I. FUNDAMENTALS OF PRACTICE

FWPE item #1: Adheres consistently to AOTA Code of Ethics & Ethics Standards (AOTA 2010, draft) & site’s policies & procedures; including, when relevant, those related to human subject research as stated below:

☐ Demonstrates concern for well-being & safety of recipients of services (beneficence)
☐ Intentionally refrains from actions that cause harm (nonmaleficence)
☐ Respects right of individual to self rule (autonomy, confidentiality)
☐ Provides services in fair & equitable manner (social justice)
☐ Complies with institutional rules, local, state, federal, international laws & AOTA documents
☐ Applicable to profession of occupational therapy (procedural justice)
☐ Provides comprehensive, accurate, & objective information when representing profession (veracity)
☐ Treats colleagues & other professionals with respect, fairness, discretion, & integrity (fidelity)
☐ Other:

FWPE item #2: Adheres consistently to safety regulations. Anticipates potentially hazardous situations & takes steps to prevent accidents for clients & staff members throughout fieldwork related activities including:

☐ record review
☐ medication side effects
☐ post-surgical
☐ infection control
☐ fall prevention
☐ swallowing
☐ food allergies
☐ ambulation status
☐ behavioral system/privilege level
  (e.g., locked area/unit, on grounds)
☐ 1:1 for personal safety/suicide precautions
☐ sharps count
☐ Environment set up (no clutter, spills, unsafe items, etc.)

FWPE item #3: Uses sound judgment in regard to safety of self & others during all fieldwork related activities:

☐ adheres to facility policies & procedures
☐ thorough chart reviews/checks MD orders/parent consent for IEP
☐ consistently analyzes environment for potential hazards based on client risk factors
☐ addresses anticipated safety concerns
☐ provides safe supervision of client based on client status
☐ accurately identifies ambulation needs/functional mobility status
☐ uses safe transfer techniques/body mechanics/equipment according to protocols
☐ Determines wheelchair positioning needs (e.g., footrests, cushions, trays/supports, etc.)
☐ Correctly positions client (e.g., in chair/bed; at desk, for feeding, etc.)
☐ provides supervision of client based on client status to ensure safety
☐ demonstrates proper splinting techniques such as
  correct selection of type
  correct selection of materials
☐ making adjustments as needed
FWPE item #3 (con’t): Uses sound judgment in regard to safety of self & others during all fieldwork related activities:
- operates equipment according to training protocols
- attends to professional boundaries in therapeutic use of self-disclosure
- effectively limit sets & redirects client(s)
- establishes safe group climate (reinforce expectations/group rules or contract)
- Other:

II. BASIC TENETS

FWPE items #4-6: Clearly, confidently, & accurately communicates values/beliefs of occupational therapy profession, occupation as method/outcome, roles of OT/OTA as collaborative team appropriate to setting, using examples & language consistent w/ OTPF:
- verbally
- via written material (e.g., handout, article, sample job description, etc)
Communicates about these 3 tenets with:
- client
- families/significant others
- OTA
- PT
- SLP
- Teacher
- Aides
- Medical staff
- Nursing
- SW
- Psychologist
- CRTS
- CRC
- AT
- MT
- 3rd party payers
- regulatory bodies
- general public (e.g., promotional materials, in-services)
- Others:
Communicates about these 3 tenets in:
- client intervention/education
- Meetings
- documentation/correspondence
- In-services, brochures, bulletin boards, media announcements, etc.
- Other:
Communicates re: occupation using:
- examples of occupation-based assessment tools
- citations of literature/evidence base for use of occupation relative to person/context
- terms & examples specific to person, organization, population (facility mission/level of care/service delivery)
- OTPF language (revised) verbally & in written work
- current AOTA official documents/fact sheets
- Other:
Communicates re: OT/OTA roles using:
- current AOTA official documents
- federal & state laws/practice acts governing evaluation/intervention
- state laws/practice acts re: role of OT/OTA
- theoretical discussion
- Other:

FWPE item # 7: Effectively collaborates with clients, family/significant others throughout occupational therapy process (evaluation, intervention, outcome):
- seeks & responds to client feedback
- incorporates client/family priorities & interests
- maintains client focus in sessions
- tailors client/family education to individual needs
- respectfully engages in discussion when conflict arises to address concerns
- provides written documentation of collaborative plan (e.g., home program)
- Other:

III. EVALUATION AND SCREENING

FWPE item #8: Articulates clear & logical rationale for evaluation process:
- describes reasoning based on client, condition, context, FOR/EBP
- explains choice of evaluation and occupation-based &/or client factors
- discusses psychometric properties (validity & reliability) of assessment tool
- Other:
FWPE item #9: Selects relevant screening/assessment* methods (*see assessment chart):
- Selects assessment according to:
  - Client condition
  - Client priorities
  - Current context
  - Future context
  - Evidence
  - Psychometric properties/validity/reliability
- Selects assessment based on Theories/Frames of reference pertinent to setting such as:

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<thead>
<tr>
<th>Theory/Frame of Reference</th>
<th>Other</th>
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<td>EO</td>
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<td>Biomechanical</td>
<td>NDT</td>
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<td>Behavioral Functional</td>
<td>Group Model</td>
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<td>Acquisition</td>
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<td>Psychodynamic</td>
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<td>Cognitive Behavioral</td>
<td>Ecology of Human Performance</td>
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<td>DBT</td>
<td>Rehabilitation</td>
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<td>Sensory Processing</td>
<td>Clinical Reasoning</td>
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<td>Developmental</td>
<td>Cognitive/Cognitive Disability</td>
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<td>Motor Learning</td>
<td>Coping</td>
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<tr>
<td>Other</td>
<td>Other:</td>
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FWPE item #10: Determines occupational profile & performance through appropriate assessment methods (see assessment chart for specific tools/competency expectations)

FWPE item #11: Assesses client factors & contexts that support or hinder occupational performance (see assessment chart for specific tools/competency expectations)

FWPE item #12: Obtains sufficient/necessary information from relevant resources such as client, families, significant others, service providers, & records prior to & during evaluation process via:
- Thorough record/chart review
- Client interview
- Observation of client performance in areas of occupation (ADL/IADL, Education, Work, Play, Leisure, Social Participation, Rest/Sleep)
- Assessment instruments addressing occupational performance (see assessment chart)
- Observation of client performance skills (motor & praxis, emotional regulation, cognitive, communication/social, sensory-perceptual)
- Assessment instruments addressing client performance skills
- Observation of client performance patterns (roles, routines, rituals, habits)
- Assessment instruments addressing client performance patterns (see assessment chart)
- Assessment of client factors (see assessment chart)
- Gathering information re: anticipated future context(s)
- Gathering input from family/significant others/service providers (PCA, nursing, teachers, team members, referral source)
- Discussion of psychosocial factors that effect performance/disposition (e.g., motivation, adjustment, anxiety, self-concept, QoL/participation, etc.)
- Assessment instruments that address psychosocial factors that effect performance/disposition (see assessment chart)

Occupational Profile addresses:
- Who is client?
- Why seeking services?
- Priorities
- Client problems
- Occupational history
- Influence of environment/context
- Client values/interests/needs
- Client successes/strengths
- Other(s):
FWPE item #13: Admisters assessments in uniform manner to ensure valid/reliable results:
- Adheres to assessment tool protocols/procedures (format, script, item use, scoring, etc.)

FWPE item #14: Adjusts/modifies assessment procedures based on client needs, behaviors, cultural variables such as:
- fatigue
- O2 sat/respiration rate
- BP/heart rate
- frustration tolerance
- anxiety
- acuity
- concerns re: safety (please specify):
- cultural beliefs, values, customs, expectations
- cognitive status
- pain
- language
- attention
- inability to perform task
- refusal

FWPE item #15: Interprets evaluation results to determine client’s occupational performance strengths & challenges by integrating quantitative & qualitative information such as:
- standardized assessment results
- observations of client’s performance
- information re: client condition/dx
- client’s stated values, beliefs/motivations
- subjective/objective impressions
- identified problems/needs
- verbal reports of others (team, family/caregivers, etc.)

FWPE item #16: Establishes accurate & appropriate plan based on evaluation results, integrating factors such as client’s priorities, context(s), theories & evidence-based practice:
- integrates information with client priorities to create plan relative to setting/scope of practice
- incorporates client’s present and future context(s) (personal, cultural, temporal, virtual, physical, social) in clinical reasoning/intervention planning
- utilizes summarized evidence from Critically Appraised Topics/Papers (CATs/CAPs) to guide decision-making/reasoning (http://www.otcats.com/index.html)
- uses EBP approach (e.g., PICO question: Person, Intervention, Comparison, Outcome) to search for/find relevant evidence according to client priorities & frame of reference
- critically appraises findings (e.g., CAT: http://www.otcats.com/template/index.html; or CanChild (www.canchild.ca/en/canchildresources/educationalmaterials.asp#CriticalReview)
- uses structured method to review evidence (journals, case studies, consensus of experts)
- creates realistic plan reflective of accurate understanding of client abilities and potential
- sets goals consistent with client priorities, theory/frame of reference, evidence, & setting

FWPE item #17: Documents results of evaluation process in manner that demonstrates objective measurement of client’s occupational performance:
- records observed performance in areas of occupation (ADL/IADL, Education, Work, Play, Leisure, Social Participation, Rest/Sleep) as per setting’s policies & procedures/Scope of practice
- accurately reports standardized assessment data (raw scores/results) as applicable
- formulates and documents goals that are specific, measurable, realistic, attainable, time-limited
- utilizes outcome measurement methods when available or per setting policies

IV. INTERVENTION

FWPE item #18: Articulates a clear and logical rationale for intervention process:
- verbally in supervision sessions
- verbally in client sessions
- via written assignments (journal, case study)
- via sharing EBP article reviews
- in rounds/team meetings
- Other:
FWPE item #19 (part 1): Utilizes evidence from published research & relevant resources to make informed decisions, with supervisor/client/team/caregiver/agency (as appropriate) using information found in:
- articles from peer reviewed journals (e.g., AJOT, OTJR, etc.,)

FWPE item #19 (part 2): Utilizes evidence from published research & relevant resources to make informed decisions with supervisor/client/team/caregiver/agency (as appropriate) using:
- discussion/sharing of material learned via other sources (textbooks, OT Practice, coursework, association website searches, conferences, etc.,) in supervision
- Other:

FWPE items #20 & 21: Chooses relevant occupations/activities that motivate & challenge clients to facilitate meeting established goals based on clients’:
- condition/status
- stated interests
- beliefs & values
- psychosocial needs
- progress
- current context & resources
- future context & resources
- Other:

FWPE items #22 & 23: Implements client centered & activities/occupation based intervention plans considering areas of occupation/outcomes such as:
- Role competence
- Social participation
- Quality of life
- Other:
- Preparatory
- Purposeful
- Occupation-based

FWPE item #24: Modifies task, approach, occupations, & environment to maximize client performance by:
- adapting sequence of activity & objects used
- sensory input
- visual/verbal cues
- amount of physical assistance provided
- social demand (1:1 vs. group, family vs. peer(s), rules/norms)
- amount of emotional/behavioral support provided
- promoting safety
- creating adaptive device(s)
- reviewing/revising expectations with client(s) relative to desired occupations, role(s) & context
- Other:

FWPE item #25: Updates, modifies, or terminates intervention plan based upon careful monitoring of client’s status:
- accurately represents client progress verbally & in documentation
- accurately reports change in client status (e.g., illness, affect) affecting performance
- frequently re-evaluates effectiveness of intervention based on goal achievement and/or outcome measurement
- subjective data consistent with objective data reported verbally or in documentation

FWPE item #26: Documents client’s response to services in a manner that demonstrates efficacy of interventions via:
- progress reports with quantitative data (goal attainment scaling, excel charts/graphing, re-assessment, score comparison, outcome measurement results)
- narrative summary with qualitative descriptors according to problems identified/goals achieved
- Other:
V. MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES

FWPE item # 27: Demonstrates through practice or discussion ability to assign appropriate responsibilities to the
☐ occupational therapy assistant & occupational therapy aide:
☐ describes or ☐ assigns duties commensurate to educational level, assessed competency, 
 federal & state laws regulating use of supportive personnel
☐ considers number of clients, complexity of needs, type of setting, safety
☐ describes or provides type of supervision required (close, direct, line of sight)
☐ provides reference for state statutes/regulations governing performance of services & definitions of 
supervision (www.aota.org/Practitioners/Licensure/StateRegs/Supervision/36455.aspx)
☐ Other:

FWPE item # 28: Demonstrates through ☐ practice or ☐ discussion ability to actively collaborate with occupational 
therapy assistant:
☐ describes &/or engages in tasks with OTA relative to job description &/or scope of practice as 
defined by state guidelines (e. g., soliciting contributions to evaluation process &/or delegating 
implementing & adjusting intervention plan) in accordance with AOTA Official Guidelines for 
Supervision, Roles, & Responsibilities (www.aota.org/Practitioners/Official.aspx)
☐ completes alternate assignment to meet objective (please describe or attach):

FWPE item # 29: Demonstrates understanding the costs and funding related to occupational therapy services at this 
site:
☐ discusses political issues/policy decisions that affect funding
☐ outlines how services are regulated and funds allocated pertaining to local and/or federal laws such as 
IDEA, ADA, Medicare/Medicaid, etc.
☐ describes agency billing/payment system (grant funding, types of insurance, private pay, cost- share, 
state/federal funding)
☐ describes eligibility criteria for reimbursement and discharge
☐ identifies possible resources available (grants, community partnerships, sources for donations, 
fundraising ideas, etc..)
☐ demonstrates awareness of risk management and liability as part of costs and quality care
☐ demonstrates awareness of budgetary implications when procuring/using supplies
☐ Other:

FWPE item #30: Accomplishes organizational goals by establishing priorities, developing strategies, and meeting 
deadlines:
☐ articulates setting’s mission & values
☐ schedules meetings/sessions according to facility expectations
☐ begins & ends sessions on time
☐ attends meetings on time
☐ reports in meetings in concise manner
☐ meets paper work deadlines per policy & procedures
☐ prioritizes workload according to policies & caseload demands
☐ uses time management strategies (checklists, templates, to-do list)
☐ Other:

FWPE item #31: Produces the volume of work required in the expected time frame:
☐ is self directed in managing schedule to meet workload/caseload
☐ gathers necessary evaluation data within allotted amount of time - specify:
☐ completes evaluation write-up with documentation co-signed & in chart/record within:
☐ conducts (specify number) of evaluations: ☐ per day ☐ per week ☐ per month
☐ serves caseload commensurate with entry-level therapist (please specify # of clients/groups):
       / per day       / per week       / per month
Level II Fieldwork Site Specific Objectives Checklist
(adapted from original by NEOTEC, Inc)

FWPE item #31 (con’t): Produces the volume of work required in the expected time frame:

- [ ] completes progress note documentation within expected time period of: [ ]
- [ ] completes (specify number) of progress notes: [ ] per day [ ] per week [ ] per month
- [ ] Other:

VI. COMMUNICATION

FWPE item #32: Clearly & effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public:

- [ ] uses language appropriate to the recipient of information, including but not limited to funding agencies & regulatory agencies
- [ ] gauges use of terminology to level of understanding of person with whom communicating
- [ ] utilizes examples to illustrate meaning/intent
- [ ] uses active listening strategies (restates/paraphrases) to ensure both parties have shared understanding of information/plan
- [ ] uses multiple modes of communication (verbal, written, nonverbal)
- [ ] makes eye contact when appropriate
- [ ] attends to physical boundaries/body space
- [ ] demonstrates professional presentation/demeanor in facial expression, posture, grooming affect, & attire
- [ ] utilizes setting’s services for translators or translation of written materials when indicated/available
- [ ] communicates accurate/pertinent information to others in a timely manner
- [ ] Other:

FWPE item #33-34: Produces clear and accurate documentation according to site requirements. All written communication is legible, using proper spelling, punctuation, and grammar:

- [ ] completes computerized &/or hand-written documentation requirements per setting protocols/formats
- [ ] uses approved institutional terminology/abbreviations
- [ ] uses technology when available to check work (grammar, spelling)
- [ ] uses strategies such as proof reading, reading aloud, checking against template, asking colleague/peer to proof if feasible
- [ ] Other

FWPE item #35: Uses language appropriate to the recipient of the information, including but not limited to funding agencies & regulatory agencies:

- [ ] writes in a manner conducive to being read by recipients of services & other disciplines, free of jargon, retaining language consistent with OTPF-Revised (client profile, analysis of occupational performance (areas, skills/patterns, influence of context(s), client factors)
- [ ] gauges use of terminology to level of understanding of person with whom communicating
- [ ] utilizes examples to illustrate meaning/intent (verbal/demonstration)
- [ ] takes into account cultural differences, providing handouts in client’s first language, when available, providing illustrations with written content
- [ ] adjusts content (verbal/nonverbal) in response to clients/family/caregivers colleagues’ response
- [ ] provides clear & concise instructions
- [ ] Other:

VII. PROFESSIONAL BEHAVIORS

FWPE item #36: Collaborates with supervisor(s) to maximize the learning experience:

- [ ] asks supervisor for specific feedback
- [ ] consistently checks in to clarify expectations
- [ ] shares information about learning style with supervisor and asks for help as needed to adjust
- [ ] utilizes structures in setting to support learning (e.g., student manual, reviews expectations, tracks own caseload/workload)
- [ ] asserts need to schedule supervision meetings
FWPE item #36 (con’t): Collaborates with supervisor(s) to maximize the learning experience:
- discusses concerns & identify possible avenues for changes or improvements
- discusses &/or negotiates need for adjustments to supervisory relationship, performance expectations, caseload, & learning environment to improve quality of experience (e.g., reviews AOTA Fieldwork Experience Assessment Tool)

FWPE item #37: Takes responsibility for attaining professional competence by seeking out learning opportunities & interactions with supervisor(s) & others:
- comes to supervision w/ list of questions/concerns & possible options for how to address them
- takes initiative to meet w/ other members of team to understand their role/perspective
- reviews testing materials/manuals on own prior to observing or administering
- seeks out, reviews & shares reading materials/articles on frames of reference/EBP, client conditions, public law/policy, etc.,
- pilots new program ideas/improvements (e.g., assessment tools, outcome measures, groups, new forms or procedures etc.) when feasible/available
- collaborates in research design or data collection with others (per IRB approval)
- exercises good judgment when choosing to attend in-services or other continuing education opportunities (e.g., based on workload management, caseload focus, scope of practice)

FWPE item #38: Responds constructively to feedback:
- engages in mutual feedback exchange (e.g., listen, clarify, acknowledge feedback &/or redirection, provide examples, ask "How can I improve?", discuss ways to make active changes, identify what would be helpful, discusses options)
- demonstrates commitment to learning by identifying specific goals/actions to improve behavior/ performance in collaboration with supervisor
- processes feedback & seeks support from supervisor appropriate to context of supervisory relationship & learning opportunity
- utilizes tools to reflect on own performance or variables affecting performance (e.g., self-assessment on FWPE, journaling, FEAT)
- takes initiative to contact academic program resource persons for support if needed

FWPE #39: Demonstrates consistent work behaviors including initiative, preparedness, dependability, and work site maintenance:
- takes initiative to address workload management
- demonstrates consistent work behaviors in both task & interpersonal interactions
- attends to site cleanliness, safety & maintenance of supplies as appropriate to role
- comes prepared for meetings/sessions
- takes responsibility to address areas of personal/professional growth proactively plans for & requests appropriate supports or accommodations in manner consistent with federal law & site resources (e.g., open in communication, provides appropriate documentation, requests reasonable accommodation if indicated)

FWPE item #40: Demonstrates effective time management:
- monitors, maintains & adapts own schedule in accordance w/ site’s priorities
- organizes agenda or materials for meetings & sessions
- conducts evaluation &/or intervention sessions w/in allotted time, inclusive of set-up/clean-up
- arrives on time to work, meetings, client sessions
- completes documentation/paperwork in timely manner
- completes learning activities by due dates
FWPE item #41: Demonstrates positive interpersonal skills including but not limited to cooperation, flexibility, tact, and empathy in social interactions w/ clients/patients, peers & colleagues:
- communicates concerns in 1st person manner (e.g., “I statements”)
- remains calm when conveying point of view when conflict arises
- compromises as needed when negotiating workload
- demonstrates flexibility to support own learning or department mission (e.g., extra effort, stay late if needed, etc.)
- demonstrates ongoing awareness of impact of own behavior on others
- displays positive regard for others
- demonstrates effective use of therapeutic use of self/self disclosure (e.g., moderate) to build rapport, establish alliance(s) & motivate others (peers/colleagues/clients)
- provides genuine encouragement to maximize client’s participation/performance
- provides timely & specific feedback
- sets limits to maintain safety & support positive behavior/performance improvement

FWPE #42: Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices:
- demonstrates awareness of own background and sensitivity to worldviews of others (clients, family, colleagues)
- refrains from imposing own beliefs & values on others
- maintains clients’ dignity
- gathers information about clients’ cultural values &/or spiritual beliefs
- incorporates clients’ values & beliefs into therapeutic interactions & interventions
- considers clients socioeconomic & community resources & lifestyle when designing intervention plans & discharge planning
- demonstrates tolerance for differences in others & willingness to work w/ all clients

Other expectations not noted above:

______________________________
Signature