

**NEOTEC Inc., Level II Fieldwork Site Specific Objectives Checklist for use with:  
The AOTA Fieldwork Performance Evaluation (for the Occupational Therapy Student)**

**Site:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Contact Person:** \_\_\_\_\_ **Phone #:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Fax #:** \_\_\_\_\_

**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:

- |  |   |
|--|---|
| <input type="checkbox"/> record review   | <input type="checkbox"/> OSHA/BBP                           |
| <input type="checkbox"/> medication side effects   | <input type="checkbox"/> I.V./lines                         |
| <input type="checkbox"/> post-surgical   | <input type="checkbox"/> ER codes/protocols                 |
| <input type="checkbox"/> infection control   | <input type="checkbox"/> restraint reduction                |
| <input type="checkbox"/> fall prevention   | <input type="checkbox"/> HIPAA                              |
| <input type="checkbox"/> swallowing  | <input type="checkbox"/> w/c locks/bedrails/call button     |
| <input type="checkbox"/> food allergies  | <input type="checkbox"/> Vital signs (BP, O2)               |
| <input type="checkbox"/> ambulation status   | <input type="checkbox"/> Trach/Ventilator monitoring        |
| <input type="checkbox"/> behavioral system/privilege level<br>(e.g., locked area/unit, on grounds) | <input type="checkbox"/> Fire/Evacuation/Lockdown           |
| <input type="checkbox"/> 1:1 for personal safety/suicide precautions                               | <input type="checkbox"/> CPR certification                  |
| <input type="checkbox"/> sharps count  | <input type="checkbox"/> Communication re: change in status |
| <input type="checkbox"/> environment set up (no clutter, spills, unsafe items, etc.)               | <input type="checkbox"/> Other: _____                       |

**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 agreement for IEP
- consistently analyzes space 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/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
- PTA
- SLP
- Teacher
- Aides
- MDs
- Nursing
- LISCW
- Psychologist
- CRTS
- CRC
- AT
- MT
- 3<sup>rd</sup> 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
- Other: \_\_\_\_\_

**FWPE item # 7:** Effectively collaborates with clients, family/significant others throughout occupational therapy process (evaluation, intervention, outcome):

- seeks & responds to client feedback
- maintains client focus in sessions
- respectfully engages in discussion when conflict arises to address concerns
- provides written documentation of collaborative plan (e.g., home program)
- incorporates client/family priorities & interests
- tailors client/family education to individual needs
- 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 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:

<input type="checkbox"/> PEO	<input type="checkbox"/> Sensory Integrative
<input type="checkbox"/> Biomechanical	<input type="checkbox"/> NDT
<input type="checkbox"/> Behavioral	<input type="checkbox"/> Functional Group Model
<input type="checkbox"/> Acquisitional	<input type="checkbox"/> MOHO
<input type="checkbox"/> Psychodynamic	<input type="checkbox"/> Occupational adaptation
<input type="checkbox"/> Cognitive Behavioral	<input type="checkbox"/> Ecology of Human Performance
<input type="checkbox"/> DBT	<input type="checkbox"/> Rehabilitation
<input type="checkbox"/> Sensory Processing	<input type="checkbox"/> Clinical Reasoning
<input type="checkbox"/> Developmental	<input type="checkbox"/> Cognitive/Cognitive Disability
<input type="checkbox"/> Motor Learning	<input type="checkbox"/> Coping
<input type="checkbox"/> Other:	<input type="checkbox"/> Other:
<input type="checkbox"/> Other:	<input type="checkbox"/> Other:

**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)
- observation in current context(s) (personal, physical/environment, social, cultural, temporal, virtual)
- 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?
  - Client problems
  - Client values/interests/needs
  - Why seeking services?
  - Occupational history
  - Client successes/strengths
  - Priorities
  - Influence of environment/context
- Other(s): \_\_\_\_\_

**FWPE item #13:** Administers 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
- Other: \_\_\_\_\_

**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/caretakers, etc.)
- Other: \_\_\_\_\_

**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](http://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
- Other: \_\_\_\_\_

**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 goals that are specific, measurable, realistic, attainable, time-limited
- utilizes outcome measurement methods when available or per setting policies
- Other: \_\_\_\_\_

**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)
- in pt education materials
- via sharing EBP article reviews
- in written documentation
- in rounds/team meetings
- via in-services
- 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:

- Critically Appraised Papers (CAPs)/Critically Appraised Topics (CATs)  
([www.aota.org/Educate/Research.aspx](http://www.aota.org/Educate/Research.aspx); <http://www.otcats.com/index.html>)
- 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 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 & occupation based intervention plans considering areas of occupation/outcomes such as:

- Role competence       ADL       Play       Work       IADL       Sleep/rest
- Social participation       Education       Leisure       Adaptation       Health/wellness
- Quality of life       Self advocacy       Occupational (social) justice
- Other: \_\_\_\_\_

**FWPE item #24:** Modifies task, approach, occupations, & environment to maximize client performance by:

- adapting sequence of activity & objects used       changing length/frequency/timing of sessions
- ↑↓ sensory input       ↑↓ cognitive demand
- ↑↓ visual/verbal cues       ↑↓ physical requirements
- ↑↓ 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 (↑awareness, education/feedback, environmental modifications, removing potential sources of injury, etc., )
- 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](http://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](http://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:
  - 8 hours       24 hrs       1 week       other: \_\_\_\_\_
- 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

**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
- 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 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)
- Other: \_\_\_\_\_

**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)
- Other: \_\_\_\_\_

**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
- Other: \_\_\_\_\_

**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)
- Other: \_\_\_\_\_

**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 1<sup>st</sup> 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 self disclosure (e.g., moderate)/therapeutic use of self 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:**

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Signature