



**Samuel Merritt
University**

Occupational Therapy Fieldwork Manual

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1. Introduction to Fieldwork

1.1 Purpose of Fieldwork

Fieldwork is an integral part of the training to become an occupational therapist. Fieldwork provides an opportunity to apply and integrate academic learning. During fieldwork, students carry out professional responsibilities under the supervision of qualified professionals to make the transition from student to practitioner.

1.2 Overview of Fieldwork Courses at Samuel Merritt University

Fieldwork courses are designed in accordance with the Accreditation Council for Occupational Fieldwork Education (ACOTE) Standards.

Level I Fieldwork courses are offered throughout the first and second year using three distinct instructional methods: (a) through simulations using standardized patients and simulated environments, (b) through supervision by a fieldwork educator in a practice environment that is off-site within clinical settings during the summer between the first and second years of didactic coursework, and (c) through engagement in meaningful occupations within group occupational therapy sessions with a psychosocial focus.

Level II Fieldwork is completed after the second year of didactic classes. Level II Fieldwork entails two 12-week full-time fieldwork experiences of two different settings and populations. The purpose of Fieldwork II is to prepare the student to become a competent entry-level Occupational Therapist.

Level I Fieldwork: OT 6002/702 (FWIA), 6021L/721L (FWIB), and 626L/726L (FWIC)

Level I Fieldwork introduces the clinical application of didactic learning. The primary purpose is to allow hands-on experiences to translate theory into practice. Through observation and participation in selected aspects of the occupational therapy process, students are introduced to clinical settings and client populations with whom an occupational therapist might work. 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 Fieldwork Level IB. *The remainder of this manual primarily refers to procedures related to the Fieldwork Level IB portion.*

Level II Fieldwork: OT 6040L/7040L & OT 6041L/7041L (6 units per course; total 12 units)

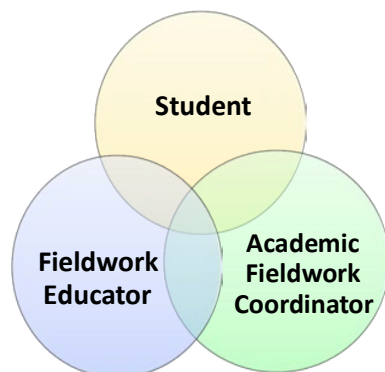
Level II Fieldwork is designed to transition a student to the full responsibilities of an entry-level occupational therapist. Working under the supervision of licensed occupational therapists, students are expected to function as an entry-level occupational therapist by the end of each Level II Fieldwork rotation. Each of the two rotations is the equivalent of 12 weeks full time. Students are eligible to register for Level II Fieldwork after successfully completing two years of didactic

coursework. Students must successfully complete OT 6040L/7040L (the first rotation) before they are eligible to register for OT 641L/741L (the second rotation). In cases where learning is disrupted due to local or national emergency or disaster, a student may be given an In Progress (IP) and allowed to complete the course at a future date.

ACOTE states that fieldwork should expose students to a wide variety of clients and practice settings to develop competent, generalist occupational therapists. Completing Level II Fieldwork in at least two different types of practice settings broadens a student's range of clinical experiences. The faculty highly recommends that students complete one assignment in physical disabilities and another in psychosocial disabilities. If students are assigned to two physical disabilities sites, the two sites must be quite different in terms of practice settings (such as acute versus long term care). Pediatrics or hand therapy placements are usually reserved for the second Level II rotation, after completion of an adult physical disabilities' assignment. Exceptions to this policy can be made if a student can demonstrate that they had extensive previous experience in either hands or pediatric occupational therapy.

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 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 assumes 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.

Roles and Responsibilities of the Student:

1. Comply with all student policies and procedures described in the student handbook.
2. Communicate with your placement before starting fieldwork regarding onboarding tasks that must be completed.

3. Submit updated student health information, certifications, and trainings, as instructed in a timely manner. Failure to do so may result in a delay or cancellation of the rotation.
4. Follow the Occupational Therapy Code of Ethics at all times.
5. Maintain a professional attitude at all times. Remember, you are representing Samuel Merritt University.
6. Communicate honestly with your FW Educator, remembering you are there to learn.
7. Complete all Canvas assignments for the fieldwork course.
8. Keep the Academic Fieldwork Coordinator informed of any changes in supervision or your ability to attend fieldwork.
9. Inform the Academic Fieldwork Coordinator if you miss a day of fieldwork due to illness or other.
10. Discuss any problems related to your placement first with your FW Educator and then with the Academic Fieldwork Coordinator.

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 fieldwork educator is often an occupational therapist, although this is not an ACOTE requirement. Students could be supervised by an individual from another profession such as a recreation therapist, social worker, nurse, or teacher. There is no minimum experience requirement for the Level I Fieldwork Educator. The role of the educator is to provide guided learning to increase students' awareness of the clinical setting, client population, and therapeutic interventions.

Level II Fieldwork Educator

For Level II Fieldwork, the supervising FE must be an occupational therapist who has been practicing for a minimum of one year. The FE provides an environment in which students can bridge the gap between academic education and clinical application. Educators work with students to gradually increase their responsibilities until they can handle the typical caseload of an entry-level therapist at the fieldwork site. While most fieldwork placements will be one fieldwork educator to one student, there are appropriate times when a student may have more than one fieldwork educator, or a single fieldwork educator may have more than one student. The ratio of fieldwork educators to students will always ensure that the following criteria are met: a) proper supervision, b) protection of consumers, c) opportunities for appropriate role modeling of occupational therapy practice, and d) the educator's ability to provide frequent assessment of student progress in achieving stated fieldwork objectives.

Academic Fieldwork Coordinator (AFWC)

The Academic Fieldwork Coordinator is the Samuel Merritt University faculty responsible for securing fieldwork sites, maintaining files on students and fieldwork sites, assigning fieldwork

placements to students, and collaborating with Fieldwork Educators and students to provide appropriate student placements. Once students are placed at fieldwork sites, the AFWC serves as the academic advisor. The AFWC assigns each student's academic grade for the fieldwork courses based on input from the fieldwork educator. The AFWC is responsible for ensuring that the university's fieldwork program is in compliance with ACOTE fieldwork education requirements and for maintaining a collaborative relationship between the academic and clinical settings. The AFWC will reach out to students during the fieldwork to check on progress and experience. Students are also responsible for reaching out to the AFWC and should communicate via email or telephone call.

2. For Fieldwork Educators – About Samuel Merritt University

2.1 History and Philosophy of the Occupational Therapy Program

Samuel Merritt University was founded in 1909 as a school of nursing. The Master of Occupational Therapy (MOT) program was established in 1994, and the Doctor of Occupational Therapy (OTD) program was implemented in 2016. Other professional programs offered by the university include nursing, physical therapy, physician assistant, and podiatry.

Samuel Merritt University's occupational therapy program incorporates the Mind-body Model, which views the mind and body as one entity. The Mind-body 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.

2.2 Overview of the Occupational Therapy Curriculum

The OT curriculum reflects current trends in education, occupational therapy practice, and the health care system. Problem solving skills are cultivated as a foundation for clinical reasoning. The curriculum is competency-based and designed for adult learners. The coursework provides an opportunity for self-directed, collaborative learning and the integration of life experiences. The Mind-body Model is infused throughout the curriculum. Other major themes in our curriculum design include evidence-based practice, scholarship, and professionalism.

The first year's course work provides a firm foundation in occupational therapy theory, basic health sciences, observation skills, and interpersonal skills. Students complete Level I Fieldwork experiences during the second, third, and fourth semesters of the program with the traditional clinical practice setting experience occurring off-site during the third semester (summer between first and second years). Under the supervision of occupational therapy faculty, second year

students gain clinical experiences with real clients in three contexts: an on-site pediatric lab, an on-site adult lab, and off-site psychosocial settings. Students complete six months of Level II Fieldwork after the second year of didactic courses. Following Level II Fieldwork, MOT students are eligible to sit for the NBCOT exam, whereas OTD students complete an additional semester of capstone coursework.

Further details and information about the MOT and OTD curricula are summarized at <https://www.samuelmerritt.edu/programs/doctor-and-master-occupational-therapy>.

2.3 Roles and Responsibilities of Fieldwork Educators

Fieldwork Educators' responsibilities are provided below.

Level IB 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. Realize that per the California Board of Occupational Therapy, it is acceptable for students to assist with providing services to clients who are receiving therapy that is considered Advanced Practice (such as hand rehabilitation, use of physical agent modalities, and/or dysphagia) if students are working under the supervised guidance of the occupational therapist.
4. Provide the student with some **hands-on experience** with clients to learn and practice therapeutic techniques, in addition to observation-based learning.
5. Provide **students with at least one written assignment** which may include a progress note, SOAP note, a written report regarding a diagnosis, a case study, or another assignment per the Fieldwork Educator's discretion.
6. Provide the student with ongoing verbal feedback and a final written evaluation regarding progress, skill development, or suggestions for areas of improvement.
7. Complete the written student evaluation via Qualtrics and discuss it with the student (to be reviewed upon completion by the AFWC).
8. Contact the level I Academic Fieldwork Coordinator as soon as possible if an issue arises.
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 two semesters 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, teachers, social workers, nurses, and physical therapists.

Level II Fieldwork

1. Ensure that the fieldwork experience is designed to promote clinical reasoning and reflective practice, transmit the values and beliefs that enable ethical practice, and develop professionalism and competence.
2. Provide a level II fieldwork in traditional and/or emerging practice settings consistent with the curriculum design as discussed with the academic fieldwork coordinator. Incorporate the Occupational Therapy Practice Framework in clinical practice.
3. Assure that psychosocial factors influencing engagement in occupation are understood and integrated for the development of client-centered, meaningful, occupation-based outcomes in all settings.
4. Review and contribute to fieldwork learning objectives prior to the start of the fieldwork experience (see Appendix E).
5. Provide orientation to the clinical setting, including policies, procedures, and scheduling.
6. Ensure that the level of supervision provides protection of consumers and opportunities for appropriate role modeling of occupational therapy practice. *Initially, supervision should be direct* and then decreases to less direct supervision as is appropriate for the setting, the severity of the client's condition, and the ability of the student.
7. 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 at the assigned fieldwork site.
8. Understand that although students have completed two years of didactic coursework, they may need additional explanations and demonstrations to implement specific evaluation and intervention techniques with clients. Provide individualized instruction according to each student's unique learning needs.
9. Provide structured clinical supervision, including a consistent schedule and a mechanism to evaluate ongoing supervision between the Fieldwork Educator and the student.
 - a. Provide written weekly learning objectives to the student. A sample schedule of weekly learning objectives is provided in Appendix D of this manual.
 - b. Meet weekly with the student to review progress toward learning objectives and to identify specific areas needing improvement (sample Objectives, Appendix E).
 - c. Complete a written online midterm evaluation and final evaluation using the American Occupational Therapy Association's *Fieldwork Performance Evaluation for the Occupational Therapy Student*. Instructions for completing the online evaluations will be provided once fieldwork is in progress. Discuss the midterm and final evaluations with the student and submit online to Exxat Prism for the Academic Fieldwork Coordinator to review.
10. Contact the academic fieldwork coordinator **as soon as possible** if there is a concern that a student may not pass fieldwork. If corrective action is needed, provide the student and

the academic fieldwork coordinator with a remediation plan followed up by ongoing verbal and written feedback as well as ongoing assessment of progress.

11. Assist the student to determine a topic for in-service or project requirements during level II Fieldwork.
12. Attend and participate in the California Occupational Therapy Fieldwork Council's fieldwork conferences to receive professional development and resources for enhancing supervision of students.
13. **For emerging practice settings with pre-approval from Samuel Merritt University** - 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. Direct 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.

2.4 Learning Objectives for Fieldwork Courses

It is important that Fieldwork Educators are aware of the learning objectives of our program. To ensure we meet ACOTE standards, the learning objectives for fieldwork courses are provided below, so that Fieldwork Educators are aware of them for implementation during fieldwork education. For Level IB and Level II Fieldwork, educators will have the opportunity to review and contribute to the fieldwork objectives prior to each placement, via a Collaboration survey that will be disseminated 4 weeks prior to the start of the placement.

Fieldwork Level IB (OT 6021L/7021L) Learning Objectives

Upon the completion of this course, the student will:

1. Identify the various roles and functions of an occupational therapist in various practice settings
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. Demonstrate professional behaviors including using sound judgment in seeking assistance and responding to feedback; Conduct oneself ethically and professionally in all interactions; Dress appropriately; and demonstrate reliable work habits and communication
4. Demonstrate the ability to establish meaningful, comfortable, therapeutic relationships with clients. Understand the difference between friendship and therapeutic relationships, and the ethical responsibilities in a therapeutic relationship.

5. 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.
6. Explore and identify appropriate assessments and intervention processes based on a client's occupational profile.
7. Formulate general therapeutic goals for a client. Understand how issues such as client values, life experiences, cultural considerations, race, religion, ethnicity, gender, sexuality and present life roles influence the formulation of therapeutic goals and intervention activities.
8. Integrate the OTPF, critical thinking and clinical reasoning, relevant theories, frames of reference, and best evidence to develop a therapeutic occupational therapy plan, for the clinical case/scenario, which balances areas of occupation with the achievement of health, wellness, and occupational performance for an individual.
9. Demonstrate writing skills necessary for clinical documentation through clear, concise, and professionally written assignments.
10. Analyze personal feelings associated with and biasing any interactions with standardized patient, client, staff, or institution.
11. Demonstrate knowledge and understanding of fieldwork policies and procedures as delineated in the Fieldwork Manual and course syllabus.

Level II Fieldwork Learning Objectives (OT 6040L/7040L and OT 6041L/7041L)

Upon the completion of this course, the student will:

1. Demonstrate clinical reasoning and reflection to ensure ethical practice.
2. Use sound judgment to ensure safety of self and others; adhere to safety and client confidentiality regulations throughout the occupational therapy process.
3. Apply the mind-body approach by considering and addressing each individual's biophysical, cognitive, affective, social and spiritual domains for all client populations and settings.
4. Analyze, synthesize, and apply models of occupational performance throughout the therapeutic process. Be able to explain to clients or staff how specific occupations address client goals; be able to explain the meaning and dynamics of occupation and activity including the interrelatedness of occupations, performance skills, performance patterns, activity demands, contexts, and client factors.
5. Understand and explain the various roles and functions an occupational therapist may have as a practitioner, including case coordinator and case manager; educator; researcher; consultant and entrepreneur in traditional and emerging practice settings.
6. Explain the importance of the therapeutic relationship in attaining client goals; demonstrate the ability to establish meaningful, comfortable, therapeutic relationships with clients; and explain the ethical responsibilities in this relationship.

7. Demonstrate the ability to select appropriate evaluation techniques to formulate an intervention plan, including general and specific goals and objectives. Select, administer, and interpret a variety of standardized and non-standardized screening or assessment tools as appropriate to the client's needs.
8. Apply clinical reasoning and flexibility in implementing evidence-based intervention plans related to client values, life experiences, present life roles, and changes that may occur during the intervention process. Demonstrate the ability to select and deliver occupations and activities, preparatory methods and tasks, education and training, and advocacy.
9. Be able to monitor the effect of occupational therapy intervention and reassess the need for continued or modified intervention. Be prepared to plan for discharge in collaboration with the client, significant others, and the healthcare team.
10. Demonstrate an understanding of the respective roles of the occupational therapist and occupational therapy assistant within the fieldwork setting regardless of whether an OTA is in the setting. Identify and demonstrate skills of supervision and collaboration with occupational therapy assistants.
11. Demonstrate effective written, oral and nonverbal communication skills for collaboration with clients, families, colleagues and other healthcare providers.
12. Produce effective clinical documentation to ensure justification and reimbursement for occupational therapy services.
13. Demonstrate good judgment and professionalism in seeking assistance, responding to feedback, and resolving conflicts in all interpersonal interactions.
14. Demonstrate respect and consideration for factors of culture, diversity, disability status and other individual and contextual variables of a setting.
15. Demonstrate reliable work habits, ongoing communication of schedule with supervisor, effective time management, and other important professional behaviors.

2.5 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. This is the responsibility of the student.

2.6 Procedures for Student Injuries During Fieldwork

Students in Clinical

1. All injuries and illnesses, regardless of severity, must be reported to your clinical supervisor immediately.

2. If it's an emergency, **CALL 911**, receive treatment at your clinical site, or visit the nearest emergency department.
3. If it's non-life threatening, and ***you need medical treatment information including finding a medical provider, search for a provider in the [Medical Provider Network](#).***

*SMU students attending clinical in relation to their academic program, and while working at SMU as a student employee, are considered "Employees," therefore worker's compensation benefits are available if they sustain an injury or illness.

*Student Health and Counseling (SHAC) does not treat or see students for occupational injuries while in clinical or working as a student employee.

If your student's clinical-related injury or illness requires medical attention, please provide them the **Workers' Compensation Claim Form** to complete.

Contacts

Risk Management and Insurance Contacts

SMU Risk Management Workers Compensation - Shaun Quirk (510) 879-3370

Insurance Carrier - The Hartford

[My Workers' Comp Connection | The Hartford](#)

Policy Number: 57WEBL8A4J

Policy Period: 1/1/26 - 1/1/27

Claim Reporting Options

Phone: (800) 327-3636

Online: <https://www.thehartford.com/claims>

Email: Lossconnect@thehartford.com

Fax: (800) 347-8197

(See Appendix H)

Declination of Workers' Compensation Benefits

If the student chooses to decline medical treatment or file a worker's compensation claim, please proceed with completing the **Workers' Compensation Medical Treatment Declination Form**. When emailing the completed form, please formally state that you are declining workers' compensation benefits and provide a brief summary of the incident.

Additional information needed after reporting claim

1. Number of weeks in rotation
2. Number of days/week student is in clinic
3. Number of hours per day student is in clinic

All completed forms are to be emailed to [The Office of Risk Management and Safety](mailto:safetyandsecurity@samuelmerritt.edu) at: safetyandsecurity@samuelmerritt.edu

2.7 Resources for Fieldwork Education

Within this manual, fieldwork educators may find it particularly useful to review the following:

- Chapter 1. Introduction to Fieldwork
- Chapter 6. Professional Behaviors During Fieldwork
- Chapter 7. Contingency Planning for Planning for Level II Fieldwork
- Chapter 8. Learning Contracts
- Appendices

In addition, SMU has a dedicated fieldwork educators' webpage, which provides resources to support the critical role of Fieldwork Educator for the occupational therapy profession.

Resources include the Fieldwork Educators Certificate Workshop, the AOTA website, the California Occupational Therapy Fieldwork Council's annual fieldwork conference, as well as assessment forms and communication tools to be used with students. Please visit

<https://www.samuelmerritt.edu/occupational-therapy-fieldwork-education>

3. Fieldwork Scheduling Process

3.1 Criteria for Assigning Students to Fieldwork Sites

The AFWC 's primary consideration is meeting the ACOTE mandate that each student has a broad exposure to OT practice areas and is well-prepared as a generalist entry level occupational therapist.

Additionally, other criteria which can be considered include:

- Availability of sites and qualified fieldwork educators
- Student preference to be within a 90-minute commute
- Student request regarding type of setting or client population
- Discussion with faculty about student's learning needs
- Input from students about their learning style

For each student, the AFWC considers factors such as whether the student would benefit from a:

- Slow vs. fast-paced environment
- Large vs. smaller facility
- Structured vs. a less structured student program
- Predictable vs. a more dynamic clinical setting
- Traditional vs. emerging practice area

Flexibility from both the student and the AFWC is a necessary component of this placement process. Efforts to meet individual students' needs are made as much as possible; however, it may not be possible to accommodate all aspects 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. In addition, circumstances beyond Samuel Merritt University's control (e.g., staffing changes at fieldwork sites) affect the availability of sites. Adaptability and a willingness to learn in any environment will provide students with the best experience.

3.2 Contacting Sites to Request Fieldwork Placements

It is the sole responsibility of the AFWC to communicate with sites to request, schedule, and confirm fieldwork placements. If a student has contact information for a potential site, they should forward the information to the AFWC, who will follow up. **Students are not allowed to contact sites directly to request fieldwork placements.** Doing so may potentially jeopardize sites' receptiveness to accepting Samuel Merritt University students. If a student contacts a site without

permission, then it is the prerogative of the AFWC to place that student last in the cycle thus potentially resulting in a delayed start date.

3.3 Contracts Between Fieldwork Sites and Samuel Merritt University

All fieldwork sites must have a current, signed contract with Samuel Merritt University before a student can be placed at a 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 six months to a year for completion. Unexpected circumstances may further delay or prevent the contract completion process. The Department of Occupational Therapy cannot guarantee that a contract being pursued to meet a specific student's request will be completed.

3.4 Level IB Fieldwork

Students submit their geographic preferences for Level I clinical placements in October of the first year of the OT program and have an opportunity to update their preferences in January. In the Spring semester, the Level I AFWC distributes site assignments to students based on their geographic preferences. After receiving the site assignment, the student contacts the fieldwork site to schedule the specific dates for fieldwork. Only fieldwork arranged between the site and the AFWC will fulfill the academic requirement for fieldwork.

3.5 Level II Fieldwork

Table 1. Level II Fieldwork Site Assignment: Process and Timelines

When	What
First Year of OT Program	
First Semester	Students provide preliminary geographic preferences to the AFWC
April 15	Last day for students to update out-of-state requests
August 15	Last day for students to update requests within California
Second Year of OT Program	
October - March	AFWC works with fieldwork sites to secure needed placements. Some students will be assigned placements during this time to meet site requirements for earlier confirmations.
April	AFWC notifies students of site assignments as placements are confirmed via Exxat
April – June	AFWC continues to assure placements are completed and confirmed.

The planning process for Level II Fieldwork begins during the first semester of the OT program. Students provide preliminary information to the AFWC about geographic preferences and types of experiences desired. Throughout the first year of the OT program, students can modify their fieldwork requests up to **April 15** for out-of-state requests and **August 15** for requests in California.

A few students may be notified of their placements during the fall semester of the second academic year if specific sites require confirmation at that time. Generally, students are assigned fieldwork sites by April 1 preceding the summer Level II fieldwork. In some instances, delays may occur when sites cannot confirm placements by April 1; the AFWC will notify students as soon as sites confirm.

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

3.6 Out-of-State Fieldwork Assignments

Students who wish to return to their home state will be considered 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 a student has contacts for fieldwork sites, this information should be provided to the AFWC. However, all direct communications with potential sites to request fieldwork placements must be completed by the AFWC; **students are not allowed to contact sites to request fieldwork.** There are some states where we are unable to place students due to restriction with the State Authorization Reciprocity Agreement (SARA).

In some instances, the AFWC may determine that it is in the student's best interest to remain in California, so that the AFWC can offer more immediate support to the student. It is important for students to have flexibility with locations, such as a broader geographic region or to remain in California for fieldwork.

3.7 Fieldwork Supervision Where No OT Services Exist

When a student is assigned to a level II fieldwork placement in a setting where no occupational therapy services exist, a plan for supervision will be made. Supervision will be by a currently licensed or otherwise regulated occupational therapist with at least 3 years' full-time or its equivalent of professional experience prior to the Level II fieldwork. Supervision will include a minimum of 8 hours of direct supervision each week of the fieldwork experience. An occupational therapy supervisor will be available, via a variety of contact methods, to the

student during all working hours. An on-site supervisor designee of another profession will be assigned while the occupational therapy supervisor is off site.

3.8 International Fieldwork Policy

Samuel Merritt University does not provide occupational therapy fieldwork assignments outside the United States. The focus of our program is to prepare students for passing the NBCOT examination and for practicing in the U.S. Providing fieldwork within the U.S. is the most effective way to provide students the relevant knowledge and skills necessary for practice within the U.S.

3.9 Level II Fieldwork Duration and Dates

Each student is required to complete a minimum of 24 weeks' full-time Level II fieldwork. In special circumstances this may be completed on a part-time basis, as defined by the fieldwork placement and 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. The student can complete Level II fieldwork in a minimum of one setting if it is reflective of more than one practice area, or in a maximum of four different settings. The site's definition of full time is typically used for fieldwork. In general, a work week is defined as 40 hours. With prior approval of the AFWC and the site, 32 hours direct care with the expectation of additional after hours work can be approved, but more typically we extend the number of weeks to provide an appropriate experience.

The table below provides the dates for Level II fieldwork. There may be some variance in fieldwork dates due to individual student circumstances or sites' needs. Students are expected to be fully available for fieldwork for the entire six (6) month period.

Table 2. Level II Fieldwork Dates

	2027	2028	2029
First Rotation Summer Semester	5/17 to 8/6	5/15 to 8/4	5/14- 8/3
Second Rotation Fall Semester	8/23 to 11/12	8/28 to 11/17	8/23-11/16

3.10 LEVEL II FIELDWORK: FORMS

Standard AOTA forms used in Level II Fieldwork include:

- AOTA Student Evaluation of the Fieldwork Experience (SEFWE) (Appendix G)
- Fieldwork Performance Evaluation (FWPE) (Appendix F)
- NEOTEC Site Specific Objectives (See Appendix E)

Fieldwork educators are responsible for completing the online Fieldwork Performance Evaluation of the Occupational Therapy Student (FWPE) tool (Appendix F) at mid-term and again at the conclusion of Level II Fieldwork. Student assessment of fieldwork performance will be calculated by the fieldwork educator followed by a discussion of the findings of the evaluation between the students and the fieldwork educator. Mid-term and final FWPEs are then accessed by the FWE and the AFWC.

Students are responsible for completing the AOTA Student Evaluation of the Fieldwork Experience (SEFWE) form (Appendix G) upon completion of each 12-week affiliation and submitting the form. As part of program evaluation, info on Exxat. Information from the SEFWE is used to assess the ability of current fieldwork sites to meet OTD and MOT program objectives. Future students will have access to the SEFWE for information regarding fieldwork placements during the selection process.

4. Requirements for Fieldwork

4.1 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, on Exxat, and online at <https://www.samuelmerritt.edu/occupational-therapy-fieldwork-education>. Site specific requirements vary and change. **It is each student's personal responsibility to verify the current requirements for each assigned site within 2 weeks of receiving a fieldwork assignment and uploading information to EXXAT.**

Table 3. Common Requirements for Fieldwork

Requirement	Notes	Documentation
Physical examination	To be completed within 12 months of starting fieldwork. Some sites require the physical to be even more recent.	Student will upload documentation in Exxat. Additionally, be prepared to provide a copy of original health records if requested at each site.
Updated immunization	Refer to section 4.4 for more information	
Flu shot	Needed if placement is at a medically-based site during flu season. Must wear a mask if flu shot is declined.	
TB test	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.	
COVID vaccine or COVID negative test	Though the COVID vaccine is no longer required through Student Health, it may be required by some clinical sites. An exemption form is available through the University, though this may not be accepted by a clinical site.	
CPR for Healthcare Providers	Must remain current for the entire duration of fieldwork. This must be completed through the American Heart Association. Compliance must be maintained and updated prior to all clinical experiences.	
Bloodborne pathogens certification	Refer to section 4.7	Student uploads certificates to Exxat and takes copies to each site
HIPAA training	Refer to section 4.8	

These additional requirements may be required. They are provided by the student directly to their site		
Background checks	Refer to section 4.9	Obtain specific instructions from the fieldwork site. Student provides proof directly to each site.
Fingerprinting	Refer to section 4.10	
Drug testing	Refer to section 4.11	
N95 mask	Refer to section 4.12	

4.2 Student Responsibility for Obtaining Required Documentation

It is the students' personal responsibility to ensure that all requirements are fulfilled prior to starting fieldwork. Physical examination, immunizations, and TB testing are provided at Samuel Merritt University's Student Health Services. Completed background checks can be accessed by the student through the CastleBranch portal. Fees incurred to meet fieldwork requirements are the student's responsibility.

4.3 Student Information Release to Fieldwork Sites via EXXAT

For planning purposes, the AFWC needs to release student information to fieldwork sites. Students are responsible for uploading relevant documentation on their EXXAT account. In addition, students must expressly authorize this release of information on the "Review & Sign" page of the student profile on EXXAT.

4.4 Immunization Requirements

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

- Measles (Rubella), Mumps and Rubella
- Hepatitis B
- Varicella (Chicken Pox)
- Tdap
- COVID vaccine + booster

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.

4.5 Influenza (flu) Vaccine

Hospitals commonly require their workers to either have evidence of a flu shot or to wear a mask when working with their patients during flu season. Samuel Merritt University requires students to have a flu shot before starting any clinical experience. Please plan to obtain a flu shot or expect to wear a mask during patient contact.

4.6 COVID Guidelines

COVID guidelines are continuously changing. The student is responsible for asking each fieldwork site about specific guidelines for COVID; the COVID vaccine and COVID testing may be required.

4.7 Bloodborne Pathogens Certification

Students are required to complete an online self-study course to obtain the bloodborne pathogens certification. To meet this certification, you will complete an assigned course on VectorLMS. At the conclusion of the course, you will receive a certificate of completion. Please keep a certificate for your own records and upload a copy to Exxat.

4.8 HIPAA Training

HIPAA regulations require that all clinicians must comply with confidentiality standards. The Level I AFWC will provide students with specific instructions for completing a self-study training module on VectorLMS. Upon completion of the module, students will receive a certificate of completion and sign a confidentiality agreement. Students should save a copy of the confidentiality agreement for their own records and upload a copy to Exxat. Some fieldwork sites may require students to undergo additional HIPPA training.

4.9 Background Checks

Many fieldwork sites require criminal background checks prior to starting fieldwork. Occasionally, the background check completed by students prior to entry into SMU is sufficient to meet the fieldwork site's requirements. More often, the site will want an additional background check that is completed no more than 3 months prior to starting fieldwork. Instructions to access an additional background check can be found on the SMU Student Services page website

<https://www.samuelmerritt.edu/discover/student-experience/studentservices>

It is the student's responsibility to complete these requirements well in advance of starting fieldwork to avoid a delay in start date. A background check can take 3-4 weeks to complete; please factor this in when planning. There may be fees associated with background checks; students are responsible for paying their own fees.

4.10 Fingerprinting/Live Scan

Students are often required to complete fingerprinting prior to working with pediatric clients. Some sites may require the Live Scan method and will provide you with the necessary forms and specific instructions.

4.11 Drug Screening

Students may be requested to complete 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 preferred by the fieldwork site, students may be asked to schedule their own drug screenings for a fee. Instructions are available on the Student Services page: <https://www.samuelmerritt.edu/discover/student-experience/student-services>.

If you are taking a medication that your physician has indicated can create a false positive on a drug screen, then it is up to the student to provide the drug testing site with the necessary document/proof indicating they are on prescription medicines. This is the only way the drug testing centers can verify that it is prescription meds and produce a negative drug screen document for the student. FW sites will not accept students without a negative drug screen.

If you use marijuana recreationally, it is recommended that you consult with your physician prior to a drug screening. You may not pass a drug screen if there is tetrahydrocannabinol (THC) in your system. The SMU Student Health and Counseling Center recommends abstaining from marijuana use or getting a prescription for medicinal cannabinoid if you are required to complete a drug screening.

4.12 N95 mask

The N95 mask is a lightweight, nose-and-mouth respirator that can provide some level of protection from airborne pathogens. Students may be required to be fitted for the N95 mask prior to fieldwork. An N95 mask fit test can be completed through WellnessMart, or if additional instructions are provided by your site. The student is responsible for the cost of the N95 mask fit.

5. Planning and Preparing for Fieldwork

5.1 Contacting the Fieldwork Site Prior to Fieldwork

Level IB Fieldwork

Students receive assignments for Level I typically in the Spring. The student is responsible for contacting the site as soon as possible to schedule the specific dates of the fieldwork experience and to request/confirm the onboarding requirements for the site. It is imperative that students begin the onboarding processes immediately as these often take time.

Level II Fieldwork

Many fieldwork sites require students to complete an interview before confirming a student for a Level II placement. The fieldwork site will usually inform a student in advance when an interview is necessary, and the student will contact the site directly to schedule the interview. The AFWC will send the contact name and email to the student. In some instances, interviews are competitive with other potential students from other programs. Other times, the interview is non-competitive and intended to be informational and to ensure a match. Students are encouraged to schedule a practice interview with the AFWC or another faculty of their choice; all faculty are available to support students with this interview process. The student should also be sure their resume is updated and posted in Exxat. Most sites request the student's resume be emailed to them.

If contacted by a site to interview, the student should attempt to schedule the interview at a time that does not interfere with SMU classes. If this is not possible and the student will have to miss a class to attend a fieldwork interview, the student is required to notify the academic fieldwork coordinator as well as obtain advanced permission from the instructor of the class affected. The student is responsible for making up any missed work and course content.

If you have not been contacted by your site or FEW, then **at least four weeks prior to the start** of the scheduled Level II Fieldwork, students will contact the Fieldwork Educator to verify the start date, arrival time and location where they will meet their Fieldwork Educator.

5.2 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 and options to meet their financial obligations during fieldwork. Level II Fieldwork is usually 40 hours per week for 24 weeks. Level II Fieldwork is a rigorous time, and students will be required to complete learning activities and Canvas assignments in addition to the 40 hours per week at the fieldwork site. **Employment in addition to Level II Fieldwork is strongly discouraged.**

5.3 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 in advance of beginning their Level II placement.
2. The requested accommodations do not cause undue hardship on the operations of the specific site.
3. The requested accommodations do not fundamentally alter the nature of the services provided at the site.
4. Students can demonstrate the ability to maintain ***essential job functions*** required 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 request accommodations, as well as when and how to do so, are solely the student's decision.

- Requests for disability accommodations at fieldwork sites should be addressed with the Disability Resource Center (DRC), which will consult with the AFWC.
- If clinical accommodations are approved by the DRC, the method of notification to the site will be determined jointly by the AFWC, DRC, and the student.
- If a student who has a documented disability chooses to request accommodations during fieldwork, the student is encouraged to contact the DRC as early as possible.
- A student may 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.
- Students are encouraged to access the SMU DRC <https://www.samuelmerritt.edu/discover/studentexperience/student-affairs/disability> <https://www.samuelmerritt.edu/discover/student-experience/student-affairs/disability-resource-center> [resource-center](#) for more information.
- If you have any questions, contact the Academic Fieldwork Coordinator.

6. Professional Behaviors During Fieldwork

6.1 Professional Conduct

All fieldwork students are required 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. Students are responsible for adhering to the professional behavior standards as stated in the: Samuel Merritt University Occupational Therapy Department Student Handbook, Samuel Merritt University Student Handbook, and AOTA's Occupational Therapy Code of Ethics.

6.2 Site-Specific Professional Expectations

During 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, and dress requirements. It is the student's responsibility to clarify site-specific dress standards prior to each fieldwork assignment. Dress standards are based on safety, and professional image considerations. The following is a summary of common dress standards for occupational therapy practice:

Table 4. Professional Dress Code Requirements

Name tags	Worn visibly at all times
Hair	Worn neatly (tied back if needed) to avoid interfering with therapy activities
Nails	Appropriate length for physical handling of clients
Fragrances	No perfume, cologne or other body fragrances due to the potential negative effect on clients who have impaired respiratory or neurological function
Jewelry	Should be minimal and should not interfere with therapy activities. Some areas such as ICU request jewelry removal before entering.
Shoes	▪ Close-toed ▪ Flat-heeled ▪ Slip-resistant soles
Pants	▪ No jeans ▪ No exercise or yoga pants ▪ Undergarments and skin should remain concealed when bending and reaching
Shirts	▪ No T-shirts, tank tops or exercise attire ▪ Undergarments and skin should remain concealed when bending and reaching
Lab coats	May be required

Tattoos and piercings	Some settings may require that tattoos and piercings be covered while at work. If you have extensive tattoos and piercings, please check with your site prior to the start of fieldwork to obtain guidelines.
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6.3 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, tampering with client charts or accessing information about clients not on their caseload. 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 pseudonyms to maintain confidentiality.

6.4 Mandatory Reporting

Students receive information about preventing and reporting 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.

In addition, 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.

6.5 Occupational Injury Protocol

It is the student's responsibility to become familiar with this protocol prior to starting fieldwork (see section 2.6 of this Manual). Samuel Merritt University Clinical Student Injury Procedures must be followed if a fieldwork student is injured on the job. Please also notify the Academic Fieldwork Coordinator immediately.

6.6 Sexual Harassment Policy

Samuel Merritt University's sexual harassment policy applies to students who are on fieldwork. As defined in the *SMU Catalog and Student Handbook*, sexual harassment is any "unwelcome sexual or gender-based verbal, written, online and/or physical conduct." Trust your gut feeling and contact the AFWC immediately if you have any concerns that you are being sexually harassed.

Other SMU staff here to support you are:

Charu Bhatia

SMU Title IX Coordinator

Charu.Bhatia@samuelmerritt.edu

6.6 Holidays and Absences

Samuel Merritt University allows no more than **three total days** of *any* student absence (which may include site holidays or sick days) per 12-week rotation. **However, if a fieldwork site has specific requirements that do not allow any days off, the school defers to such policy.** Students must use the timesheet in Exxat Prism to show their hours for each fieldwork rotation. If a student is absent from Fieldwork, they must contact the AFWC in addition to their Clinical Instructor to inform of their absence.

The student is allowed time off for holidays observed by the fieldwork site; SMU academic calendar holidays are not days off for students who are in fieldwork. If the fieldwork site observes more than three days of holidays during a student's rotation, the AFWC and the fieldwork educator will collaboratively determine an alternate plan. For example, the student may either extend the duration of the fieldwork or the student may be assigned to work on an independent project to continue accruing fieldwork hours.

In addition to site holidays, Samuel Merritt University's occupational therapy program allows students to take time off for illness and emergencies. A fieldwork site may require documentation to support such an absence requested/taken by a student. If a student is absent from fieldwork for more than three days during a 12-week rotation, the student is responsible for arranging to make up the missed time.

6.7 Updating Health Status and Contact Information

If a student develops a health condition that may limit their 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 Samuel Merritt's website at <https://www.samuelmerritt.edu/programs/doctor-and-master-occupational-therapy>.

The student must provide the AFWC with current address and phone contact information over the course of fieldwork. The AFWC must be able to reach a student at any time.

6.8 Note of Appreciation

Within two weeks following the completion of fieldwork assignments, students are encouraged to write a note to their Fieldwork Educators, thanking them for their time and professional commitment to provide fieldwork experience.

7. Contingency Planning for Level II Fieldwork

7.1 Communication Is Key

Students must be proactive in obtaining regular, ongoing feedback from their Fieldwork Educators regarding their clinical progress over the course of fieldwork. If areas of concern regarding student performance are identified early, the student, Fieldwork Educator (FWE) and Academic Fieldwork Coordinator will have a better opportunity to address those concerns. The student is encouraged to directly communicate with the FWE on a regular basis to clarify whether the student is meeting the required clinical expectations for fieldwork. Available tools to facilitate this communication process include:

- Regularly scheduled supervision meetings (frequency may range from daily to weekly, depending on the FWE and the practice setting)
- Completion and discussion of the Level II Fieldwork, Student Feedback Regarding Fieldwork Supervision Process form (provided in the Appendix B of this manual) to facilitate communication of student needs
- Completion and discussion of the Level II Fieldwork, 4 Week and 8 Week Evaluation forms (provided in the Appendix)
- Completion of the Fieldwork Essential Assessment Tool (FEAT) with the FE and possibly with the AFWC in attendance
- Completion of the Student Evaluation of Fieldwork Experience (SEFWE) and sharing the evaluation with the FE
- Reviewing the Level II Fieldwork, AOTA Fieldwork Performance Evaluation (FWPE, Appendix E) for the Occupational Therapy Student (provided in the Appendix E) at midterm and final.

During fieldwork, students can access the above communication tools on Canvas. The SEFWE will be available on EXXAT. The FWPE will be completed by the fieldwork educator online.

Students are encouraged to discuss their learning needs and preferences 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.

If concerns arise...

- 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.
- If a 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 works with both the student and the FE to support the student's successful completion of the fieldwork assignment.
- Development of a learning contract/plan may improve communication between the student and the Fieldwork Educator to facilitate successful completion of fieldwork. Chapter 8 of this manual provides more information about learning contracts. Learning contract templates will be available to the student on Canvas during fieldwork.

7.2 Minimum Entry-level Clinical Skills

To pass each fieldwork placement, a student must demonstrate the minimum competency level of an entry level occupational therapist in that practice setting. SMU uses AOTA's Fieldwork Performance Evaluation (FWPE) scoring guidelines to determine whether minimum entry-level skills have been met. A copy of this evaluation form is provided in the Appendix of this manual. It is important to note that by the end of fieldwork, students must achieve ***proficient performance*** in three fundamentals of practice:

- 1) Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations,
- 2) Adheres to safety regulations and reports/documents incidents appropriately, and
- 3) Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents.

Failure to achieve ***proficient performance*** as defined by the FWPE scoring guide in any of the three aforementioned fundamental skills will result in failing a fieldwork placement.

If at midterm the student has received a score of below 80 then they should reach out to the AFWC and set up a meeting, or the AFWC will contact the FWE to discuss the student's progress. The purpose is to set up a corrective course of action and to provide extra support to the student.

If a Fieldwork Educator indicates and the AFWC confirms 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 sooner but should be apparent by the 10th week. Failing fieldwork should never be a surprise to a student, and mediation should always be tried first.

7.3 Student Request to Discontinue Fieldwork

If for any reason a student wishes to discontinue a Level II Fieldwork placement, the student must continue 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. Initial action should focus on resolution, including 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 learning contract to address concerns; or removal of the student from the site.
3. If a student leaves the Level II Fieldwork site **without prior permission** from the Academic Fieldwork Coordinator, the student **may 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, the AFWC decides 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, the AFWC will conduct an investigation and may give the student an "In Progress" grade 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 may *not* count toward the required 12 weeks per fieldwork.
7. If a student is showing a specific pattern of behavior or area of concern, the AFWC has the option of creating a remediation course for that student. This course is a 0 unit course and is titled OT 799 or OT 699. The AFWC will create a team of professors and a specific course of study to address the concerns. This course typically includes simulation videos, simulation lab experiences with debriefs, assigned reading, reflective writing assignments, and documentation homework.

7.4 Disciplinary Action Due to Violation of SMU Policy

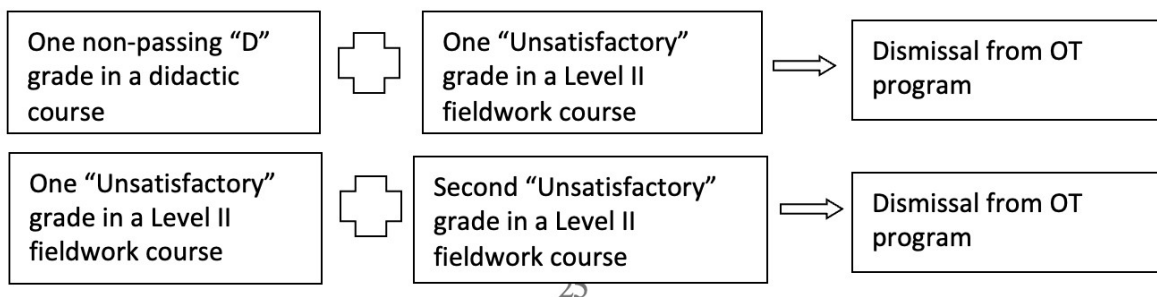
Students enrolled at Samuel Merritt University assume an obligation to conduct themselves in a manner compatible with the philosophy of the University, the professional code of ethics, and state laws and regulations pertaining to their profession. Issues which could result in disciplinary action, receiving a non-passing grade for a fieldwork assignment or expulsion from the OT 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**. All students are responsible for familiarizing themselves with this information as it pertains to fieldwork.

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

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



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. Every effort will be made to find another site for the student who needs to repeat a fieldwork course. 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.

7.6 Impact on Progression Through the Curriculum

Should a student need to withdraw, delay or repeat fieldwork for any reason, there are no guarantees about when another fieldwork placement can be scheduled. For MOT students needing to repeat a fieldwork, this waiting period for a placement may further delay their graduation from the program.

For OTD students, ACOTE stipulates that the capstone experience can only be started after completion of all other coursework and Level II fieldwork. Thus, the need to repeat or restart a fieldwork rotation would delay the start of the 14-week capstone experience and subsequent graduation from the program.

7.7 Leave of Absence (LOA)

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. This LOA must be approved by the AFWC, and only students who are in good academic standing are allowed to take a LOA. If students receive financial aid, they should contact the SMU financial aid office before taking a LOA to determine the financial implications.

8. Learning Contracts

8.1 Introduction to Learning Contracts

In addition to site-specific weekly student learning objectives (see Appendix E. Additionally, examples can be accessed from AOTA 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 need 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.

8.2 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 regarding 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 <https://www.samuelmerritt.edu/ot/fieldwork-forms> for a sample learning contract and examples of learning contract templates.

9. The NBCOT Certification Exam

9.1 About the NBCOT certification exam

Passing the NBCOT certification exam entitles an individual to use the designation Occupational Therapist Registered (OTR). Although each state's licensure law is unique, in general, individuals need to pass the NBCOT certification exam before they are eligible to obtain a state license and practice as an occupational therapist in the United States.

The NBCOT certification exam is a computer-based exam that is designed to evaluate the assimilation of information related to the practice of occupational therapy. The NBCOT website www.nbcot.org provides students with comprehensive information about the exam.

9.2 Exam preparation process and policies

Students will take a practice exam during the spring semester before fieldwork in the course OT7037, the OTKE (Occupational Therapy Knowledge Exam). In addition, students are provided resources and guidance to establish a study plan for the NBCOT exam. MOT students are eligible to sit for the NBCOT exam after completion of Level II Fieldwork. OTD students are eligible to sit for the NBCOT exam during or after the completion of the two final capstone courses (OT 7054 and OT 7055). The OT Department Chair will provide additional information about the process and departmental policies regarding the NBCOT exam.

Appendix A – Level I Fieldwork Evaluation

Please return this form to Nichole Vasquez, OTD, OTR/L, BCPR, CPAM
Academic Fieldwork Coordinator, Level I
Samuel Merritt University, Occupational Therapy Department

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 – 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 **after 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

	1	2	3	4	5	Comments & Explanations
Orientation						
Structure						
Variety of clients						
Variety of interventions						
Supervision						
Independence						
Feedback						
Method of instruction						
Clarity of communication						
Clarity of expectations						
Meetings with supervisor						
Meetings with others						
Supportive environment						
Learning resources						

Accessibility of resources						
----------------------------	--	--	--	--	--	--

Other Comments:

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.

Appendix D- Fieldwork II, Sample Weekly Student Schedule

This sample schedule should be adjusted for each individual student's learning pace and needs.

Week 1:	Orientation to the facility, the inter-professional team, and documentation method Scheduling – instruction on scheduling at site Establish weekly meeting time with supervisor Set expectations between student and fieldwork educator Observe staff with clients Familiarize with all OT equipment
Week 2:	Begin orientation to evaluations commonly used in facility (may have begun previous week) Orient to client safety issues - transfers, restraints, etc. (may have begun previous week) Begin client treatment with one client (or more at the discretion of the supervising therapist)
Week 3:	Instruction in evaluation, perform portions of evaluations with supervisor Present/report information about a client at team meeting with supervisor Discuss plan for final project with supervisor Assume no more than 25% of caseload typical of an entry level therapist at this facility
Week 4:	Select content and initiate client evaluation, with supervision Continue with orientation to common evaluation materials – practice time is good Observe special evaluation (i.e., kitchen or home eval)
Week 5:	Assume 50% of caseload typical of an entry level therapist at this facility if fieldwork educator feels students is ready.
Week 6:	Assume 50% of caseload typical of an entry level therapist at this facility by this week Discuss case study with supervisor Supervisor provides written midterm evaluation
Week 7:	Project due Present project in department in-service Continue with 50% of caseload typical of an entry level therapist at this facility
Week 8:	Assume 75% of caseload typical of entry level therapist at this facility Plan case study presentation
Week 9:	Continue 75% caseload
Week 10:	Assume 85-95% of caseload typical for an entry level therapist at this facility
Week 11:	Continue with full caseload

Present case study in department in-service

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

Typical caseload equivalent in typical facility:

25% = 1-2 hours of client contact per day 50% = 3 hours of client contact per day
75% = 4-5 hours of client contact per day full = 6-7.5 hours of client contact per day

Appendix E- Fieldwork II, Sample Objectives

Level II Fieldwork Objectives

Week 1: Site Orientation/Time Management:

- ✓ Facility tour, review site student manual, AOTA fieldwork resources, documentation review;
- ✓ Completes site orientation regarding HIPAA/OSHA/safety;
- ✓ Learns fieldwork supervisor's daily routines;
- ✓ Orients to site-specific objectives including independent learning activities such as evidence-based article reviews, presentations, case studies, etc.;
- ✓ Introduction to scheduling, billing, coding, documentation, and data collection forms;
- ✓ Reviews confidential charts for a few clients on supervisor caseload;
- ✓ Completes treatment observations, write up and review with supervisor;
- ✓ Writes treatment plan, grade therapeutic activity, begins journals as required by site;
- ✓ Student begins to assist in therapy sessions as appropriate, and meet daily with supervisor (directive)
- ✓ Student begins to assist in therapy sessions as appropriate; and meets daily with supervisor (directive).

Week 2: Intervention/Evaluations Begins

- ✓ Reviews assignments, completes observations/chart reviews; Learns fieldwork supervisor's weekly routines;
- ✓ Records observations and partial administration of evaluations;
- ✓ Completes discharge summary/transfer of services forms, supervisor gives feedback;
- ✓ Reviews and assists daily documentation, billing, coding;
- ✓ Student develops, reviews and implements treatment plans for 1-3 clients; Student grades a therapeutic activity listing ways to modify for different skill level;
- ✓ Researches and summarizes two evidence-based journal articles relevant to site; Chart reviews, treatment observation(s) with responses; and
- ✓ Supervisor reviews student progress in daily meeting with supervisor (directive).

Week 3: Assume Responsibility for ¼ Caseload

- Reviews assignments from previous week;
- ✓ Completes evaluation(s) and corresponding documentation with supervisor as observer and providing feedback;
- ✓ Interprets evaluation results based on age/developmental skill level, including all relevant information regarding prospective discharge scenario;
- ✓ Increased completion and implementation of treatment plans, discharge summaries, and corresponding documentation.
- ✓ Supervisor reviews, offers suggestions;
- ✓ Student completes treatment analysis for supervisor;
- ✓ Develops a list of suggested home activities; and meets daily with supervisor (directive).

Week 4: Supervision moves to coaching style from directive style

- ✓ Supervisor will review student progress and assignments from previous week; begins to plan week to week
- ✓ Orients to specific client conditions;
- ✓ Increase caseload for treatment planning, sessions, evaluations/discharge, and corresponding documentation and billing;
- ✓ Completes treatment analysis and writes up proposed summary and recommendations of observed evaluation
- ✓ Develops goals and objectives for client evaluation with supervisor providing feedback
- ✓ Observes at least one other professional working with client
- ✓ Student will add one new treatment and/or activity to therapeutic tools' and meets weekly to check-in 'as needed' with supervisor
- ✓ Completes treatment analysis; ✓ Writes up proposed summary and recommendations of observed evaluation; ✓ Develops relevant goals/objectives for client evaluation, supervisor provides feedback; ✓ Observes at least one other professional working with client;

Week 5: Student transitioning to primary therapist/leader

- ✓ Reviews assignments from previous week;
- ✓ Develops, reviews and implements treatment sessions for ½ therapist caseload with corresponding documentation and billing
- ✓ Reviews client work samples, most recent assessment, progress notes, and develops goal/objectives;
- ✓ Develops treatment plans for five clients, supervisor provides feedback; ✓ Completes treatment analysis for one session, supervisor provides feedback; ✓ Completes an equipment justification letter/form;

- ✓ Develops intervention strategies with another professional working with client;
- ✓ Meets weekly and check in “as needed” with supervisor; and Complete Level II Fieldwork Midterm Feedback form and review with supervisors.

Week 6: Assume responsibility for ½ therapist caseload

- ✓ Reviews assignments from previous week;
- ✓ Develops and implements treatment sessions for ½ therapist caseload with corresponding documentation and billing;
- ✓ Presents to staff case study/ evidence-based article review, therapeutic treatment tools;
- ✓ Participates in interprofessional collaborative practice with more than one other professional in co-treating or co-leading, team planning demonstrating competency in values/ethics (IPEC, 2011);
- ✓ Meets weekly and checks in “as needed” with supervisor; and ✓ Complete midterm evaluation and discuss areas of strengths and areas for continued growth with student. ✓ Contacts the AFC coordinator as appropriate.

Week 7: Supervision moves from coaching style to supporting style

- ✓ Reviews assignments from previous week; ✓ Designs, implements treatment sessions and corresponding documentation; ✓ Types up client adaptation, accommodation and/or modifications for one client to be reviewed with staff;
- ✓ Grades one therapeutic activity listing ways to modify for different skill levels; ✓ Begins co-treating or group co-leading each day, as appropriate; ✓ Participates in interprofessional collaborative practice with more than one other professional in co-treating or co-leading, team planning developing competency in roles/responsibility (IPEC, 2011); and
- ✓ Meets weekly and checks in “as needed” with supervisor.

Week 8: Caseload increasing, increasing focus on interprofessional collaborative practice

- ✓ Review assignments from previous week;
- ✓ Student will present modifications to appropriate staff with supervisor present; ✓ Designs and implements treatment and completes corresponding

documentation from $\frac{3}{4}$ supervisor's caseload; Complete treatment analysis for one session;

- ✓ Participates in interprofessional collaborative practice with more than one other professional in

co-treating or co-leading, team planning developing competency in interprofessional communication (IPEC, 2011); and

- ✓ Meets weekly and checks in “as needed” with supervisor, review overall student progress.

Week 9: Increasing autonomy

- ✓ Reviews assignments from previous week;
- ✓ Designs and implements treatment and completes corresponding documentation from $\frac{3}{4}$ supervisor’s caseload;
- ✓ Completes $\frac{1}{2}$ supervisor’s caseload evaluations/re-evaluations/discharge summaries from supervisor caseload;
- ✓ Develops treatment plans for supervisors’ full caseload each day; ✓ Completes treatment analysis form for one session; ✓ Identifies and begin work on final project;
- ✓ Participates in interprofessional collaborative practice with more than one other professional in co-treating or co-leading, team planning developing competency in teams and teamwork (IPEC, 2011); and
- ✓ Meets weekly and checks in “as needed” with supervisor.

Week 10: Assume responsibility for all clients on caseload

- ✓ Supervisor reviews student progress with student;
- ✓ Designs/implements treatment and evaluation sessions for supervisor’s full caseload and corresponding documentation;
- ✓ Supervision moves to delegating style from supporting styles; ✓ Works on final project;
- ✓ Participates in interprofessional collaborative practice; and meets weekly and checks in “as needed” with supervisor.

Week 11: Continues responsibility for full caseload

- ✓ Reviews assignments from previous week;
- ✓ Implements OT interventions/evaluations as appropriate for full supervisor’s full caseload and discuss feedback with supervisor;
- ✓ Sets up/implement consultation time with a staff member; ✓ Implements a group treatment session on therapist’s caseload; ✓ Participates in interprofessional collaborative practice;
- ✓ Works on final project;
- ✓ Meets weekly and checks in “as needed” with supervisor; and

- ✓ Student completes AOTA Student Evaluation of the Fieldwork Experience (SEFWE).

Week 12 (Final Week): Continues full caseload, final project, final evaluation

- ✓ Reviews assignments from previous week;
- ✓ Implements treatment sessions for full caseload and discuss feedback with supervisor;
- ✓ Presents final project;
- ✓ Participates in interprofessional collaborative practice;
- ✓ Student discusses results of SEWE with fieldwork supervisors, provide original to site;
- ✓ Supervisors complete FINAL EVALUATION on student's performance and discusses results with the student; provide copy to student; original copy to
FW coordinator; and ✓ Site FW coordinator will mail the Performance Evaluation Form and the Student Evaluation of the Fieldwork Experience to the Academic Fieldwork Coordinator.

Appendix F – Level II Fieldwork, AOTA Fieldwork Performance Evaluation (FWPE) for the Occupational Therapy Student

Fieldwork educators will receive email instructions for completing and submitting the AOTA fieldwork evaluation online via Formstack.

Rating Scale

Rating	Definition
4 – Exemplary performance	Demonstrates satisfactory competence in specific skills consistently; demonstrates substantial breadth and depth in understanding and/or skillful application of fundamental knowledge and skills.
3 - Proficient performance	Demonstrates satisfactory competence in specific skills; demonstrates adequate understanding and/or application of fundamental knowledge and skills.
2 - Emerging performance	Demonstrates limited competence in specific skills (inconsistencies may be evident); demonstrates limited understanding and/or application of fundamental knowledge and skills (displays some gaps and/or inaccuracies).
1 -Unsatisfactory performance	Fails to demonstrate competence in specific skills; performs in an inappropriate manner; demonstrates inadequate understanding and/or application of fundamental knowledge and skills; (demonstrates significant gaps and/or inaccuracies).

Scoring Guidelines

The *midterm* evaluation does not have a PASS/FAIL status.

To receive a passing score on the *final* FWPE:

1. All items included must be scored.
2. The sum score must be 111 or higher.
3. All items must have a score of 2 or higher. Scores of 1 on any of the items are not allowed.
4. A **score of 3** or higher is required on these items
 - # 1: Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations
 - # 2: Adheres to safety regulations and reports/documents incidents appropriately
 - # 3: Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents.

Fieldwork Performance Evaluation (FWPE) for the Occupational Therapy Student (Revised in 2020)

FUNDAMENTALS OF PRACTICE	
1	Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations. Examples: Medicare, Medicaid, client privacy, social media, human subject research
2	Adheres to safety regulations and reports/documents incidents appropriately. Examples: fire safety, OSHA regulations, body substance precautions, emergency procedures
3	Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents. Examples: body mechanics, medical safety, equipment safety, client-specific precautions, contraindications, community safety
BASIC TENETS	
4	Articulates the values, beliefs, and distinct perspective of the occupational therapy profession to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public
5	Articulates the value of occupation as a method and desired outcome of occupational therapy to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public
6	Articulates the role of occupational therapy practitioners to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public
SCREENING AND EVALUATION	
7	Articulates a clear and logical rationale for the evaluation process based on client information, contexts, theories, frames of reference, and/or practice models.
8	Obtains sufficient and necessary information from relevant sources throughout the evaluation process. Examples: record or chart review, client, family, caregivers, service providers

9	Selects relevant screening and assessment tools based on various factors. Examples: Psychosocial factors, client priorities, needs, and concerns about occupational performance and participation, theoretical support, evidence, practice context, funding sources, cultural relevance
10	Determines the client's occupational profile and occupational performance through interview and other appropriate evaluation methods.
	Occupational profile: Summary of the client's occupational history and experiences, patterns of daily living, interests, values, and needs. Occupational performance: Act of doing and accomplishing a selected action (performance skill), activity, or occupation that results from the dynamic transaction among the client, the context, and the activity. Improving or enabling skills and patterns in occupational performance leads to engagement in occupations or activities.
11	Evaluates and analyzes client factors and contexts that support or hinder occupational performance. Client factors: Specific capacities, characteristics, or beliefs that reside within the person and that influence performance in occupations. Client factors include values, beliefs, and spirituality; body functions (includes psychological functions); and body structures. Contexts: Variety of interrelated conditions within and surrounding the client that influence performance, including cultural, personal, physical, social, temporal, and virtual contexts. Includes the consideration of all client centered components including psychosocial factors
12	Administers standardized and non-standardized assessments and surveys accurately and efficiently to ensure findings are valid and reliable. Examples: follows assessment protocols, adheres to time guidelines
13	Modifies evaluation procedures based on client factors and contexts. Examples: uses a quiet space, breaks up evaluation into smaller parts, provides multisensory instructions
14	Interprets evaluation results to determine the client's occupational performance strengths and challenges.
15	Synthesizes and documents the results of the evaluation process clearly, accurately, and concisely, using systematic methods to record the client's occupational performance.
INTERVENTION	
16	Articulates a clear and logical rationale for the intervention process based on the evaluation results, contexts, theories, frames of reference, practice models, and evidence.
17	Establishes an accurate and appropriate client-centered plan based on the evaluation results, contexts, theories, frames of reference, and/or practice models. Examples: creates relevant and measurable goals in collaboration with the client and/or family/caregivers; recommends additional consultation and referrals

18	Uses evidence from research and relevant resources to make informed intervention decisions.
19	Selects client-centered and occupation-based interventions that motivate and challenge the client to achieve established goals that support targeted outcomes. Includes the consideration of all client centered components including psychosocial factors
20	Implements client-centered and occupation-based intervention plans. Includes the consideration of all client centered components including psychosocial factors
21	Chooses and, if needed, modifies intervention approach to achieve established goals that support targeted outcomes. Examples: prevention, restoration, maintenance, promotion
22	Modifies task and/or environment to maximize the client's performance.

	Examples: upgrades/downgrades task; arranges client's workspace for optimal performance
23	Modifies the intervention plan and determines the need for continuation or discontinuation of services based on the client's status.
24	Documents the client's response to services in a manner that demonstrates the effectiveness of interventions.

MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES

25	Demonstrates through practice or discussion the ability to collaborate with and assign appropriate tasks to the occupational therapy assistant, occupational therapy aide, or others to whom responsibilities might be assigned, while remaining responsible for all aspects of treatment. Examples: paraprofessionals, nurses' aides, volunteers
26	Demonstrates through practice or discussion an understanding of costs and funding systems related to occupational therapy services, such as federal, state, third party, and private payers. Examples: billing for OT services, inventory and ordering of supplies for OT services, and options for client procurement of adaptive equipment
27	Demonstrates knowledge about the organization. Examples: mission and vision, accreditation status, licensing, specialty certifications
28	Meets productivity standards or volume of work expected of occupational therapy students.

COMMUNICATION AND PROFESSIONAL BEHAVIORS

29	Communicates clearly and effectively, both verbally and nonverbally. Examples: clients, families, caregivers, colleagues, service providers, administration, the public
30	Produces clear and accurate documentation. Examples: legibility, spelling, punctuation, grammar, adherence to electronic health documentation requirements

31	Collaborates with fieldwork educator(s) to maximize the learning experience. Examples: initiates communication, asks for feedback about performance, identifies own strengths and challenges
32	Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with fieldwork educator(s) and others.
33	Responds constructively to feedback in a timely manner.
34	Demonstrates consistent and acceptable work behaviors. Examples: punctuality, initiative, preparedness, flexibility, dependability, professional appearance
35	Demonstrates effective time management. Examples: plans ahead, adheres to schedules, completes work in expected timeframe
36	Manages relationships effectively through therapeutic use of self and adjusts approach to meet the needs of clients and others.
37	Demonstrates respect for diversity factors of others. Examples: culture, socioeconomic status, beliefs, identity

Appendix G – SEFWE

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 fieldwork educator[s] 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
- Provide objective information to students who are selecting sites for future Level II fieldwork

This form is designed to offer each program the opportunity to gather meaningful and useful information. Programs may adapt this form to suit their needs.

Instructions to the Student:

Complete the SEFWE before your final meeting with your fieldwork educator(s).

Make a copy of the form for yourself. This form gets submitted to your fieldwork educator during or after you review your final fieldwork performance evaluation (FWPE). The SEFWE is signed by you and the fieldwork educator(s).

Instructions to the Fieldwork Educator(s):

Review the SEFWE with the student after the final Fieldwork Performance Evaluation (FWPE) has been reviewed and signed.

The SEFWE is signed by both the fieldwork educator(s) and the student.

Return both the FWPE and SEFWE promptly upon completion of the fieldwork to the academic fieldwork coordinator.

STUDENT EVALUATION OF THE FIELDWORK EXPERIENCE

SUMMARY of FIELDWORK EXPERIENCE

1 = Strongly disagree
 2 = Disagree
 3 = Neutral
 4 = Agree
 5 = Strongly agree

	Circle one				
Expectations of fieldwork experience were clearly defined	1	2	3	4	5
Expectations were challenging but not overwhelming	1	2	3	4	5
Experiences supported student's professional development	1	2	3	4	5

What particular qualities or personal performance skills should a student have to function successfully on this fieldwork placement?

What advice do you have for future students who wish to prepare for this placement?
 Study the following evaluations:

Study the following intervention methods:

Read up on the following in advance:

Overall, what changes would you recommend in this Level II fieldwork experience?

Please feel free to add any further comments, descriptions, or information concerning your fieldwork at this center.

Would you recommend this fieldwork site to other students? Yes or No ____

Why or why not? _____

INSTRUCTIONS

One form must be completed for each fieldwork educator who provided supervision. You can detach this page and make more copies as needed.

Check the box that best describes your opinion of the fieldwork educator's efforts in each are

FIELDWORK EDUCATOR NAME: _____

FIELDWORK EDUCATOR YEARS OF EXPERIENCE: _____

1 = Strongly Disagree
2 = Disagree
3 = Neutral
4 = Agree
5 = Strongly agree

	1	2	3	4	5
Provided ongoing positive feedback in a timely manner					
Provided ongoing constructive feedback in a timely manner					
Reviewed written work in a timely manner					
Made specific suggestions to student to improve performance					
Provided clear performance expectations					
Sequenced learning experiences to grade progression					
Used a variety of instructional strategies					
Taught knowledge and skills to facilitate learning and challenge student					
Identified resources to promote student development					
Presented clear explanations					
Facilitated student's clinical reasoning					
Used a variety of supervisory approaches to facilitate student performance					
Elicited and responded to student feedback and concerns					
Adjusted responsibilities to facilitate student's growth					
Supervision changed as fieldwork progressed					
Provided a positive role model of professional behavior in practice					
Modeled and encouraged occupation-based practice					
Modeled and encouraged client-centered practice					
Modeled and encouraged evidence-based practice					
Modeled and encouraged interprofessional collaboration					
Modeled and encouraged intra-professional collaboration					

Comments: _____

Appendix H – Reporting an Injury



Report a Workers' Compensation Claim

Report a Workers' Compensation Claim

What you'll need

- 1 The policy number.** You can report without it, but it makes things go faster.
- 2 Information about the injured worker and what happened.** The system will prompt you for the rest. You only need to fill in what you know. You'll get a claim number and handler info as soon as you submit. Filing online takes about 10 minutes.

Start a Claim



Student Acknowledgment of Receiving the Fieldwork Manual

Please sign and return this form immediately to the Fieldwork Administrative Assistant acknowledging the receipt of the Fieldwork Manual.

I, _____, hereby acknowledge that I have
(print student's name)

Been provided a copy of the Samuel Merritt University, Occupational Therapy Department, Fieldwork Manual, either in print or electronically.

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 university and departmental policies as stated in 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 OT 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 person information on my behalf to fieldwork sites as described in this manual to facilitate my successful completion of the fieldwork requirements of occupational therapy education.

Student's Signature

Date