



**College of Nursing
and Health Sciences**

**University of Vermont
Doctor of Occupational Therapy Program
Fieldwork Educator Manual**

UVM OTD Site Resource Page

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Acknowledgements

Thank you for the vital role you play in educating and mentoring the next generation of occupational therapy professionals. Clinical environments are busier than ever, with demanding caseloads, documentation, and competing responsibilities, yet you make the time to support a student's growth and development, and that commitment does not go unnoticed.

Your guidance and expertise help shape students into thoughtful, skilled, and compassionate practitioners. By welcoming a UVM OTD student into your setting, you are making a meaningful contribution not only to their professional journey, but also to the growth of the occupational therapy profession in Vermont.

As the state's first occupational therapy program, UVM is honored to collaborate with dedicated fieldwork educators like you. Your partnership supports the development of a strong, prepared healthcare workforce that will help meet the needs of communities across the region.

This manual is intended to be a helpful resource as you engage in the important work of student mentorship. Your time, energy, and collaboration are deeply appreciated by the UVM OTD community.

With appreciation,

Nicki Hawko

Academic Fieldwork Coordinator

University of Vermont

Doctor of Occupational Therapy Program

Glossary of Terms

Academic Fieldwork Coordinator (AFWC) is the faculty member at the educational institution responsible for securing Fieldwork sites, supporting the Fieldwork educator in providing a quality fieldwork experience, placing students in fieldwork rotations, and overseeing the fieldwork experience.

Accreditation Council for Occupational Therapy Education (ACOTE) Standards are a set of criteria an Occupational Therapy Program must meet to confer an occupational therapy (OT) practitioner degree and produce graduates who are eligible to take the Board Certification Exam. You may access the full ACOTE Standards and Interpretive Guide (2023) at: [2023-ACOTE-Standards \(2\).pdf](#)

Fieldwork Educator (FWE) is the individual responsible for student education in the fieldwork education center or facility. They may also be known as clinical educator or instructor, fieldwork supervisor or student supervisor.

Fieldwork Experience is an integral part of the education process and professional preparation, it is intended to complement academic preparation by offering opportunities to apply knowledge and to develop and test clinical skills.

Level I Fieldwork Experience includes experiences designed as an integral part of didactic courses for the purpose of directed observation and participation in selected field settings.

Level II Fieldwork Experience is intended to emphasize the application of an academically acquired body of knowledge by providing the student with in-depth experience in performing delivery of OT services to individuals, groups or populations.

Memorandum of Understanding (MOU) A document outlining the terms and details of an agreement between parties, including each party's requirements and responsibilities. A fieldwork memorandum of understanding may be signed by any individual who is authorized by the institution to do so on its behalf.

Occupational Therapy (OT) The art and science of applying occupation to effect positive, measurable change in the health status and functional outcomes of a client by a qualified occupational therapist and/or occupational therapy assistant (as appropriate).

Psychosocial Factors "Pertaining to the influence of social factors on an individual's mind or behavior, and to the interrelation of behavioral and social factors" (Martikainen et al., 2002).

Supervision Direct/Continuous: Two-way communication that occurs in real time and offers both audio and visual capabilities to ensure opportunities for timely feedback.

Supervisor One who ensures that tasks assigned to others are performed correctly and efficiently.

Telehealth The application of evaluative, consultative, preventative, and therapeutic services delivered through telecommunication and information technologies.

Virtual Environments An environment in which communication occurs by means of airwaves or computers in the absence of physical contact. The virtual context includes simulated, real-time, or near-time environments such as chat rooms, email, video conferencing, or radio transmissions; remote monitoring via wireless sensors; or computer-based data collection.

Introduction to Fieldwork

According to the standards set forth by the Accreditation Council for Occupational Therapy Education (ACOTE) fieldwork education provides students the opportunity to develop skills that support professional growth (AOTA, 2023). The fieldwork experience is an integral component of the curriculum design. Fieldwork (FW) promotes clinical reasoning that reflects the profession's values and beliefs of ethical practice. Under the supervision of qualified personnel serving as role models, students connect theory and research-based evidence while learning skills essential to becoming a competent practitioner including effective interpersonal and communication skills. Occupational therapy students may provide services in diverse sites outside of traditional hospital or medical model settings including various community settings, rehabilitation centers, out-patient settings, school systems, private practice, long-term care centers, private homes, and industrial work settings. Each fieldwork education facility will collaborate with the academic institution to develop specific learning objectives that are consistent with expected educational outcomes. The academic fieldwork coordinator (AFWC) is responsible for the program's compliance with the fieldwork education requirements.

The fieldwork goals for the Entry-Level Doctorate in Occupational Therapy (OTD) program at the University of Vermont (UVM) are to provide practice-based learning experiences that allow for:

- Application of knowledge in meaningful occupations across the lifespan
- Development of an understanding of the needs of clients and family members in providing evidence-based care
- Opportunities to develop competencies required for a generalist occupational therapist
- Exposure of the student to a variety of practice settings, documentation and reimbursement systems, and application of the profession's theoretical tenets and frames of reference
- Growth in personal leadership, advocacy, and cultural competence including awareness of issues related to diversity and inclusion
- Development of a strong personal code of ethics and professional development responsibilities

ACOTE specifies fieldwork requirements for all students. The requirements are divided into two major classifications: **Level I and Level II fieldwork experiences**. Each fieldwork experience is designed to progressively build on previous skills and knowledge. Specific nature and structure of the fieldwork education is determined by the academic faculty in collaboration with the fieldwork educator (FWE). *Fieldwork objectives for all experiences include a psychosocial objective.*

Occupational Therapy Program Overview

The UVM OTD program's mission and vision align with the College of Nursing and Health Sciences (CNHS) mission and vision and with the American Occupational Therapy Association's 2025 Vision statement: *As an inclusive profession, occupational therapy maximizes health, well-being, and quality of life for all people, populations, and communities through effective solutions that facilitate participation in everyday living.*

The mission of the UVM OTD program is to *“blend the art and science of the occupational therapy profession and produce evidence-based occupational therapists and leaders rooted in science, who are creative, innovative, scholarly thinkers, able to deliver and advocate for services that will improve the health, wellbeing, and quality of life for those served.”*

The vision of the UVM OTD program is to *“become leaders in the field of occupational therapy through research, scholarly activity, innovation, and exemplary teaching, and promote health and wellness by ensuring people are able to engage in life at their desired capacity.”*

The UVM OTD program teaching philosophy is to create an educational setting that:

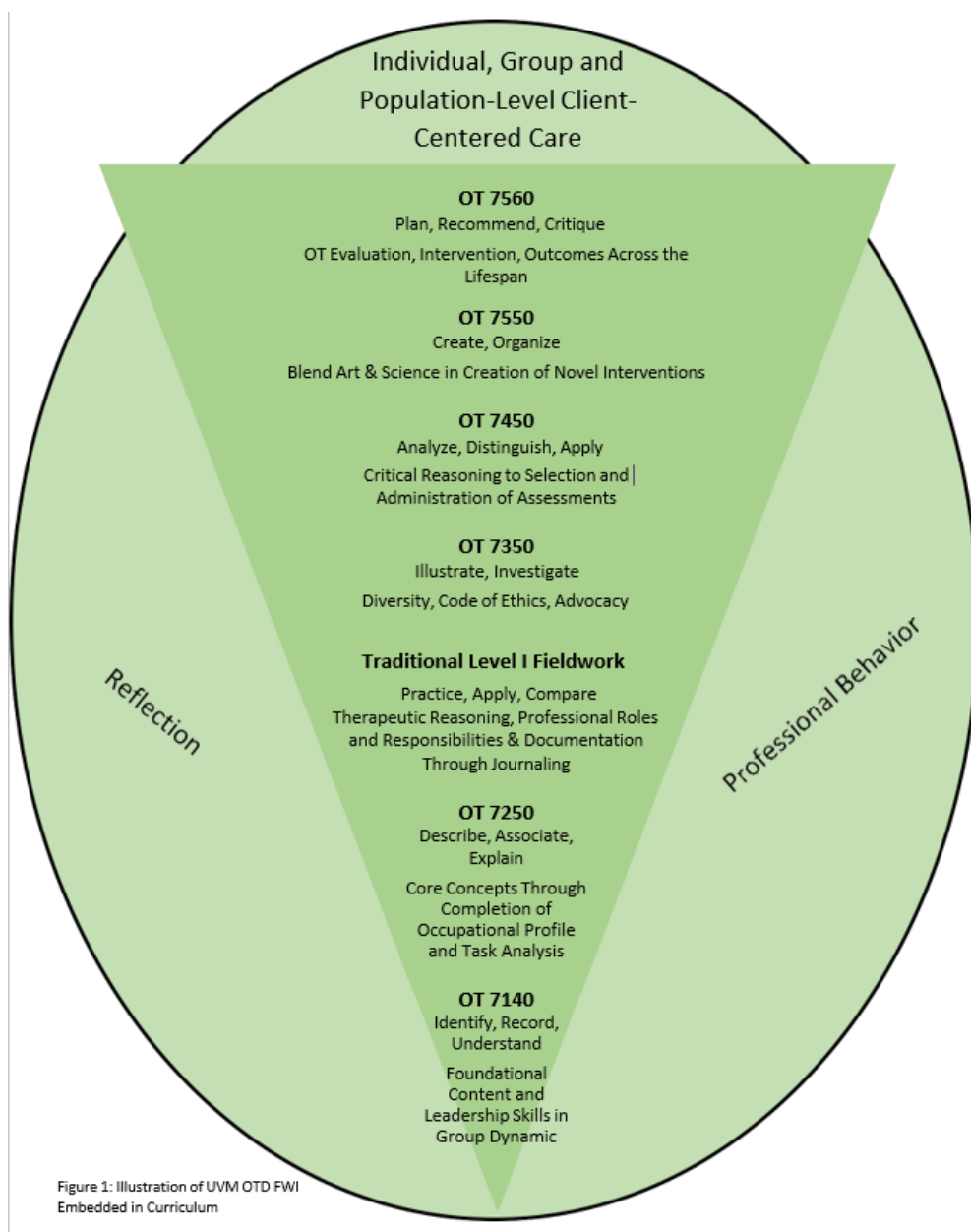
- Is rigorous and steeped in science and evidence
- Is supportive, forward-thinking, and flexible to accommodate for individual learning styles and allow all students to flourish
- Uses a developmental approach to learning with core concepts emphasized before deeper levels of critical thinking and analysis are introduced
- Encourages learning through experience and reflection
- Challenges students through constructive feedback to promote individual growth

This scaffolded fieldwork approach aligns each experience with the curriculum’s sequence and scope, reinforcing connections between didactic learning and clinical practice in collaboration with faculty (ACOTE standard c.1.1).

Fieldwork Education and Curriculum Design

The fieldwork experience for the OTD program at UVM supports the curriculum goals of developing innovative and effective, occupation-based, and evidence-based practitioners; creating leaders and advocates in the profession; and nurturing compassionate, inclusive, and collaborative practitioners. As a critical element of the experiential learning component of the curriculum, Level I and Level II fieldwork will link with didactic content taught in class. The program contains 6 Level I fieldwork experiences woven into the curriculum. Course content will be aligned with fieldwork standards to ensure that experiences *across traditional, nontraditional, and emerging settings* reinforce and strengthen the connection between didactic learning and fieldwork education. Fieldwork education follows a scaffolded approach, with each Level I and II experience building on prior learning to develop competency, reasoning, and responsibility, and each Level I and Level II experience will support this progression, leading to entry-level competence as generalist occupational therapy practitioners. Specific fieldwork learning objectives will be developed collaboratively between the academic institution and the fieldwork education site to ensure understanding with expected educational outcomes. Embedded fieldwork in program courses provides structured Level I experiences such as simulations, faculty led site visits, and supervised practice, with consistent objectives, assignments, and faculty led assessments to ensure all students have similar experiences (ACOTE Standard C.1.11). These experiences also include a focus on mental health, behavioral health, or psychosocial aspects of client performance, ensuring each student completes at least one fieldwork with this emphasis (ACOTE Standard C.1.6).

Our program has established fieldwork contracts with sites across the country, ensuring that written agreements clearly outline the responsibilities of both the sponsoring institution and the fieldwork site, are signed and in effect prior to the start of all Level I and Level II experiences, and are submitted and maintained in EXXAT; these agreements are selected and updated based on defined criteria to ensure a sufficient number and variety of placements to support timely graduation and meet program policies (ACOTE standards C.1.4 and C.1.5).



Level I Fieldwork

The goal of Level I fieldwork is to introduce students to fieldwork, apply knowledge to practice, and develop understanding of the needs of clients. Level I fieldwork is intended to complement academic coursework through meaningful observation and participation in select aspects of the occupational therapy process. Fieldwork learning objectives are documented in the syllabi as academic course objectives, and assessed through course assignments, on-going observation of student progress, and formal evaluation at the completion of each Level I fieldwork experience. As well, students are provided with access to site-specific information, requirements, objectives, and performance expectations through the EXXAT system, which houses all relevant fieldwork site details and documents prior to the start of each placement (ACOTE standard C.1.2).

OT7700 -Level 1C

This is a two (2) week course (minimum of 30 hours x2 weeks) fieldwork experience in a practice setting and is more rigorously designed to give students a fully immersive opportunity to observe the occupational therapy process in a manner that supports didactic content covered in the first two semesters' coursework and provide context for subsequent coursework. Students will practice documentation skills, apply therapeutic reasoning to observed interventions and compare professional roles and responsibilities of OTs and OTAs in that unique setting. Fieldwork related coursework will represent 100% of the course grade. Students are expected to log 40 hours a week of time across observation and completion of assignments.

Level II Fieldwork

The goal of Level II fieldwork according to ACOTE's 2023 Standards "is to develop competent, entry-level, generalist occupational therapists. Level II fieldwork must be integral to the program's curriculum design and must include an in-depth experience in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation and research, administration, and management of occupational therapy services. It is recommended that the student be exposed to a variety of clients across the lifespan and to a variety of settings." (ACOTE, 2023, p 39).

During the Level II experience, students are exposed to a variety of clients across the lifespan and across a variety of settings. Students fulfill the requirements for Level II FW with placement in two, 12-week, full-time practice areas. This may be completed on a part-time basis as defined by the fieldwork placement in accordance with the fieldwork placement's usual and customary personnel policies, but may not be less than 50% of a full time employee at that site (ACOTE standard C.1.12). In some circumstances, a student may complete their Level II fieldwork in a minimum of one setting if the site offers distinct experiences in more than one practice area, or in a maximum of four different settings. Fieldwork learning objectives are documented in the syllabi as academic course objectives and assessed through formal evaluation at the midterm and completion of each Level II fieldwork experience (ACOTE standard C.1.15). As well, students are provided with access to site-specific information, requirements, objectives, and performance expectations through the EXXAT system, which houses all relevant fieldwork site details and documents prior to the start of each placement (ACOTE standard C.1.2).

All UVM OTD students must complete at least one Level II FW in a physical disabilities setting. Integrated with the UVM OTD program's curriculum design, FW assignments in two major practice areas provide the opportunity for students to demonstrate entry-level skills as a generalist OT. Students engage in an in-depth experience delivering OT services, focusing on the application of purposeful and meaningful occupation and research, administration, and management as is prescribed by ACOTE. Students are exposed to a variety of clients across the lifespan and across a variety of settings.

During each Level II rotation, students and clinical instructors will receive emails, and a documented midterm site visit will be conducted to monitor progress, address any issues promptly, and ensure ongoing communication and support throughout the fieldwork experience (ACOTE standard C.1.9).

Progression of Level II FW rigor is represented as IIA and IIB. At the completion of Level IIB fieldwork, students are expected to demonstrate entry-level clinical reasoning and reflective practice that embodies the values and beliefs of the profession in a professional and competent manner. The UVM Level II occupational therapy fieldwork design will follow AOTA Commission on Education (COE) Guidelines for an Occupational Therapy Fieldwork Experience-Level II. A copy of the guidelines can be downloaded [coe-guidelines-for-an-occupational-therapy-fieldwork-experience-level-ii-final.pdf](#)

Role of the Fieldwork Educator

The role of the fieldwork educator is to ensure that as the student gains greater competency the supervision transitions from direct to less direct as appropriate for the setting, the severity of the client's condition, and the ability of the student to support that progression toward entry-level competence. Additionally, FWEs are responsible for:

- Orienting students to the clinical facility
- Communicating with students about clinical expectations including learning objectives
- Serve as a positive role model for clinical practice
- Guide students in the provision of client-centered OT services
- Regularly assess student competence
- Clearly communicate any problems with student performance immediately to the student and the AFWC
- Document student performance in a timely manner on the AOTA FWPE

Our program uses a fieldwork attestation form to document that academic and fieldwork educators agree on objectives prior to the start of the experience, including at least one objective focused on the occupational therapy practitioner's role in addressing psychosocial aspects of client engagement (ACOTE standard C.1.3).

Level I Fieldwork Educators (FWEs) include but are not limited to *currently licensed or otherwise regulated occupational therapists and occupational therapy assistants, psychologist, physician assistants, teachers, social workers, physicians, speech language pathologists, nurses, and physical therapists*. They are expected to provide opportunities for directed observations and guided participation of their client population and typical daily job responsibilities. They are also expected to

evaluate the student's level of active engagement and professional behavior during the fieldwork (ACOTE standard C.1.10).

Level II Fieldwork Educators are currently licensed or otherwise regulated occupational therapists who have a minimum of one year full-time (or equivalent) of practice experience as a licensed or otherwise regulated occupational therapist prior to the onset of the Level II fieldwork (ACOTE standard C.1.13). The Level II FWE is encouraged to provide supervision using approaches that vary from direct to less direct depending upon client needs and student abilities (ACOTE standard C.1.14). Fieldwork educators are asked to inform the Academic Fieldwork Coordinator as soon as possible if they need to cancel a student placement or place a student in more than one setting during the rotation.

Fieldwork Supervision Models

Fieldwork experiences heavily rely on the student-supervisor relationship. Depending on certain factors, a one-to-one ratio may be a great fit; however, alternative models may also be used. It is important to consider the learning style of a student and the nature of the fieldwork site when determining which supervision model to use. Fieldwork educator-to-student ratios are maintained to ensure adequate supervision, consumer safety, effective role modeling, and frequent assessment of student progress toward fieldwork objectives (ACOTE standard C.1.7).

1:1 Supervision

This represents a more traditional model, in which one student is paired with one supervisor. It is especially helpful when the learning and teaching styles align well. The student becomes very familiar with the supervisor and can form a strong mentorship connection that continues into the student's future career. A potential downside is that the student only observes one treatment style. This type of supervision may also put a greater strain on one employee, especially if that employee supervises several students each year.

Shared Supervision (multiple supervisors: one student)

This model divides the supervisory load among two or more supervisors. The student has a unique opportunity to learn from multiple mentors and observe different treatment styles. If the supervisors specialize in different areas of practice, the student may also have opportunities to learn about various settings, diagnoses, and interventions. Supervisors may benefit from dividing responsibilities and may work together to fill a student's schedule, especially if they have administrative responsibilities that reduce their clinical time (such as a director of rehabilitation who only sees clients half of the time). A potential downside is that the student may hear conflicting information or may have to meet different expectations among the two supervisors. This could become confusing and stressful without adequate communication and clear policies in place.

Collaborative Model (one supervisor: multiple students)

This model matches one supervisor with two or more students. Students may bond as a team by working together and learning from each other. Students may be encouraged to collaborate and brainstorm with each other before asking for the supervisor's input. This approach is beneficial to support student learning and the growth of the occupational therapy profession. A potential downside is that the supervisor may feel overwhelmed, especially at first when the emphasis is on helping the

students become accustomed to the fieldwork experience. Over time, as students become more independent, the process is anticipated to become more efficient.

Attendance Policy

Level I

Level I Fieldwork at UVM is completed during the academic semester assigned to the related course number. Time requirements must be pre-approved by the AFWC. Students are expected to work the hours of their supervisor (including holidays, should the supervisor work the holiday). If the required number of hours are not met, the student will receive a failing grade. Any time missed during Level I FW must be made up before a final grade will be assigned.

Level II

Level II Fieldwork at UVM is usually completed during the summer semester in Year 2 and fall semester in Year 3 of the program. The Level II experience includes a minimum of two, 12-week, full-time experiences (ACOTE standard C.1.12). Some sites may have different time requirements and must be pre-approved by the AFWC. Students are expected to work the hours of their supervisor (including weekends and holidays, should the supervisor work). If the required number of hours are not met, the student will receive a failing grade. Any time missed during Level II FW must be made up before a final grade will be assigned.

For both Level I and Level II FW placements, students are required to contact their fieldwork coordinator and/or fieldwork educator/supervisor in the event of any unforeseen absence from the site. Absences for personal illness, and extenuating circumstances will be reviewed on a case-by-case basis. The fieldwork educator will determine with assistance from the fieldwork coordinator if the day will be required to be rescheduled. Two or more absences from each individual fieldwork placement are required to be rescheduled at the convenience of the fieldwork site.

Students are required to request all planned absences from fieldwork prior to making any plans to not be in the placement. The fieldwork coordinator and program director have full authority to approve or deny a request. If approved, the fieldwork coordinator will communicate with the placement site. All planned absences must be re-scheduled at the convenience of the fieldwork site.

Learning Activities

Level I Fieldwork

Level I Fieldwork is mainly observation of licensed professional demonstrating clinical, hands-on techniques. Based on a student's performance and fieldwork supervisor's level of comfort, additional learning activities may be added onto foundational observation expectations. Any client-facing interactions are advised to occur under direct supervision. Recommendations for learning activities may include:

- Client/patient screening
- Evaluation administration
- Assistance with intervention
- Development of intervention plan

- Contribution to discharge summary
- In-service presentation
- Discussions at team meetings
- Consultation participation
- Client and caregiver education
- Home program development
- Activity analysis and gradation
- Instruction of adaptive equipment use
- Non-OT observation/consultation (e.g., PT, SLP, group therapy)
- Chart reviews
- Evidence/literature review
- Discussion of OT and OTA delegation
- Discussion of funding for services

Level II Fieldwork

Level II Fieldwork is anticipated to gradually progress toward greater independence over a 12-week timespan. During this experience, the student may move from initial observation to practice under direct supervision to practice under indirect supervision. The timing and scaffolding of this process is ultimately decided by the fieldwork supervisor, based on judgment of a student's readiness and ability to meet site-specific expectations for safety, efficiency, and competence.

Independent learning activities, outside of clinical caseload responsibilities, may include:

- Evidence/literature reviews
- Observe/interview practitioners or other students (in same or different discipline)
- Familiarize self with equipment, intervention materials, and technology
- Review documentation samples
- Create resources for client or department
- Self-assessment (fieldwork review and/or video review of clinical performance)
- Write case study on a client

Supervision Meetings

For Level II fieldwork placements, it is recommended that the student and fieldwork supervisor(s) meet at least one time per week to discuss student performance and progress. Effective weekly meetings are usually 30-60 minutes in length, though this may differ based on supervisor availability. The Occupational Therapy Department Fieldwork Weekly Planning Form can be utilized by students to prepare for weekly supervisory meetings with their fieldwork educator(s). See Appendix B for a copy of this form (ACOTE standard C.1.8).

Performance Evaluation

Evaluation Preparation for Fieldwork Educators

Preparation:

- Familiarize self with assessment tool

- Level I: AOTA Level I Fieldwork Evaluation
- Level II: Fieldwork Performance Evaluation (FWPE)
- Examine own attitude toward student
- Differentiate between issues related to student's knowledge, skills, and attitude
- Review supervisory records and data on student
- Maximize student participation through self-evaluation
- Request input from colleagues
- Discuss evaluation procedures in advance
- Recognize that performance review requires additional meeting time

During Review Meeting:

- Review all evaluation procedures to reduce student's anxiety
- Present overview of student performance
- Encourage student self-evaluation
- Provide specific feedback to student
- Refer back to student's self-evaluation
- Identify patterns of behavior
- Invite student feedback on experience (SEFWE will be completed for Level II)
- Recognize that student may require additional processing time

For Written Evaluation:

- Be clear and factual
- Substantiate comments with examples
- Ensure congruence between comments and rating/scores

Source: American Occupational Therapy Association. (2020). Tufts University; Policies and procedures. [PDF].

<https://www.aota.org/-/media/Corporate/Files/EducationCareers/Educators/Fieldwork/Supervisor/Samples/Tufts-Policies-Procedures.pdf>

Adapted from: Gaipman, B. & Anthony, A. (1992) Fundamentals of supervision: A practical course for those who supervise students. Toronto: University of Toronto.

Level I Evaluation

Grading rubrics for assignments will be included in related course syllabi and distributed prior to the Level I experience. Fieldwork supervisors will be asked to complete a performance evaluation related to the students' performance during the fieldwork experience. At a minimum, students need to 'meet standards' in all areas on the Fieldwork Level I Competency Evaluation to pass Level I fieldwork. The AOTA Level I fieldwork competency evaluation for OT and OTA students can be viewed at:

<https://www.ameritech.edu/wp-content/uploads/2021/04/Level-I-FW-Competency-Evaluation-for-OT-and-OTA-Students.pdf>

Students will also be graded on professional behaviors, using the Professional Behaviors Competency spreadsheet. The fillable form will be sent to fieldwork educators prior to the student's final evaluation. The effectiveness of supervision will be evaluated through the student assessment form, and the data will be tracked and reviewed by the Academic Fieldwork Coordinator to monitor and support quality supervision across sites ACOTE standard C.1.8).

Level II Evaluation (FWPE)

Students must achieve a “passing” score on the Fieldwork Performance Evaluation (FWPE) in addition to completing graded academic coursework.

The FWPE is the standard instrument used by OT programs to assess performance during Level II FW. Supervisors should review the FWPE prior to the start of the FW experience to familiarize themselves with the scoring instrument. A minimum score of 111 or higher on the final evaluation is required to pass. A copy of the FWPE can be viewed at <https://www.aota.org/-/media/Corporate/Files/EducationCareers/Fieldwork/Fieldwork-Performance-Evaluation-Occupational-Therapy-Student.pdf>

The student's FWE completes the Fieldwork Performance Evaluation for the Occupational Therapy Student mid-way through the fieldwork experience. This assists the FWE in determining the amount of supervision the student needs. The AFWC contacts each site and confirms a mid-term is completed. If the student is not meeting the mid-term requirements a site visit is scheduled and an action plan is developed between the student, the FWE, and the AFWC.

The fieldwork student is required to complete a self-assessment FWPE. It is advised to schedule a final supervision meeting to thoroughly discuss the outcomes noted on performance evaluation measures. Comparison of final results to the student's self-assessment may be a helpful reflective exercise.

Completed evaluation forms must be returned to the AFWC for the student to receive credit for fieldwork.

Student Evaluation of Fieldwork Experience (SEFWE)

Student educational experience and the effectiveness of supervision is formally measured using the American Occupational Therapy Association's SEFWE (Student Evaluation of Fieldwork Experience). The AFWC uses the SEFWE to ensure Level II fieldwork supervision is direct and then decreases to less direct supervision as appropriate for the setting, the severity of the client's condition, and the ability of the student to support progression toward entry-level competence (ACOTE standard C.1.8). The SEFWE questionnaire can be found in Appendix J.

Fieldwork Supervision Where No OT Services Exist

When a student is placed at a site without on-site occupational therapy services, our program will document a plan that outlines the provision of occupational therapy services and supervision by a licensed occupational therapist with at least three years of full-time experience. This supervision will include a minimum of eight hours of direct supervision each week, with the OT supervisor available to the student during all working hours through various modes of communication. Additionally, an on-site designee from another profession will be assigned to support the student when the occupational therapy supervisor is off site (ACOTE standard C.1.16).

Exxat

Exxat will be used to track performance and completion of course work related to fieldwork experiences. Communication between the university, the student, and the site will occur within Exxat. Exxat will also house all fieldwork site information, fieldwork education information, and student information. Students will be responsible for providing information to the AFWC as requested by each

site. The UVM OTD Site Resource Page can be found here:
<https://public.exxat.com/D003/University%20of%20Vermont>

Fieldwork Timelines

Level I Timeline

Prior to fieldwork start date:

- Affiliation agreement (or **MOU**) is signed by both parties
- Site shares health clearance and eligibility requirements (e.g., interview, resume, etc.)
- Supervisors are informed of UVM OTD curriculum and fieldwork design, as detailed in course **syllabus** and **fieldwork educator manual**
- Supervisor and AFWC agree on **fieldwork learning objectives** (included in OT Fieldwork Site Profile, Appendix E)
- Supervisor qualifications are verified, as noted by **licensure documentation** through appropriate professional licensing board. Fieldwork educator will attest to qualifications on the **Fieldwork Educator Affirmation Form** (Appendix D and sent via email upon confirmation of a student placement).
- Site completes **NEOTEC Fieldwork Site Profile** (found on Exxat and in Appendix E)
- Student health clearance forms and Exxat profile are shared with the site
- Student will sign and submit **Level I Student Fieldwork Agreement Form** (Appendix G)
- *Contact AFWC as soon as possible if changes to placement have to be made*

Throughout fieldwork:

- *Contact AFWC as needed with any questions, concerns, or updates*

At end of fieldwork:

- **Final student evaluation** submitted to AFWC via email
- Student will complete the **Level I Student Evaluation of Fieldwork Site** (Appendix I) and submit to AFWC
- AFWC will send **professional development certificate** via email

Level II Timeline

Prior to fieldwork start date:

- Affiliation agreement (or **MOU**) is signed by both parties
- Site shares health clearance and eligibility requirements (e.g., interview, resume, etc.)
- Supervisors are informed of UVM OTD curriculum and fieldwork design, as detailed in course **syllabus** and **fieldwork educator manual**
- Supervisor and AFWC agree on **fieldwork learning objectives** (included in OT Fieldwork Site Profile, Appendix E)
- Supervisor qualifications are verified, as noted by **licensure documentation** through appropriate professional licensing board. Fieldwork educator will provide licensure information on the **Fieldwork Educator Affirmation Form** (Appendix D and sent via email upon confirmation of a student placement).

- Site completes **NEOTEC Fieldwork Site Profile** (found on Exxat and in Appendix E)
- Student health clearance forms and Exxat profile are shared with the site
- Student will sign and submit **Level II Student Fieldwork Agreement Form** (Appendix H)
- *Contact AFWC as soon as possible if changes to placement have to be made*

Throughout fieldwork:

- Weekly supervision meetings with student
- Optional 4-week check-in
- AFWC will conduct site visit and complete **Site Visit Form** (Appendix F)
- **Midterm evaluation (FWPE)** to be completed by end of week 6 and submitted to AFWC
 - Student advised to complete midterm FWPE self-assessment
- *Contact AFWC as needed with any questions, concerns, or updates*

At end of fieldwork:

- **Final evaluation (FWPE)** to be completed by end of week 12 and submitted to AFWC
 - Student advised to complete final FWPE self-assessment
- Student will complete **SEFWE** (Appendix J) and submit to AFWC
- AFWC will send **professional development certificate** via email

A recommended week-by-week structure for Level II is included in the Appendix A.

Family Educational Rights and Privacy Act (FERPA)

FERPA is a federal law that protects students' privacy of educational records. The legislation acts in a similar manner to HIPAA, which protects patients' privacy of medical records in a healthcare setting. Fieldwork evaluations and related grades fall under the umbrella of FERPA. Fieldwork educators should be mindful of all discussions regarding a student's grade (including previous students) and academic standing. It is best practice to avoid sharing any information related to grades, academic records, and academic standing with anyone besides the student, AFWC, or other relevant university faculty (i.e., program director).

FERPA may also limit the information that the AFWC is permitted to share with a fieldwork site/educator.

Please note the following language from the UVM Memorandum of Understanding:

The CLINICAL EDUCATION SITE shall ensure that all student records provided to it to effectuate clinical education, or created at UNIVERSITY's request relating to a student and their performance while with the CLINICAL EDUCATION SITE, shall be made available only in conformance with the Family Education Rights and Privacy Act of 1974 ("FERPA"), 20 U.S.C. 1232g, as it may be amended from time to time, and other governing laws.

Fieldwork Accommodation Policy

The UVM OTD program faculty are committed to assisting learners with disabilities to have equitable access in our academic courses and fieldwork experiences while protecting the privacy of all learners as

well. Early acknowledgement and communication with the Program director is essential to a successful partnership in arranging accommodations.

The Student Accessibility Services (SAS) provides services and accommodations to all UVM students who have current documentation of a disability. It includes but is not limited to assistance with walking, talking, learning, hearing, or seeing. The SAS Office is located at A170 Living Learning Center. Their web address is: https://www.uvm.edu/academicsuccess/student_accessibility_services

If a student qualifies for a fieldwork accommodation, the AFWC will notify the fieldwork educator. Additional guidance and collaboration will be offered to guide implementation of accommodation efforts.

Student Orientation

A comprehensive overview of site policies and procedures is helpful for both fieldwork students and supervisors. The following areas may be included in the student orientation:

- Staff introduction
- Physical facilities and safety protocols
- Emergency procedures
- Facility/agency philosophy
- Documentation
- Site-specific fieldwork objectives

Safety Procedures

The fieldwork educator is responsible for the safety of clients at all times. Appropriate means of student supervision must be considered to maintain client safety. Supervision should begin at the line-of-sight level and may gradually decrease to less direct supervision, given adequate demonstration of student knowledge and use of safety techniques. All safety procedures endorsed by the sight should be discussed in detail during orientation, treatment sessions, and supervision meetings. Written resources discussing safety procedures are also helpful for students to review, especially during downtime activities.

Safety precautions for students to be aware of may include:

- Ergonomics and safe handling
- Medication alerts
- Post-surgical precautions
- Contact guard assist during ambulation
- Fall risks
- Swallowing/choking risks
- Environmental restrictions (e.g., locked units)
- Sharps count
- Suicide precautions
- Hospital codes

Emergency Procedures

In case of emergency, communication is key. An exchange of contact information between fieldwork educator and student is recommended no later than day one of the fieldwork placement.

If a student does not arrive at fieldwork as expected, the following procedure is recommended:

1. Attempt to contact the student by any means available, including phone, text, and email.
2. Submit a CARE Form: https://www.uvm.edu/deanofstudents/student_advocacy OR [uvm.edu/report](https://www.uvm.edu/report)
 - a. The CARE form will alert the university of any concerns. It is the quickest way to connect with helpful supports; it will not get the student in trouble.
3. Contact the university, including administrator, AFWC, or program director. Please note that faculty schedules may alter during summer semesters, as indicated below.
 - a. Administrator (full-time during summer)
 - i. Email: Karen.morris@med.uvm.edu
 - ii. Phone: 802-656-3252
 - b. AFWC
 - i. Email: Nicola.Hawko@med.uvm.edu
 - ii. Phone: (802) 324-3900
 - c. Program Director
 - i. Email: Victoria.priganc@med.uvm.edu
4. The university will contact the student's emergency contact. Fieldwork sites may request emergency contact information during orientation to use in case of emergency.

Other helpful information:

- UVM Police: (802) 656-3473 (or dial 911)
- Download CatSafe (LiveSafe app) to connect with UVM Police via call or text
- Crisis text line: text VT to 741741

Behavioral Objectives

The following professional behaviors are expected of all fieldwork students:

Attitude	Communicates in positive manner
	Provides constructive feedback to others
	Manages stressors constructively
	Adapts and copes well with change
	Modifies performance after feedback
	Is a team player
	Is proactive and anticipates needs of others
	Assists with problem resolution
Performance	Demonstrates positive verbal and non-verbal interpersonal communication skills
	Uses supplies and equipment according to site guidelines and safety
	Demonstrates clear, legible, grammatically correct, and concise writing
	Handles conflict constructively
	Displays professional appearance
	Shows attentive behaviors
Judgement	Respects diversity

	Meets deadlines, informs supervisor when changes to deadlines are necessary
	Follows the chain of command
	Is aware of own strengths and weaknesses
	Respects and maintains confidentiality
	Ability to separate personal and professional issues
	Demonstrates awareness of/follows Code of Ethics

Demonstration of professional behaviors should be included in midterm and final evaluations for each fieldwork rotation. Challenges with behavioral expectations at any time during the fieldwork rotation should be communicated to the AFWC *as soon as possible so a remediation plan can be implemented.*

Patient Confidentiality Information

Per HIPAA guidelines, students cannot report this patient information in fieldwork assignments, such as case study presentations:

- Name
- Location – includes anything smaller than a state, such as street address
 - May include descriptor of location, such as “a large university medical center”
- Dates – all, including date of birth, admission, and discharge dates
- Telephone and fax numbers
- E-mail addresses
- Social security numbers, medical record numbers, account numbers, health plan beneficiary numbers, certificate and/or license numbers
- Vehicle identification numbers and license plate numbers
- Device identifiers and their serial numbers
- Web Universal Resource Locators (URLs)
- Internal Protocol (IP) address numbers
- Biometric identifiers, including finger and voice prints
- Full face photographic images and any comparable images
- Any other unique identifying number, characteristic, or code

For written reports, the following information *can* be shared:

- Age
 - Age 90 and over must be aggregated to prevent the identification of older individuals
- Race
- Ethnicity
- Marital status
- Codes – a random code may be used to link cases, as long as the code does not contain, or is not a derivative of, the person’s social security number, date of birth, phone/fax numbers, etc.

Students, as well as therapists, often keep “working files” in their desks. This is still allowed under HIPAA guidelines; however, this information must be locked in a file cabinet when not in use, and must be shredded when no longer needed.

Source: American Occupational Therapy Association (2016). HIPAA guidelines for fieldwork. [PDF]. <https://www.aota.org/education/fieldwork/-/media/54a6b578dd8d4b99b3d23602899e9680.ashx>

Guidelines for Documentation

Sample Documentation Templates

Session SOAP Note

OCCUPATIONAL THERAPY SESSION NOTE

Client Information

Facility Name:

Treating Therapist:

Patient Name:

Patient DOB / Age:

Date of Session:

Diagnosis Code(s):

Treatment Codes(s):

Subjective: *Client/family concerns, client report, complaints*

Objective: *Observations, measurements, level of assistance needed, prompts provided, task and/or environmental modifications, grading of activity, percentage of successful trials*

Assessment: *Interpretation of client progress, therapist rationale for activity choices and intervention techniques, significant changes in functioning or potential reason for plateau*

Plan: *Ongoing plan of care, referrals, recommendations across settings*

Initial Evaluation

OCCUPATIONAL THERAPY EVALUATION: Inpatient Outpatient

Performed On:

Performed By:

Reason for Treatment

Subjective Statement:
Reason for Referral:
Chief Complaint:
OT Referring Physician:
OT Episode of Care:
OT Visit:
OT Diagnosis:
OT Previous Services for Diagnosis:
OT Age: DOB:
OT Sex:
OT Local Services:
OT Interim Medical History:
OT Compliance of Home Program:
OT Cultural Barriers:
OT Accompanied by:
OT Response to Treatment:
OT Re-evaluation:
I attest to reviewing the medical chart prior to this appointment.

General Information

OT Precautions:
OT location:
OT Pain Present:
During the session pain was addressed by:
OT Prescription:

OT Past Medical History and Diagnoses _

Medications:
Allergies:
Social History:
Cultural Concerns:

UE ROM/Strength

Upper Extremity Overall ROM Grid

Left Upper Extremity Active Range:		
Left Upper Extremity Passive Range:		
Right Upper Extremity Active Range:		

Right Upper Extremity Passive Range:		
Lt Upper Extremity Strength:		
Rt Upper Extremity Strength:		

Left Upper Extremity Strength Grid

Scapular Elevation:		
Shoulder Flexion:		
Shoulder Extension:		
Shoulder Abduction:		
Shoulder Adduction:		
Shoulder External Rotation:		
Shoulder Internal Rotation:		
Elbow Flexion:		
Elbow Extension:		
Forearm Pronation:		
Forearm Supination:		
Wrist Flexion:		
Wrist Extension:		
Finger Flexion:		
Finger Extension:		
Other:		

Right Upper Extremity Strength Grid

Scapular Elevation:		
Shoulder Flexion:		
Shoulder Extension:		
Shoulder Abduction:		
Shoulder Adduction:		
Shoulder External Rotation:		
Shoulder Internal Rotation:		
Elbow Flexion:		
Elbow Extension:		
Forearm Pronation:		
Forearm Supination:		
Wrist Flexion:		
Wrist Extension:		
Finger Flexion:		
Finger Extension:		
Other:		

Orthotics

Splint Type:
Wearing Schedule:
Splint Purpose:
Splint Details:
Ability to Don/Doff:
Precautions Reviewed, Discontinue and Call Therapist If:

UE Coordination:

UE Function:

Therapeutic Activities:

Therapeutic Exercise:

Neuromuscular Reeducation

Cognition:

Vision/Perception:

Basic ADL/ IADL:

Development:

Sensory Integration:

Education:

Education Topic:
Individuals Taught:
Teaching Method:
Teaching Outcome:
Learning Style:
Barriers to learning:

Occupational profile: Number of impairments:

Completed above: yes/ no

If no, please specify:

Assessment

OT Treatment Recommendations: _

Rehab Potential: (good, fair, poor) _

OT Evaluation Code Justification

OT Profile and Med History: Brief/ Expanded/ extended
Patient Assessment: 1-3/ 3-5/ or 5 or more Performance deficits
Clinical Decision-Making OT: Low complexity/ Moderate Complexity/ High Complexity

Goals

OT Patient/Caregiver Goal:

Short-term goals: _

Duration: _

1. _
 - a. Date initiated: _
 - b. Status: _
 - c. % met/ Comments: _
2. _
 - a. Date initiated: _
 - b. Status: _
 - c. % met/ Comments: _

Long-term goals:

Duration:

1. _
 - a. Date initiated: _
 - b. Status: _
 - c. % met/ Comments: _
2. _
 - a. Date initiated: _
 - b. Status: _
 - c. % met/ Comments: _

Plan of Care

Frequency:
Duration:
Planned Treatments:
Treatment Plan/Goals Established With Patient/Caregiver:
OT Evaluation Complete:

OT Charges

Medicare Patient:
OT Evaluation Charge: Low/ Medium/ High
OT Evaluation Time:
OT Reevaluation Charge:
OT Re-Evaluation Time:
ICD Code Problem List OT:

Evaluation	Low Complexity	Moderate Complexity	High Complexity
OT Profile and Med. Hx.	Occupational profile and medical and therapy history Brief history relating to present problem	Occupational profile and medical and therapy history Expanded review of history relating to present problem	Occupational profile and medical and therapy history Extensive review of history relating to present problem
Patient Assessment	Assessment that includes 1-3 performance deficits that result in activity limitations and/or participation restrictions	Assessment that includes 3-5 performance deficits that result in activity limitations and/or participation restrictions	Assessment that includes 5 or more performance deficits that result in activity limitations and/or participation restrictions
Clinical Decision Making	Low complexity with analysis of occupational profile, analysis of data from assessments and consideration of limited # of treatment options No comorbidities that affect occupational performance Modification of tasks or assistance with assessment is not necessary to enable completion of evaluation component Typically 30 minutes of face to face contact	Moderate complexity with analysis of occupational profile, analysis of data from assessments and consideration of several treatment options Presents with comorbidities that affect occupational performance Minimal to moderate modification of tasks or assistance with assessment is necessary to enable completion of evaluation component Typically 45 minutes of face to face contact	High analytical complexity with analysis of occupational profile, analysis of data from assessments and consideration of multiple treatment options Presents with comorbidities that affect occupational performance Significant modification of tasks or assistance with assessment is necessary to enable completion of evaluation component Typically 60 minutes of face to face contact

Clinician's Signature/Credentials _____

Name (printed): _____

License # _____

Time _____ Date _____

Adapted from: Boston Children's Hospital, Downtime Documentation Templates

Prohibited Medical Abbreviations



Official "Do Not Use" List¹

Do Not Use	Potential Problem	Use Instead
U (unit)	Mistaken for "0" (zero), the number "4" (four) or "cc"	Write "unit"
IU (International Unit)	Mistaken for IV (intravenous) or the number 10 (ten)	Write "International Unit"
Q.D., QD, q.d., qd (daily)	Mistaken for each other	Write "daily"
Q.O.D., QOD, q.o.d., qod (every other day)	Period after the Q mistaken for "I" and the "O" mistaken for "I"	Write "every other day"
Trailing zero (X.0 mg)*	Decimal point is missed	Write X mg
Lack of leading zero (.X mg)		Write 0.X mg
MS	Can mean morphine sulfate or magnesium sulfate	Write "morphine sulfate" Write "magnesium sulfate"
MSO ₄ and MgSO ₄	Confused for one another	

¹ Applies to all orders and all medication-related documentation that is handwritten (including free-text computer entry) or on pre-printed forms.

***Exception:** A "trailing zero" may be used only where required to demonstrate the level of precision of the value being reported, such as for laboratory results, imaging studies that report size of lesions, or catheter/tube sizes. It may not be used in medication orders or other medication-related documentation.

Additional Abbreviations, Acronyms and Symbols (For possible future inclusion in the Official "Do Not Use" List)

Do Not Use	Potential Problem	Use Instead
> (greater than)	Misinterpreted as the number	Write "greater than"
< (less than)	"7" (seven) or the letter "L"	Write "less than"
	Confused for one another	
Abbreviations for drug names	Misinterpreted due to similar abbreviations for multiple drugs	Write drug names in full
Apothecary units	Unfamiliar to many practitioners	Use metric units
	Confused with metric units	
@	Mistaken for the number "2" (two)	Write "at"
cc	Mistaken for U (units) when poorly written	Write "mL" or "ml" or "milliliters" ("mL" is preferred)
µg	Mistaken for mg (milligrams) resulting in one thousand-fold overdose	Write "mcg" or "micrograms"

Updated 3/5/09

Source: Tariq, R.A. & Sharma, S. (2022). Do not use list Joint Commission [PDF]. Retrieved from <https://www.ncbi.nlm.nih.gov/books/NBK519006/figure/article-17002.image.f1/>

Billing for Student-led Services

Centers for Medicare & Medicaid Services (CMS) denotes billing guidelines that may impact payment for services provided by students under supervision. It is the fieldwork supervisor's responsibility to review the billing guidelines at the state and site levels. Details regarding Medicare requirements can be found here: <https://www.aota.org/education/fieldwork/medicare-requirements-for-student-supervision>

Inpatient hospital and inpatient rehabilitation facility (IRF)—Medicare Part A

Final SNF PPS Rule for FY 2012 (76 Fed. Reg. 48510-48511), CMS stated: "We are hereby discontinuing the policy announced in the FY 2000 final rule's preamble requiring line-of-sight supervision of therapy students in SNFs, as set forth in the FY 2012 proposed rule. Instead, effective October 1, 2011, **as with other inpatient settings, each SNF/provider will determine for itself the appropriate manner of supervision of therapy students consistent with state and local laws and practice standards.**"

Per current guidelines, "Services provided by therapy students may count toward the IRF three-hour rule/intensity of therapy services requirement." Adequate supervision must be provided to ensure quality service provision.

Skilled nursing facility (SNF)—Medicare Part A

Per current guidelines, services provided by OT students may count as therapy minutes on the Minimum Data Set (MDS).

The MDS 3.0 RAI Manual, Chapter 3, Section O includes the following guidance for therapy students:

Therapy Students

Medicare Part A—Therapy students are not required to be in line-of-sight of the professional supervising therapist/assistant (Federal Register, August 8, 2011). Within individual facilities, *supervising therapists/assistants must make the determination as to whether or not a student is ready to treat patients without line-of-sight supervision.* Additionally all state and professional practice guidelines for student supervision must be followed.

Time may be coded on the MDS when the *therapist provides skilled services and direction to a student who is participating in the provision of therapy.* All time that the student spends with patients should be documented.

For "individual therapy," the RAI manual states:

When a therapy student is involved with the treatment of a resident, the minutes may be coded as individual therapy when *only one resident is being treated by the therapy student and supervising therapist/assistant* (Medicare A and Medicare B). The supervising therapist/assistant shall not be engaged in any other activity or treatment when the resident is receiving therapy under Medicare B. However, for those residents whose stay is covered under Medicare A, *the supervising therapist/assistant shall not be treating or supervising other individuals and he/she is able to immediately intervene/assist the student as needed.*

Home health—Medicare Part A

Home health services may be provided by a student when a supervising therapy is present in the home. See relevant state laws for further guidance.

Medicare Part B—Private practice, hospital outpatient, SNF, CORF, ORF, rehabilitation agency, and other Part B providers including home health agencies when providing Part B services

Students may deliver services under the direction of the supervising therapist. The supervising therapist must remain in the same room as the student at all times during evaluation and treatment, and cannot treat a different patient at the same time. The supervising therapist signs off on all documentation and is ultimately responsible for all clinical decisions and services delivered.

Additional Resources for Fieldwork Educators

UVM OTD Site Resource Page

The UVM OTD Site Resource Page will be continually updated with resources for fieldwork educators. This webpage also includes the most up-to-date version of fieldwork course syllabi and departmental handbooks. The Site Resource Page can be found here:

<https://public.exxat.com/D003/University%20of%20Vermont/announcement>

Time-sensitive resources (such as upcoming workshops, continuing education courses, or relevant announcements) will be sent to fieldwork educators via email from the AFWC.

NEOTEC

As a member of New England Occupational Therapy Education Consortium (NEOTEC), FWEs are encouraged to access this website for additional student supervision resources [NEOTEC - New England Occupational Therapy Education Council \(neotecouncil.org\)](http://neotecouncil.org)

Fieldwork Educator Certificate Workshop

AOTA offers fieldwork educator workshops to provide strategies for clinical education. It could be an opportunity to support students as well as support the fieldwork site by learning how to facilitate an optimal fieldwork experience. Learn more about upcoming workshops here:

<https://www.aota.org/education/fieldwork/fieldwork-educators-certification-workshop>

Self-Assessment Tool for Fieldwork Educator Competency (SAFECOM)

This tool is designed to provide information about strengths and potential areas for growth as a fieldwork educator. Additional information, the questionnaire, and a professional development tool can be found here: [https://www.aota.org/-](https://www.aota.org/-/media/Corporate/Files/EducationCareers/Educators/Fieldwork/Supervisor/Forms/Self-Assessment%20Tool%20FW%20Ed%20Competency%20(2009).pdf)

[/media/Corporate/Files/EducationCareers/Educators/Fieldwork/Supervisor/Forms/Self-Assessment%20Tool%20FW%20Ed%20Competency%20\(2009\).pdf](https://www.aota.org/-/media/Corporate/Files/EducationCareers/Educators/Fieldwork/Supervisor/Forms/Self-Assessment%20Tool%20FW%20Ed%20Competency%20(2009).pdf)

StrengthsFinder 2.0

UVM OTD students take the Clifton StrengthsFinder assessment in the first year of the program. It is an evidence-based questionnaire that highlights individuals' top 5 strengths. The insight report also details how to capitalize and advocate on one's own strengths, as well as how to adjust behavioral patterns when needed. Fieldwork educators may ask students to share their top strengths or insight reports in order to establish a strengths-based approach to fieldwork. If supervisors have taken similar personality inventories, they may share their results with students.

Occupational Therapy Practice Framework

The OTPF-4 details the essential constructs of occupational therapy practice. The updated version also includes examples to demonstrate each category. It is a helpful tool to guide clinical reasoning of therapists and outcome-driven education of fieldwork students.

Occupational Therapy Practice Framework: Domain and Process—Fourth Edition. Am J Occup Ther August 2020, Vol. 74(Supplement_2), 7412410010p1–7412410010p87. doi: <https://doi.org/10.5014/ajot.2020.74S2001>

Appendix A: Sample Week-by-Week Structure of Responsibilities

Week	1	2	3	4	5	6	7	8	9	10	11	12
Orientation	Observations Orientation mtgs HIPAA/OSHA/BBP Safety in-services			May orient/educate re: specific client conditions, interventions, or tasks/roles as need arises and student(s)' competencies develop; EBP searches								
Time Management	Learn daily routine	Know weekly routine	Plan week to week		Understand length of stay				Able to plan for tasks of caseload (entry level role: admission thru discharge)			
Evaluation	Per site: Acute = more frequent / Long-term = less frequent Scaffolded skills include: recording observations, partial administration, tool selection, full administration											
Intervention	Observe; may begin co-treatment and/or group co-leadership			Continue with co-treatment or co-leadership; gradually increase number of clients on student caseload until student becomes primary therapist/leader (under supervision) – per site/payer policies								
Caseload	1/4 caseload			1/2 caseload			3/4 caseload				Full caseload	
Supervision	Directive – daily check-ins			Coaching – weekly meetings + daily check-in as needed			Supporting – weekly meetings + check-in as needed			Delegating – weekly meetings + check-in as needed		
Documentation	Per site policies: contact, daily, weekly, biweekly, monthly – according to caseload needs May include: group protocols, process notes, session plans Initial evaluations/re-evaluations (ongoing), Discharge summaries/transfer of service notes (ongoing)											
Student Assessment Forms	Review initial forms Set goals Site-specific objectives			May do informal 4-week check-in	Formal FWPE Midterm		Ongoing feedback between student and supervisor				FWPE + SEFWE sent to AFWC	

Adapted from American Occupational Therapy Association. (2020). Tufts University; Policies and procedures. [PDF].

<https://www.aota.org/-/media/Corporate/Files/EducationCareers/Educators/Fieldwork/Supervisor/Samples/Tufts-Policies-Procedures.pdf>

Appendix B: Occupational Therapy Department Fieldwork Weekly Planning Form

Student:

Facility:

Fieldwork Educator:

Date:

Week #:

Directions: This form is to be completed by the student and is to be brought to the weekly meeting between the student and the Fieldwork Educator.

1. What I think that I did well with this week:

2. What I think that I did not do well with this week:

3. Questions and Concerns:

4. Supervision Needs:

5. Goals for next week:

Appendix C: Sample Outline for Site-Specific Fieldwork Student Manual

1. Orientation Outline
2. Assignments
3. Safety Procedures/Codes
4. Behavioral Objectives
5. Week-by-Week Schedule of Responsibilities
6. Patient Confidentiality Information (Patient Rights)
7. Guidelines for Documentation:
 - Completed samples of all forms
 - Acceptable medical abbreviations
 - Discharge plan
 - Billing
 - Dictation Directions, if applicable
8. The Occupational Therapy Practice Framework: Domain and Process

Additional information that can gradually be added to the student manual

1. Organizational Chart of the Fieldwork Setting
2. History of the Fieldwork Setting
3. Department Information
 - Policy and procedures
 - Mission statement
 - Organizational chart
 - Essential job functions
 - Dress code
4. Regularly Scheduled Meetings:
 - Dates\times
 - Purpose of meeting
5. Special Client Related Groups\Programs
 - Purpose
 - Referral system
 - Operation
 - Transport
6. Patient Confidentiality Information (Patient Rights)
7. Guidelines for Documentation
8. Responsibilities of:
 - Fieldwork educator
 - Student
 - Fieldwork coordinator (if position exists)
9. Performance Evaluation
Procedure and guidelines used in the evaluation of
 - Student
 - Fieldwork Educator
 - Fieldwork Experience

Appendix D: Fieldwork Educator Affirmation Form
Fieldwork Educator Affirmation Form – Level One



Fieldwork Site	
Address	

In preparation for assuming the role of fieldwork educator for the UVM OTD program, I attest to the following (please initial all items):

Initial	
	<p>I have been adequately prepared to supervise an occupational therapy student based on my exposure to the following information (check all that apply):</p> <p><input type="checkbox"/> Communication with UVM OTD faculty via emails, phone calls, site visits, videos, etc..)</p> <p><input type="checkbox"/> Previous experience as a fieldwork educator</p> <p><input type="checkbox"/> Individual research and self-study (journals, self-assessments, etc..)</p> <p><input type="checkbox"/> Facility-based fieldwork supervision training</p> <p><input type="checkbox"/> UVM OTD offered conferences, workshops or trainings</p> <p><input type="checkbox"/> NEOTEC offered conferences, workshops or trainings</p> <p><input type="checkbox"/> Other: _____</p>
	<p>I have received and reviewed the course syllabus <i>before</i> the accompanied fieldwork course which includes information on learning objectives, the UVM OTD curriculum design and fieldwork program design.</p>

Name	
Signature	
Date	

Note: This form verifies the UVM OTD program is compliant with ACOTE standard C.1.10 & C.1.13.
 Adapted from: Western New England University, Division of Occupational Therapy

Fieldwork Educator Affirmation Form – Level Two

Fieldwork Site	
Address	

In preparation for assuming the role of fieldwork educator for the UVM OTD program, I attest to the following (please initial all items):

Initial			
	I am licensed to practice occupational therapy in the State of _____		
	License #	Issue date	Expiration Date
	<p>I have been adequately prepared to supervise an occupational therapy student based on my exposure to the following information (check all that apply):</p> <p><input type="checkbox"/> Communication with UVM OTD faculty via emails, phone calls, site visits, videos, etc..)</p> <p><input type="checkbox"/> Previous experience as a fieldwork educator</p> <p><input type="checkbox"/> Individual research and self-study (journals, self-assessments, etc..)</p> <p><input type="checkbox"/> Facility-based fieldwork supervision training</p> <p><input type="checkbox"/> UVM OTD offered conferences, workshops or trainings</p> <p><input type="checkbox"/> NEOTEC offered conferences, workshops or trainings</p> <p><input type="checkbox"/> Completed Self Assessment of Fieldwork Educator Competency (SAFECOM)</p> <p><input type="checkbox"/> Other: _____</p>		
	I have received and reviewed the course syllabus for the accompanied fieldwork course which includes information on learning objectives, the UVM OTD curriculum design and fieldwork program design.		
	I understand that the OTD student that is under my supervision for Level Two fieldwork must complete a full-time equivalent 12 weeks of fieldwork.		
	I have been working full time as an occupational therapist for a minimum of one year.		

Name	
Signature	
Date	

Note: This form verifies the UVM OTD program is compliant with ACOTE standard C.1.10 & C.1.13.
Adapted from: Western New England University, Division of Occupational Therapy

Appendix E: NEOTEC OT Fieldwork Site Profile

The NEOTEC OT Fieldwork Site Profile can be found as fillable PDF through this link:

<https://neotecouncil.org/wp-content/uploads/2023/02/Fieldwork-Site-Profile-2023.pdf>

This form combines the Fieldwork Data Form and the Site-Specific Objectives. It will also be sent to fieldwork educators via email upon confirmation of a student placement.

Appendix F: UVM OT Program Site Visit Form

**University of Vermont
Occupational Therapy Program
Site Visit Form**

Year		
Term		
Date		
Student Name		
Supervisor		
Academic Fieldwork Coordinator		

Primary supervisor's years of experience _____

Site Demographics

Site;
Type of Setting:
Type/Diagnosis frequently seen:
Staff: OT's _____ OTA's _____
Other discipline collaboration:
Learning Assignments:
Optional Learning Opportunities:

Supervisor/Student Feedback

Type of supervision (group. 1:1):	Frequency:
✧ Number of supervisors to whom student is assigned: _____	
✧ Ratio of supervisors to students (if group/collab. Supv.) _____	
✧ Supervision sessions are regularly scheduled <input type="checkbox"/> Yes <input type="checkbox"/> No	

✧ Sufficient time is scheduled for supervision?	<input type="checkbox"/> Yes <input type="checkbox"/> No
✧ Individual supervision is available	<input type="checkbox"/> Yes <input type="checkbox"/> No
✧ Student thinks supervision, support, and feedback are adequate:	<input type="checkbox"/> Yes <input type="checkbox"/> No
✧ Style of supervision meets students needs:	<input type="checkbox"/> Yes <input type="checkbox"/> No
✧ Objectives/Expectations are communicated at beginning of fieldwork:	<input type="checkbox"/> Yes <input type="checkbox"/> No
✧ Student receives at least 6 hours per week of Direct OT Supervision:	<input type="checkbox"/> Yes <input type="checkbox"/> No
✧ Student provided with opportunity to engage clients/observe	
Client Centered/Occupation Based Treatment:	<input type="checkbox"/> Yes <input type="checkbox"/> No
✧ Site/Supervisor familiar with Academic Curriculum Design:	<input type="checkbox"/> Yes <input type="checkbox"/> No

Student Performance Feedback

Identification of student strengths and needs:

✧ Student Perspective:

✧ Supervisor Perspective:

Progress of Clinical Skills and Professionalism:

Interventions or learning strategies implemented to address problems (if any) and results:

If applicable, Recommendations for further action (site/school/student)

Appendix G: OT7700 Level I Student Fieldwork Agreement Form

I, [Click or tap here to enter text.](#) agree to honor my commitment to professionally participate in a FW program as a University of Vermont occupational therapy student at (facility name) [Click or tap here to enter text.](#) beginning on (start date of FW [Click or tap here to enter text.](#)) and ending on (end date of FW) [Click or tap here to enter text.](#). Prior to FW I will review the facility site specific information and complete all necessary prerequisites.

I agree to be responsible for:

- Respecting confidentiality of information regarding clients and the client records in accordance to HIPAA and with the fieldwork site's policies and procedures.
- Complying with the professional standards set up by the clinical program, the University of Vermont and the AOTA code of Ethics. If I do not know or understand these standards, it will be my responsibility to learn them and to raise any items in question for discussion.
- Attending the fieldwork each day and on time for the duration of the fieldwork experience. Time off is not allowed. If an extenuating circumstance does occur, the FWEd and AFWC must be notified immediately. Missed time must be rescheduled and made up.
- Adherence to the policies and procedures of the facility.
- Arrange for my own transportation and/or housing when not provided by the facility; and arrange for my own meals when not provided by the facility.
- Provide the fieldwork site with evidence of an annual physical examination, 2 step PPD, immunizations, titers, and other medical tests prior to or during FW.
- The Occupational Therapy Program has permission to release health records & criminal background clearances to the student's fieldwork site.
- Wear the fieldwork site's uniform (i.e. lab coat, scrubs); if no dress code is required, will adhere to the University of Vermont dress code. I will wear my name tag/identification at all times.
- Obtain prior written approval from the facility and the University of Vermont before publishing any written material relating to the fieldwork experience.
- Drug screening, it is my responsibility to review the AOTA FW Data form to identify whether or not drug screening is required. If so, I will obtain the proper panel of screening and have it done during the requested time.

[Click or tap here to enter text.](#)

Student's Signature

[Click or tap here to enter text.](#)

Date

Adapted from the Occupational Therapy Student Manual at Florida Gulf Coast University

Appendix H: Level II Student Fieldwork Agreement Form

I, [Click or tap here to enter text.](#) agree to honor my commitment to professionally participate in a fieldwork program as an occupational therapy student at The University of Vermont (UVM) at (facility name) [Click or tap here to enter text.](#) beginning on (start date of FW) [Click or tap here to enter text.](#) and ending on (end date of FW) [Click or tap here to enter text.](#). Prior to my fieldwork I will review the facility site-specific information and complete all necessary prerequisites. At least one month prior to my Level II fieldwork or after placed, I will contact my fieldwork site and make final arrangements.

I agree to be responsible for:

- Respecting the confidentiality of information regarding clients in accordance to HIPAA and with the fieldwork site's policies and procedures;
- Complying with the professional standards set up by the fieldwork program, UVM, and the AOTA code of Ethics. If I do not know or understand these standards, it will be my responsibility to learn them and to raise any items in question for discussion;
- Attending fieldwork every day. If an absence does occur, the student must notify the FWEd and the UVM AFWC immediately. If a student does miss greater than three days an intervention plan will be devised. The FWEd, student, and AFWC will develop an action plan to address how the missed assignments and time will be made up.
- Adherence to the policies and procedures of the facility;
- Arranging for my own transportation, meals, and housing when not provided by the facility;
- Providing the fieldwork site with evidence of an annual physical examination and 2 step PPD, immunizations, titers, and other medical tests as requested.
- Wearing the fieldwork site's uniform (i.e. lab coat, scrubs); if no dress code is required, will adhere to the UVM dress code. I will wear my name tag/identification.
- Obtaining prior written approval from the facility and UVM before publishing any written material relating to the fieldwork experience.
- Completing assignments while on each Level II fieldwork.

I also recognize the following:

- The OT Program has permission to release health records, results from criminal background checks to the fieldwork site.
- It is my responsibility to review the fieldwork site data form to identify whether or not drug screening is required. If so, I will obtain the proper panel of screening and have it done during the requested time.

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)

Student's Signature

Date

Adapted from the Occupational Therapy Student Manual at Florida Gulf Coast University

Appendix I: Level I - OT Student Evaluation of Fieldwork Site

Facility Name:

Location:

Setting:

FWEd Name and Credentials:

FWEd's email address:

FWEd's telephone number:

1. Did the site require any prerequisites prior to this fieldwork; if so, what were the requirements?
2. What were some of the site expectations & student responsibilities?
3. What aspects of the experience did you find most meaningful?
4. What aspects of the experience did you find least meaningful?
5. Did you feel prepared for this experience? If not, what could have been done to prepare you to the fullest for this experience?
6. Do you feel you received effective supervision? Explain Why or Why not:
7. Would you recommend this fieldwork site to another student? Why?
8. Outline, at least three areas you like to share with other OT students or some things you would have like knowing prior to this FW.
9. Should UVM continue to place students at this facility for Level I FW, why or why not?
10. What else would you like to share about this Fieldwork experience?

Appendix J: Student Evaluation of Fieldwork Experience (SEFWE)

STUDENT EVALUATION OF THE FIELDWORK EXPERIENCE (SEFWE)

Purpose:

This evaluation serves as a tool for fieldwork sites, academic programs, and students. The main objectives of this evaluation are to:

- Enable the Level II fieldwork student who is completing a placement at the site to evaluate and provide feedback to the fieldwork educator[s] and fieldwork setting
- Enable academic programs, fieldwork sites, and fieldwork educators to benefit from student feedback in order to develop and refine their Level II fieldwork programs
- Provide objective information to students who are selecting sites for future Level II fieldwork

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

Instructions to the Student:

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

Instructions to the Fieldwork Educator(s):

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

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

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

STUDENT EVALUATION OF THE FIELDWORK EXPERIENCE (SEFWE)

Fieldwork Site: _____

Address: _____

Type of Fieldwork: _____

Placement Dates: from _____ to _____

Order of Placement: [] First [] Second [] Third [] Fourth

Student work schedule:

Hours required: _____ per week

☐ Weekends required ☐ Evenings required

☐ Flex/Alternate Schedules Describe: _____

Identify Access to Public Transportation: _____

Please write your e-mail address here if you don't mind future students contacting you to ask you about your experience at this site: _____

We have mutually shared and clarified this Student Evaluation of the Fieldwork

Experience report on _____.
(date)

Student's Signature

FW Educator's Signature

Student's Name (Please Print)

FW Educator's Name and credentials (Please Print)

FW Educator's years of experience _____

ORIENTATION—WEEK 1

Indicate the adequacy of the orientation by checking “Yes” (Y) or “Needs Improvement” (I).

TOPIC	Adequate		Comment
	Y	I	
Site-specific fieldwork objectives			
Student supervision process			
Requirements/assignments for students			
Student schedule (daily/weekly/monthly)			
Agency/Department policies and procedures			
Documentation procedures			
Safety and Emergency Procedures			

CLIENT PROFILE

Check age groups worked with

Age	
0–5 years old	
6–12 years old	
13–21 years old	
22–65 years old	
65+ years old	

List most commonly seen occupational issues in this setting

Occupational Performance Issues

Describe the typical population: _____

OCCUPATIONAL THERAPY PROCESS

I. EVALUATION

List assessment tools used	Observed	Performed

II. INTERVENTION

List major therapeutic interventions frequently used and indicate whether each was provided as individual, group, or co-treatment, or as a consultation. List other professionals involved.

Types of Intervention	Individual	Group	Co-Tx	Consultation
Occupations: client-directed life activities that match/support/address identified goals				
Activities: meaningful to client, address performance skills and patterns to facilitate occupational engagement				
Preparatory methods: modalities, devices and techniques. These are provided to the client, no active engagement				
Preparatory tasks: actions that target specific client factors or performance skills. Requires client engagement				
Education: provides knowledge & enhances understanding about occupation, health and well-being to client to develop helpful behaviors, habits, routines				

Training: develops concrete skills for specific goal attainment. Targets client performance				
Advocacy: promotes occupational justice and empowers clients				

Identify theory(ies) that guided intervention: _____

III. OUTCOMES

Identify the types of outcomes measured as a result of OT intervention provided:

Type of outcome	yes	no	Provide example
Occupational Performance			
Prevention			
Health & Wellness			
Quality of Life			
Participation			
Role competence			
Well-being			
Occupational Justice			

**OTPF-III terminology

ASPECTS OF THE ENVIRONMENT

	Yes	No
The current Practice Framework was integrated into practice		
Evidence-based practice was integrated into OT intervention		
There were opportunities for OT/OTA collaboration		
There were opportunities to collaborate with other professionals		
There were opportunities to assist in the supervision of others—specify:		
There were opportunities to interact with other students		
There were opportunities to expand knowledge of community resources		
Student work area/supplies/equipment were adequate		

Additional educational opportunities provided with comments (specify): _____

DOCUMENTATION AND CASE LOAD

Documentation Format:

☐ Narrative ☐ SOAP ☐ Checklist ☐ Other: _____
☐ Hand-written documentation ☐ Electronic

If electronic, name format & program: _____

Time frame & frequency of documentation: _____

Ending student caseload expectation: _____ # of clients per week or day

Ending student productivity expectation: _____ % per day (direct care)

SUPERVISION

What was the primary model of supervision used? (check one)

- ☐ one fieldwork educator : one student
☐ one fieldwork educator : group of students
☐ two fieldwork educators : one student
☐ one fieldwork educator : two students
☐ distant supervision (primarily off-site)
☐ three or more fieldwork educators : one student (count person as fieldwork educator if supervision occurred at least weekly)

Frequency of meetings/types of meetings with fieldwork educator (value/frequency):

General comments on supervision: _____

SUMMARY of FIELDWORK EXPERIENCE

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

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

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

What advice do you have for future students who wish to prepare for this placement?

Study the following evaluations:

Study the following intervention methods:

Read up on the following in advance:

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

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

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

Why or why not? _____

INSTRUCTIONS

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

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

FIELDWORK EDUCATOR NAME: _____

FIELDWORK EDUCATOR YEARS OF EXPERIENCE: _____

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

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

Comments: _____

AOTA SEFWE Task Force, 2016

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