



School of Health Professions and Education

Occupational Therapy Program

OCCUPATIONAL THERAPY

FIELDWORK MANUAL

2025-2026

TABLE OF CONTENTS

SECTION I – OVERVIEW OF FIELDWORK.....	4
A. Introduction to Fieldwork.....	4
B. Participants in the Fieldwork Process, Academic Fieldwork Coordinator, Clinical Fieldwork Coordinator, and Fieldwork Educator	5
C. General Fieldwork Information.....	7
D. Objectives.....	8
1. Level I (Refer to Appendix A)	
2. Level II (Refer to Appendix B)	
SECTION II – SELECTION OF PLACEMENT	
A. Selection Process.....	9
B. Site Information Files.....	9
C. Wish List Process.....	10
D. Placement Process.....	10
SECTION III – PLACEMENT CONFIRMATION	
A. Confirmation of Fieldwork Placement.....	10
SECTION IV – PREREQUISITES FOR FIELDWORK	
A. Health Information.....	12
B. My Profile on EXXAT.....	12
C. Basic Life Support(BLS)	12
D. Malpractice Insurance.....	12
E. Infection Control/Standard Precaution Documentation.....	12
F. Fingerprinting.....	13
G. Health Information Protection Accountability Act (HIPAA) Training/Family Educational Rights and Privacy Act (FERPA) training	13
H. Contract.....	13
SECTION V – PACKET INFORMATION FOR FIELDWORK SITES	
A. Level and Level II.....	13
SECTION VI – COMMUNICATION DURING FIELDWORK	
A. Contact with students for Fieldwork Level I A&B.....	14
B. Level I C: monitored and assigned by course faculty.....	14
C. Contact with students during Fieldwork Level II A&B.....	14
SECTION VII – POLICIES AND PROCEDURES FOR FIELDWORK	
A. Confirmed Fieldwork Placement.....	14
B. Student Fieldwork Review.....	15
C. Collaboration with Fieldwork Sites.....	16
D. Criteria and Procedure for Fieldwork Sites that do not have Occupational Therapy.....	16
E. Criteria and Procedure for Faculty-Led Fieldwork Experience.....	17
F. Criteria and Procedure for Fieldwork Sites where no OT Services Exist.....	18

APPENDICES.....21

SECTION I

A. Introduction to Fieldwork

Level I and Level II experiences promote professional and clinical reasoning, critical thinking; cultural understanding; and the integration of professional values, theories, evidence, ethics, and skills in practice. (Utica University, 2021a)

The students complete three Fieldwork Level I experiences. Two Fieldwork Level II experiences totaling 24 weeks (ACOTE, 2018). These experiences finalize students' preparation for entry-level practice as occupational therapists.

Level I Fieldworks are in community settings. The overarching objectives of Level I fieldwork are to understand the Occupational Therapy Practice Framework, 2020 (*OTPF-4*) and its application to practice. These experiences reinforce previous coursework, and enrich the subsequent courses. Fieldwork Level Is are in preparation for Fieldwork Level II and are complete prior to Fieldwork Level II experiences.

The main objective for Fieldwork Level II is to facilitate students' development and transformation into competent, entry-level generalist occupational therapists (ACOTE, 2018). For the program at Utica University, students have one Fieldwork Level II in a setting that provides services with adults and another in a setting that provides services with children. The majority of students complete these on a full-time basis. However, the option exists for students (who receive permission from the occupational therapy faculty) to complete them part-time for a more extended time. A part-time fieldwork placement must be at least 50 percent of a full-time equivalent (FTE) schedule at the site. These experiences and timelines meet the requirements stated in the ACOTE Standards (ACOTE, 2018).

Our program has a variety of established fieldwork sites, and our program has a student-centered approach to fieldwork planning. The availability of fieldwork sites and state education laws limits fieldwork placement options. Utica University has established contracts with fieldwork sites both within as well as outside of New York State. Each state has different rules and regulations for authorization. Therefore, the University must secure approval/clearance from the relevant state agency (e.g., Licensing Board or Department of Education etc.) before placing a student in a host facility within certain states. Utica University may cancel a clinical placement if regulatory approval cannot be secured. We attempt to place students in a fieldwork site of their preference; however, we cannot guarantee this is possible.

International fieldwork experiences are encouraged for Utica University students; however, only one fieldwork experience can be international. Students must consider travel and living expenses.

The process for securing an international placement:

- Notify potential fieldwork educator and discuss international placement specifics and requirements
- The student will contact the Utica University International Programs Office to formalize their request to travel abroad within the travel policies of the university.

- The AFWC starts coordinating with the prospective site to ensure supervision, educational background of the FWE, and fieldwork site-specific objectives of the international site.
- The AFWC will begin the paperwork process, including a contract, Fieldwork Data Form, Site Specific Objectives, and 12-week schedule, which must be in place before the start date of placement.

Students are required to **pass all fieldwork placements** as part of the academic requirements for the program. Students are allowed to make up one failed fieldwork: **the second failure in fieldwork results in automatic dismissal from the program**. See the Graduate Student Catalog for policies related to dismissal and appeal. Students must complete all academic fieldwork requirements within 24 months of completion of didactic coursework.

Criminal Misconduct

Any student with a history of convicted criminal misconduct may be denied fieldwork placement, licensure, or registration to practice the profession of Occupational Therapy and employment. Students should meet with their academic fieldwork coordinator. Students should contact the state or country's regulatory board in which they plan to practice to determine whether or not their criminal misconduct would restrict their ability to practice. The National Board for Certification in Occupational Therapy (<http://www.nbcot.org/character-review-process>) has an "Early Determination Review" (for a fee) that will determine potential eligibility to take the exam.

This may include convicted of a felony, any professional license, registration, or certification denied, revoked, suspended, or subject to probationary conditions by a regulatory authority or certification board, found by any court, administrative, or disciplinary proceeding to have committed negligence, malpractice, recklessness, or willful or intentional misconduct which resulted in harm to another or suspended and expelled from a university or university for non-academic reasons.

B. Participants in the Fieldwork Process

Academic Fieldwork Coordinator (AFWC)

Responsibilities include:

1. Select and develop fieldwork sites.
2. Develop fieldwork objectives in collaboration with the fieldwork educators and academic faculty.
3. Maintain a file of information on each fieldwork site.
4. Assure that a written contract and letters of agreement between Utica University and the Fieldwork Facility are signed and periodically reviewed.
5. Maintain a collaborative relationship with the clinical fieldwork coordinators and supervisors.

6. Prepare students for each level of fieldwork placement.
7. Determine in collaboration with program faculty each student's eligibility to participate in fieldwork experiences.
8. Assign all eligible students to Level I and Level II fieldwork.
9. Coordinate relationships between the fieldwork site, the faculty, and the student.
10. Make regular contact and/or visit the fieldwork sites, monitor the student process, and provide support for the site.
11. Provide support to students while on fieldwork.
12. Provide the necessary support or referral to the student and/or FWE when issues arise during fieldwork.
13. Withdraw/remove students from placement per negotiated contractual agreement and related programmatic policies and procedures.
14. Review each fieldwork evaluation and determine pass/fail status.
15. Record student grades (P/F) and maintain student fieldwork records.

Student

The OT student participating in the required fieldwork experience:

1. Completed all the necessary fieldwork classes and prerequisite coursework for the fieldwork
2. Complete all the necessary health work by the established **deadline**.
3. Submit preference sheets by the specified deadline.
4. Complete Personal Data Sheet within the time frame required.
5. Completed an annual certification process for BLS, HIPAA, FERPA, and Infection Control/Standard Precautions.
6. Provide proof of health insurance by an established deadline.
7. Maintain professional liability insurance.
8. Arrange housing and transportation while on fieldwork experience.
9. Pay all costs incurred for travel, housing, background check, and tuition related to the fieldwork experience (Withdrawal or dismissal from fieldwork will result in additional tuition costs continuation if the program is approved and fieldwork is subsequently repeated).
10. Fully engage in the fieldwork experience, including ongoing self-analysis of their development and competence with the AOTA (2020) *Fieldwork Performance Evaluation for the Occupational Therapy Student*.
11. Follow policies and procedures of specific facilities/agencies.
12. Acknowledge safety protocols and professional ethics *during all fieldwork-related activities* (AOTA 2018).
13. Complete all fieldwork-related assignments from clinical setting /FWE and academic programs.
14. Provide accurate documentation of all the occupational therapy services provided according to site-specific requirements.
15. Communicate *clearly, confidently, and accurately* (AOTA 2018) with FWE(s), colleagues, and campus representatives.
16. Provide written feedback to the FWE, CFWC, and AFWC about the facility-learning environment and related student experience.
17. Be responsible for the costs of any required personal emergency medical care.

18. Read/sign an acknowledgment of the facility/agency contract for every assigned placement.

Clinical Fieldwork Coordinator (CFWC) and Fieldwork Educator (FWE)

The Clinical Fieldwork Coordinator is the manager of the fieldwork program at the facility/agency. The CFWC coordinates the processing of fieldwork-related documents and procedures, including contracts, fieldwork data forms, site objectives, student manuals, and orientation, and assignment of fieldwork educators. The CFWC provides agency oversight of all fieldwork-related activities *to ensure that supervision provides protection of consumers* (ACOTE 2018) and facilitates the development of the fieldwork student/clinician in collaboration with the fieldwork educator and the campus AFWC or representative.

The fieldwork educator is the facility/agency staff member assigned to supervise the OT student. AOTA requires that the individual has practiced the equivalent of full-time in the profession for a minimum of 1 year and meets their state regulations governing practice. The FWE will have knowledge and experience across the scope of practice for the fieldwork setting. The FWE must also be authorized to practice within the facility/agency.

Fieldwork Educator:

1. Coordinates appropriate orientation to the facility/agency for the student.
2. Communicate expectations, objectives, and assignments for successful fieldwork completion.
3. Supervises the provision of occupational therapy services, documentation, and other related responsibilities.
4. Provide ongoing feedback to the student(s) regarding performance, including weekly progress reviews, midterm, and final performance evaluations.
5. Communicates routinely with the academic program regarding student progress.
6. Be a professional role model for the student.
7. Inform AFWC regarding any unexpected situations promptly to facilitate student performance.

C. General Fieldwork Information

Students enrolled in the Occupational Therapy program at Utica University must fulfill three Level I fieldwork experiences and two Level II fieldwork experiences. A third level II fieldwork is optional and can be taken for a (0-4) credit load.

The Utica University Occupational Therapy Program requires that all Fieldwork Level II requirements be satisfied within twenty-four months of completing academic courses. Requirements for graduation may be found in the [Utica University Graduate Catalog](#).

The students will take all fieldwork classes scheduled throughout the OT program. These are part of each student's regular semester class schedule. These classes prepare and help qualify students for fieldwork, gather necessary information for fieldwork, and reflect upon the fieldwork process.

Fieldwork is completed in each of the following areas to include experiences that facilitate the development of entry-level skills as an OT generalist and appreciation of psychological and social factors that influence occupation across the lifespan:

Adult\Older Adult: settings may include acute hospital, acute rehabilitation, subacute rehabilitation/nursing home, outpatient clinic, home care, day habilitation, community residence, or other appropriate settings.

Child\Adolescent: settings may include early intervention, preschool, K-12, hospital, residential, community, or other appropriate practice settings.

The students have specific time frames when fieldworks are to be completed and particular times when preference sheets are due.

1. Fieldwork Level I

OCT 553: Level I A Fieldwork: adult: 1st fall semester

OCT 633: Level I B Fieldwork: child: 2nd fall semester

OCT 551/552: Level I C Fieldwork: throughout the first year of the program

2. Fieldwork Level II

OCT 654: Level II-A Fieldwork: adult: 12 weeks: summer between year one and two

OCT 656: Level II- B Fieldwork: child: 12 weeks: end of Jan – end of April year two

OCT 657: Level II- C Fieldwork: adult or child: optional: 4-12 weeks: after completion of Fieldwork II A & B: preference sheets are due the fall semester of year one: Specialty: an elected course taken for 0 - 4 credits. Continuous enrollment fees may apply.

D. Objectives

Fieldwork objectives are included in each syllabus for the specific fieldwork (See appendix A and B)

SECTION II:

SELECTION OF PLACEMENTS

Each student must meet individually with the fieldwork coordinator to discuss their specific needs and interests for fieldwork. This meeting must happen before the placement process begins for each student. The meeting occurs before adult placements and before child placements.

A. Selection Process

The fieldwork experiences must be distributed across the lifespan according to the progression of the curriculum and in different practice settings. The student must make sure the following items are taken into account when providing preferences for fieldwork:

- a. Practice setting
- b. Location
- c. Financial resources
- d. Family and relationship responsibilities
- e. Significant other (remember this may change)

Fieldwork placements are assigned by numerical order of the computer-generated lottery, preferred region, facility/agency contractual status, and space availability in consideration of your site preferences.

Students begin their search of the Google Drive site folder <https://drive.google.com/drive/folders/0AAvxV3vgWjZHUK9PVA>. Begin searching for sites in geographic areas of interest that may not be listed on the google site drive. If any questions arise, arrange a meeting with the AFWC.

The fieldwork coordinator makes all requests for placements. **DO NOT contact FIELDWORK SITES directly. If a student contacts a site directly, the student will automatically receive a move to the lottery's back.**

There may be unexpected expenses incurred for fieldwork, including but not limited to time, travel, housing, and other site requirements.

All students should be prepared to travel up to 90 minutes each way for any fieldwork placement.

B. Google Drive Site Folder and EXXAT Clinical Placements

Google Drive access to Fieldwork Data Forms and Student Feedback Forms

All students have access to this Google Drive. Students will also have access to EXXAT to view sites that are currently and previously been utilized for fieldwork placements.

The Fieldwork Coordinator will arrange access to this Google Drive

C. Fieldwork Wishlist Process

Students fill out a wishlist for fieldwork placements.

1. The student must fill out the top portion of the wish list to determine the student's group and the type of fieldwork.
2. The student must complete the demographic information so that the AFWC can contact the student when they are not on campus for questions concerning fieldwork placements.

3. All correspondence will go through the Utica University email account.
4. The student must complete one fieldwork wish list for each of the categories (child and adult).
5. The student is to submit the wish list on or before the established deadline.
6. Wish list numbers are assigned by computer-generated lottery; the lottery is for adult wishlists and child wishlists.
7. Wish Lists are ordered according to the lottery numbers.
8. The placement process will begin.

D. Placement Process

The AFWC will begin contacting sites to facilitate placements.

Variables affecting the placement process:

- contracts
- communication process
- individual state education department policies
- site policies
- site schedule
- time frame
- other academic programs requesting placements

This process usually takes many months. Some students may be placed right away, and others may not receive placement until just before the start date. These variables are not within the Academic Fieldwork Coordinators' control.

SECTION III

PLACEMENT CONFIRMATION

A. Confirmation of Fieldwork Placement

Confirmation of placement is done by the fieldwork coordinators using the following process:

1. AFWC will research contract status.
2. AFWC receives confirmation from the site for placement.
3. AFWC informs the student of the placement by phone or e-mail or in person.
4. The AFWC will contact CFWC at a specific site and give the student's name.
5. CFWC will communicate specific requirements of the site – interview, qualities necessary, and medical
6. The student will communicate with the facility to discuss requirements via email.
7. Students will communicate with the AFWC the outcome of the communication.
8. AFWC publishes placements within EXXAT and students are notified.
9. The student will complete the requirements of the site and communicate with the AFWC when complete.
10. AFWC will send out a confirmation letter via EXXAT, including the Student Profile.

SECTION IV

PREREQUISITES FOR FIELDWORK

Health Requirements:

Following the New York State Health Department and the terms of the contractual agreements between the university and host facilities, students must adhere to the following policy regarding health requirements. Students must be prepared to complete any additional state or agency/facility health requirements required by their specific placement site. These requirements promote the protection of students, clinicians and individuals served at the host facilities.

Policy:

At their own expense, each student is required to have an ANNUAL physical examination and specified immunizations/titers.

Other requirements include current Basic Life Support certification - American Heart Association hands-on course and proof of personal health insurance.

These requirements must be completed by the due dates established by the Utica University Occupational Therapy program. Students should plan to ensure that the required items are submitted on time and are current and valid for the duration of the fieldwork experiences. Students must keep accurate and current copies of these health records at all times.

Failure to observe the stated deadlines and requirements will prevent the student from participating in fieldwork education, which will delay or prevent progress in the student's program.

Utica University has contracted with EXXAT to provide compliance tracking with these requirements. Physical exams and additional health requirements are submitted directly by the student to EXXAT using directions provided by the students' programs. **Students will establish an EXXAT Account.**

A. Health Information

Health Insurance-All students must be covered by health insurance while engaged in any lab work and fieldwork. Students must provide proof of insurance coverage and upload it to EXXAT.

Health Work:

- Annual physical
- Mantoux/PPD/QuantiFeron Gold Plus (GFT-GIT) or T-SPOT(blood tests) within one year, sometimes more frequently (site-specific)
chest x-ray within five years if positive must have results of a positive test,
- Measles, Mumps, and Rubella (MMR) documentation

- Hepatitis B (Hep-B) documentation or signed a declination
- Tetanus, diphtheria, and pertussis (Tdap) within ten years
- Flu shot (Annual)
- COVID Vaccination

Students must complete their health work at the beginning of each semester for lab participation and before each fieldwork placement as dictated by the AFWC and the fieldwork site.

B. Student Profile

Student Profiles are to be completed in EXXAT by the student by the established deadlines. Student Profile is sent with the confirmation letters and student packets for all placements. Be honest when presenting personal data.

C. Basic Life Support (BLS): CPR and AED American Heart Association Training (Hands-on, not online)

Current BLS is a requirement for the OT program. Note that the timing of the certification must cover the entire time of each placement. If it expires during your placement, you should renew early to prevent a lapse. You can locate a course by checking the American Heart Association web page; however, not all agencies list current courses. Schools, hospitals, fire departments, and community agencies often host courses for staff and first responders and are suggested options for locating a course within your geographic area.

Students must provide a copy of the BLS card to EXXAT.

A copy of the card will be included with the student fieldwork packet.

D. Malpractice/ Professional Liability Insurance

Each student in the Occupational Therapy program at Utica University must have malpractice/professional liability insurance.

Utica University has bought into a blanket malpractice/professional liability insurance plan covering a \$2,000,000 incident/\$4,000,000 aggregate for the student to purchase. This \$18.00 (2020) charge will be connected to the student account in each of the following courses: OCT 553 and OCT 633.

E. Infection Control, Prevention, and Blood Borne Pathogens.

Students will receive training for infection control and standard precautions in fieldwork preparation class. Students must demonstrate knowledge of these areas before beginning fieldwork. Students will complete the verification of this training and upload it to EXXAT. This documentation of training will be included and sent in the student packet to the fieldwork sites.

F. Fieldwork Educator Contact Information

Each student will be responsible for gathering the information to EXXAT before the beginning of Fieldwork placements which will include their Fieldwork Educator contact information. The student can begin obtaining information for EXXAT after receiving email confirmation of Fieldwork placement from the Academic Fieldwork Coordinator.

G. Facility Requirements above Utica University Requirements including but not Limited to Fingerprinting/Background Check/Criminal Background Check

The student is responsible for contacting the CFWC at the facility for requirements and details. A criminal background check result may influence your placement at specific sites.

H. HIPAA/FERPA Training

Annual training will be completed, and documentation of training will be uploaded in EXXAT and will be provided to student fieldwork sites.

I. Contract

Students must review and sign an Attestation on EXXAT that they have examined the specific contract for their placement site, site-specific objectives, and fieldwork data form before arrival at the fieldwork site.

SECTION V

PACKET INFORMATION FOR FIELDWORK SITES

A. Level I:

The student is responsible for gathering the following items:

- Memorandum of Understanding
- Record of Fieldwork Level I Hours (EXXAT)
- Site Supervisor Student Feedback Assessment (EXXAT)
- Level I Performance Evaluation (EXXAT)

B. Level II:

AFWC will send a student packet to the fieldwork site six weeks before the start date of the fieldwork via EXXAT. The packet includes:

- Student Profile
- Infection control and standard precautions verification
- HIPAA/FERPA Training verification
- Directions for accessing the Fieldwork Performance Evaluation for the Occupational Therapy Student from **EXXAT**
- Student Evaluation of Fieldwork Experience / Educator
- Weekly Supervision Forms and directions
- BLS verification and Health Insurance verification
- Student Health work is sent from the student

SECTION VI

COMMUNICATION DURING FIELDWORK Level II placement

Policy:

Maintain contact with students while on fieldwork Level II and facilitate student success.

Procedure:

All students meet with the AFWC weekly via ZOOM while on Level II A&B placement. The AFWC also schedules a midterm meeting with the student and their FWE.

All students are expected to contact the university (academic fieldwork coordinator) while on Level II if questions/concerns arise. In urgent situations, the Academic Fieldwork Coordinator and/or Program Chair/Director should be contacted as soon as possible. The dean's office has further contact information if these individuals are not immediately available through routine contact numbers or email.

All students are expected to facilitate effective communication with their FWE when difficulties arise. If more support is necessary, the AFWC and program chair are available. When a learning contract is essential, it is developed in collaboration with the student, the FWE, and the AFWC. This contract is designed to document and outline a plan to remediate the areas of concern.

SECTION VII

POLICY AND PROCEDURES FOR FIELDWORK

A. Confirmed Fieldwork Placement

Policy:

A student is **confirmed** at a fieldwork placement when the student and site receive their placement confirmation via EXXAT. **Students cannot change a confirmed placement.** Forfeiting a placement will have academic and financial consequences. These students will be subject to program review and may not continue in the program as planned.

Procedure:

A student is given an exception to this policy for the following **documented** reasons:

- Death (documentation required) or major illness (documentation necessary from a licensed provider) in the **immediate** family (**parent, guardian, and siblings**)
- **Significant** personal injury or illness: documentation necessary from an approved provider

***Note that significant illness/injury is considered that which requires immediate, high levels of care.**

Reasons why an exception will NOT be granted:

1. Financial reasons (we will refer students to explore financial options with appropriate offices)
2. Housing changes (students need to consider this when signing leases).
3. Changes in family status or relationship (students are expected to have a backup plan for support before they commit to this intensive program and fieldwork)
4. Employment/athletic reasons (employers/coaches/others should notify the fieldwork commitment in advance).
5. Want a different practice setting or geographic area (this is part of pre-planning)

If a student needs to be considered for an exception and alternative fieldwork placement, the following procedure must be followed:

1. The student schedules a formal meeting with the fieldwork coordinator and is prepared to explain and provide documentation of their situation.
2. After meeting with the coordinator, the student may submit a letter of intent with verifiable situation documentation. The fieldwork coordinator will provide their recommendation to the OT Chair/Program Director, who will confer with the student and appropriate others as necessary (faculty/dean/registrar/financial aid/etc.) in consideration of student confidentiality policies to make a just determination.
3. Once a determination has been made, the student will be notified in writing. Any necessary campus or fieldwork facility/agency offices will be notified by standard communication protocol for the site (letter, email, telephone).
4. **Students denied exception must attend the fieldwork placement as scheduled or the forfeiture policy applies, and the student will be subject to review for possible dismissal from the program.**

B. Student Fieldwork Review

The faculty meet each semester to review each student. At this meeting, students are reviewed for professional behaviors as it relates to coursework and fieldwork. The areas include academic preparation/performance and professional behaviors, and completion of documentation. (See Appendix D)

C. Fieldwork Educator Verification

Policy:

The verification of the supervisor's qualifications to supervise an Occupational Therapy Student from Utica University will be gathered before the Fieldwork placement.

Procedure:

One of those requirements is completed within EXXAT and lists the qualifications of the FWE to ensure eligibility to serve as a fieldwork supervisor and other information.

Each student will be responsible for gathering the information to complete within EXXAT at least six weeks before the beginning of Fieldwork placements. The student can begin obtaining information for their Fieldwork educator after receiving EXXAT confirmation of Fieldwork placement from the Academic Fieldwork Coordinator.

Once information is provided, the Academic Fieldwork Coordinator will ensure that the intended FWE:

1. For level I fieldwork experiences – occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, physicians, speech-language pathologists, nurses, or physical therapists (ACOTE, 2018) with at least one year of experience and holds a current license to practice;
2. For a level II fieldwork experience – is an OT with at least one year of experience and holds a current license to practice occupational therapy;
3. For international fieldwork experiences, an OT with at least one year of experience has graduated from a WFOT approved education program and held the credentials required to practice occupational therapy in that country.

The site coordinator will be contacted for those sites in which the FWE does not meet these criteria, and the student either reassigned to a qualified FWE or the placement is canceled.

D. Collaboration with Fieldwork Sites

Policy: Academic and fieldwork educators will collaborate in establishing fieldwork objectives with the fieldwork site before the student experience and communicate with the student and fieldwork educator about progress and performance during the student experience.

Procedure:

Collaboration between the AFWC and fieldwork educators before the fieldwork experience:

- The AFWCs provide *FW Objectives*, established by program faculty and consistent with our curriculum, to each FW site. They ask CFWC to review those objectives and collaboratively work with them to add to or revise goals as necessary to reflect the site's learning environment accurately.
- Twelve-week schedules are also collaboratively determined to ensure that the experience is planned to meet those objectives.

Communication with the student and fieldwork educator during fieldwork:

- During FWII placements, the AFWCs and/or an academic faculty member communicate weekly with students in group zoom meetings and weekly discussion posts. There is a midterm meeting via zoom or site visit with the AFWC, FWE, and Student. A visit is planned for each site on a three-year rotating basis if geographically distant and annually if local. This site visit may be carried out by a faculty member other than the AFWCs. Such contacts between FW sites and faculty are seen as a way for academic educators to collaborate with fieldwork educators.

- If students are reported as having difficulty by either themselves or the FWE, contact is more frequent. In such instances, a *Learning Contract* is developed collaboratively between the student, the AFWCs, and the FWE. Program faculty and/or administrators are informed and provide input into such contracts. The AFWCs maintain all such learning contracts in the students' folders.

E. Criteria and Procedure for Faculty-Led Fieldwork Experience.

Policy: The program has Fieldwork Level I opportunities that are faculty-led. The faculty guide the progression of the fieldwork experience. The students have access to the faculty while on placement. The faculty facilitates learning opportunities with the clients/consumers that meet the needs of the consumers/clients and the objectives for the specific course.

F. Criteria and Procedure for Fieldwork Sites where no OT Services Exist.

Policy: The program does initiate FWII experiences in sites without OT services upon student request. If a student requests placement at a site with no occupational therapy services, the AFWC will assess the site and place a student on a case-by-case basis.

Criteria for student approval:

Any student who seeks a non-traditional level II fieldwork must obtain full faculty approval.

Such approval will be based on the following criteria:

- a) Exceptional academic performance
- b) Self-directed and independent in learning style
- c) Demonstrated understanding of the role of OT in non-traditional settings.

Procedure for student approval:

1. Any student seeking a non-traditional placement will submit a letter of request to the AFWC.
2. The AFWC will review the letter with the student, identifying the possibility of a potential placement setting.
3. The AFWC will bring the letter to a faculty meeting, at which time the faculty will approve/disapprove the student for the non-traditional placement.
4. At the same time, a faculty member will be identified to serve as a supervisor. This individual must be an occupational therapist (initially certified) and available to serve as a supervisor no less than 8 hours per week. The criteria for this individual are:
 - a. Three years of full-time clinical practice appropriate to the intended placement
 - b. current license in the state of NY to practice occupational therapy.
5. This decision will be communicated to the student by the AFWC. The AFWC will seek an appropriate placement following the criteria and procedures listed below if the decision is favorable.

Criteria for site selection: All such non-traditional level II fieldwork sites must meet the following requirements:

1. The fieldwork site must provide services that fit the sequence of our curriculum.
 - a) Sites considered for FW II A must provide services to adolescents and/or adults.
 - b) Sites considered for FW II B must provide services to children.
2. The fieldwork site must provide services that fit the scope of our curriculum.
 - a) Services may be provided in many different settings such as medical-based (acute and sub-acute care, rehab), community-based (school, home-health), psycho-social (mental health), or residential (SNF).
 - b) Services at the site must allow students to observe/engage in assessment and intervention strategies/techniques to address clients' occupational performance.
 - c) Such assessment and intervention services must be in keeping with the scope of academic coursework completed before the placement and the respective state's practice act.
 - d) Services at the site must provide students, at the end of the placement, with a case-load and level of responsibility consistent with entry-level practice at that site.

3. The fieldwork site must provide an individual competent to serve in the role of student site supervisor.
 - a) Student site supervisors must be individuals with at least one year of practice and identified by their supervisor as competent in their practice areas.
 - b) Supervision at the site must be provided by an individual considered adequate in supervisory skills by the site supervisor.
 - c) Supervision at the site must be provided by an individual who can engage in effective communication with various individuals as determined by their supervisor.
 - d) Supervision must allow students to engage in a practice that ensures the safety of both the client and the student.
 - e) Supervision at the site must allow students to practice skills in keeping with their level of competence.
 - f) Supervision must be provided in such a way as to foster students' development throughout the fieldwork. Supervision is structured by using the 12-week progression of objectives as developed by the program in collaboration with the site supervisor.

Procedure for site placement and plan for supervision:

- 1) Should approval be obtained and a faculty supervisor identified, the AFWC, in collaboration with the faculty supervisor, will develop learning objectives appropriate to the site and consistent with the expectations of FWII experiences and the curriculum sequence and scope.
- 2) The AFWC will begin exploring likely fieldwork sites that could facilitate the student's ability to meet those learning objectives and meet the criteria listed above. This exploration would include the identification of an appropriate site supervisor who meets the requirements listed above.
- 3) Should such a site and supervisor be identified, will initiate negotiations between the site administration, site supervisor, the AFWC, and the faculty supervisor. Negotiations will include an agreement on a detailed description of the responsibilities of all parties to include the provision of occupational therapy services and the supervisory schedule and duties of the site and faculty supervisors. Arrangements for both direct and on-call supervision by the faculty supervisor will be outlined in writing.
- 4) The site administration and supervisor may request an interview with the student to consider this placement.
- 5) Should all parties agree to the specifics of this plan, including the student, a contractual agreement initiated by the AFWC and the University's Contract Administrative Assistant is then approved by both the site and the University, placement is scheduled.
- 6) During the placement, the student and faculty supervisor will keep daily logs of the time involved in supervisory activities, both direct and indirect. These logs are shared weekly with the AFWC, who will check the level of supervision provided.
- 7) The student's performance is evaluated collaboratively using the FWPE by the faculty supervisor and site supervisor.

Appendix A

A. Level I A, B, C objectives

Level I A INSTRUCTIONAL OBJECTIVES:

1. Students will demonstrate knowledge and understanding of the American Occupational Therapy Association (AOTA) Occupational Therapy Code of Ethics and the AOTA Standards of Practice in the context of fieldwork through vignettes requiring application, decision-making, and problem-solving. (B.7.1, PG 3) Reinforced). Assessment: Class discussion/assignments.
2. Students will understand and recall personal and professional responsibilities related to liability under current models of service provision and the roles of the occupational therapist providing service on a contractual basis (B.7.5, PG 3) Reinforced). Assessment: Class discussion, assignments.
3. Preparation for Level II fieldwork (C.1.10, instructional objectives 5-11)
4. Articulates values and beliefs of occupational therapy. Verbalizes definition of occupational therapy as relevant to FW setting, module, and/ or audience. Assessment: Class discussion.
5. Utilizes relevant evidence to make informed practice decisions. Connects class concepts to FW through inquiry or discussion. Articulates the value of using evidence-based practice. Identifies and provides evidence that is relevant to the setting or clients. Assessment: Class discussion and assignments.
6. The student will demonstrate the ability to take responsibility for their learning and demonstrate motivation. Assessment: Class discussion and assignments.
7. The student will demonstrate the ability to use self-reflection; willingness to ask questions, analyze, synthesize, and interpret information; and understand the OT process. Assessment: Class discussion and assignments.
8. The student will demonstrate the ability to use proper grammar and spelling, legibility of work, successful completion of written assignments, and documentation skills. Assessment: Assignments and discussion posts.
9. The student will demonstrate initiative, the ability to seek and acquire information from various sources, and demonstrate flexibility as needed. Assessment: Observation and interactions with colleagues.
10. The student will demonstrate the ability to give, receive, and respond to feedback; seek guidance when necessary; and follow proper communication channels. Assessment: Discussions, observation of interaction with colleagues.
11. Students will Apply, analyze and evaluate the interaction of occupation and activity, including areas of occupation, and performance skills. performance patterns, context (s) and environments,

and client factors (B.3.2, Demonstrated). Assessment: Discussion of ICE video of the client, creation of an occupational profile.

12. Student will apply knowledge of occupational therapy process in emerging practice settings (B.4.27, Demonstrated) Assessment: Primary Care Proposal

13. The student will identify, analyze and advocate for existing and future service delivery models and policies, and their potential effect on the practice of occupational therapy and opportunities to address societal needs. (B 5.2, identify, analyze and advocate) The student will also evaluate access to community resources and design community or primary care programs to support occupational performance for persons, groups, and populations. (B 4.27, evaluate and design for persons) Assessment: 14. The student will demonstrate the awareness of the psychological and social factors influencing engagement in occupation (C.1.3, Demonstrated). Assessment

Level I B INSTRUCTIONAL OBJECTIVES:

1. Adheres consistently to AOTA's Occupational Therapy Code of Ethics and safety regulations and uses sound judgment to ensure safety. (Standard B7.1, PG 3) Assessment: Performance Evaluation
2. Articulates the values and beliefs of Occupational Therapy to others. Assessment: Performance Evaluation
3. Demonstrates professional behaviors in time, organization, self-direction, written communication, initiative, observation, participation in supervision, and professional terminology. (PG 3) Assessment: Flyer Assignment, Teacher Interview, Performance Evaluation
4. Contributes to the screening and evaluation process through interviews, Occupational Profile, goals, and documentation. (PG 2,5,6) Assessment: Teacher Interview, Performance Evaluation
5. Contributes to the intervention process by identifying client-centered interventions, using evidence to modify intervention, discharge, and documentation of services. (PG 2,4,5,6) Assessment: Performance Evaluation
6. Utilizes relevant evidence to make informed practice decisions. Connects class concepts to FW through inquiry or discussion. Articulates the value of using evidence-based practice. Identifies and provides evidence that is relevant to the setting or clients. Assessment: Performance Assessment.
7. The student will demonstrate the ability to use self-reflection; willingness to ask questions, analyze, synthesize, and interpret information; and understand the OT process.

8. The student will demonstrate the ability to use proper grammar and spelling, legibility of work, successful completion of written assignments, and documentation skills.
9. The student will demonstrate initiative, the ability to seek and acquire information from various sources, and demonstrate flexibility as needed. Assessment: Observation and interactions with colleagues.
10. The student will demonstrate the ability to give, receive, and respond to feedback; seek guidance when necessary; and follow proper communication channels.
11. Students will Apply, analyze and evaluate the interaction of occupation and activity, including areas of occupation, and performance skills. performance patterns, context (s) and environments, and client factors
12. The student will demonstrate the awareness of the psychological and social factors influencing engagement in occupation (C.1.3, Demonstrated). Assessment: Classroom Observation Reflection Assignment

Level I C INSTRUCTIONAL OBJECTIVES:

By the completion of this course, the student will:

- Communicate effectively, responsibly, and responsively with classmates, instructor, fieldwork site participants, and team using **interpersonal, written, and oral communication skills**. The development of skills to communicate across linguistic differences and literacy barriers. (ACOTE Standard 2018 B.4.23 introduced) (Program Goal 5) Assessment = teaching plan and reflection, UCOT Community/Service Learning Assessment of Performance, journal posts, essay.
- **Show ethical, respectful, and professional behavior** in all learning environments. Assessment = class participation, UCOT Community/Service Learning Assessment of Performance. (Program Goal 3)
- Complete a Level I Psychosocial OT fieldwork experience (Standard C1.7).
- Demonstrate knowledge of behavioral concepts, including the behavioral science of occupation (ACOTE 2018 Standard B1.1) Assessment: FWIC forum posts
- Demonstrate sound judgment regarding the safety of self and others. (ACOTE 2018 Standard B.3.7) Assessment: Fieldwork IC Performance Evaluation, Section I.
- Demonstrate therapeutic use of self, including one's personality, insights, perceptions, and judgments, as part of the therapeutic process in individual and group interaction. (ACOTE 2018 Standard B.4.1) Assessment: FWIC forum posts; FWIC performance evaluation, Section VII.
- Demonstrate effective communication with fieldwork setting participants, families, communities, and interprofessional team members responsively and responsibly, supporting a team approach to identifying occupational needs and promoting health and wellness. (ACOTE 2018 Standard B.4.23) Assessment: FWIC forum participation; FWIC performance evaluation, Sections II, III, and VI.

- Analyze the roles of sociocultural, socioeconomic, diversity factors and lifestyle choices in shaping the occupational profiles of their fieldwork population and setting (ACOTE 2018 Standard B.1.2) Assessment: Occupational Profile
- Demonstrate ethical behavior and decision-making in the fieldwork setting and interactions with classmates and instructors, using the AOTA Occupational Therapy Code of Ethics and AOTA Standards of Practice as guides. (ACOTE 2018 Standard B.7.1). Assessment: FWIC Performance Evaluation, Section I.
- Apply behavioral concepts and analyze psychosocial factors as part of efforts to understand and meet the needs of individuals and groups at the fieldwork site. Assessment: FWIC forum posts; FWIC performance evaluation
- Demonstrate preparatory methods, activities, advocacy, education and training, and/or occupation-based interventions as appropriate to the needs of the fieldwork site and its participants. Assessment: FWIC forum posts; FWIC performance evaluation.

Through full participation in this course, the student will become able to:

1. Develop **self-awareness** of one's own social and cultural background and strengths and challenges concerning **cultural competency and therapeutic use of self** (impact of self on others and the environment, personal values, interests, beliefs, knowledge, and attitudes). Assessment = cultural self-assessment, class participation, online posts, final essay. (Program Goal 4)
2. Analyze the roles of sociocultural, socioeconomic, and diversity factors and lifestyle choices in contemporary society and apply this knowledge to meet the needs of persons, groups, and populations. (ACOTE 2018 Standard B.1.2 reinforced) Assessment = class participation, journals, final essay
3. Demonstrate knowledge of the **social determinants of health** for persons, groups, and populations with or at risk for disabilities and chronic health conditions, particularly concerning populations served at the student's fieldwork site. (ACOTE 2018 Standard B.1.3 introduced) Assessment = class participation, online posts.
4. Identify how **contextual factors**, current policy issues, socioeconomic, political, geographic, and demographic factors influence the student's fieldwork site, its participants' health, well-being and/or occupational engagement, and people in similar circumstances. Describe how changes in policy, culture, and/or social systems could promote populations' wellbeing and occupational justice and how OTs could help promote such developments. (ACOTE 2018 standard B.5.1. introduced) (PG 4,6) (assessment = online posts, essay)
5. Communicate effectively, responsibly, and responsively with classmates, instructor, fieldwork site participants, and team using **interpersonal, written, and oral communication skills**. Communication includes developing skills to communicate across linguistic differences and literacy barriers. (ACOTE Standard 2018 B.4.23 introduced) (Program Goal 5) Assessment = teaching plan and reflection, UCOT Community/Service Learning Assessment of Performance, journal posts, essay.

6. Utilize **health literacy and teaching-learning** principles to design activities for groups and populations. Develop and carry out a group activity that is occupation-based and relevant to the needs, interests, living situation, cultural background, and linguistic ability of an individual or group of learners. Reflect on the process and lessons learned. (ACOTE 2018 standard B.4.21 introduced) .(*PG4*) (assessment = learning plan, materials, reflection)
7. **Show ethical, respectful, and professional behavior** in all learning environments. Assessment = class participation, UCOT Community/Service Learning Assessment of Performance. (Program Goal 3)

Appendix B

B. Level II A&B Objectives

Level II Fieldwork Objectives:

Upon completion of Level II fieldwork:

1. The student will demonstrate safe practice as demonstrated by providing service in an environment that promotes safety for self and client and follows all established safety procedures.
2. The student will demonstrate ethical practice that is consistent with the values of occupational therapy. This will be shown by ensuring confidentiality throughout the provision of services and articulating an awareness of ethical issues that arise, demonstrating appropriate action relevant to those issues.
3. The student will adhere to the basic tenets of occupational therapy through the articulation of the values and beliefs of the profession to clients and staff, communication of roles and responsibilities of the occupational therapist, and collaboration with the client on service goals and methods.
4. The student will demonstrate proficiency in evaluating clients' ability to function in their valued occupational roles and current or projected future environments. The student will consider the nature of the dynamic system in which the client functions during evaluation analysis and interpretation.
5. The student will select, administer, and interpret specific assessments guided by knowledge of the multiple dimensions of performance, clinical reasoning, and frames of reference, administering assessments according to standard administration protocols or guidelines.
6. The student will determine whether the evaluation results indicate the need for occupational therapy services, referral for other services, or termination of services.
7. The student will develop and implement strategies and occupational-based interventions based on an evaluation that promotes clients' strengths in achieving functional outcomes appropriate to their identity, valued roles, and occupational environments guided by *the Framework*.
8. When planning service activities, the student will demonstrate appropriate clinical reasoning considering the client's specific goals, preferred roles, interests, and tasks, realistic environmental challenges and resources, and relevant time constraints or factors.
9. The student will make recommendations for intervention grounded in a professionally accepted body of knowledge (*the Framework*) as determined by the fieldwork educator.
10. The student will document services that reflect the client's involvement and support client-centered care in developing the intervention plan and adoption of specific strategies which support *the Framework*.

11. The student will communicate verbally and non-verbally, producing clear/legible documentation in language understandable to the recipient.
12. The student will communicate and collaborate with health care and other professionals in a professional manner.
13. The student will demonstrate professional behavior in the areas of collaborating with their supervisor, taking responsibility for professional competence, responding constructively to feedback, demonstrating consistently acceptable work behaviors and effective time management skills, using positive interpersonal skills, advocating for self and clients, and respecting self, others and the environment.
14. The student will apply the OT process to understand how psychosocial factors impact occupational performance and the overall well-being of individuals and groups in which they work by applying behavioral concepts and analyzing psychosocial factors to understand and meet the needs of individuals and groups at their fieldwork site.
15. The student will consider and incorporate the role of lifestyle choices and sociocultural, socioeconomic, and diversity factors in contemporary society, as well as these influences on occupation within an ethical context during assessment, treatment design, and implementation in the practice setting.

*Additionally, students are expected to fulfill their site's specific behavioral objectives.

Appendix C

Wish List Forms for Level II Fieldwork

Adult

[Level II A Wishlist sheet blank](#)

Child

[Level II B \(Child\) Occupational Therapy Student Preference Form](#)

Appendix D

Student Review Form

Student Fieldwork Review: IIA _____ IIB _____

«FIRSTNAME» «LASTNAME» has been reviewed by the Occupational Therapy faculty. Each semester, this review plan identifies students who are/are not considered ready for fieldwork placement.

_____ Fieldwork site placement has been confirmed- Placement notification email sent via EXXAT

_____ It is recommended that fieldwork placement be completed as scheduled.

_____ It is recommended that fieldwork placement be delayed for the following reasons:

_____ Academic requirements have not been completed.

_____ Professional behaviors are considered inadequate for successful fieldwork performance in the following area(s):

_____ Commitment to Learning

_____ Interpersonal Skills

_____ Communication Skills

_____ Effective Use of Time and Resources

_____ Use of Constructive Feedback

_____ Problem Solving

_____ Professionalism

_____ Responsibility

_____ Critical Thinking

_____ Stress Management

_____ Competency Skills (Safety)

_____ Academics

Plan for remediation:

Faculty member responsible for supervising remedial work: _____

The academic fieldwork coordinator will initiate procurement and scheduling of fieldwork site(s) when advised by the faculty supervisor that completion of remedial work can be assured.

Justine Hutchins Mc Allister, OTD, MS, OTR/L Academic Fieldwork Coordinator

Trista S. Richardson, OTD, MS, OTR/L Academic Fieldwork Coordinator

