GUIDELINES FOR AN OCCUPATIONAL THERAPY LEVEL II FIELDWORK EXPERIENCE (AOTA, 2006)

History and Purpose:
The intent of this document is to describe the desired characteristics of a fieldwork placement for occupational therapy and occupational therapy assistant students in Level II fieldwork. It is not intended to be interpreted as a standard of performance or requirement of a program, rather as a reference to be used in conjunction with the ACOTE Standards for Fieldwork Education. It is for internal use by members of the AOTA.

This document was originally prepared by the Loma Linda Fieldwork Council at the request of the Commission on Education (COE) and approved by the COE on April 15, 1985. The document was revised by the AOTA Fieldwork Issues Committee in 1992, revised by COE in June, 2000, and is now being revised again by the COE in 2006.

Definition:
The new Draft ACOTE Standards for an Accredited Educational Program for the Occupational Therapist or Occupational Therapy Assistant (AOTA, 2006) describe fieldwork as..."a crucial part of professional preparation", and state the goal of Level II Fieldwork as “to develop competent, entry-level, generalist occupational therapists and occupational therapy assistants” (AOTA, 2006). Similar to Level I fieldwork, Level II fieldwork must be integrated into the educational program’s curriculum design. The Level II fieldwork experience provides students with the opportunity to integrate academic knowledge with the application of skills in a practice setting through “an in-depth experience in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation” (AOTA, 2006).

For occupational therapy students this experience also includes research, administration and management of occupational therapy services. Both OT and OTA students are to have Level II fieldwork experiences in settings that expose them to a variety of clients, across the life span, and in a variety of practice settings.

RECOMMENDATIONS RELATED TO ACOTE STANDARDS FOR LEVEL II FIELDWORK:
1.) Level II fieldwork shall be designed to promote clinical reasoning and reflective practice, to transmit the values and beliefs that enable the application of ethics related to the profession, to communicate and model professionalism as a developmental process and a career responsibility, and to develop and expand a repertoire of occupational therapy assessments and interventions related to human occupation and performance. In all settings, psychosocial factors must be understood and integrated for the development of client-centered, meaningful, occupation-based outcomes.

   Level II fieldwork experience should include in-depth experience in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation.

2.) The fieldwork experience shall meet requirements in accordance with the ACOTE Standards for an Accredited Educational Program for the Occupational Therapist or the Occupational Therapy Assistant. Occupational therapy students must complete at least 24 weeks of full-time Level II fieldwork, and occupational therapy assistant students must complete 16 weeks of full-time Level II fieldwork experiences. Students may complete fieldwork on a part-time basis, as long as it is no less than 50% of the full-time equivalent at that fieldwork site. Students may complete their required weeks of fieldwork in a minimum of one setting, if it is reflective of more than one practice area. The occupational therapy student may complete fieldwork in a maximum of four settings, and the occupational therapy assistant student may complete fieldwork in a maximum of three practice settings.

   This standard is pretty straightforward, outlining the variations that may occur in Level II fieldwork for OT and OTA students.

3.) The student shall have the opportunity to develop increased knowledge, attitudes, and skills in administration, research and professional relationships. These should include experiences in collaboration between the occupational therapist and occupational therapy assistant, other staff, clients, family members, and/or significant others.
Suggested ways to implement this guideline, for example, are actual supervision of support staff, volunteers, or Level I Fieldwork students in certain tasks or work assignments; involvement in research projects; and attendance at administrative meetings. In settings where there are no opportunities for the student to observe collaboration between the OT and OTA, then the fieldwork educator should include learning experiences designed to expose the student to this area of practice in order to measure the student’s level of competency.

4.) The fieldwork agency must be in compliance with standards by external review bodies.
   This recommendation requires that the fieldwork site/agency/facility itself has gone through some type of external review process (JCAHO, CARF, Department of Health, etc.); it is not intended to be prescriptive in nature.

5.) Representatives from the educational program should thoroughly review fieldwork sites to ensure that they will be suitable for OT and OTA students to meet the learning objectives.
   This objective can be met by visiting the site, which is preferred. However, when this is not possible, the Fieldwork Data Form and a phone consultation with the occupational therapist or occupational therapy assistant responsible for fieldwork can suffice.

6.) The fieldwork agency should have a stated mission or purpose.
   A stated mission or purpose of the fieldwork agency is a statement that reflects principles underlying the agency’s operation. This statement should serve as a guide for the delivery of service for individuals and groups, the degree of emphasis on research, and the commitment to education.

7.) There should be evidence of teamwork and communication among staff and students at the fieldwork site.
   In situations where there is little possibility for communication among staff due to the nature of the fieldwork placement, the occupational therapist may independently establish intervention plans and goals when providing consultation, evaluation and treatment services.

8.) There should be occupational therapy representation in planning programs and formulating policies that would affect occupational therapy services or involvement.
   Occupational therapy representation may be through participation in program-related conferences, quality review processes, or in groups in which planning and policy-making may be carried out.

9.) The staff of the fieldwork placement should understand the philosophy and curriculum design of the occupational therapy education program and should accept the responsibility for making it an integral part of their function, as required by the new Draft ACOTE Standards for an Accredited Educational Program for the Occupational Therapist or Occupational Therapy Assistant (AOTA, 2006).
   Since the occupational therapy fieldwork education experience exists within the philosophy and policies of the fieldwork agency, it is essential that the staff understand, accept and support the program.

10.) The fieldwork agency recognizes that the primary objective of the fieldwork experience is to benefit the student's education.
   The educational value of the student fieldwork experience should be of primary importance, and the placement should not be used to extend services offered by the fieldwork agency.

11.) Opportunities for continuing education and professional development of the occupational therapy students should be supported.
   Attendance at workshops, institutes, conferences, courses and professional meetings should be encouraged when the content of the educational event is relevant to the fieldwork assignment.
   Students should not be penalized for attending conferences, and may be asked by the fieldwork site to present an in-service to staff about the conference.
   Financial support enhances a professional’s ability to supervise a student.
   In-service education programs should be developed and made available.
   Fieldwork students should be encouraged to participate in continuing education and be provided time to do so, when content is relevant to the fieldwork experience.
12.) Occupational therapists who supervise students should articulate the value of active participation in occupational therapy associations and in occupational therapy educational programs to students, and should serve as active participants whenever possible.

Occupational therapists and occupational therapy assistants serve as role models and should be actively involved with national, state, and local occupational therapy associations when possible. Occupational therapists and occupational therapy assistants should be involved with the occupational therapy educational programs from which they accept students on an ongoing basis. Such involvement may include education council meetings, on-site visits, correspondence, telephone calls, e-mail communication, etc.

13.) There must be adequate resources to support the fieldwork placement.

Resources can take many forms including space and time for students, sufficient numbers/types of patients/clients to support learning objectives, and administrative support of educating fieldwork students.

14.) Client records should be available to the staff and students for intervention planning and practice, educational, and research purposes. The fieldwork site must be in full compliance with HIPAA/FERPA/IDEA regulations, and students shall be instructed to comply with all HIPAA/FERPA/IDEA regulations to guarantee the confidentiality of client’s records.

Students should review any site-specific guideline for confidentiality that the fieldwork site has in place during their orientation to the fieldwork site, and sign some form of documentation indicating their review and agreement to comply with all regulations. Fieldwork educators should include in their Orientation Manual a section on HIPAA/FERPA/IDEA as it relates to clinical documentation and other forms of privileged communication. They should insure that students understand the implications of the regulations and should instruct students not to use the identifying information” when completing all required assignments.

15.) The occupational therapy philosophy regarding practice and education programs should be stated in writing. The written objectives of the program should reflect the specific contribution occupational therapy makes to the overall agency and program.

The philosophy of the occupational therapy services should be written and should include the following: purpose; responsibility to society, profession, staff, and service recipients; degree of commitment to service recipients, education and research; and attitude toward future growth. The objectives should be based on the concepts, beliefs, and values established in the philosophy.

16.) The occupational therapist and occupational therapy assistant should comply with state regulations governing referrals from qualified referral sources and from others seeking service in the medical, educational and broader human services community. Occupational therapy staff should collaborate with duly licensed providers in those instances where medical management is active, indicated or required.

This guideline requires that occupational therapists and occupational therapy assistants who supervise Level II fieldwork must be aware of, and comply with their state’s licensure laws, policies and procedures with regard to referral, and scope of practice.

17.) Fieldwork educators responsible for educating Level II Fieldwork occupational therapy students shall be occupational therapists. Fieldwork educators responsible for educating Level II fieldwork occupational therapy assistant students shall be occupational therapists or occupational therapy assistants. Both occupational therapists and occupational therapy assistants who serve as fieldwork educators must have at least one year of practice experience, and must be certified nationally. They must be prepared for their role of fieldwork educator through training and/or experience; fieldwork educators may be engaged by the fieldwork site or the academic institution.

Fieldwork educators must have one year of work experience following their successfully taking the NBCOT certification examination. They must also have some kind of training and/or experience in fieldwork education/clinical supervision. There is no requirement prohibiting the use of academic faculty to supervise fieldwork students as long as the fieldwork site is in agreement with this.

18.) The fieldwork educator should document their continuing competency in providing effective supervision to students through assessment tools (such as the Student Evaluation of Fieldwork Experience - SEFWE - or the Fieldwork Experience Assessment Tool – FEAT), and should maintain
documentation of their continued learning on supervision theory/practice (articles/books that have been read, courses/trainings that have been taken, etc).

In an attempt to provide quality fieldwork education to students, fieldwork educators need to engage in ongoing learning about clinical supervision/fieldwork education. This can take the form of formalized coursework, and/or reading articles/books on the subject. Fieldwork educators can also engage in reflective practice learning activities designed to measure their readiness and competence to supervise students; two excellent resources are the SEWFE and FEAT that can be used to get students feedback about their supervision. Another is the Self-Assessment of Fieldwork Educator Competency.

19.) The fieldwork agency’s communication system should ensure accountability in service provision and documentation.

   A. There should be regular procedures for communication among fieldwork educators and students.
   B. Adequate records and reports should be maintained in accordance with AOTA standards and legal requirements. This must include a signed and dated memorandum of understanding between the educational program and the fieldwork agency that is reviewed at least once every five years by both parties. Records should be maintained to provide sufficient data for quality improvement. Records may include administrative, service and other data. Administrative reports would include such information as numbers of persons serviced, attendance records, schedules and budgets. Service records should include such information as referral data, client assessments, intervention plan progress notes and discharge summaries.

20.) The fieldwork educator and student should have access to current professional information, publications, texts, and/or Internet resources related to occupational therapy and pertinent topics related to populations and systems being served, to support evidence-based practice.

   This item is intended to support the utilization of evidence-based practice. Most students on fieldwork continue to have remote access to their school’s library system; some schools are able to extend this courtesy to fieldwork educators in order to increase utilization of evidence-based practice. Health care organizations also usually have medical libraries that staff and sometimes students can access.

21.) The educational program and the fieldwork placement should work collaboratively to develop objectives in which the aims are compatible with those of the educational program, and which reflect skills specific to the roles of occupational therapists and occupational therapy assistants with populations served at the fieldwork site. The objectives should be reviewed at least annually. These objectives should be clearly defined for the student and continually evaluated to determine the effectiveness of the fieldwork experience.

   The fieldwork experience is an extension of the educational program into the clinical or community setting. The objectives should reflect both the curriculum design of the educational program and the model of service delivery of the fieldwork setting.

22.) Adequate staff to provide occupational therapy services and educational services should be maintained with supervisory and administrative responsibilities clearly defined.

   A. The ratio of fieldwork educators considered adequate to carry out a fieldwork experience is dependent upon the complexity of the services and the ability to ensure proper supervision and frequent assessment in achieving fieldwork objectives.
   B. Administrative and staff responsibilities should be clearly defined.

23.) The fieldwork educator should carry out and document an organized procedure of orientation to the agency, services, and the fieldwork experience.

   There must be some kind of orientation procedures in place for the student at the start of the fieldwork experience, but the type, length, and structure of that orientation is left up to the facility. Some large health-care organizations require students to attend the same orientation that new employees receive, while others may simply have students read a Policy & Procedure manual. Whatever system is appropriate to the setting is acceptable, as long as it is documented.

24.) The fieldwork placements should provide the student with experience with various populations and service delivery models reflective of current practice in the profession.
Within the required total of 16 weeks for the occupational therapy assistant student and 24 weeks for the occupational therapy student, there should be exposure to a variety of practice settings and a variety of client ages and conditions.

25.) The fieldwork educator shall provide ongoing supervision of the student, and shall maintain records of supervisory sessions conducted with student.
   A. The student should be supervised in all aspects of his/her fieldwork experience by adequate supervisory staff who should have full knowledge of and responsibility for all aspects of the services being carried out by the student under her or his guidance and protection.
   
The fieldwork educator should have full knowledge of the student's assigned workload and responsibilities and how they are being handled and should be available to the setting and to the needs of the student. This ensures that the supervision provides protection of consumers.
   B. Ongoing supervision should be provided daily and/or weekly as an essential part of the fieldwork program. It should be flexible in accordance with the interests, needs and abilities of the student. Supervision should initially be direct and gradually decrease to less direct supervision as is appropriate for the setting, the severity of the client’s condition, and the ability of the student.
   C. The ratio of fieldwork educators to students shall be such as to ensure adequate supervision and frequent assessment in achieving fieldwork objectives.
   D. In a setting where there is no occupational therapy practitioner on site, ACOTE Standards requires a documented plan and a minimum of 8 hours of supervision per week by an occupational therapist or occupational therapy assistant who has a minimum of three years of professional experience. This should include direct observation of client/student interaction, role modeling, meetings with the student, review of student paperwork, consultation and communication regarding the learning experience. The fieldwork educator may work with students in groups, but should be aware of individual student needs and respond accordingly. An occupational therapy supervisor must be available, via a variety of means of contact, to the student during all working hours. In addition, a designated on-site supervisor of another profession must be assigned while the occupational therapy supervisor is off-site. A documented plan for provision of occupational therapy services in accordance with state regulations and in coordination with the educational program should be in place.
   E. Students completing Level II fieldwork outside the United States must be supervised by an occupational therapist who graduated from a World Federation of Occupational Therapists (WFOT) accredited educational program, and who has at least one year of experience in practice. Fieldwork experiences outside the United States must not exceed 12 weeks for the occupational therapy student, and 8 weeks for the occupational therapy assistant student.

26.) The student shall be evaluated and kept informed on an ongoing basis of her/his performance status.
   A. A tool, such as the AOTA Fieldwork Performance Evaluation (FWPE) or comparable instrument, should be used as a rating tool. The student should be formally evaluated using this form at the mid-point of the fieldwork experience, and again at the conclusion of the Level II fieldwork experience. Other structured forms of feedback (such as the AOTA Fieldwork Experience Assessment Tool or FEAT) that promote educator/student communication on the student's progress may also be used on an ongoing basis.
   B. The fieldwork experience should be evaluated by the student, using a tool such as the AOTA Student Evaluation for Fieldwork Experience (SEFWE) form, and should be reviewed by the fieldwork educator and the student at the conclusion of the fieldwork experience. Other structured forms of feedback (such as the AOTA Fieldwork Experience Assessment Tool or FEAT) that promote educator/student communication on the learning experience may also be used on an ongoing basis.
   C. If the student's performance is not satisfactory at mid-term or at any point in the fieldwork experience, both the student and academic institution must be notified immediately and documentation concerning the student's progress and outcomes of interventions must be maintained.