to AFWC  
  - Obtain physical  
  - Update immunizations  
  - Obtain TB test  
  - Complete Blood Borne Pathogens certification  
  - Complete HIPAA certification  
  - Obtain/ renew CPR certification  
  - Complete background check (if required by site)  
  - Complete fingerprinting (if required by site) | Students          |
| April                 | **MANDATORY** part-day introductory seminar for Level II Fieldwork the Monday following finals week (9:00 – 2:00) | Students          |

**Third Year of the MOT Program**

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>June to September</td>
<td>Complete first Level II Fieldwork – most of class (some students choose to begin in next quarter)</td>
<td>Students</td>
</tr>
<tr>
<td>September to December</td>
<td>Complete second Level II Fieldwork – most of class</td>
<td>Students</td>
</tr>
<tr>
<td>October 1</td>
<td>Last day to request Optional Level III Internship</td>
<td>Students</td>
</tr>
<tr>
<td>Second Thursday and Friday of November</td>
<td>Take NBCOT review exam at SMU during two-day Level II Fieldwork mid-semester meeting</td>
<td>Students</td>
</tr>
<tr>
<td>January to March</td>
<td>Complete optional Level III Internship</td>
<td>Students</td>
</tr>
</tbody>
</table>
2.8 AOTA Level II Fieldwork Dates
The schedule for Level II Fieldwork is as follows:

<table>
<thead>
<tr>
<th>2014</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 6 – Mar 28</td>
<td>Jan 7 – Mar 29</td>
<td>Jan 4 – Mar 25</td>
</tr>
<tr>
<td>Mar 31 – June 20</td>
<td>Apr 1 – June 21</td>
<td>Mar 31 – June 20</td>
</tr>
<tr>
<td>June 23 – Sept 12</td>
<td>June 22 – Sept 11</td>
<td>June 20 – Sept 09</td>
</tr>
</tbody>
</table>

2.9 Caveats Pertaining to Fieldwork Scheduling
- The MOT program’s obligation is to provide a generalist occupational therapy education, including fieldwork education. Assignments in specialty practice areas will be made at the discretion of the AFWC, often in consultation with other faculty members.

- The faculty strongly recommends that students complete a Level II Fieldwork in mental health, but it is not required.

- The AFWC will consider student preferences for particular practice settings (e.g. pediatrics, rehabilitation, acute care). However, the AFWC cannot guarantee that all students will be assigned in accordance with their expressed preferences.

- If students request a pediatric assignment for Level II Fieldwork, it can only be for a second Level II placement. Students may also request an optional Level III internship in pediatrics.

- Due to advanced practice regulations for California, only an optional Level III internship in hand therapy can be used towards completion of requirements to achieve advanced practice for a California license. Hours completed in hand therapy practice during Level II Fieldwork cannot be applied toward advanced practice.

- No student is to contact a potential fieldwork site without prior approval by the AFWC. Students are allowed to contact fieldwork sites after the assignment has been made, for the purpose of setting up pre-fieldwork interviews or site visits.

- Students requests for changes in Level II Fieldwork assignments are not allowed after January 30. If extenuating circumstances arise that preclude a student from completing the assigned fieldwork, the student must contact the AFWC immediately.
3.0 Requirements for Fieldwork
## 3.1 Overview of Common Requirements for Fieldwork

The following table is an overview of requirements that are commonly requested by fieldwork sites. Information about how to meet these requirements is provided in this chapter and online at [https://www.samuelmerritt.edu/ot/fieldwork-requirements](https://www.samuelmerritt.edu/ot/fieldwork-requirements). Site-specific requirements may vary and change. Therefore, **it is each student’s personal responsibility to verify the current requirements for his/her assigned sites prior to starting fieldwork.**

The Student Personal Data Sheet is only required for Level II Fieldwork. All other requirements are applicable to all fieldwork placements (Level I, Level II, and optional Level III). Section 2.7 of this manual provides timelines for completing these requirements.

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Notes</th>
<th>Routing of Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical examination</td>
<td>To be completed within 12 months of starting fieldwork. Some sites require the physical to be even more recent.</td>
<td>Student provides copy of health records as requested at each site</td>
</tr>
<tr>
<td>Updated immunizations</td>
<td>Refer to section 3.4, 3.5 for more information</td>
<td>Student brings proof of updated immunizations to each site</td>
</tr>
<tr>
<td>TB test</td>
<td>Usually needs to be completed within 6 months of each fieldwork assignment. Some sites require two-step TB testing, which is provided by SMU’s Student Health Services.</td>
<td>Student brings proof of TB clearance to each site</td>
</tr>
<tr>
<td>Blood borne pathogens certification</td>
<td>Refer to section 3.6</td>
<td>Student provides certificates to Drew Ward and brings copies to each site</td>
</tr>
<tr>
<td>HIPAA certification</td>
<td>Refer to section 3.7</td>
<td></td>
</tr>
<tr>
<td>Current CPR for Healthcare Providers certification</td>
<td>Must remain current for the entire duration of fieldwork.</td>
<td>Student brings proof of CPR certification to each site</td>
</tr>
<tr>
<td>Student Personal Data Sheet</td>
<td>Refer to Appendix C. Required for Level II Fieldwork</td>
<td>AFWC sends completed copy to sites prior to fieldwork</td>
</tr>
</tbody>
</table>

These additional requirements **may** be required:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Notes</th>
<th>Routing of Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Background checks</td>
<td>Refer to section 3.7</td>
<td>Obtain specific instructions from the fieldwork site, if any.</td>
</tr>
<tr>
<td>Fingerprinting</td>
<td>Refer to section 3.8</td>
<td></td>
</tr>
<tr>
<td>Drug testing</td>
<td>Refer to section 3.9</td>
<td></td>
</tr>
<tr>
<td>Flu shot</td>
<td>Often required at medically-based sites</td>
<td>Student provides proof directly to each site.</td>
</tr>
<tr>
<td>N95 mask</td>
<td>Refer to section 3.10</td>
<td></td>
</tr>
</tbody>
</table>
3.2 Student Responsibility for Obtaining Required Documentation

It is the students’ personal responsibility to ensure that all requirements are fulfilled prior to starting fieldwork. The physical examination, immunizations, and TB testing are provided at Samuel Merritt University’s Student Health Services. Documentation of student background checks completed upon admittance to the MOT program can be accessed from SMU’s Enrollment and Student Services Office. The student needs to maintain current CPR certification throughout fieldwork and if requested, to complete fingerprinting and additional background checks. Fees incurred to meet fieldwork requirements are at the student’s expense.

3.3 Student Information Release to Fieldwork Sites by AFWC

By enrolling in fieldwork courses, the student authorizes the AFWC to release student information to fieldwork sites for planning purposes.

Level I Fieldwork
The AFWC sends the following information to the fieldwork sites prior to the start of fieldwork:
- Student’s name
- Course syllabus*
- Level I Fieldwork Evaluation* (see Appendix A)
- Other documentation as requested by specific sites.

Level II Fieldwork
At least one month prior to the start of Level II Fieldwork, the AFWC sends the following documents to the fieldwork sites:
- Cover letter containing general information about fieldwork
- Course syllabus*
- Level II Fieldwork Learning Objectives
- Student’s Personal Data Sheet* (see Appendix C)
- Other documentation as requested by specific sites.

*Note: during fieldwork, students can access additional copies of these documents from Canvas and/or on SMU website location for student paperwork.

3.4 Immunization Requirements

Fieldwork sites commonly require students to provide documentation (either immunization records or positive titers) for the following:

- Measles (Rubeloa), Mumps and Rubella
- Hepatitis B.
- Influenza

Please refer to the “Student Health Requirements and Policies” section of the Samuel Merritt University Catalog/Student Handbook or contact Student Health Services for more information.
3.5 Influenza (flu) shots
We have noted an increasing number of hospitals require their workers to either have evidence of a flu shot or individuals are required to wear a mask when working with their patients/clients. Please check with your placement to find out about whether you are required to show evidence of a flu shot before you begin your assignment.

3.6 Blood Borne Pathogens Certification
Students are required to complete an online self-study module in order to obtain the blood borne pathogens certification. The steps for this process are as follows:
1. Log on to the “Pre-Fieldwork Requirements” webpage at 
https://www.samuelmerritt.edu/ot/fieldwork-requirements
2. Follow the instructions under the “Blood Borne Pathogens Certification” section on the webpage.
3. Complete the course entitled “Standard Precaution: Bloodborne Pathogens and Other Potentially Infectious Materials.”
4. At the conclusion of the course, student will be required to take a multiple-choice exam online.
5. After passing the exam, print a certificate of completion for the course.
6. Provide a copy of the certificate to Drew Ward and keep the original to bring to fieldwork sites.

3.7 HIPAA Certification
HIPAA regulations require that all clinicians must comply with confidentiality standards. Students are required to complete an online self-study module in order to obtain the HIPAA certification. The steps for this process are as follows:
1. The AFWC will send by email specific information/instructions for self study and completion of confidentiality page to be submitted to Drew Ward. Alternatively, Log on to the “Pre-Fieldwork Requirements” webpage at 
https://www.samuelmerritt.edu/ot/fieldwork-requirements
2. Follow the instructions under the “HIPAA Certification” section on the webpage.
3. Complete the course entitled “HIPAA.”
4. At the conclusion of the course, student will be required to take a multiple-choice exam online.
5. After passing the exam, print a certificate of completion for the course.
6. Provide a copy of the certificate to Drew Ward and keep the original to bring to fieldwork sites.

In addition to the online certification, students are required to sign a confidentiality agreement prior to fieldwork.

The SMU HIPAA certification does not preclude fieldwork sites from requiring students to undergo additional HIPPA training.

3.8 Background Checks
Some fieldwork sites require criminal background checks prior to starting fieldwork. In many instances, the background check completed by students prior to entry into the MOT program is sufficient to meet the fieldwork site’s requirements. Students may contact enrollment services to
receive a copy of letter verifying background check completed. Contact Kathie McWilliams in Enrollment Management to ask whether she can provide you a letter of confirmation of your completion of successful background check.

Information about criminal background checks for fieldwork is also provided at https://www.samuelmerritt.edu/ot/fieldwork-requirements.

A fieldwork site may require a more recent background check; students may complete a new background check through verifystudents.com or Customer Service at 1-800-229-8608, option 3. In other instances, a more extensive background check may be required; one method frequently requested is Live Scan (www.livescan.com).

It is the student’s responsibility to complete these requirements well in advance of starting fieldwork to avoid a delay in start date.

3.9 Fingerprinting
Students are often required to complete fingerprinting prior to working with pediatric clients. A local police station may be helpful in this effort.

3.10 Drug Screening
Students may be requested to take a drug screening. The student must find out from the specific site what type of testing is required and whether this is done by the fieldwork site or to be completed by the student. If acceptable to the fieldwork site, students can schedule their own drug screenings for a fee by logging onto their verifystudents.com accounts or by calling Verifystudents.com Customer Service at 1-800-299-8606, option 3. Additional information about drug screening is provided at https://www.samuelmerritt.edu/ot/fieldwork-requirements.

3.11 N95 mask
The N95 mask is a lightweight, nose-and-mouth respirator that can provide some level of protection from viruses. Students may be required to be fitted for the N95 mask prior to fieldwork. Resources for obtaining a N95 mask may be found online. Students can also contact the AFWC for more information. It is now possible to be fit with N95 mask through SMU Student Health. Please contact them directly.
4.0 Planning and Preparing for Fieldwork
4.1 Contacting the Fieldwork Site Prior to Fieldwork
Now, many fieldwork sites require students to complete an on-site interview before confirming a student for placement. The Academic Fieldwork Coordinator or the fieldwork site will inform students when an on-site interview is necessary, and the student will contact the Fieldwork Educator to schedule the interview. Even if an on-site interview is not mandatory, it is recommended for students to arrange a site visit prior to starting to fieldwork.

Note that increasingly, interviews are competitive with other potential students from other programs. Please schedule a practice interview with AFWC or other faculty. We are all available to assist.

At least four weeks prior to the first day of the scheduled Level II Fieldwork, students will contact the Fieldwork Educator to verify the starting date, arrival time and location where they will meet their Fieldwork Educator. If there are any problems at this time, the student must immediately contact the Academic Fieldwork Coordinator.

4.2 Living Accommodations During Fieldwork
Students are responsible for their own transportation and living accommodations during fieldwork. Some sites provide student housing on a first-come basis; few sites provide stipends. Neither the University nor the sites can be held responsible for changes in the availability of housing or stipends. It is the student’s responsibility to remain current on this information pertaining to their assigned fieldwork sites.

4.3 Financial Aid and Financial Planning
Student loans and other financial aid vary widely. Students must check with the Financial Aid Office to explore financial planning/scholarships/loans to meet this part of their educational requirement. Level II Fieldwork is usually 40 hours per week for 24 weeks. There is a 1-2 week break after the first 12 weeks to allow students to relocate if needed. Level II Fieldwork is a rigorous time, and students will be required to complete learning activities in addition to the 40 hours per week at the fieldwork site. Employment in addition to Level II Fieldwork is strongly discouraged.

4.4 Requesting Accommodations and ADA Guidelines
Under ADA, fieldwork sites are obligated to make reasonable accommodations for a qualified student with a disability under the following conditions:

1. The student requests accommodations
2. The requested accommodations do not cause undue hardship on the operations of the site
3. The requested accommodations do not fundamentally alter the nature of the services provided at the site.

The request for accommodations cannot be used to deny a fieldwork placement if the student is otherwise able to fulfill the essential job functions. The fieldwork site is expected to maintain any requests for accommodations as confidential information.

Whether to disclose a disability, as well as when and how to do so, are solely the student’s decision. If a student chooses to disclose a disability and to request accommodations, the student is encouraged to provide the AFWC with written notification of this request as early as possible.
The request for accommodations is made after a site has accepted the student. The AFWC will convey such requests on the student’s behalf after the student provides written authorization to share such information. It is acceptable for a student to disclose a disability and to request accommodations after a fieldwork assignment is already in progress. However, evaluation of the students’ performance prior to disclosure will not be changed retroactively based on the disclosure of a disability.

The OT Department’s ADA Guidelines can be found on SMU’s website, under “Occupational Therapy Technical Standards” [www.samuelmerritt.edu/occupational_therapy/technical_standards](http://www.samuelmerritt.edu/occupational_therapy/technical_standards).

### 4.5 Fieldwork FAQs

AOTA provides answers to students about fieldwork topics such as: requirements, supervision, grading, failing, and accommodations for a disability. The information can be accessed from AOTA’s website: [www.aota.org](http://www.aota.org)
5.0 Professional Behaviors During Fieldwork
5.1 Professional Conduct
All fieldwork students are expected to maintain professional behavior and adhere to legal and ethical standards as representatives of Samuel Merritt University, the fieldwork site, and the occupational therapy profession as a whole. Students are responsible for adhering to the professional behavior standards as stated in:

- Samuel Merritt University Occupational Therapy Department Student Handbook
- Indicators for Professional Practice, Samuel Merritt University Student Handbook
- Occupational Therapy Code of Ethics and Ethics Standards (AOTA, 2010)

5.2 Updating Health Status and Contact Information
If a student develops a health condition that may limit his/her ability to fulfill the essential job functions for a fieldwork assignment, the student must inform the Academic Fieldwork Coordinator immediately. Please refer to the essential skills as delineated in the document entitled “Occupational Therapy Technical Standard,” found on SMU’s website at http://www.samuelmerritt.edu/occupational_therapy/technical_standards.

In addition, the student must provide the Academic Fieldwork Coordinator with current address and phone contact information throughout fieldwork experiences. Students are expected to directly notify the AFWC in timely manner if there are any changes in their contact information over the course of fieldwork.

5.3 Client Confidentiality
Information that is divulged to students about any client during fieldwork is to be kept confidential. When client information is being shared for learning purposes or when case presentations are required, students will refer to clients using initials or fictitious names to maintain client confidentiality. Client charts are a confidential and legal document, and must be treated as such. Students must adhere to HIPAA standards and to each fieldwork site’s specific policies pertaining to client confidentiality and client records. Students can be dismissed from fieldwork sites for misuse or tampering with client charts.

5.4 Dress Standards
Students will maintain appropriate dress as determined by each fieldwork site. It is the student’s responsibility to clarify site-specific dress standards prior to each fieldwork assignment. Dress standards are based on safety and therapeutic considerations. The following is a summary of common dress standards for occupational therapy practice:

<table>
<thead>
<tr>
<th>Name tags</th>
<th>Worn visibly at all times</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hair</td>
<td>Worn neatly (tied back if needed) to avoid interfering with treatment activities</td>
</tr>
<tr>
<td>Nails</td>
<td>Appropriate length for physical handling of clients</td>
</tr>
<tr>
<td>Fragrances</td>
<td>No perfume, cologne or other body fragrances due to the potential negative effect on clients who have impaired respiratory or neurological function</td>
</tr>
<tr>
<td>Jewelry</td>
<td>Should be minimal and should not interfere with therapy activities</td>
</tr>
</tbody>
</table>
| Shoes           | ▪ Close-toed  
                  ▪ Flat-heeled  
                  ▪ Slip-resistant soles |
| Pants           | ▪ No jeans  
                  ▪ Undergarments and skin should remain concealed when bending and reaching |
<table>
<thead>
<tr>
<th>Shirts</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ No T-shirts</td>
</tr>
<tr>
<td>▪ Undergarments and skin should remain concealed when bending and reaching</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lab coats</th>
</tr>
</thead>
<tbody>
<tr>
<td>May be required</td>
</tr>
</tbody>
</table>

### 5.5 Holidays and Absences
During Level II Fieldwork, the student is only allowed time off for holidays **observed by the fieldwork site only**; however, holidays, or any time off cannot exceed 3 days per placement. (Note that school holidays are not allowed days off once start fieldwork).

**No absences are allowed** during Level II assignments. If a student is absent from fieldwork due to emergency circumstances or illness, the student is responsible for arranging to make up the missed time.

### 5.6 Site-Specific Professional Expectations
During Level II Fieldwork, the student is functioning as an employee of the fieldwork site. Students are expected to adhere to all professional standards and policies of the site, including work schedule, attendance, dress, and grooming requirements. The student is not to enter restricted areas without permission from the supervising therapist, nor enter a fieldwork site during off-hours unless given permission from the supervising therapist.

### 5.7 Occupational Injury Protocol
If a student becomes injured during fieldwork, the student is expected to follow the Occupational Injury Protocol as described in Appendix J and on SMU’s website, at [http://www.samuelmerritt.edu/human_resources/workers_comp_insurance](http://www.samuelmerritt.edu/human_resources/workers_comp_insurance). It is the student’s responsibility to become familiar with this protocol prior to starting fieldwork.

### 5.8 Preventing and Reporting Elder Abuse
Students receive information about how to prevent and report elder abuse during their academic coursework. Students are required to sign a statement confirming they have this information and agree to report if they see an incidence of elder abuse.

### 5.9 Reporting Child Abuse
Occupational therapy practitioners are mandated by federal law to report suspected cases of child abuse and neglect to state child protective services agencies. Statutes and information about reporting procedures for each state are available on the child welfare website [www.childwelfare.gov](http://www.childwelfare.gov).

### 5.10 Note of Appreciation
Within two weeks following the completion of fieldwork assignments, students should write a note to their Fieldwork Educators, thanking them for their time and professional commitment to provide fieldwork experiences.
6.0 Contingency Planning for Level II Fieldwork: Departmental Policies
6.1 Not Completing Level II Fieldwork – what is the policy?
If a student experiences dissatisfaction with a Level II Fieldwork placement and wishes to discontinue, the student must keep attending the fieldwork assignment while taking the following actions:

1. **Immediately notify the Academic Fieldwork Coordinator.** State the areas of concern and the student’s proposed resolution. Primary action should focus on resolution, including the possibility of the Academic Fieldwork Coordinator acting as an intermediary so that the student may complete the fieldwork assignment in a manner that is acceptable to the student, Fieldwork Educator, and Academic Fieldwork Coordinator.

2. Once a student has expressed concern about continuing with the fieldwork assignment, an **intervention process will be initiated by the Academic Fieldwork Coordinator.** This may include but is not limited to: meeting with the student and the Fieldwork Educator, separately or together; site visit by the AFWC; developing a behavior contract to address concerns; or removal of the student from the site. Alternative communication methods such as Skype may be utilized for students who are out of state.

3. If a student leaves the Level II Fieldwork site **without prior permission** from the Academic Fieldwork Coordinator, the student **will receive a failing grade.** The only exception is where the situation would involve bodily harm and endangerment to the student; the circumstances must be confirmed through investigation by the AFWC.

4. If the student refuses to go through the process described in item 2, the student will receive a failing grade.

5. If a student goes through the process described in item 2 and the Academic Fieldwork Coordinator deems the situation irresolvable, it is the decision of the AFWC whether or not to withdraw a student from a site. **Poor clinical or professional performance of the student is not a legitimate reason for withdrawing** a student from a fieldwork placement.

6. If the reason for the withdrawal is **not** related to student performance issues, then the AFWC may give the student an “incomplete” in the coursework and allow the student to complete the fieldwork course at another site. There are no guarantees regarding the start date, geographic location or practice setting for the alternative site. Fieldwork hours completed at the first site will **not** count toward the required 12 weeks per fieldwork.

6.2 Not Passing Level II Fieldwork Due to Student Performance – What to do
Students need to be proactive in obtaining regular, ongoing feedback from their Fieldwork Educators regarding their clinical progress over the course fieldwork. The student is encouraged to directly communicate with the supervising FE on a regular basis to clarify whether the student is meeting the required clinical expectations for fieldwork. Tools to facilitate this communication process include:
- Regularly scheduled supervision meetings (frequency may range from daily to weekly, depending on the FE and the practice setting)
- Completion and discussion of the Level II Fieldwork, Student Feedback Regarding Fieldwork Supervision Process form (refer to Appendix D)
• Completion and discussion of the Level II Fieldwork, 4 Week and 8 Week Evaluation forms (refer to Appendix E)
• Completion of the Fieldwork Essential Assessment Tool (FEAT), with FE and possibly with AFWC in attendance or completion of Student Evaluation of Fieldwork Experience (SEFWE) at midterm, shared with FE in addition to completion at 10 weeks.
• Reviewing the Level II Fieldwork, AOTA Fieldwork Performance Evaluation for the Occupational Therapy Student (refer to Appendix F) at midterm and final. The evaluation tool may be used more frequently if needed.

*Note: the evaluation forms contained in Appendix D, E and F are provided to the FE. The forms contained in Appendix D and E will also be available to students on Blackboard.

If, at any time, a FE communicates any concern about a student passing the fieldwork placement, the student must immediately contact the AFWC to report this information. Likewise, if the student has any concerns about how the fieldwork is progressing, the student must communicate these concerns to the AFWC in a timely manner, before the situation worsens. The AFWC may work with both the student and the FE in order to support the student’s successful completion of the fieldwork assignment. Development of a learning contract may improve communication between the student and the Fieldwork Educator to facilitate successful completion of fieldwork. Please refer to Section 8 of this manual for more information about learning contracts.

If a Fieldwork Educator and the AFWC ultimately determine that a student has not successfully completed the fieldwork assignment due to inability to demonstrate the minimum entry level clinical skills for the site, the student shall receive a failing grade for the fieldwork course. This determination may be made either at the end of the 12-week placement or could occur as early as six weeks, or sooner is situation is considered necessary following review by AFWC and consultation with Program Chair, following relevant review with student and FE. Please refer to Section 6.3 for information about the MOT departmental policy regarding non-passing grades for fieldwork courses.

6.3 OT Departmental Policy Regarding Non-Passing Grades for Fieldwork Courses

1. To successfully complete the MOT program, a student is only allowed to receive one non-passing grade of “D” in a didactic course or one “Unsatisfactory” grade in a Level II fieldwork course. A student who receives two non-passing grades as defined above will be dismissed from the MOT program. The flowcharts below exemplify the different scenarios involving Level II Fieldwork that would result in a dismissal from the program.

- One non-passing “D” grade in a didactic course
- One “Unsatisfactory” grade in a Level II fieldwork course
- Dismissal from MOT program

- One “Unsatisfactory” grade in a Level II fieldwork course
- Second “Unsatisfactory” grade in a Level II fieldwork course
- Dismissal from MOT program
2. A student who needs to repeat a fieldwork course due to receiving a failing grade must pay
the usual tuition to repeat the 6-unit course.
3. Every effort will be made to find another site for the student who needs to repeat a
fieldwork course. However, there are no guarantees that a site will be found before the
next start date. If a student needs to take a leave of absence (LOA) from the academic
program while waiting for an available fieldwork site, the student must complete and
submit documentation as required by the Registrar to take a leave of absence and to
reenter the program. Only students who are in good academic standing are allowed to take
a leave of absence. No funding by loans occurs during a LOA.
4. For students who need to repeat a fieldwork course, there are no guarantees about finding
another site in accordance with the student’s preferences for geographic or practice setting.

6.4 Disciplinary Action due to Violation of SMU Policy
Students enrolled at Samuel Merritt University assume an obligation to conduct themselves in a
manner compatible with the philosophy of the University, the professional code of ethics, and
state laws and regulations pertaining to their respective professions. Issues which could result in
disciplinary action, receiving a non-passing grade for a fieldwork assignment or expulsion from
the MOT program include, but are not limited to:

- Violation of the ethical practice of occupational therapy
- Absence without contacting the Fieldwork Educator within 2 hours of failure to
  arrive
- Being under the influence of alcohol or non-prescriptive psychotropic drugs, or
  bringing these items to the fieldwork site
- Bringing firearms or other weapons onto the property of the fieldwork site
- Academic dishonesty or plagiarism
- Behaviors which endanger or compromise the safety of clients or other staff.

A list of behaviors for which students are subject to disciplinary action is contained in the
Samuel Merritt University Student Handbook, including the dispute resolution procedures for
academic and behavioral issues. All students are responsible for familiarizing themselves with
this information as it pertains to fieldwork.
7.0 Information for Fieldwork Educators
7.1 History of Samuel Merritt University
Samuel Merritt University was founded in 1909 as a school of nursing. The Master of Occupational Therapy (MOT) program was established in 1994 and graduated its first class in August 1996. The MOT program is fully accredited by the Accreditation Council for Occupational Therapy Education (ACOTE). Samuel Merritt University is accredited by the Senior Commission of the Western Association of Schools and Universities. Other professional programs offered by the university include: nursing, nurse-anesthetist, physical therapy, physician’s assistant, and podiatry. Samuel Merritt University is affiliated with Alta Bates Summit Medical Center, a nonprofit community health care organization under Sutter Health.

7.2 Master of Occupational Therapy Program Philosophy
Samuel Merritt University’s occupational therapy program supports the Mindbody Model, which views the mind and body as one entity. The Mindbody Model derives its scientific support from research in neuroscience, health psychology, and psychoneuroimmunology. These evolving disciplines hold the key to understanding the therapeutic value of occupation and provide the scientific rigor to study the whole person while engaged in meaningful activities of everyday life.

7.3 Overview of the Master of Occupational Therapy Curriculum
The MOT curriculum reflects current trends in education, occupational therapy practice and the health care system. The curriculum is competency-based and aimed at the mastery of specific skills and practices. Problem solving skills are cultivated as a foundation for clinical reasoning. The curriculum is designed for the adult learner. The course work provides an opportunity for self-directed, collaborative learning and the integration of life experiences.

The curriculum is an entry-level professional program totaling two and a half years in length. The first year’s course work provides students with a firm foundation in occupational therapy theory, basic health sciences, observation skills and interpersonal skills. Students complete Level I Fieldwork following the first year of didactic courses. The second year of didactic class work focuses on practical skills for working with a broad range of client populations. Under the supervision of occupational therapy faculty, second year students are provided with clinical experiences with real clients in three contexts: an on-site pediatric clinic, an on-site adult clinic, and off-site mental health settings. Student complete six months of Level II Fieldwork after successfully finishing all didactic courses.

The current MOT curriculum sequence is as follows:

**YEAR ONE**

**Fall Semester**
- OT 610  Anatomical and Physiological Basis for Human Occupation (5 units)
- OT 611  Foundations of Occupational Therapy Practice (3 units)
- OT 612  Theories of Inquiry and Research Methodology (3 units)
- OT 619  Human Occupation Throughout the Life Span (3 units)
- OT 623  The Health Care Industry (2 units)

**Spring Semester**
- OT602 Integrative Seminar 1
- OT 613  Introduction to Psychopathology (1 unit)
- OT 615  Guided Research Seminar (1 unit)
OT616 Therapeutic Media, Materials and Processes (3 units)
OT 617 Interpersonal/Inter-professional Communication (2 units)
OT 627 Applied Biomechanics and Kinesiology (2 units)

**Summer Semester**
OT 621L Introduction to Fieldwork Level I (3 units)
OT 609 Documentation (hybrid) (1 unit)

**YEAR TWO**

**Fall Semester**
OT 609 Introduction to Professional Documentation (1 unit)
OT 618 Functional Neuroscience (3 units)
OT 622 Guided Research Seminar (1 unit)
OT 624 Conditions of Human Dysfunction (3 units)
OT 626 Theory and Practice in Psychosocial Dysfunction (4 units)
OT 632 Advanced Clinical Practice-Pediatrics (4 units)
OT 634 Professional Development Seminar (2 units)

**Spring Semester**
OT 602 Integrative (PBL) Seminar (2 units)
OT 628 Administration and Management (2 units)
OT 629 Theory and Practice in Physical Dysfunction (4 units)
OT 630 Research Synthesis Project (2 units)
OT 631 Assistive Technology and Introduction to Modalities (3 units)
OT 636 Advanced Clinical Practice-Adults (4 units)
OT 633 Complementary Systems of Health Care (2 units)

**Summer Semester**
OT 640L Fieldwork Level II (6 units). 12 weeks at 40 hours per week

**Fall Semester**
OT 641L Fieldwork Level II (6 units). 12 weeks at 40 hours per week

**Spring Semester**
Elective Course: OT 642L Post Professional Level III Internship (2 units)

### 7.4 Course Descriptions
For detailed course descriptions, please refer to the university catalog on Samuel Merritt University’s website [www.samuelmerritt.edu](http://www.samuelmerritt.edu).

### 7.5 Roles and Responsibilities of Fieldwork Educators
Fieldwork Educators’ responsibilities, as delineated in the syllabi for fieldwork courses, are provided below.

**Level I Fieldwork**
1. Provide orientation to the clinical setting, including policies, procedures, and scheduling.
2. Provide structured clinical supervision, including a consistent schedule which the student is expected to follow.
3. Provide the student with ongoing verbal feedback and a final written evaluation regarding progress, skill development, or suggestions for areas of improvement.
4. Provide the student with some **hands-on experience** with clients to learn and practice therapeutic techniques in addition to observation-based learning.
5. Realize that it is acceptable per the California Board of Occupational Therapy for students to assist with treatment of clients who are receiving therapy that is considered Advanced Practice such as hand rehabilitation, use of physical agent modalities, and/or dysphasia so long as students are working under the supervised guidance of the occupational therapist.
6. Provide **students with at least one written assignment** which may include a progress note, a written report regarding a diagnosis, a case study, or another assignment per the Fieldwork Educator’s discretion.
7. Complete the written student evaluation, discuss it with the student, and send a copy to Samuel Merritt University, OT Academic Fieldwork Coordinator, Level I, 450 30th Street, 4th Floor, Oakland, CA 94609.
8. Contact the OT Academic Fieldwork Coordinator, Level I, at (510) 869-6511, ext. 4918 as soon as possible if problems arise.
9. Create an environment in which the student may ask questions to enhance observation skills and integrate classroom learning.
10. Understand that the student has completed one year of didactic education to this point. Therefore, the student may need demonstrations or explanations since not all pertinent content will have been covered yet in the student's academic coursework.
11. Ensure that Level I Fieldwork students are supervised by qualified personnel, which may include but are not limited to occupational therapists, occupational therapy assistants, psychologists, physician assistants, teachers, social workers, nurses, and physical therapists.

**Level II Fieldwork**

1. Provide orientation to the clinical setting, including policies, procedures, and scheduling.
2. 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.
3. Provide a Level II Fieldwork in traditional and/or emerging practice settings consistent with the curriculum design as discussed with the AFWC. Incorporate the Occupational Therapy Practice Framework in clinical practice.
4. Assure that psychosocial factors influencing engagement in occupation are understood and integrated for the development of client-centered, meaningful, occupation-based outcomes.
5. Create and maintain an environment in which the students may ask and be asked questions to facilitate the integration of their classroom learning into clinical application and gradually assume the role of an entry-level therapist related to the expectation of the facility to which they are assigned.
6. Provide structured clinical supervision, including a consistent schedule and a mechanism to evaluate ongoing supervision between the Fieldwork Educator and the
At the beginning of fieldwork, provide written learning weekly objectives to the student. Meet weekly with the student to review progress toward learning objectives and to identify specific areas needing improvement.

Attend and participate in local fieldwork educators’ annual seminars provided by the university to receive resources for enhancing supervision of students. The seminar will provide continuing education and resources for the development of supervisory abilities.

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 is appropriate for the setting, the severity of client’s condition, and the ability of the student.

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 occupational therapist with at least 3 years of professional experience. Supervision must be a minimum of 8 hours per week. An occupational therapy supervisor must be available, via a variety of contact methods, 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.

Provide the student with ongoing verbal feedback, a written plan for corrective action if needed, a written midterm evaluation, and a written final evaluation using the American Occupational Therapy Association’s Fieldwork Performance Evaluation for the Occupational Therapy Student provided by Samuel Merritt University. Discuss the midterm and final evaluations with the student and send a copy to Samuel Merritt University, OT Academic Fieldwork Coordinator at 450 - 30th Street, Suite 4738, Oakland, CA 94609.

Contact the AFWC at (510) 869-6743 as soon as possible if there is a concern that a student may not receive a passing final evaluation for the fieldwork.

Understand that although students have completed all didactic coursework, they may need additional explanations and demonstrations in order to implement specific evaluation and intervention techniques with clients. Provide individualized instruction according to each student’s unique learning needs.

Assist the student in determining content for inservice or project requirements during Level II Fieldwork.

7.6 Learning Objectives for Fieldwork Courses
Per ACOTE standard 10.5, it is important that the Fieldwork Educator is aware of the learning objectives of our specific program. To ensure we are completing this standard, the learning objectives for fieldwork courses are provided below so that Fieldwork Educators are aware of them for implementation during fieldwork education.

**Level I Fieldwork (OT 621L)**
*Upon the completion of this course, the student will be able to:*

1. Identify the various roles and functions of an occupational therapist in the settings in which the student observed, and have a general understanding of the roles of an
occupational therapist in other practice settings based on participation in an interactive seminar with other students. Evaluated through Field Reports, class meetings, and Canvas discussion.

2. Explain and compare the roles and collaborative relationships between the occupational therapist and the occupational therapy assistant; understand the supervisory and professional roles of each.

3. Describe the ongoing professional responsibility for providing fieldwork education and the criteria for becoming a fieldwork educator.

4. Demonstrate sound judgment in seeking assistance and responding to feedback. Conduct oneself ethically and professionally with all clients and staff. Evaluated through Field Reports, class discussion and evaluations from fieldwork site.

5. Formulate general therapeutic goals for a client. Understand how issues such as client values, life experiences, cultural considerations, sexuality and present life roles influence the formulation of therapeutic goals and intervention activities. Evaluated through written report and Canvas postings.

6. Learn to identify cultural, ethnic, racial, religious and gender issues as they may appear clinically and how they may affect the therapeutic process. Evaluated through Field Report, class discussions, and FE evaluations of the student.

7. Demonstrate the ability to establish meaningful, comfortable, therapeutic relationships with client. Understand the difference between friendship and therapeutic relationships, and the ethical responsibilities in a therapeutic relationship. Evaluated through Field Report, FE evaluation of student, class discussion, and Canvas postings.

8. Demonstrate the ability to establish positive working relationships with staff and supervisor as evaluated by the fieldwork site.

9. Demonstrate reliable work habits and communicate/coordinate their schedule with their supervisor as demonstrated through evaluation by fieldwork site.

10. Demonstrate appropriate professional behaviors including dressing appropriately for a clinical setting. Evaluated by the fieldwork site.

11. Demonstrate writing skills necessary for clinical documentation through clear, concise and professionally written assignments including those requested at the individual fieldwork site. Demonstrated through professional writing of Field Report and from report of documentation provided by fieldwork sites. Complete a minimum of one written assignment as determined by the FE.

12. Describe the use and administration of various evaluation tools in the settings observed. Demonstrate a general understanding of evaluation tools as described by fellow students in the interactive forum. Evaluated by written report, class discussion, and evaluation from the fieldwork site.

13. Demonstrate the ability to use the Mindbody approach when observing, evaluating and treating clients in a variety of settings through observation of the cognitive, biophysical, affective, psychosocial, and spiritual domains in which each individual functions. Evaluated through the Field Report, Canvas and classroom discussion, and the Student’s Summary of Experience.

14. Analyze personal and professional feelings associated with and biasing any interactions with clients, staff, or institution as demonstrated through Summary of Experience.

15. Demonstrate knowledge and understanding of fieldwork policies and procedures as delineated in the Fieldwork Manual and course syllabus through successful completion of exam, 70% pass rate, at end of the semester.
16. Apply theoretical constructs to evaluation and intervention with various types of clients and practice contexts to analyze and effect meaningful occupation. (B.3.5)

**Level II Fieldwork (OT 640L and OT 641L)**

Fieldwork Educators will be asked to sign a form acknowledging their receipt and acceptance of the course learning objectives for Level II Fieldwork courses.

*Upon the completion of this course, the student will demonstrate abilities to complete the following objectives as evaluated by the Fieldwork Educator and the AFWC:*

1. Engage in fieldwork experience designed to promote clinical reasoning and reflective practice, to transmit the values and beliefs that enable ethical practice, and develop professionalism and competence in career responsibilities.
2. Complete Level II fieldwork in traditional and/or emerging practice settings consistent with the curriculum design based on incorporation of the Mind-body Model, the philosophy of Samuel Merritt University’s MOT program.
3. Understand and integrate psychosocial factors influencing engagement in occupation for the development of client-centered, meaningful, occupation-based outcomes in all practice settings.
4. Apply the Mind body approach when observing, evaluating and treating clients in a variety of settings through observation and evaluation of the biophysical, cognitive, affective, social and spiritual domains in which each individual functions.
5. Understand and explain the various roles and functions an occupational therapist may have as a practitioner, educator, researcher, consultant and entrepreneur. Identify and demonstrate techniques in skills of supervision and collaboration with occupational therapy assistants on therapeutic interventions, as appropriate to the setting.
6. Demonstrate the ability to select appropriate evaluation techniques, formulate an intervention plan including general and specific goals and objectives incorporating performance skills, performance patterns, activity demands, context and client factors. Be able to explain to clients or other staff how specific occupations address intervention goals.
7. Achieve independence in the ability to analyze tasks relative to areas of occupation, performance skills, performance patterns, activity demands, context and client factors to formulate an intervention plan in the clinical setting. Demonstrate sound judgment with implementing and adhering to safety precautions and regulations at all times.
8. Understand and demonstrate the ability to select and administer a variety of evaluation tools, the appropriate application and interpretation of these tools related to purpose, achievable goals, validity, standardization, and criteria reference and based on client needs, contextual factors, and psychometric properties of the tests. Demonstrate the ability to use standardized and non-standardized screening and assessment tools as appropriate to the clinical setting to determine the need for occupational therapy intervention.
9. Demonstrate reliable work habits, ongoing communication of schedule with supervisor, and other important professional behaviors.
10. Demonstrate sound judgment in seeking assistance and responding to feedback.
Conduct oneself ethically and professionally with all clients and staff.

11. Demonstrate and implement effective written, oral and nonverbal communication skills necessary for writing and reporting clinical documentation, and effectively communicating with client, family, colleagues and other health providers as a professional.

12. Complete a total of 12 weeks of Level II Fieldwork at each assigned site. No absences are allowed due to ACOTE requirements for students to complete 24 total weeks of Level II Fieldwork. If a students is absent from fieldwork due to emergency circumstances, the student is responsible to make arrangements for making up the missed time. A student is only allowed time off for holidays observed by the site; however, holidays cannot exceed 3 days per placement.


7.7 Student Privacy Rights
According to the Family Educational Rights and Privacy Act (FERPA), students have explicit privacy rights with respect to their education records. Samuel Merritt University is not authorized to disclose information to Fieldwork Educators regarding students’ disability status or performance in academic coursework, including previous fieldwork assignments.

7.8 Procedures for Student Injuries During Fieldwork
Please refer to Appendix I, which delineates Samuel Merritt University’s procedures pertaining to occupational injuries.

7.9 Resources for Fieldwork Education
AOTA offers many resources to support the critical role of Fieldwork Educator for the occupational therapy profession. The Fieldwork Educators Certificate Workshop is available through AOTA and is highly recommended. The AOTA website www.aota.org provides many useful documents that can be downloaded, including:

- Resources for new fieldwork programs
- Sample fieldwork objectives
- Sample student evaluation forms.

Fieldwork Educators may also find it helpful to review Chapter 8 of this manual for information about learning contracts.

7.10 Fieldwork Educators’ Annual Meetings
Annual meetings are held at least once a year as required by ACOTE Standards. The meetings provide a forum through which communication about student preparation, educational program revisions, Fieldwork Educators’ needs, and continuing education related to fieldwork education can be exchanged. Northern California’s occupational therapy education programs (which include Samuel Merritt University, Dominican University of California, San Jose State University and Sacramento City College) jointly present an annual educational program to Fieldwork Educators. More recently, the California Occupational Therapy Fieldwork Council (made up of academic fieldwork coordinators from all of the occupational therapy education programs in California) has been intimately involved with designing educational events for fieldwork education throughout California.
8.0 Learning Styles and Learning Contracts
8.1 Learning Styles
Students are encouraged to discuss their learning styles with Fieldwork Educators at the beginning of each fieldwork assignment. This communication process will likely improve the quality of supervision and enhance the student’s learning experience during fieldwork. Learning style inventories are available online.

8.2 Learning Contracts
In addition to the weekly learning objectives that fieldwork sites provide for students (sample Level II Fieldwork learning objectives can be accessed from AOTA’s website, www.aota.org), some students benefit from the additional structure and clarity provided by individualized Learning Contracts. A Learning Contract is useful when specific professional or clinical behaviors require improvement.

The Learning Contract is an agreement that is developed collaboratively by the student and the Fieldwork Educator. The Learning Contract should specify:
1. The learning objective
2. The resources and strategies required to accomplish the objective
3. The methods and criteria for evaluating whether the objective has been met
4. The target timeline for accomplishing the learning objective

8.3 How to Prepare a Learning Contract
Step 1: Determine the student’s learning needs. "A learning need is the gap between where you are now, and where you want to be with regard to a particular set of competencies" (Knowles, 1986, p. 28).

Step 2: Determine the specific learning objective. Learning objectives usually contain an action verb such as to increase, demonstrate, apply, or interpret, and are written in operational terms that are meaningful to the learner. The objective should specify what the student will learn, and may address knowledge acquisition, practice skills, or interpersonal behaviors.

Objectives should be specific and measurable. For example, if a student has a learning need in the area of assisting clients with transfers, a specific learning objective may be: The student will safely transfer 5 clients between their bed and wheelchair without any prompting from the fieldwork educator.

Step 3: Specify learning resources and strategies. Describe how the student will go about accomplishing each objective. Resources pertain to material or human factors that the student plans to use, and strategies relate to learning activities that the student will employ. For example, if the student’s learning objective is to increase competency and safety with performing transfers, the resources or strategies may entail:
- Observe the fieldwork educator and other experienced therapists perform transfers
- Review textbooks and academic course materials pertaining to transfer techniques
- Review the fieldwork site’s written policies and safety guidelines regarding transfers
- Create cue cards containing safety checklists and the sequence of steps for
various types of transfers
  ▪ Practice performing transfers with the fieldwork educator or with peers
  ▪ Perform transfers with clients under the guidance and supervision of the
    fieldwork educator.

Step 4: Specify the methods for evaluating the student’s learning. Describe what evidence will be collected to assess the student’s accomplishment of the learning objective. In the example provided, observation by the fieldwork educator would be the primary evaluation method to determine the student’s safety and competency with transferring clients.

Step 5: Specify the criteria for meeting the learning objective. In the sample learning objective provided above, “safely” and “without any prompting from the fieldwork educator” are the criteria for accomplishment. While developing the learning contract with the student, it would be helpful to have the student identify specific safety parameters for transfers, such as: locking the brakes on the wheelchair and the bed, ensuring adherence to weight bearing or hip precaution as applicable, monitoring the client’s vital signs, or managing medical equipment and lines properly.

Step 6: Review the completed Learning Contract with the fieldwork site’s student coordinator and/or the AFWC. The following questions may be used to guide the review process:
  ▪ Is the learning objective clear, understandable and realistic?
  ▪ Does the learning objective describe what the student proposes to learn?
  ▪ Are the learning strategies and resources appropriate?
  ▪ Is the evaluation method relevant to the objective?
  ▪ Are the evaluation criteria clear and measurable?

Step 7: Carry out the contract. Once the Learning Contract is finalized, determine a target date for completion.

Refer to Appendix H for a sample learning contract.
9.0 Fieldwork Is Completed!
9.1 When Level II Fieldwork Is Successfully Completed
Successful completion of the 24 weeks of Level II Fieldwork qualifies the student to sit for the National Board for Certification in Occupational Therapy (NBCOT) exam. Passing the certification exam entitles the student to use the designation Occupational Therapist Registered (OTR) and to practice as an occupational therapist.

9.2 Requirements for Completion of Level II Fieldwork Courses
To receive a grade for the fieldwork course, students must complete all of the requirements as delineated in the course syllabus. The syllabus will be provided as a separate document and will distributed to students and fieldwork educators prior to the start of fieldwork.

9.3 About the NBCOT certification exam
The NBCOT certification exam is offered as an on-demand computer exam. The exam is designed to evaluate the assimilation of information related to the practice of occupational therapy. The exam is multiple choice, and questions are written to ask for the best answer among several plausible choices. The NBCOT website www.nbcot.org provides students with resources for test preparation, including the opportunity to take a practice test online.

Samuel Merritt University’s MOT program requires students to take a review exam that has been constructed to mimic the format of the NBCOT exam (200 multiple-choice questions); this practice exam is completed during the Level II mid-semester meeting held in November (the second Thursday and Friday of November).

AOTA now has a practice exam online at www.aota.org.
9.4 Applying to Take the NBCOT exam

Student completes 24 total weeks of Level II Fieldwork and completes all requirements for Level II Fieldwork courses as delineated in the course syllabus

AFWC receives original copies of the AOTA Fieldwork Performance Evaluation and the Student Evaluation of Fieldwork Experience + other requirements fulfilled

AFWC submits grades for Level II Fieldwork courses to Registrar

Transcript is complete (may require up to 2 weeks from time of grade submission)

Students submits NBCOT examination application – Complete prior to finishing 2nd Level II fieldwork

As of 2014, no Academic Verification forms will be used and **grads must wait for transcripts to be sent to NBCOT, after grade is submitted.**

Student submits written request for Registrar to send transcripts to NBCOT – Complete before finish Level II placement, to be ready.

Registrar sends completed transcript to NBCOT

NBCOT sends “Authorization to Test” letter to student upon receipt of completed application and transcript

Student schedules to take the NBCOT exam
A student becomes eligible to take the NBCOT certification exam upon completion of 24 weeks of Level II Fieldwork within 24 months of finishing didactic coursework. The student is responsible for contacting NBCOT directly to obtain information and to arrange for taking the OTR certification exam. **The Academic Fieldwork Coordinator is not involved in the process of contacting NBCOT.** A brief overview of the process, also outlined on the preceding page, is as follows:

- The student will complete the NBCOT examination application in advance, before Level II ends.
- The student will submit a written request, in advance, for the Registrar’s office to send official transcripts to NBCOT. Transcripts will be sent free of charge.
- Upon receipt of the student’s completed application and transcripts, NBCOT will send an “Authorization to Test” (ATT) letter to the student.
- Upon receipt of the ATT letter, the student may schedule a time to take the certification examination.

Please note that the process and requirements for the certification examination are subject to change; therefore, the student is responsible for obtaining the most up-to-date information from NBCOT directly. An overview of process is provided during November fieldwork meeting on campus (during second Level II fieldwork).

### 9.5 Restrictions on Eligibility to Take the Certification Exam

Certain types of criminal convictions may prevent students from qualifying to take the certification exam. Information is available from NBCOT pertaining to how criminal convictions may affect practice privileges. Students who have concerns about such issues should contact NBCOT directly. Should a student request advance clearance for eligibility for the certification exam due to a pending or existing legal indictment, the student is advised by this institution and NBCOT to seek legal counsel before disclosing such information to NBCOT. The student does not need to disclose that information to Samuel Merritt University.

### 9.6 Working in a Licensed State

Each state's licensure law is unique, and students must complete the application process for the specific state in which they are interested. In general, individuals need to pass the NBCOT certification exam before they are eligible to obtain a state license.

In California, students can apply for a **limited permit**, which would allow them to work under the supervision of a licensed therapist while waiting to take the NBCOT examination. **In no circumstances**, if a student applies for a limited permit prior to the transcript being complete, will the school be able to sign off. As of 2014, per NBCOT, the use of the Academic Verification form is no longer an option to expedite those seeking a temporary permit before completion of the NBCOT exam.

The student is advised to directly contact the California Board of Occupational Therapy at [www.cbot.org](http://www.cbot.org) and NBCOT at [www.nbcot.org](http://www.nbcot.org) to obtain additional information.

### 9.7 Guidelines for Use of Credentials

After you pass the NBCOT certification examination and receive a state license to practice occupational therapy, your credentials will be as follows: John Doe, MOT, OTR/L
We wish you success in your career as an occupational therapist.

You are entering an exciting and dynamic profession at a time when health care needs providers who focus on occupation, independence and the whole person. Even more exciting is that Occupational Therapy is now one of the top professions according to various reports!

The Occupational Therapy Department at Samuel Merritt University takes pride in your success. We look forward to hearing from you after you graduate!
APPENDICES
Appendix A.

Level I Fieldwork Evaluation

Please return this form to Beth Ching, M.Ed., OTR/L
Assistant Professor, Academic Fieldwork Coordinator, Level I
Samuel Merritt University, Occupational Therapy Department
450 - 30th Street, 4th floor, Oakland, CA 94609. FAX 510-869-6951

Student’s name: ____________________________________________

Fieldwork Educator: __________________________________________

Facility (name, city & state) ____________________________________

Phone # where Fieldwork Educator may be reached: ____________

Total hours of fieldwork completed by the student: ______________

Please describe the type of facility and/or patient/clients:
______________________________________________________________

On a scale of 1-10, with 1 being completely unsatisfactory, and 10 being outstanding, please rate the student on the following objectives for Fieldwork I. Please keep in mind that the student is only part way through the required OT curriculum, and should be integrating new learning during this Fieldwork I experience. You may mark any item N/A. A copy of this form will be shared with the student.

1. Identifies the various roles and functions of an occupational therapist at this fieldwork setting.

   Unsatisfactory 1 2 3 4 5 6 7 8 9 10 Outstanding

   Comments:

2. Demonstrates good judgment and clinical reasoning as evidenced by appropriate questions, seeking assistance, responding to feedback, and synthesizing and interpreting information.

   Unsatisfactory 1 2 3 4 5 6 7 8 9 10 Outstanding

   Comments:

3. Understands how specific activities address specific goals and vary according to patient/client values, life experiences and present life roles.

   Unsatisfactory 1 2 3 4 5 6 7 8 9 10 Outstanding

   Comments:

4. Recognizes psychosocial and/or Mind Body issues influencing engagement in occupation and in client interventions.

   Unsatisfactory 1 2 3 4 5 6 7 8 9 10 Outstanding

   Comments:
5. Establishes meaningful, comfortable, therapeutic relationships with patients/clients: understands the difference between friendship and therapeutic relationships and the ethical responsibilities in a therapeutic relationship.

Unsatisfactory  1  2  3  4  5  6  7  8  9  10  Outstanding

Comments:

6. Displays a positive attitude toward fieldwork responsibilities, peers, staff and institution.

Unsatisfactory  1  2  3  4  5  6  7  8  9  10  Outstanding

Comments:

7. Demonstrates reliable, dependable work habits; timely arrival at scheduled times; and communication of schedule with supervisor.

Unsatisfactory  1  2  3  4  5  6  7  8  9  10  Outstanding

Comments:

8. Maintains non-biased, empathetic interactions with clients.

Unsatisfactory  1  2  3  4  5  6  7  8  9  10  Outstanding

Comments:

9. Dresses appropriately and professionally according to facility dress code.

Unsatisfactory  1  2  3  4  5  6  7  8  9  10  Outstanding

Comments:

10. Develops culturally competent approaches to problem solving that take into account individual differences.

Unsatisfactory  1  2  3  4  5  6  7  8  9  10  Outstanding

Comments:

***Please discuss any additional strengths or challenges which the student demonstrated, which could impact the student’s development into a qualified entry-level occupational therapist.

----------------------------------
Signature of Fieldwork Educator  Date
Appendix B

STUDENT EVALUATION OF LEVEL I FIELDWORK EXPERIENCE
SAMUEL MERRITT UNIVERSITY
OCUPATIONAL THERAPY DEPARTMENT

Student’s Name: ___________________________ Date: _________________________

<table>
<thead>
<tr>
<th>Full Name of Fieldwork Site</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. (adult physical disabilities)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. (mental health)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. (pediatrics)</td>
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</table>

This form is intended to help you summarize and reflect upon your Level I Fieldwork experience. It is recommended for you to keep a copy of this form to share with your Level II Fieldwork Educators in order to provide them with a summary of your clinical experiences to date. The information you provide is important for assuring the quality of the fieldwork education at Samuel Merritt University.

ACADEMIC PREPARATION:
Rate the relevance and the adequacy of your academic course work relative to the needs of your Level I Fieldwork experiences.

The relevance is rated on a scale of 1 to 5 with:

<table>
<thead>
<tr>
<th>Item</th>
<th>1 as low</th>
<th>5 as high</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Education, basic science course work, undergrad degree</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OT610/614 - Anatomy / Physiology I and II</td>
<td></td>
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<tr>
<td>OT611 - Foundations of Occupational Therapy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OT612 - Theories of Inquiry &amp; Research Methodology</td>
<td></td>
<td></td>
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<tr>
<td>OT617 - Interpersonal / Interprofessional Communication</td>
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<td></td>
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<tr>
<td>OT615 - Research Seminar</td>
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<td></td>
</tr>
<tr>
<td>OT616 - Therapeutic Media/Materials/Process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OT625 / 627 - Kinesiology &amp; Biomechanics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OT619 - Human Occupation Throughout the Lifespan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OT623 - The Health Care Industry</td>
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</tbody>
</table>
What aspects of your academic coursework were the most helpful in preparing you for Level I Fieldwork? Be specific when relating information to course work.

What changes would you recommend in your academic program to enhance the Level I Fieldwork experience? Discuss any specific content you felt was absent and should have been included prior to Level I Fieldwork.

STUDENT ORIENTATION:

1. Was time available to orient you to the fieldwork site? (Circle correct response)

<table>
<thead>
<tr>
<th>Site 1: Adult Phys Dis</th>
<th>Site 2: Mental Health</th>
<th>Site 3: Pediatrics</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>YES</td>
<td>NO</td>
<td>YES</td>
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<tr>
<td>YES</td>
<td>NO</td>
<td>NO</td>
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</table>

Indicate which of the following were included in your orientation to the site:

- a. Staff introductions
- b. Tour of physical facilities
- c. Facility/department philosophy
- d. Facility services
- e. Occupational therapy services
- f. Departmental documentation
- g. Confidentiality
- h. Departmental frame(s) of reference
- i. Did you do any hands-on client treatment?

2. Which topics above were most helpful in your understanding the sites’ treatment programs and use of occupational therapy intervention?

3. What other orientation topics not included in the list above were helpful in your understanding the sites’ treatment programs and use of occupational therapy interventions?
CASE LOAD DESCRIPTION:

1. List the approximate number of clients you observed in each age category

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Site 1</th>
<th>Site 2</th>
<th>Site 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - 5 years old</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>6 - 12 years old</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13 - 21 years old</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>adult</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>older adult</td>
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</tbody>
</table>

2. List the five most common diagnostic categories you observed in each setting and the approximate number of clients in each diagnostic category.

<table>
<thead>
<tr>
<th>Diagnostic Category</th>
<th>Site 1</th>
<th>Site 2</th>
<th>Site 3</th>
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<td></td>
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</table>

INTERVENTIONS:

List the four most common therapeutic interventions observed in each setting and indicate whether the interventions were provided in a group or individually:

<table>
<thead>
<tr>
<th>Therapeutic Intervention</th>
<th>Site 1</th>
<th>Site 2</th>
<th>Site 3</th>
</tr>
</thead>
</table>
SUPERVISION:

1. List the primary supervisor with whom you observed at each site:

<table>
<thead>
<tr>
<th>Supervisor’s Name</th>
<th>Title</th>
<th>Site 1</th>
<th>Site 2</th>
<th>Site 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
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<td>3.</td>
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</tr>
</tbody>
</table>

2. In the table below, check the descriptors that apply to the supervision you received at each fieldwork site:

<table>
<thead>
<tr>
<th>Descriptor</th>
<th>1 = Site 1</th>
<th>2 = Site 2</th>
<th>3 = Site 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Taught knowledge and skills as required.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Presented clear explanation</td>
<td></td>
<td></td>
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<tr>
<td>3. Provided supervision, which enhanced your experience.</td>
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<tr>
<td>4. Encouraged student questions and exchange of information.</td>
<td></td>
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<tr>
<td>5. Facilitated student’s problem solving/clinical reasoning.</td>
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<tr>
<td>6. Approachable and interested in students.</td>
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<tr>
<td>7. Made the student feel comfortable in the agency.</td>
<td></td>
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<tr>
<td>8. Showed interest and commitment in their work.</td>
<td></td>
<td></td>
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<tr>
<td>9. Provided a positive role model of professional behavior.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. General comments on supervision:
OBSERVATION OF PROFESSIONAL RELATIONSHIPS:
In the table below, check the descriptors that apply to each site:

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Provided exposure to OTR/ COTA/ other service extended roles</td>
<td></td>
<td></td>
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<tr>
<td>2. Provided opportunities to observe other professionals.</td>
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<td></td>
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</tr>
<tr>
<td>3. Experienced interdisciplinary approach and/or therapy.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Observed modeling of professional and therapeutic relationships.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>5. Expanded your OT and interdisciplinary knowledge</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Expanded your awareness of the use of community resources.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

RECOMMENDATIONS:
1. Would you recommend the sites at which you did your Level I Fieldwork to other students?

<table>
<thead>
<tr>
<th>Site, City, State</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

2. What suggestions do you have to improving your learning experience during Level I Fieldwork?

3. Please provide any additional comments or information about your fieldwork experiences.
Appendix C

PERSONAL DATA SHEET
For Level II Fieldwork

PERSONAL INFORMATION

Name: ____________________________________________________________

Date: ____________________________________________________________

Permanent Home Address: _________________________________________

Phone number & dates that you will be available at that number

Phone Number ________________________ Dates _______________________

Email ___________________________________________________________

Name, address, and phone number of person to be notified in case of accident or illness:

____________________________________________________________________

____________________________________________________________________

EDUCATION INFORMATION

1. Expected degree: Masters
2. Anticipated year of graduation ______________________________
3. Prior degree obtained _________________________________________
4. Foreign languages read ____________________ spoken ____________________
5. Do you hold a current CPR certification card? Yes________ No __________
   Date of expiration ____________________

HEALTH INFORMATION

1. Are you currently covered under any health insurance? Yes ________ No ________
2. If yes, name of company

   Group # ________________________ Subscriber # ______________________

3. Date of last TB Test:

____________________________________________________________________
PREVIOUS WORK/VOLUNTEER EXPERIENCE: (does not need to be detail of job duties)

PERSONAL PROFILE

1. Strengths: ___________________________________________

2. Special skills or interests: ________________________________

3. Describe your preferred learning style: ______________________

4. Describe your preferred style of supervision: ___________________

5. Will you need housing during your affiliation? Yes _______ No _______

6. Will you have your own transportation during your affiliation? Yes ____ No ___

7. (Optional) Are there any disability-related challenges that will impact your ability to complete fieldwork?

_____________________________________________________

Fieldwork Experience Schedule

<table>
<thead>
<tr>
<th>LEVEL I EXPERIENCE</th>
<th>SITE</th>
<th>TYPE OF FW EXPERIENCE</th>
<th>LENGTH OF FW EXPERIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
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<td></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>LEVEL II EXPERIENCE</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

ADDITIONAL COMMENTS:
Appendix D

Level II Fieldwork, Student Feedback Regarding Fieldwork Supervision Process

This sheet is designed to help the student and the Fieldwork Educator assess the fieldwork experience from the student's perspective. This is to be used at week 3, so that adjustments can be made for the student to have a fulfilling learning experience. Reviewing this form together is intended to facilitate communication between the student and the Fieldwork Educator. Please send a copy of this form to the AFWC.

Use the following key to complete the items below:

1  =  not enough, unclear, not meeting student's needs
2  =  occasionally meets needs, a little more would be helpful
3  =  meets needs, the just right level
4  =  sometimes too much but not a major concern
5  =  consistently too much, more than what the student needs

<table>
<thead>
<tr>
<th>Comments &amp; Explanations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orientation</td>
</tr>
<tr>
<td>Structure</td>
</tr>
<tr>
<td>Variety of clients</td>
</tr>
<tr>
<td>Variety of interventions</td>
</tr>
<tr>
<td>Supervision</td>
</tr>
<tr>
<td>Independence</td>
</tr>
<tr>
<td>Feedback</td>
</tr>
<tr>
<td>Method of instruction</td>
</tr>
<tr>
<td>Clarity of communication</td>
</tr>
<tr>
<td>Clarity of expectations</td>
</tr>
<tr>
<td>Meetings with supervisor</td>
</tr>
<tr>
<td>Meetings with others</td>
</tr>
<tr>
<td>Supportive environment</td>
</tr>
<tr>
<td>Learning resources</td>
</tr>
<tr>
<td>Accessibility of resources</td>
</tr>
</tbody>
</table>

Other Comments:
Appendix E

Level II Fieldwork – 4 Week and 8 Week Evaluation

This form is to be completed separately by both the student and the Fieldwork Educator at week four, and again at week eight. Please send all copies to the AFWC.

Student’s name:______________________________________________

Fieldwork Educator’s name:_____________________________________

Fieldwork site:________________________________________________

Person completing this form:____________________________________

1. What is the student (are you) doing well in this Level II Fieldwork experience?

2. Please share reflections on the student’s (your own) performance/overall progress to date. Where might the student (you) need to focus more efforts to improve? Please share observations/questions/problems encountered.

3. Does the student assure he/she considered psychosocial and/or mind body issues influencing engagement in occupation, that illustrates an understanding of ability to integrate psychosocial concerns into the intervention as demonstrated in the student’s individual client interventions? Please describe an example.
4. Is clinical reasoning and reflective practice effectively demonstrated as the student progresses in this fieldwork experience? Please cite an example.

5. What strategies and/or goals do you recommend for the student (for yourself), and for the fieldwork educator to enable further improvement?

6. Identify one specific learning objective for this student, to be achieved in two weeks. (Please refer to Section 8.3 and Appendix H of the Fieldwork Manual for examples of learning objectives.)
Appendix F  

Fieldwork II - Sample Weekly Student Schedule

This template for student schedule is an example, and should be adjusted depending upon individual student’s readiness to proceed to next “step”

Week 1:
- Orientation to facility
- Orientation to individual disciplines of team
- Scheduling – instruction on scheduling at site
- Documentation – learn electronic method if relevant to facility
- Familiarize with all OT equipment
- Observe staff with patients
- Establish weekly meeting time with supervisor
- Set expectations between student and fieldwork educator

Week 2:
- Begin orientation to evaluations commonly used in facility (may have begun previous week)
- Orient to patient safety issues - transfers, restraints, etc. (may have begun previous week)
- Begin patient treatment with one patient (or more at discrepancy of supervising therapist)

Week 3:
- Instruction in evaluation, perform portions of evaluations with supervisor, under supervision
- Present/report information about a client at team meeting with supervisor
- Discuss plan for final project with supervisor
- Assume 1/4 caseload typical of facility

Week 4:
- Select content and initiate patient evaluation, with supervision (or without if ok with supervisor)
- Continue with orientation to common evaluation materials – practice time is good
- Observe special evaluation (i.e., kitchen or home eval)

Week 5:
- Assume 1/2 caseload typical of facility if ready

Week 6:
- Should assume ½ caseload typical of facility by this week
- Discuss case study with supervisor
- Written midterm evaluation by supervisor using AOTA fieldwork form, &/or form provided

Week 7:
- Project due
- Present project in department inservice
- Continue with ½ caseload typical of facility

Week 8:
- Assume ¾ caseload typical of facility
- Plan case study presentation

Week 9:
- Continue 3/4 caseload

Week 10:
- Visit another facility for 1/2 day, arranging coverage for patients during facility visit
- Assume full caseload typical of facility

Week 11:
- Continue with full caseload
- Present case study in department inservice

Week 12:
- Complete treatment and prepare for other therapist to assume caseload before finish
- Final evaluation with supervisor using AOTA fieldwork form

Typical caseload equivalent in typical facility:
- 1/4 = 1-2 hours of patient contact per day
- 1/2 = 3 hours of patient contact per day
- 3/4 = 4-5 hours of patient contact per day
- full = 6-7.5 hours of patient contact per day
Appendix G

Level II Fieldwork
AOTA Fieldwork Performance Evaluation for the Occupational Therapy Student

The AOTA evaluation forms will be provided to the Fieldwork Educator by each fieldwork student upon his/her arrival at the site.

**Midterm Evaluation:**
Please provide a midterm evaluation to the student using this form. Please contact the Academic Fieldwork Coordinator (AFWC) at midterm to discuss the student’s performance, EVEN IF THE STUDENT HAS NO SIGNIFICANT PROBLEMS. The AFWC may be reached by phone at (510) 869-6743.

If a student is not meeting minimum requirements and is at risk for not passing this fieldwork assignment, please fax a copy of the midterm performance evaluation to the Academic Fieldwork Coordinator at (510) 869-6951.

**Final Evaluation:**

<table>
<thead>
<tr>
<th>Score</th>
<th>AOTA Rating Scale</th>
<th>Frequency of Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Unsatisfactory: Performance is below standards and requires development for entry-level practice. This rating is given when there is a concern about performance.</td>
<td>Completes item <strong>0-25%</strong> of the time</td>
</tr>
<tr>
<td>2</td>
<td>Needs Improvement: Performing is progressing but still needs improvement for entry-level practice. This is a realistic rating of performance at midterm, and some ratings of 2 may be reasonable at the final.</td>
<td>Completes item <strong>26-50%</strong> of the time</td>
</tr>
<tr>
<td>3</td>
<td>Meets Standards: Performance is consistent with entry-level practice. This rating is infrequently given at midterm and is a strong rating at final.</td>
<td>Completes item <strong>51-75%</strong> of the time</td>
</tr>
<tr>
<td>4</td>
<td>Exceeds Standards: Performance is highly skilled and self-initiated. This rating is rarely given and would represent the top 5% of all the students you have supervised.</td>
<td>Completes item <strong>76-100%</strong> of the time</td>
</tr>
</tbody>
</table>
Upon the student’s completion of fieldwork, the Fieldwork Educator is requested to please send an original signature copy of the final evaluation within two weeks of completion to:

Donna Breger Stanton, OTD, OTR/L, CHT, FAOTA  
Associate Professor, Academic Fieldwork Coordinator  
OT Program, Samuel Merritt University  
450 - 30th Street  
Oakland, CA  94609  
Tel:  510-869-6743  
FAX: 510-869-6951

Please Note: The AFWC cannot forward a student’s grade to the Registrar until this final evaluation form has been received. Your timeliness in completing and sending the AOTA Performance Evaluation for the student is most appreciated.
Fieldwork Performance Evaluation
For The Occupational Therapy Student

SIGNATURES:
I HAVE READ THIS REPORT.

SIGNATURE OF STUDENT

NUMBER OF PERSONS CONTRIBUTING TO THIS REPORT

SIGNATURE OF RATER #1

PRINT NAME/CREDENTIALS/POSITION

SIGNATURE OF RATER #2 (IF APPLICABLE)

PRINT NAME/CREDENTIALS/POSITION

MS.NR.
NAME: (LAST) (FIRST) (MIDDLE)

COLLEGE OR UNIVERSITY

FIELDWORK SETTING:

NAME OF ORGANIZATION/FACILITY

ADDRESS: (STREET OR PO BOX)

CITY STATE ZIP

TYPE OF FIELDWORK

ORDER OF PLACEMENT: 1 2 3 4 OUT OF 1 2 3 4

FROM TO:

DATES OF PLACEMENT

NUMBER OF HOURS COMPLETED

FINAL SCORE

PASS: NO PASS:

SUMMARY COMMENTS:

ADDRESS: STUDENT'S CLINICAL COMPETENCE

AOTA grants permission to photocopy the Fieldwork Performance Evaluation for the Occupational Therapy Student for training purposes only. Training purposes encompass using the PWPE forms in student notebooks and training manuals for clinical fieldwork sites, in training sessions for practitioners on the proper use and scoring of the forms, and for students to complete a self-analysis during their fieldwork training. Permission to use the forms must be submitted to copyright@aota.org.
Fieldwork Performance Evaluation
For The Occupational Therapy Student

This evaluation is a revision of the 1987 American Occupational Therapy Association, Inc. Fieldwork Evaluation Form for the Occupational Therapist and was produced by a committee of the Commission on Education.

PURPOSE
The primary purpose of the Fieldwork Performance Evaluation for the Occupational Therapy Student is to measure entry-level competence of the occupational therapy student. The evaluation is designed to differentiate the competent student from the incompetent student and is not designed to differentiate levels above entry level competence. For further clarification on entry-level competency refer to the Standards of Practice for Occupational Therapy.

The evaluation is designed to measure the performance of the occupational therapy process and was not designed to measure the specific occupational therapy tasks in isolation. This evaluation reflects the 1998 Accreditation Council for Occupational Therapy Education Standards and the National Board for Certification in Occupational Therapy, Inc. Practice Analysis results. In addition, this evaluation allows students to evaluate their own strengths and challenges in relation to their performance as an occupational therapist.

USE OF THE FIELDWORK PERFORMANCE EVALUATION FOR THE OCCUPATIONAL THERAPY STUDENT

The Fieldwork Performance Evaluation is intended to provide the student with an accurate assessment of his/her competence for entry-level practice. Both the student and fieldwork educator should recognize that growth occurs over time. The midterm and final evaluation scores will reflect development of student competency and growth. In order to effectively use this evaluation to assess student competence, site-specific objectives need to be developed. Utilize this evaluation as a framework to assist in ensuring that all key performance areas are reflected in the site-specific objectives.

Using this evaluation at midterm and final, it is suggested that the student complete a self-evaluation of his/her own performance. During the midterm review process, the student and fieldwork educator should collaboratively develop a plan, which would enable the student to achieve entry-level competence by the end of the fieldwork experience. This plan should include specific objectives and enabling activities to be used by the student and fieldwork educator in order to achieve the desired competence.

The Fieldwork Educator must contact the Academic Fieldwork Coordinator when: (1) a student exhibits unsatisfactory behavior in a substantial number of tasks or (2) a student's potential for achieving entry-level competence by the end of the affiliation is in question.

DIRECTIONS FOR RATING STUDENT PERFORMANCE

- There are 42 performance items.
- Every item must be scored, using the one to four point rating scale (see below).
- The rating scales should be carefully studied prior to using this evaluation. Definitions of the scales are given at the top of each page.
- Circle the number that corresponds to the description that best describes the student's performance.
- The ratings for the Ethics and Safety items must be scored at 3 or above on the final evaluation for the student to pass the fieldwork experience. If the ratings are below 3, continue to complete the Fieldwork Performance Evaluation to provide feedback to the student on his/her performance.
- Record midterm and final ratings on the Performance Rating Summary Sheet.
- Compare overall midterm and final score to the scale below.

OVERALL MIDTERM SCORE
Satisfactory Performance ............... 90 and above
Unsatisfactory Performance ............. 89 and below

OVERALL FINAL SCORE
Pass ......................................... 122 points and above
No Pass ..................................... 121 points and below

RATING SCALE FOR STUDENT PERFORMANCE

4 — Exceeds Standards: Performance is highly skilled and self-initiated. This rating is rarely given and would represent the top 5% of all the students you have supervised.

3 — Meets Standards: Performance is consistent with entry-level practice. This rating is infrequently given at midterm and is a strong rating at final.

2 — Needs Improvement: Performance is progressing but still needs improvement for entry-level practice. This is a realistic rating of performance at midterm, and some ratings of 2 may be reasonable at final.

1 — Unsatisfactory: Performance is below standards and requires development for entry-level practice. This rating is given when there is a concern about performance.
RATING SCALE FOR STUDENT PERFORMANCE

4 — Exceeds Standards: Performance is highly skilled and self-initiated. This rating is rarely given and would represent the top 5% of all the students you have supervised.

3 — Meets Standards: Performance is consistent with entry-level practice. This rating is infrequently given at midterm and is a strong rating at final.

2 — Needs improvement: Performance is progressing but still needs improvement for entry-level practice. This is a realistic rating of performance at midterm, and some ratings of 2 may be reasonable at the final.

1 — Unsatisfactory: Performance is below standards and requires development for entry-level practice. This rating is given when there is a concern about performance.

I. FUNDAMENTALS OF PRACTICE:

All items in this area must be scored at a #3 or above on the final evaluation in order to pass fieldwork.

1. Adheres to ethics: Adheres consistently to the American Occupational Therapy Association Code of Ethics and site’s policies and procedures including when relevant, those related to human subject research.
   Midterm 1 2 3 4
   Final 1 2 3 4

2. Adheres to safety regulations: Adheres consistently to safety regulations. Anticipates potentially hazardous situations and takes steps to prevent accidents.
   Midterm 1 2 3 4
   Final 1 2 3 4

3. Uses judgment in safety: Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.
   Midterm 1 2 3 4
   Final 1 2 3 4

Comments on strengths and areas for improvement:

• Midterm

• Final

II. BASIC TENETS:

4. Clearly and confidently articulates the values and beliefs of the occupational therapy profession to clients, families, significant others, colleagues, service providers, and the public.
   Midterm 1 2 3 4
   Final 1 2 3 4

5. Clearly, confidently, and accurately articulates the value of occupation as a method and desired outcome of occupational therapy to clients, families, significant others, colleagues, service providers, and the public.
   Midterm 1 2 3 4
   Final 1 2 3 4

6. Clearly, confidently, and accurately communicates the roles of the occupational therapist and occupational therapy assistant to clients, families, significant others, colleagues, service providers, and the public.
   Midterm 1 2 3 4
   Final 1 2 3 4

7. Collaborates with client, family, and significant others throughout the occupational therapy process.
   Midterm 1 2 3 4
   Final 1 2 3 4

Comments on strengths and areas for improvement:

• Midterm

• Final
RATING SCALE FOR STUDENT PERFORMANCE

4 — Exceeds Standards: Performance is highly skilled and self-initiated. This rating is rarely given and would represent the top 5% of all the students you have supervised.

3 — Meets Standards: Performance is consistent with entry-level practice. This rating is infrequently given at midterm and is a strong rating at final.

2 — Needs improvement: Performance is progressing but still needs improvement for entry-level practice. This is a realistic rating of performance at midterm, and some ratings of 2 may be reasonable at the final.

1 — Unsatisfactory: Performance is below standard and requires development for entry-level practice. This rating is given when there is a concern about performance.

III. EVALUATION AND SCREENING:

8. Articulates a clear and logical rationale for the evaluation process.
   Midterm 1 2 3 4
   Final 1 2 3 4

9. Selects relevant screening and assessment methods while considering such factors as client’s priorities, context(s), theories, and evidence-based practice.
   Midterm 1 2 3 4
   Final 1 2 3 4

10. Determines client's occupational profile and performance through appropriate assessment methods.
    Midterm 1 2 3 4
    Final 1 2 3 4

11. Assesses client factors and context(s) that support or hinder occupational performance.
    Midterm 1 2 3 4
    Final 1 2 3 4

12. Obtains sufficient and necessary information from relevant resources such as client, families, significant others, service providers, and records prior to and during the evaluation process.
    Midterm 1 2 3 4
    Final 1 2 3 4

13. Administers assessments in a uniform manner to ensure findings are valid and reliable.
    Midterm 1 2 3 4
    Final 1 2 3 4

14. Adjusts/modifies the assessment procedures based on client's needs, behaviors, and culture.
    Midterm 1 2 3 4
    Final 1 2 3 4

15. Interprets evaluation results to determine client's occupational performance strengths and challenges.
    Midterm 1 2 3 4
    Final 1 2 3 4

16. Establishes an accurate and appropriate plan based on the evaluation results, through integrating multiple factors such as client’s priorities, context(s), theories, and evidence-based practice.
    Midterm 1 2 3 4
    Final 1 2 3 4

17. Documents the results of the evaluation process that demonstrates objective measurement of client’s occupational performance.
    Midterm 1 2 3 4
    Final 1 2 3 4

Comments on strengths and areas for improvement:

• Midterm

• Final

IV. INTERVENTION:

18. Articulates a clear and logical rationale for the intervention process.
    Midterm 1 2 3 4
    Final 1 2 3 4

19. Utilizes evidence from published research and relevant resources to make informed intervention decisions.
    Midterm 1 2 3 4
    Final 1 2 3 4
20. **Chooses occupations** that motivate and challenge clients.
   - **Midterm** 1 2 3 4
   - **Final** 1 2 3 4

21. **Selects relevant occupations** to facilitate clients meeting established goals.
   - **Midterm** 1 2 3 4
   - **Final** 1 2 3 4

22. **Implements intervention plans that are client-centered.**
   - **Midterm** 1 2 3 4
   - **Final** 1 2 3 4

23. **Implements intervention plans that are occupation-based.**
   - **Midterm** 1 2 3 4
   - **Final** 1 2 3 4

24. **Modifies task approach, occupations, and the environment to maximize client performance.**
   - **Midterm** 1 2 3 4
   - **Final** 1 2 3 4

25. **Updates, modifies, or terminates the intervention plan** based upon careful monitoring of the client’s status.
   - **Midterm** 1 2 3 4
   - **Final** 1 2 3 4

26. **Documents client’s response to services** in a manner that demonstrates the efficacy of interventions.
   - **Midterm** 1 2 3 4
   - **Final** 1 2 3 4

**Comments on strengths and areas for improvement:**
- **Midterm**
- **Final**

---

**V. MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES:**

27. Demonstrates through practice or discussion the ability to assign appropriate responsibilities to the occupational therapy assistant and occupational therapy aide.
   - **Midterm** 1 2 3 4
   - **Final** 1 2 3 4

28. Demonstrates through practice or discussion the ability to actively collaborate with the occupational therapy assistant.
   - **Midterm** 1 2 3 4
   - **Final** 1 2 3 4

29. Demonstrates understanding of the costs and funding related to occupational therapy services at this site.
   - **Midterm** 1 2 3 4
   - **Final** 1 2 3 4

30. Accomplishes organizational goals by establishing priorities, developing strategies, and meeting deadlines.
   - **Midterm** 1 2 3 4
   - **Final** 1 2 3 4

31. Produces the volume of work required in the expected time frame.
   - **Midterm** 1 2 3 4
   - **Final** 1 2 3 4

**Comments on strengths and areas for improvement:**
- **Midterm**
- **Final**
RATING SCALE FOR STUDENT PERFORMANCE

4 — Exceeds Standards: Performance is highly skilled and self-initiated. This rating is rarely given and would represent the top 5% of all the students you have supervised.

3 — Meets Standards: Performance is consistent with entry-level practice. This rating is infrequently given at midterm and is a strong rating at final.

2 — Needs Improvement: Performance is progressing but still needs improvement for entry-level practice. This is a realistic rating of performance at midterm, and some ratings of 2 may be reasonable at the final.

1 — Unsatisfactory: Performance is below standards and requires development for entry-level practice. This rating is given when there is a concern about performance.

VI. COMMUNICATION:

32. Clearly and effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public.
   Midterm 1 2 3 4
   Final 1 2 3 4

33. Produces clear and accurate documentation according to site requirements.
   Midterm 1 2 3 4
   Final 1 2 3 4

34. All written communication is legible, using proper spelling, punctuation, and grammar.
   Midterm 1 2 3 4
   Final 1 2 3 4

35. Uses language appropriate to the recipient of the information, including but not limited to funding agencies and regulatory agencies.
   Midterm 1 2 3 4
   Final 1 2 3 4

Comments on strengths and areas for improvement:

- Midterm

- Final

VII. PROFESSIONAL BEHAVIORS:

36. Collaborates with supervisor(s) to maximize the learning experience.
   Midterm 1 2 3 4
   Final 1 2 3 4

37. Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisor(s) and others.
   Midterm 1 2 3 4
   Final 1 2 3 4

38. Responds constructively to feedback.
   Midterm 1 2 3 4
   Final 1 2 3 4

39. Demonstrates consistent work behaviors including initiative, preparedness, dependability, and work site maintenance.
   Midterm 1 2 3 4
   Final 1 2 3 4

40. Demonstrates effective time management.
   Midterm 1 2 3 4
   Final 1 2 3 4

41. Demonstrates positive interpersonal skills including but not limited to cooperation, flexibility, tact, and empathy.
   Midterm 1 2 3 4
   Final 1 2 3 4

42. Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices.
   Midterm 1 2 3 4
   Final 1 2 3 4

Comments on strengths and areas for improvement:

- Midterm

- Final
## PERFORMANCE RATING SUMMARY SHEET

<table>
<thead>
<tr>
<th>Performance Items</th>
<th>Midterm Ratings</th>
<th>Final Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>I. FUNDAMENTALS OF PRACTICE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Adheres to ethics</td>
<td></td>
<td></td>
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<tr>
<td>2. Adheres to safety regulations</td>
<td></td>
<td></td>
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<tr>
<td>3. Uses judgment in safety</td>
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<tr>
<td><strong>II. BASIC TENETS OF OCCUPATIONAL THERAPY</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Articulates values and beliefs</td>
<td></td>
<td></td>
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<tr>
<td>5. Articulates value of occupation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Communicates role of occupational therapist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Collaborates with clients</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>III. EVALUATION AND SCREENING</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Articulates clear rationale for evaluation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Selects relevant methods</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Determines occupational profile</td>
<td></td>
<td></td>
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<tr>
<td>11. Assesses client and contextual factors</td>
<td></td>
<td></td>
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<tr>
<td>12. Obtains sufficient and necessary information</td>
<td></td>
<td></td>
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<tr>
<td>13. Administers assessments</td>
<td></td>
<td></td>
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<tr>
<td>14. Adjusts/Modifies assessment procedures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. Interprets evaluation results</td>
<td></td>
<td></td>
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<tr>
<td>16. Establishes accurate plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. Documents results of evaluation</td>
<td></td>
<td></td>
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<tr>
<td><strong>IV. INTERVENTION</strong></td>
<td></td>
<td></td>
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<tr>
<td>18. Articulates clear rationale for intervention</td>
<td></td>
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<tr>
<td>19. Utilizes evidence to make informed decisions</td>
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<td></td>
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<tr>
<td>20. Chooses occupations that motivate and challenge</td>
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<tr>
<td>21. Selects relevant occupations</td>
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<td></td>
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<tr>
<td>22. Implements client-centered interventions</td>
<td></td>
<td></td>
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<tr>
<td>23. Implements occupation-based interventions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24. Modifies approach, occupation, and environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25. Updates, modifies, or terminates intervention plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>26. Documents client's response</td>
<td></td>
<td></td>
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<tr>
<td><strong>V. MANAGEMENT OF OT SERVICES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>27. Demonstrates ability to assign through practice or discussion</td>
<td></td>
<td></td>
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<tr>
<td>28. Demonstrates ability to collaborate through practice or discussion</td>
<td></td>
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<tr>
<td>29. Understands costs and funding</td>
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<td></td>
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<tr>
<td>30. Accomplishes organizational goals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>31. Produces work in expected time frame</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>VI. COMMUNICATION</strong></td>
<td></td>
<td></td>
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<tr>
<td>32. Communicates verbally and nonverbally</td>
<td></td>
<td></td>
</tr>
<tr>
<td>33. Produces clear documentation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>34. Written communication is legible</td>
<td></td>
<td></td>
</tr>
<tr>
<td>35. Uses language appropriate to recipient</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>VII. PROFESSIONAL BEHAVIORS</strong></td>
<td></td>
<td></td>
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<tr>
<td>36. Collaborates with supervisor</td>
<td></td>
<td></td>
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<tr>
<td>37. Takes responsibility for professional competence</td>
<td></td>
<td></td>
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<tr>
<td>38. Responds constructively to feedback</td>
<td></td>
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<td>39. Demonstrates consistent work behaviors</td>
<td></td>
<td></td>
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<tr>
<td>40. Demonstrates time management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>41. Demonstrates positive interpersonal skills</td>
<td></td>
<td></td>
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<tr>
<td>42. Demonstrates respect for diversity</td>
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</tbody>
</table>

**TOTAL SCORE**

**MIDTERM:**
- Satisfactory Performance ................... 90 and above
- Unsatisfactory Performance .................. 89 and below

**FINAL:**
- Pass ........................................... 122 points and above
- No Pass ....................................... 121 points and below
REFERENCES


Glossary

Client Factors: Those factors that reside within the client and that may affect performance in areas of occupation. Client factors include body functions and body structures:
- body functions (a client factor, including physical, cognitive, psychological, and social aspects) — the physiological function of body systems (including psychological functions) (WHO, 2001, p.10)
- body structures (anatomical parts of the body such as organs, limbs and their components that support body function) (WHO, 2001, p.10)

(Occupational therapy practice framework: Domain and process. American Journal of Occupational Therapy, 56, 606–639.)¹

Code of Ethics: Refer to www.ota.org/general/ceo.asp

Collaborate: To work together with a mutual sharing of thoughts and ideas (ACOTE Glossary)

Competency: Adequate skills and abilities to practice as an entry-level occupational therapist or occupational therapy assistant

Context: Refers to a variety of interrelated conditions within and surrounding the client that influence performance. Contexts include cultural, physical, social, personal, spiritual, temporal and virtual. (Occupational therapy practice framework: Domain and process. American Journal of Occupational Therapy, 56, 606–639.)¹

Efficacy: Having the desired influence or outcome (from Neistadt and Crepeau, eds., Willard & Spackman's Occupational Therapy, 9th edition, 1998)


Evidence-based Practice: “Conscientious, explicit and judicious use of current best evidence in making decisions about the care of individual patients. The practice of evidence-based [health care] means integrating individual clinical expertise with the best available external clinical evidence from systematic research.” (Sackett and colleagues, Evidence-based medicine: How to practice and teach EBM, 1997, p.2) (From the Mary Law article “Evidence-Based Practice: What Can It Mean for ME?” www.acta.org)

Occupation: Groups of activities and tasks of everyday life, named, organized, and given value and meaning by individuals and a culture, occupation is everything people do to occupy themselves, including looking after themselves (self-care), enjoying life (leisure), and contributing to the social and economic fabric of their communities (productivity), the domain of concern and the therapeutic medium of occupational therapy (Townsend, ed., 1997, Enabling Occupation: An Occupational Therapy Perspective, p.181)

Occupational Performance: The result of a dynamic, interwoven relationship between persons, environment, and occupation over a person’s lifespan: the ability to choose, organize, and satisfactorily perform meaningful occupations that are culturally defined and age appropriate for looking after oneself, enjoying life, and contributing to the social and economic fabric of a community. (Townsend, ed., 1997, Enabling Occupation: An Occupational Therapy Perspective, p.181)

Occupational Profile: A profile that describes the client’s occupational history, patterns of daily living, interests, values and needs. (Occupational therapy practice framework: Domain and process. American Journal of Occupational Therapy, 56, 606–639.)¹

Spiritual: (a context) The fundamental orientation of a person’s life; that which inspires and motivates that individual. (Occupational therapy practice framework: Domain and process. American Journal of Occupational Therapy, 56, 606–639.)¹

Theory: “An organized way of thinking about given phenomena. In occupational therapy the phenomenon of concern is occupational endeavor. Theory attempts to (1) define and explain the relationships between concepts or ideas related to the phenomenon of interest, (2) explain how these relationships can predict behavior or events, and (3) suggest ways that the phenomenon can be changed or controlled. Occupational therapy theory is concerned with four major concepts related to occupational endeavor: person, environment, health, and occupation.” (Neistadt and Crepeau, eds., Willard & Spackman’s Occupational Therapy, 9th ed., 1998, p.521)
Appendix H

STUDENT EVALUATION OF THE FIELDWORK EXPERIENCE (SEFWE)

Purpose:
This evaluation serves as a tool for fieldwork sites, academic programs, and students. The main objectives of this evaluation are to:

- Enable the Level II fieldwork student who is completing a placement at the site to evaluate and provide feedback to the supervisor and fieldwork setting;
- Enable academic programs, fieldwork sites, and fieldwork educators to benefit from student feedback in order to develop and refine their Level II fieldwork programs;
- Ensure that all aspects of the fieldwork program reflect the sequence, depth, focus, and scope of content of the curriculum design;
- Provide objective information to students who are selecting sites for future Level II fieldwork; and
- Provide a means of evaluation to ensure that fieldwork is performed in settings that provide educational experiences applicable to the academic program.

This form is designed to offer each program the opportunity to gather meaningful and useful information. Sections outlined with thick black double borders are designed to be customized by your program as needed. Pages involving evaluation of individual fieldwork educators have been positioned at the end of the form to allow academic programs to easily remove these pages before making them available for future Level II student review, if they choose to do so.
STUDENT EVALUATION OF THE FIELDWORK EXPERIENCE (SEFWE)

Instructions to the Student: Please complete this STUDENT EVALUATION OF THE FIELDWORK EXPERIENCE (SEFWE) form before your final meeting with your fieldwork supervisor(s). It is imperative that you review the form with your supervisor and that both parties sign on page 1. Copy the form so that a copy remains at the site and a copy is forwarded to your Academic Fieldwork Coordinator at your educational program. This information may be reviewed by future students as well. The evaluation of the student using the AOTA Fieldwork Performance Evaluation (FWPE) should be reviewed first, followed by the student’s evaluation of the fieldwork experience (SEFWE). The final section of the SEFWE will not be shared with future students allowing the student completing this form to be honest and constructive.

Fieldwork Site _____________________________________ Site Code ________

Address ___________________________________________________________

Placement Dates: from _______________ to _________________

Order of Placement: [ ] First [ ] Second [ ] Third [ ] Fourth

Living Accommodations: (include type, cost, location, condition, only needed if you are renting, or had to relocate for this fieldwork experience)

Transportation (how get to your location and length of time for commute):

Please write your e-mail address here if you don’t mind future students contacting you to ask you about your experience at this site: -

______________________________________

IMPORTANT: MUST COMPLETE: We have mutually shared and clarified this Student Evaluation of the Fieldwork Experience report.

_______________________________________ ________________________________________
Student’s Signature                                                            FW Educator’s Signature

_______________________________________ ________________________________________
Student’s Name  (Please Print)                                                 FW Educator’s Name and credentials (Please Print)

FW Educator’s years of experience ____________

AOTA Commission on Education, Fieldwork Issues Committee
SECTION 1 – SHARED WITH YOUR FIELDWORK EDUCATOR & AFWC – THIS SECTION WILL BE AVAILABLE TO FUTURE STUDENTS FOR REVIEW

I. ORIENTATION – (Environment)
Indicate your view of the orientation by checking "Satisfactory" (S) or "Needs Improvement" (I) regarding the three factors of adequacy, organization, and timeliness. If items not included or do not seem relevant please check “Not Applicable” (NA).

<table>
<thead>
<tr>
<th>TOPIC</th>
<th>Adequate</th>
<th>Organized</th>
<th>Timely</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Facility – Mission, Vision, Policies, Procedures</td>
<td>S</td>
<td>I</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Safety, emergency procedures, confidentiality</td>
<td>S</td>
<td>I</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Fieldwork OT department</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>D. Fieldwork Processes</td>
<td></td>
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<td></td>
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<tr>
<td>E. Documentation Requirements</td>
<td></td>
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<tr>
<td>F. Other:</td>
<td></td>
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</tr>
</tbody>
</table>

G. Orientation was complete and helped me to become comfortable in my setting?  Yes___ No___

H. What would you have added to orientation to ensure effective learn about your new setting?

I. What was not necessary and could be deleted from orientation?___________________________

II. CASELOAD

A. How many clients did you treat, as an average, per week or day? __________
B. What is the expected productivity level: _____% per day (direct care)
C. Does your fieldwork educator treat other clients at the same time you are treating? Yes___ No___

1. List approximate number of each age category in your caseload.
2. List approximate number of each primary condition/problem/diagnosis in your caseload

<table>
<thead>
<tr>
<th>Age of Clients</th>
<th>Total # per Age Group</th>
<th>Condition/Problem</th>
<th># Treated per condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) 0–3 years old</td>
<td></td>
<td>a)</td>
<td></td>
</tr>
<tr>
<td>b) 3–5 years old</td>
<td></td>
<td>b)</td>
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</tr>
<tr>
<td>c) 6–12 years old</td>
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<td>c)</td>
<td></td>
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<tr>
<td>d) 13–21 years</td>
<td></td>
<td>d)</td>
<td></td>
</tr>
<tr>
<td>e) 22–50 years</td>
<td></td>
<td>e)</td>
<td></td>
</tr>
<tr>
<td>f) 50–65 years</td>
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<td>f)</td>
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<tr>
<td>g) 66 – 80</td>
<td></td>
<td>g)</td>
<td></td>
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<tr>
<td>h) 81 – 90+</td>
<td></td>
<td>h)</td>
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</tbody>
</table>
III. DOCUMENTATION

1. What type(s) or kind of documentation is used in this setting?
   a. SOAP
   b. Descriptive
   c. Other

2. Are you documenting using electronic documentation methods?
   a. Yes____
   b. No____
   c. If yes, please indicate the name of documentation software__________

3. How much additional training was required to learn and become proficient using required electronic documentation?
   a. One – two hours
   b. Full day
   c. One week
   d. Other?

IV. OCCUPATIONAL THERAPY PROCESS (Occupation)

A. Indicate the approximate number of screenings/evaluations you completed during this fieldwork experience. Indicate their value to your learning experience by circling the appropriate number with #1 being least valuable and #5 being the most valuable. Consider circling #3 when adds adequate value to learning.

<table>
<thead>
<tr>
<th></th>
<th>REQUIRED</th>
<th>HOW MANY</th>
<th>VALUE TO YOUR LEARNING</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes  No</td>
<td>1  2  3  4  5</td>
<td></td>
</tr>
<tr>
<td>1. Client/patient screening</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>a)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Client/patient evaluations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Use specific names of evaluations)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a)</td>
<td></td>
<td></td>
<td>1  2  3  4  5</td>
</tr>
<tr>
<td>b)</td>
<td></td>
<td></td>
<td>1  2  3  4  5</td>
</tr>
<tr>
<td>c)</td>
<td></td>
<td></td>
<td>1  2  3  4  5</td>
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<td>d)</td>
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<td>1  2  3  4  5</td>
</tr>
<tr>
<td>e)</td>
<td></td>
<td></td>
<td>1  2  3  4  5</td>
</tr>
<tr>
<td>3. Written treatment/care plans</td>
<td></td>
<td>1  2  3  4  5</td>
<td></td>
</tr>
<tr>
<td>4. Discharge summary</td>
<td></td>
<td>1  2  3  4  5</td>
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</tbody>
</table>
B. List major therapeutic interventions used frequently. Indicate whether the intervention was provided in group, individually, Co-Treatment, or consultation. List other professionals involved

<table>
<thead>
<tr>
<th>Therapeutic Interventions</th>
<th>Individual</th>
<th>Group</th>
<th>Co-Tx with PT, OT, Speech, Other</th>
<th>Consultation With other health professionals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupation-based activity, i.e., play, shopping, ADL, IADL, work, school activities, etc. (within client’s own context with his or her goals)</td>
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<tr>
<td>1.</td>
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<td>4.</td>
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<tr>
<td>Purposeful activity (therapeutic context leading to occupation)</td>
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<td>1.</td>
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<td>2.</td>
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<td>3.</td>
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<td>4.</td>
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<tr>
<td>Preparatory methods, i.e., sensory, PAMs, splinting, exercise, etc. (preparation for occupation-based activity)</td>
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<tr>
<td>1.</td>
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<td>2.</td>
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<td>3.</td>
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<td>4.</td>
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</table>

V. THEORY—FRAMES OF REFERENCE—MODELS OF PRACTICE

A. Indicate the primary practice model/theory/frames of reference (FOR) used in this fieldwork experience and frequency of use. For example if primary FOR used is Occupational Behavior, please include and then indicate frequency incorporated in practice. Indicate the number: 1 = Rarely; 2 = Occasionally; 3 = Frequently

<table>
<thead>
<tr>
<th>Theory/Frame of Reference used</th>
<th>Frequency</th>
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</thead>
<tbody>
<tr>
<td>a)</td>
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<tr>
<td>b)</td>
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<td>c)</td>
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</table>
VI. FIELDWORK ASSIGNMENTS – (Occupation)

A. List the types of assignments required of you during this placement (Write all that apply), and indicate their educational value (1 = not at all valuable; 3 = valuable; 5 = very valuable)

<table>
<thead>
<tr>
<th>Required Assignments, such as Case Study, Presentation, Adaptive Device, other</th>
<th>1 = not valuable; 3 = valuable; 5 = very valuable</th>
</tr>
</thead>
<tbody>
<tr>
<td>a)</td>
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<td>b)</td>
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<td>c)</td>
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<td>d)</td>
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</table>

VII. ASPECTS OF THE ENVIRONMENT (Environment)

1. Staff and administration demonstrated cultural sensitivity
2. Student work area/supplies/equipment were adequate
3. Opportunities to network with other professionals
4. Opportunities to work with COTA, e.g. co-treat
5. Opportunities to interact with other OT students
6. Opportunities to interact with students from other disciplines
7. Opportunities to observe role modeling of therapeutic relationships
8. Opportunities to expand knowledge of community resources
9. Opportunities to participate in research
10. The Practice Framework was integrated into practice
11. Additional educational opportunities (specify):

12. How would you describe the pace of this setting? (circle one)  
   Slow  Med  Fast  Very Fast
VIII. SUPERVISION (Person & Environment)

A. What was the primary model of supervision used? (check one)

1. One supervisor : one student
2. One supervisor : group of students
3. One supervisor : two students
4. Two supervisors : one student
5. Three or more supervisors : one student (count person as supervisor if supervision occurred at least weekly)
6. Weekly
7. Distant supervision (primarily off-site) (minimum 6-8 hours per week)

B. List names of primary fieldwork educators who participated in your learning experience.

<table>
<thead>
<tr>
<th>Name</th>
<th>Credentials</th>
<th>How frequent?</th>
<th>Individual Sessions?</th>
<th>Group Sessions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
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<td>2.</td>
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<tr>
<td>3.</td>
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</table>

IX. SUMMARY of PERSONAL PERFORMANCE EXPECTATIONS (Person)

A. Performance Expectations

1. Expectations of fieldwork experience were clearly defined
2. Expectations were challenging but not overwhelming
3. Experiences supported student's professional development
4. Experiences matched student's expectations
5. Changes could be made to improve this experience
6. Certain aspects made this a valuable Level II fieldwork experience

1 = Strongly disagree
2 = Disagree
3 = No Opinion
4 = Agree
5 = Strongly agree

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
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</table>
B. What changes would you recommend to improve this Level II fieldwork experience? Why (rationale)?
1. ____________________________________________________________
   ____________________________________________________________
2. ____________________________________________________________

C. What aspects of your experience do you think helped to make this a great and valuable Level II fieldwork?
1. ____________________________________________________________
2. ____________________________________________________________
3. ____________________________________________________________

D. Please add any further comments, descriptions, or information concerning this fieldwork experience that may be helpful for future placement consideration.
1. ____________________________________________________________
2. ____________________________________________________________
3. ____________________________________________________________
X. ACADEMIC PREPARATION

A. Rate the relevance and adequacy of your academic coursework relative to the needs of **THIS** fieldwork placement, **circling** the appropriate number.

<table>
<thead>
<tr>
<th>Adequate Preparation for Placement</th>
<th>Relevance for Placement</th>
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<td>Low</td>
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<tr>
<td>a) Anatomy</td>
<td>1 2 3 4 5</td>
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<tr>
<td>b) Assistive Technology</td>
<td>1 2 3 4 5</td>
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<tr>
<td>c) Communication</td>
<td>1 2 3 4 5</td>
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<tr>
<td>d) Cultural &amp; diversity integration</td>
<td>1 2 3 4 5</td>
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<tr>
<td>e) Documentation skills</td>
<td>1 2 3 4 5</td>
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<tr>
<td>f) Evaluation &amp; treatment, simulation</td>
<td>1 2 3 4 5</td>
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<tr>
<td>g) Human development</td>
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<tr>
<td>h) Interventions &amp; planning</td>
<td>1 2 3 4 5</td>
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<tr>
<td>i) Kinesiology, Biomechanics</td>
<td>1 2 3 4 5</td>
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<tr>
<td>j) Leadership &amp; Administration Management</td>
<td>1 2 3 4 5</td>
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<tr>
<td>k) Level I Fieldwork</td>
<td>1 2 3 4 5</td>
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<tr>
<td>l) Neurodevelopment</td>
<td>1 2 3 4 5</td>
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<tr>
<td>m) Professional Behavior</td>
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<tr>
<td>n) Professional development</td>
<td>1 2 3 4 5</td>
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<tr>
<td>o) Research, Evidence-based projects</td>
<td>1 2 3 4 5</td>
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<tr>
<td>p) Therapeutic Use of Self</td>
<td>1 2 3 4 5</td>
</tr>
</tbody>
</table>

B. What coursework changes would you recommend (add or delete) in your academic program relative to the needs of **THIS** Level II fieldwork experience?

a) 

b) 

c) 

XI. SUMMARY OF OVERALL EXPERIENCE

A. What qualities or personal performance skills do you feel that a student should have to function successfully on this fieldwork placement?

1. 

2. 

3. 

89
B. How can future students’ best prepare for this placement?

1. Study the following evaluations:
   a) ________________________________
   b) ________________________________
   c) ________________________________
   d) ________________________________

2. Study the following intervention methods:
   a) ________________________________
   b) ________________________________
   c) ________________________________

3. Read the following topics and/or texts in advance of fieldwork:
   a) ________________________________
   b) ________________________________
   c) ________________________________
XI. SUPERVISION SECTION – this section will NOT be shared with future students

A. SUPERVISION (Person)

Please rate your supervision by your fieldwork educator. Indicate the number that seems descriptive of each fieldwork educator. Please make a copy of this page for each individual.

FIELDWORK EDUCATOR NAME:___________________________________

FIELDWORK EDUCATOR YEARS OF EXPERIENCE: __________

MY FIELDWORK EDUCATOR PROVIDED:  (please rate the following)

<table>
<thead>
<tr>
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<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
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<tbody>
<tr>
<td>1. Ongoing positive feedback in a timely manner</td>
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<td>2. Ongoing constructive feedback in a timely manner</td>
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<td>3. Written work reviewed in a timely manner</td>
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<td>4. Positive and constructive suggestions to student to improve performance</td>
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<td>5. Clear performance expectations to facilitate clinical reasoning</td>
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<td>6. Sequenced learning experiences to grade progression of learning</td>
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<td>7. A variety of instructional strategies incorporated to enhance learning</td>
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<td>8. Knowledge and skills to facilitate learning and challenge student</td>
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<tr>
<td>9. Identified resources to promote individual student development</td>
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<td>10. Clear explanations to enhance clinical reasoning</td>
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<td>11. A variety of supervisory approaches to facilitate student performance</td>
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<tr>
<td>12. Time to encourage student feedback and concerns</td>
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<td>13. Open communication to facilitate student’s growth</td>
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<td>14. Adapted supervision to change as fieldwork progressed</td>
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<td>15. A positive role model of professional and ethical behavior in practice</td>
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<tr>
<td>16. Role modeling to encourage occupation-based practice</td>
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<tr>
<td>17. Role modeling to encourage client-centered practice</td>
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<td>18. Role modeling to encourage evidence-based practice</td>
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</table>

B. Frequency of meetings/types of meetings with supervisor:

1 = Rarely____  2= Once a week: ____  3 = 2 – 3 x/wk  4= Daily: ____

C. Value of Supervision was:

1 = Not enough____  2 = Somewhat enough ____  3= just right ____  4= too much ____

D. Additional comments to add about your supervision, or suggestions to improve supervision?
XIII. WHAT WAS YOUR (STUDENT’S) EXPERIENCE? (Person)

1. I was able to actively participate in my learning experience. a) Yes __ b) No__

2. I was given adequate time to prepare for patient care. a) Yes __ b) No__

3. I learned how to be responsive to my clients’ needs. a) Yes __ b) No__

4. I was open to my supervisor’s mentoring. a) Yes __ b) No__

   Additional Comments to add?______________________________

5. I felt comfortable and confident throughout my fieldwork experience. a) Yes __ b) No__

   Why, in what way?________________________________________

6. Communication was open between me and my fieldwork educator. a) Yes __ b) No__

7. Things I did well communicating with my fieldwork educator included: ______

   _____________________________

8. Barriers to communication between my fieldwork educator and myself were: __

   _____________________________

9. My fieldwork educator was responsive to my learning style. a) Yes __ b) No__

10. Other final comment(s) to add?:_________________________ ___________
Appendix I
SAMPLE LEARNING CONTRACT

Date: January 15, 2012

<table>
<thead>
<tr>
<th>Learning Objective</th>
<th>Methods and Criteria for Accomplishment</th>
<th>Learning Resources and Strategies</th>
<th>Target Date for Accomplishment</th>
</tr>
</thead>
</table>
| Student will complete initial evaluation documentation | Within 30 minutes  
With 2 or less corrections by the Fieldwork Educator | Review department guidelines for initial evaluation documentation  
Review initial evaluation documentation completed by other therapists  
Observe other therapists conducting evaluations and read their documentation  
Find a quiet environment for completing documentation | January 29, 2012 |

Student Signature ____________________________ Date ____________

Fieldwork Educator Signature ____________________________ Date ____________

Academic Fieldwork Coordinator Signature ____________________________ Date ____________

Adapted from the American Occupational Therapy Association, Fieldwork Educator Certificate Program Manual, 201
Appendix J: Level II Fieldwork Syllabus

OCCUPATIONAL THERAPY DEPARTMENT

LEVEL II FIELDWORK
(OT 640/641L)

Summer/Fall 2014

Faculty: Donna Breger Stanton, OTD, OTR/L, CHT, FAOTA
Associate Professor, Academic Fieldwork Coordinator
Phone: 510-869-6743 email: dbreger@samuelmerritt.edu
450 30th Street, Oakland, CA 94609

Goli Hashemi, MPH, OTR/L
Assistant Academic Fieldwork Coordinator, Level II
Phone: 510-869-6511 Ext. 3112
ghashemi@samuelmerritt.edu
**Course Overview**

**Course number:** OT 640L/641L

**Course Title:** Level II Fieldwork

**Credits:** Total 12 units – 6 units per each three month assignment (OT 640L for 6 units followed by OT 641L for another 6 units). *Students must sign up for and successfully complete OT 640L (the first Level II fieldwork assignment) before registering and completing OT 641L, the second Level II fieldwork assignment.*

**Prerequisite:** Successful completion of the full two years of didactic coursework.

**Instructors and Advisors:**
Donna Breger Stanton, OTD, OTR/L, CHT, FAOTA  
Associate Professor,  
Academic Fieldwork Coordinator, OT Program  
dbreger@samuelmerritt.edu  
Phone: 510-869-6743  
Fax: 510-869-6951

Goli Hashemi, MPH, OTR/L  
Adjunct Instructor, Assistant to Academic Fieldwork Coordinator, OT program  
ghashemi@samuelmerritt.edu  
Phone: 510-869-6511 Ext. 3112

**Office Hours and Meetings:**
Coordinators will be available on request.

Site visits may be made per request of student, the Fieldwork site, or per schedule of Academic Fieldwork Coordinator (AFWC).

It is recommended that each student keep in contact with the AFWC during their fieldwork placements. It is appreciated to hear the good things happening out in the field as well as being available for counsel and advice as needed.

For additional forms, or location for forms and information log on to  
[www.samuelmerritt.edu](http://www.samuelmerritt.edu) > occupational therapy >fieldwork>Level II fieldwork  

The same information is found on OT640L and OT641L classes on Canvas

**Mandatory Mid-Quarter Meetings:** announced by early notice
before beginning of Level II fieldwork for each semester: summer and fall, generally.

SUMMER MEETING: All students within 2 hour commute of SMU, from San Jose, Sacramento, the Peninsula, San Francisco, East Bay, Concord, Walnut Creek, and other nearby locations, are required to attend the mid-quarterly meetings.

Summer meeting: Wednesday, August 21, 2014 from 1:30-4:00

Fall meeting: Thursday and Friday, November 9 and 10, 2014 – 8 AM – 5 PM.

FALL MEETING: A MANDATORY NBCOT EXAM REVIEW IS SLATED FOR Thursday and Friday incorporated within your fall mid-quarter review and will be considered part of your fieldwork hours. Your fieldwork sites will be notified in advance that this is a mandatory meeting for you to be at school. These two days are included as part of your fieldwork allotted days. You may be asked to make up any additional days taken for travel.

Schedule of the two dates includes the NBCOT-like test taken Thursday morning and Fieldwork meeting in the afternoon. Friday morning is review of test results and in the afternoon, preparation and suggested test taking methods for the NBCOT test.

Attendance – Level II

During Level II fieldwork, the student is allowed time off for holidays observed by the site only (no observance of school holidays is allowed during fieldwork); however, holidays cannot exceed 3 days per placement. No absences are allowed due to ACOTE requirements for students to complete 24 total weeks of Level II fieldwork. If the students is absent from fieldwork due to emergency circumstances, the student is responsible to make arrangements for making up the missed time. No absences should be requested for personal and family outings as this is a working assignment, and students are evaluated as a potential employee with appropriate professional behaviors.
Course Description

Level II fieldwork is an internship designed to allow student interns work in the capacity of a student occupational therapist under the supervision of a licensed occupational therapist. It is designed to meet the requirements of the ACOTE Standards (ACOTE, 2011) as specified in the learning objectives throughout this syllabus.

The purpose of this clinical course is to provide opportunities for the student to apply classroom learning; develop realistic goals related to patient/client intervention; gradually assume the expected caseload of an entry-level therapist; and enhance his/her professional development through collaborative hands-on learning.

“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 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” (ACOTE Standards, 2011). This includes being exposed to a variety of clients across the life span and to a variety of settings.

A minimum of 24 weeks of full-time Level II Fieldwork is required to complete the course. 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 a full-time equivalent at that site. (C.1.13)

Students must complete and pass the affiliation with evidence through completion of the AOTA, Inc. Performance Evaluation for the Occupational Therapy Student, 2002 Occupational Therapy Student Form and the Student Evaluation of the Fieldwork Experience, both of which must be received by the AFWC before a grade is posted to the Registrar (C.1.18).

Fieldwork Assignment Program Policy

Recommend that the fieldwork educator is provided the opportunity to attend and participate in local fieldwork educators’ annual seminars provided by the university, in collaboration with local universities occupational therapy programs, to engage in receiving resources to enhance and enable supervision of students. This mechanism is used to provide information and learning to enhance supervisory skills through continuing education opportunities as well as provide ongoing information about potential resources that are available to add to the supervisory ability of our Fieldwork Educators.

It is the policy of Samuel Merritt University and a recommendation of ACOTE accreditation that the fieldwork experience provides the student with exposure to a variety of clients across the life span and to a variety of settings, for a required total of 24 weeks Level II fieldwork (C.1.13). This includes providing experiences with a focus of both psychological and social factors that influence engagement in occupation that may be inclusive within a
physical disabilities setting or as a specialized setting in psychosocial dysfunction and various service delivery models reflective of current practice in the profession. Based on this requirement, the student must be assigned to two different settings.

Students may be assigned to two settings that are both physical disabilities, but each must be quite different in terms of age group or in treatment settings such as acute versus long term or rehabilitative patient care; or other parameters that may be discussed individually with the AFWC.

If an assignment is requested for pediatrics it can, generally, only be in the second Level II assignment or an optional third fieldwork assignment, and must be preceded by an adult physical disabilities assignment.

There are no guarantees of availability of specific fieldwork requests. We depend upon the sites’ ability to take our requests. It is up to the school to ensure that there are enough fieldwork sites and that contracts/agreements are sufficient in scope and number to allow completion of graduation requirements in a timely manner according to program policy (C.1.5).

During their fieldwork placements students must be supervised by currently licensed or credentialed occupational therapist that has a minimum of 1 years’ of practice experience subsequent to initial certification, and is adequately prepared to serve as a fieldwork educator (C.1.14). Supervision must include a minimum of 8 hours per week where no occupational therapy services exist, with proviso that the supervisor must be available through a variety of contact options to the student during all working hours. There must be an on-site supervisor designee while the OT supervisor is off site (C.1.17).

**Teaching methods**

The wide range of teaching methods is utilized in this course. Teaching strategies include learning through observation, discussion, experiential clinical involvement and information exchange with Fieldwork Educators (FE), the AFWC and your peers via presentations, participation in the Canvas discussion board and mid-quarter meetings.

In preparation for attaining entry level responsibilities and abilities, students are often expected to present a patient case study, a clinical in-service, and/or complete a project for the facility they are at, as agreed upon with their FE at the specific site.

All students are required to log on to Canvas and post two threads and two replies on the discussion board with the academic program per 12 week fieldwork placement. **No grade will be forwarded without meeting this requirement.**

At times the AFWC may visit placement sites. Site visits allow the AFWC to potentially observe the student in action along with their fieldwork educators or to sit down and discuss student and fieldwork educator’s progress, and to provide constructive measures if needed. It is meant to be a positive supportive visit.
Learning Methods

The student will apply the multi-media learning methods from their academic studies to the clinic, providing evaluation, treatment planning and therapeutic intervention to actual patients/clients of the facility to which they are assigned. Students will be expected to use available texts from academic courses completed, access available libraries, and potentially continue study and homework after their work day with clients/patients in preparation for developing treatment plans, and other required assignments. Canvas is required to be accessed throughout the fieldwork experiences as noted.

COURSE LEARNING OBJECTIVES and RESPONSIBILITIES

A. Student Learning Objectives

Upon the completion of this course, the student will demonstrate abilities to complete the following objectives as evaluated by the Fieldwork Educator, included in the AOTA Performance Evaluation and in discussions with the AFWC:

1. Demonstrate clinical reasoning and reflective practice, to transmit the values and beliefs that enable ethical practice, and develop professionalism and competence in career responsibilities. (C.1.11)

2. Complete Level II Fieldwork in a traditional and/or emerging practice setting 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 and occupational-based outcomes. Student may complete Level II Fieldwork in a minimum of one setting if it is reflective of more than one practice area, or a maximum of four different settings. (C.1.12)

3. Apply the mind body approach, integral to academic program focus, when observing, evaluating and treating patients/clients in a variety of settings through observation and evaluation of the biophysical, cognitive, affective, social and spiritual domains in which each individual functions.

4. Understand and explain the variety of roles and functions an occupational therapist may have as a practitioner, educator, researcher, consultant and entrepreneur. (B.9.7)

5. Demonstrate good judgment in seeking assistance, responding to feedback and conducting him/herself ethically with appropriate courtesy and attitudes in patient/client and staff relationships; understand the fieldwork educator’s function as a clinician and role model for this type of behavior.

6. Demonstrate the ability to select appropriate evaluation techniques, formulate an intervention plan including general and specific goals and objectives incorporating
performance skills, performance patterns, activity demands, context and client factors. Be able to explain to patients/clients or other staff how specific occupations address intervention goals; be able to explain the meaning and dynamics of occupation and activity including the interaction of areas of occupation, performance skills, performance patterns, activity demands, context(s), and client factors (B.2.2).

7. Demonstrate and apply clinical reasoning and flexibility in formulating intervention plans related to patient/client values, life experiences, present life roles and changes which can occur during the intervention process (B.2.10; C.1.11).

8. Achieve independence in the ability to analyze tasks relative to areas of occupation, performance skills, performance patterns, activity demands, and context and client factors to formulate an intervention plan in the clinical setting. (B.2.7). Analyze, synthesize, and apply models of occupational performance (B.2.11)

9. Demonstrate sound judgment of implementing and adhering to safety precautions and regulations at all times (B.2.7). This includes the requirement to follow safety and HIPAA standards.

10. Use of sound judgment in regard to safety of self and others, adhere to safety regulations throughout the occupational therapy process as appropriate to the setting and scope of practice (B.2.8)

11. Demonstrate ability to use standardized and non-standardized screening or assessment tools as appropriate to the clinical setting to determine the need for occupational therapy intervention. (B.4.1).

12. Understand and demonstrate the ability to select and administer a variety of evaluation tools, the appropriate application and interpretation of these tools related to purpose, achievable goals, validity, standardization, and criteria reference and based on client needs, contextual factors, and psychometric properties of the tests. (B.4.2).

13. Use appropriate procedures and protocols, including standardized formats, when administering assessments (B.4.3). Provide therapeutic use of occupational, exercises and activities (B.5.3).

14. Demonstrate ability to evaluate client(s) occupational performance in activities of daily living (ADL), instrumental activities of daily living (IADL), education, work, play, rest, sleep, leisure, and social participation (B.4.4)

15. Explain the importance of the therapeutic relationship in attaining treatment goals, demonstrate the ability to establish meaningful, comfortable, therapeutic relationships with patients/clients, and explain the ethical responsibilities in this relationship.
16. Demonstrate an understanding of the role of the occupational therapist and occupational therapy assistant that might fit in as a collaborative model within the fieldwork setting being experienced regardless of whether an OTA is in the setting or not (B.4.5). Identify and demonstrate techniques in skills of supervision and collaboration with occupational therapy assistants on therapeutic interventions, as appropriate to setting (B.5.25).

17. Demonstrate understanding of the role of the occupational therapist in care coordinator, case management, and traditional and emerging practice environments (B.5.27). Be able to monitor and reassess the effect of occupational therapy intervention and need for continued or modified intervention (B.5.28). Be prepared to plan for discharge in collaboration with the client and significant others (B.5.29).

18. Be aware of, and consider factors of culture, diversity, disability status and other individual and contextual variables of a setting (B.4.7).

19. Research, plan and carry out an in-service, or other relevant project as required by the clinical site of an occupational therapy related topic that will promote life-long learning for his/her professional career.

20. Demonstrate reliable work habits, ongoing communication of schedule with supervisor, and other important professional behaviors. Learn and know what specific professional behaviors of the assigned location are expected. Demonstrate the ability to resolve personal and professional feelings associated with any biasing interaction with patients/clients, staff, institution and self.

21. Demonstrate and implement effective written, oral and nonverbal communication skills for documentation necessary for writing and reporting clinical documentation, and effectively communicate with client, family, colleagues and other healthcare providers, the need and rationale for occupational therapy; and as a professional meet the standards for reimbursement. (B.4.10; B.5.20)

22. Evaluate effectiveness of supervision during each fieldwork assignment with completion of the Student Evaluation of Fieldwork Experience tool which then must be reviewed with the fieldwork educator and submitted to the AFWC at the end of fieldwork (C.1.15).

23. Demonstrate the ability to fulfill the requirements of an entry level occupational therapist by the end of each 12 week assignment, with independent ability to provide for intervention planning and implementation of intervention goals to achieve client’s target for occupational performance in relevant context.

24. Complete the requirements and educational essentials to qualify to sit for the National Board of Certification in Occupational Therapy (NBCOT) examination, the passing of which entitles the student to be an occupational therapist (OT).
25. Know and understand the criteria for national credentialing, certification, and/or registration for state (B.7.3).

**B. The Fieldwork Educator’s Responsibilities**

15. Provide orientation to the clinical setting, including policies, procedures, scheduling, and other relevant requirements for each setting.

16. Know and incorporate the professional responsibility for providing fieldwork education and the criteria for becoming a fieldwork educator (B.7.8).

17. Create and maintain an environment for the student to be comfortable to ask and be asked questions that facilitate the integration of classroom learning into clinical application, gradually assuming the role of an entry level therapist.

18. Establish fieldwork objectives in collaboration with academic program and communicate with student about progress and performance, ongoing, during fieldwork (C.1.3).

19. Ensure that the ratio of fieldwork educator(s) to student enable proper and adequate supervision that allows for frequent assessment of student progress to achieve fieldwork objectives (C.1.4). Provide structured clinical supervision, including a consistent schedule for the student to follow with a mechanism in place to evaluate ongoing progress and required supervision between FE and the student. For example, it is recommended that the FE and the student meet, at a minimum, on a weekly basis to review progress and discuss needs or goals for meeting the learning needs of the student. The weekly meetings can include discussion of a weekly set of objectives to be completed by the student at the beginning of the 3 month internship and discussed with the student intern then, and during each subsequent week (C.1.4).

20. 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 included in the student’s responsibilities (C.1.11).

21. Provide a Level II Fieldwork in traditional and/or emerging practice settings consistent with the curriculum design included, as discussed with AFWC from individual school. In all settings, incorporate the AOTA Framework to provide that psychosocial factors influence engagement in occupation must be understood and integrated for the development of client-centered, meaningful, occupational-based outcomes. In settings, psychosocial factors influencing engagement in occupation must be understood and integrated for the development of client-centered, meaningful, occupation-based outcomes (C.1.12).

22. Student evaluations of fieldwork are completed by students of the FE’s to constructively review their supervisory style through use of the Student Evaluation of Fieldwork Experience (SEFWE) tool (C.1.15).
23. 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 is appropriate for the setting, the severity of client’s condition, and the ability of the student. (C.1.16)

24. 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 credentialed occupational therapist with at least 3 years professional experience. Supervision must be a minimum of 8 hours per week. 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.1.17)

25. Provide the student with ongoing verbal feedback, a written plan for corrective action if needed, a written midterm evaluation, and a written final evaluation using the AOTA, Inc. Performance Evaluation for the Occupational Therapy Student, 2002 Occupational Therapy Student Form provided by Samuel Merritt University in packets sent prior to student’s beginning their affiliation. (C.1.18)

26. If there is a potential of any concern about the student’s progress and possibility of receiving an “unsatisfactory” grade from the fieldwork site, this information must be conveyed directly to the AFWC as soon as possible, preferably before the 6th week and no later than 10 weeks into the 12 week affiliation; definitely not on the last day of the affiliation. If there is any concern of failing, documentation of this must be completed and provided immediately to the AFWC. Additionally, the AFWC may request additional and more specific information regarding student progress as deemed necessary prior to submitting final grade to the Registrar’s office.

27. Complete the written evaluation completed by the fieldwork educator, and the evaluation completed by the student; discuss each with the student, and send a copy to Samuel Merritt University, OT Academic Fieldwork Coordinator at 450 - 30th Street, Suite 4738, Oakland, CA 94609.

28. Contact the OT Academic Fieldwork Coordinator at (510) 869-6743 a minimum of one time at approximately midterm in the student's assignment and as soon as possible if problems arise.

29. Understand that the student is in the final process of completing occupational therapy courses; that students have completed didactic coursework that includes completion of competency testing in various specific interventions such as ROM, MMT, transfer training, and other competencies in required adult physical disabilities, pediatrics and psychosocial supervised clinical experiences during their academic education. The student may, however, need demonstration and/or hands on direction, or further explanations to integrate the application of the above skills as their knowledge may have been only minimally applied in a clinical setting.
30. Assist the student in determining content for inservice or project requirements during the Fieldwork Level II process.

31. Recommend that the fieldwork educator is provided the opportunity to attend and participate in local fieldwork educators’ annual seminars provided by the university, in collaboration with local universities occupational therapy programs, to engage in receiving resources to enhance and enable supervision of students. This mechanism is used to provide information and learning to enhance supervisory skills through continuing education opportunities as well as provide ongoing information about potential resources that are available to add to the supervisory ability of our Fieldwork Educators.

32. Attendance policy: absences by students are intended for emergent uses only. Each facility may enforce their own policy. No more than 3 days may be taken for any use of time off without requiring make-up days. No days are taken for personal use by students, they are not given days off just to be used; only for urgent cause including illness. Student fieldwork mid-quarter meetings with the Academic Fieldwork Coordinator, on-site, are counted as “work” or “fieldwork” days and should not apply to absence policy.

C. The Academic Fieldwork Coordinator's Responsibilities

1. Ensure that the fieldwork assignment reflects the sequence and scope of content related to curriculum design in order to strengthen the ties between the didactic and fieldwork experience (C.1.1).

2. Function as student advisor and as a resource to the student and the fieldwork educator for observational and behavioral issues, clarification of responsibilities, and problem resolution.

3. Document the criteria and process for selecting fieldwork sites. Ensure that all aspects of the fieldwork program reflect the sequence, depth, focus, and scope of content in the curriculum design. Ensure memorandums of understanding are maintained for sites used, that sites comply with all requirements, that site objectives and data are maintained, and that this communication is available to students (C.1.2).

4. Demonstrate that academic and fieldwork educators collaborate through multiple means of communication, such as annual fieldwork educators meetings, to establish and update objectives regularly, and update emails, website for fieldwork educations (www.samuelmerritt.edu), communicate with student and fieldwork educator about progress and performance during fieldwork. Ensure that all aspects of the fieldwork program are developed to be consistent with the curriculum design of the program (C.1.3)
5. Ensure that fieldwork placements are made with consideration of student’s individual abilities and interests and with a goal to ensure the appropriate and successful placement, given individual placements, students’ needs and curriculum goals. Ensure that the fieldwork educators are able to effectively meet the learning needs of the students including proper supervision, ability to provide frequent assessment of student progress in achieving stated fieldwork objectives and adequate ratio of fieldwork educator(s) to student(s) (C.1.4).

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

7. Responsible for advocating the development of links between the fieldwork and didactic aspects of the curriculum, for communicating about the curriculum to the fieldwork educators, and for maintaining contracts and site data related to fieldwork placements. Fieldwork agreements must be sufficient in scope and number to allow completion of graduation requirements in a timely manner in accordance with the policy adopted by the program (C.1.5).

8. The program must have evidence of current, valid memorandums of understanding that are signed by both parties at time student is placed for Level I or Level II fieldwork experience with responsibilities of both academic institution and fieldwork site clearly documented in the memorandum of understanding (C.1.6).

9. Ensure that at least one fieldwork experience, either in Level I or Level II has a focus on both psychological and social factors that influence engagement in occupation (C.1.7).

10. 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.1.11)

11. Effectively incorporate psychosocial competencies and principles to address needs of all clients with all disabilities, in all setting, not just in a mental health setting, including ensure that the student is able to collaborate with their fieldwork educator on methods used to address the psychosocial needs of clients. “Psychosocial factors influencing engagement in occupation must be understood and integrated for the development of client-centered, meaningful, occupation-based outcomes.” For example, a case study might be done emphasizing the psychosocial factors addressed during the intervention, or complete a critical appraisal of a research article which addresses the needs of clients seen in their setting (C.1.12).

12. Ensure the placements are made that follow the mandate of ACOTE standards to provide for the variance of experience enabling the completion of a minimum of 24 full-time weeks. This may be completed on a part-time basis as defined by the fieldwork placement in accordance with the fieldwork placements usual and
customary personnel policies as long as it is at least 50% of a full-time equivalent at the site. (C.1.13)

13. Ensure that the student is supervised by a currently licensed, or credentialed occupational therapist with a minimum of 1 year of practice experience subsequent to initial certification, and is adequately prepared to serve as a fieldwork educator. (C.1.14)

14. Document a mechanism for evaluating the effectiveness of supervision which using the Student Evaluation of the Fieldwork Experience (SEFWE), and for providing resources for enhancing supervision. For example, SMU in collaboration with three other academic programs offer annual continuing education for fieldwork educators by the institution, along with provision of relevant and current educational materials on the topic of fieldwork education, theory and practice. (C.1.15)

15. Ensure that supervision provides protection of consumers and opportunities for appropriate role modeling of occupational therapy practice. (C.1.16)

16. Ensure that supervision provided in a setting where no occupational therapy services exist has a documented plan for provision of occupational therapy services and supervision by a currently licensed or credentialed occupational therapist with a minimum of 3 years of professional experience. Supervision must include a minimum of 8 hours per week. Supervision must be initially direct, gradually decreasing in amount of supervision depending upon the setting, the client’s needs, and the ability of the student. When not direct, the occupational therapy supervisor must be available by other means of contact such as phone, 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.1.17).

17. Document mechanisms for required formal evaluation of student performance on Level II fieldwork, including interim or midterm evaluations. The use of the AOTA Fieldwork Performance Evaluation for the Occupational Therapy student and the Student Evaluation of Fieldwork Experience (SEFWE) form are required for all SMU OT students to receive a grade. (C.1.18)

18. This program generally does not make international placements. If a student is attending Level II fieldwork outside the United States the AFWC must assure that the student is supervised by an occupational therapist who graduated from a program approved by the World Federation of Occupational Therapists (WFOT) and has a minimum of 1 year of experience in practice. Such fieldwork must not exceed 12 weeks. (C.1.19)

19. The policy of the SMU OT program is to have students placed either geographically within sites we have contracted, and/or sites requested and considered for locality near one’s home. The university does not send students to other geographic locations away from the local region or near family
without a written petition to the faculty providing justification for such a request. No guarantees are made as to results of review of any request.
Appendix K.  OT 642L Course Syllabus

Course number:  OT 642L

Course Title:  Clinical Practicum, Post-Professional Optional Internship

Credits:  Total of 2 units, Certificate awarded upon completion

Description:  This is a post-graduate, advanced practice internship whereby the student works in the capacity of a therapist under the close supervision of a registered occupational therapist.  This is a course that allows students the option of completing up to 12 weeks of specialty study in occupational therapy.  The total length of internship is agreed upon, and may potentially be adjusted between the student, Academic Fieldwork Coordinator and the Fieldwork Educator of the designated assignment; but usually the internship/fellowship will be arranged for 12 weeks.

Prerequisites:  Completion of OT 640L and OT 641L or a practicing occupational therapist

Instructor:  Donna Breger Stanton, OTD, OTR/L, CHT, FAOTA
Associate Professor, Academic Fieldwork Coordinator, OT Program

Schedule:  TBA

Purpose:  This course provides an opportunity for the student to practice as an entry-level therapist in a specialty area in occupational therapy.  The student intern will assume the expected caseload of an entry-level therapist, develop realistic intervention goals related to client intervention in a specialty setting, and enhance his/her professional development through collaborative hands-on learning experiences.  The student intern will usually be required to present a patient/client case study, one clinical inservice, and complete a project for the facility as agreed upon with their Fieldwork Educator.  The student intern will be expected to perform as an occupational therapist in a specialized affiliation such as in hand therapy, pediatrics, or an entry level fieldwork with a different client emphasis from his/her Level II Fieldwork assignments.

Objectives:  Upon the completion of this course, the student will be able to:

1. Perform as an entry-level occupational therapist able to deliver service under minimal supervision
2. Increase knowledge and skills in specialty area over the course of this affiliation.
3. Demonstrate independent judgment and progressive refinement of clinical reasoning in occupational therapy practice by the end of the internship.
4. Apply the SMU OT Mind body approach addressing the issues of the whole person when evaluating and treating clients.  Provide holistic interventions using the principles of occupational performance in providing progressive purposeful activities to enable return to occupational participation and well-being.
5. May complete minimum clinical requirements for one of three advanced practice
areas of hand rehabilitation, physical agent modalities, or dysphagia depending on area of practice for this affiliation.

The Fieldwork Educator’s Responsibilities are to:

1. Provide orientation to the clinical setting, including policies, procedures, scheduling, and reimbursement issues.
2. Provide appropriate clinical supervision for an entry-level therapist according to the AOTA Guidelines for practice.
3. Provide the student with ongoing verbal feedback with minimum of weekly scheduled meetings, a written plan for corrective action if needed, a written midterm evaluation, and a written final evaluation. The current American Occupational Therapy Association’s Fieldwork Performance Evaluation for the Occupational Therapy Student may be used.
4. Complete the written evaluation, discuss it with the student, and send a copy to Samuel Merritt University, Academic Fieldwork Coordinator at 450 - 30th Street, Oakland, CA 94609.
5. Contact the MOT Academic Fieldwork Coordinator at (510) 869-6743 as need.
6. Create and maintain an environment in which the student may ask and be asked questions to facilitate more advanced level clinical reasoning.
7. Recognize that the student may need instruction in clinical reasoning and demonstrations or explanations for specialty evaluations and interventions.

The Academic Fieldwork Coordinator’s Responsibilities are to:

1. Function as a resource to the student and the fieldwork educator concerning behavioral issues, performance issues, clarification of responsibilities, and problem resolution.
2. Maintain records on each student and review all fieldwork evaluation forms.
3. Maintain awareness of the student's progress through contact with the student and fieldwork educator.
4. Provide educational opportunities for the Fieldwork Educator(s).

Teaching Methods: The methods utilized in this course include direct clinical demonstration, performance of actual responsibility for client therapeutic interventions, and exchange of information with Fieldwork Educators. Facilities providing advanced fieldwork education may require appropriate assignments for the student to complete such as inservice and case study presentations or special projects, usually on a more advanced level than those required for Level II fieldwork.

Learning Methods: The student will apply their clinical and theoretical knowledge already gained to provide entry-level evaluation, intervention planning and therapeutic intervention to actual clients in accordance with the rules and policies of the facility to which they are assigned.

Evaluation Methods: This course is a post-professional internship that is graded on a Pass/Fail basis. Passing the course is dependent upon receiving minimum passing
scores on the *Fieldwork Performance Evaluation for the Occupational Therapy Student* or another relevant evaluation tool.

**Grading and Required Paperwork**
Submission of a written performance evaluation, such as the *Fieldwork Performance Evaluation for the Occupational Therapy Student*, and *The Student Evaluation of the Fieldwork Site* are required in order to receive a grade for this course. Both documents must be signed by the student and by the supervising Fieldwork Educator. The instructor cannot submit a course grade to the Registrar until both pieces of paperwork have been received. Students should contact the AFWC if their grades are not posted within a reasonable timeframe to ensure that the paperwork was actually received.

**Assignments and Requirements**
All post-professional fieldwork sites must be under contract with Samuel Merritt University to provide Fieldwork experiences. The Occupational Therapist, Registered (OTR) who will provide direct clinical supervision to the student must be a member in good standing with the National Board for Certification in Occupational Therapists (NBCOT); he/she must have a minimum of two years of clinical experience in the specialty area of post-professional internship and/or appropriate advanced certification to demonstrate competency in the specialty area, including the advance practice certificate from CBOT, and/or certification by HTCC (Hand Therapy Certification Commission). The Academic Fieldwork Coordinator must approve all facility assignments in advance, and monitor progress.

**Additional information about Optional Third Fieldwork Assignment**
Students must register for this 2-unit course. Registration is a pre-requisite to ensure student liability coverage by the university during the additional optional fieldwork assignment. Students are required to request this internship to the AFWC no later than **October 15** prior to starting the internship.

Once students begin this optional internship, they must complete the agreed upon timeframe, usually 12 weeks. Withdrawal may result in an “F” posted on the academic record, unless the student completes with withdrawal process within the timeframe as defined in the Samuel Merritt University Catalog and Handbook.

**Accommodations:**
Students who require any kind of accommodation are encouraged to disclose such a need prior to beginning this internship. If they do not disclose, the fieldwork site is not obligated to accommodate for a particular need if disclosed after the assignment has commenced.

**For more information re: ADA accommodations please refer to the Fieldwork Manual.**

**For information about reporting exposure or clinical injury on the job, please review the protocol provided in the Fieldwork Manual.**


**Attendance Policy:** Samuel Merritt University’s occupational therapy program allows for students to take up to 3 days off for emergency, illness, and urgent purposes only. No personal days are allowed and such days would need to be made up in addition to any days more than 3 days for any reason. The internship site may require documentation to support an emergency absence requested/taken by a student. If the site has specific requirements that do not allow any days off, the school defers to such policy.

Holidays that are normally observed by the fieldwork site are allowed as long as they do not exceed three days. We do not allow days off that are taken by the university. If a student is absent for more than 3 days over the course of the internship, the student is responsible for making arrangements to make-up the missed time.

**Disclaimer:**
The AFWC retains the right to make changes to the syllabus and to the class due to unforeseen schedule changes or circumstances. If any changes are made, it is the obligation of the AFWC to immediately notify the student(s) of such changes.
Appendix L
Occupational Injuries Protocol

On Oakland Campus -
ABSMC Employee Health/Occupational Medicine Dept:
3232 Elm Street, Oakland, CA 94609
(510) 869-8920  Monday-Friday
Hours 8:00 a.m. - 12:00 noon and 1:00 p.m. - 4:30 p.m.

1. Employee/Clinical Student/Work Study Student -

ON THE DAY OF OCCURRENCE
a) Report injury to Manager and complete an Injury Report.
b) *Immediately* contact ABSMC EH/OM Dept (869-8920) between 8:00 a.m. and 4:30 p.m. Monday-Friday, to report the injury and schedule an appointment to be evaluated. Take Report of Injury form to appointment.
c) After hours, or if the injury is an *emergency* (unable to continue to work; cannot wait until next morning), go to the Emergency Department and report to ABSMC EH/OM per above, the next morning.
e) Report to Traci Leno, ABSMC HR Disability Management, 3012 Summit St., 3rd Floor, with completed forms. 510-869-6914

2. Manager - ON THE DAY OF OCCURRENCE
a) Complete Supervisor Accident Report – *Note this must be completed within 3 days of occurrence.*
b) Direct employee (student) to report to ABSMC HR Disability Management (see location above)
c) Verify that the employee (student) has called ABSMC EH/OM and scheduled an appointment for evaluation and treatment.

ALL Clinical Students, Work-Study Students and Learning Centers
Employees - Sacramento
San Francisco
San Mateo

1. Employee/Students - ON THE DAY OF OCCURRENCE
a) Report injury to Clinical Instructor/Manager and complete an Injury Report
b) *Immediately* contact ABSMC HR Disability Management 510-869-6914, to report the injury and schedule an initial appointment with a doctor. Take a copy of the Accident Report to the appointment.
c) After hours, or if the injury is an emergency (unable to continue to work; cannot wait until next morning), go to the Emergency Department and contact ABSMC HR Disability Management per above, the next morning.


2. Clinical Instructor/Manager - **ON THE DAY OF OCCURRENCE**
   a) Complete Supervisor Injury Report - **Note this must be completed with 3 days of occurrence**
   b) Direct employee/student to report to ABSMC Human Resources Disability Management (see contact information above)
   c) Verify that the employee has called ABSMC HR Disability Management and scheduled an appointment for evaluation and treatment.

**Important Reporting Information**

<table>
<thead>
<tr>
<th>OT, Level II AFWC</th>
<th>Donna Breger Stanton</th>
<th>510-869-6743</th>
</tr>
</thead>
<tbody>
<tr>
<td>OT, Level II AFWC</td>
<td>Goli Hashemi</td>
<td>510-869-6511 x3112</td>
</tr>
<tr>
<td>OT, Level I AFWC</td>
<td>Beth Ching</td>
<td>510-869-6511x4918</td>
</tr>
</tbody>
</table>

Human Resources: Samuel Merritt University, 435 Hawthorne Ave, Oakland CA 94609
Elaine Lemay, Director
510-869-6739 or 510-869-6511 ext. 5351 fax 510-869-6115

Director of Facilities Samuel Merritt University
Lillian Harvin, Director
Phone 510-869-8785

Alta Bate Summit Medical Center, Summit Campus
Emergency Dept Phone # 510-869-6600
Hospital Operator # 510-655-4000

Disability Management: Susan Brown, Disability Coordinator BrownSA@sutterhealth.org, 510-869-6824
Mayra Inguanzo, Disability Technician InguanM@sutterhealth.org 510-655-4000
Acknowledgment of Receipt of Student Fieldwork Manual

Please sign and return this form immediately to Drew Ward upon the receipt of the Fieldwork Manual.

I, ______________________, hereby acknowledge that I have been
(print student's name)
provided a copy of the Samuel Merritt University, Occupational Therapy
Department, Fieldwork Manual, either in print, CD, or from the SMU
Fieldwork website.

Please initial each of the following items:

_____ I understand that I am responsible for knowing, understanding and
accepting the information provided in this manual, and the requirements
that are discussed within this Fieldwork Manual.

_____ I understand and agree to abide by the Departmental Policies as stated
in Chapter 6.0 of this manual.

_____ I acknowledge that I am responsible for the information contained in
the Samuel Merritt University Student Handbook as found on Samuel
Merritt University’s website and the MOT Program Student Handbook as it
pertains to my academic standing, behavior, eligibility and performance at
fieldwork sites.

_____ I authorize the Academic Fieldwork Coordinator to share the
information as described in this manual to facilitate my successful
completion of the fieldwork requirements of occupational therapy education.

______________________________  __________________
Student's Signature             Date