I. FUNDAMENTALS OF PRACTICE

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

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

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

☐ record review
☐ medication side effects
☐ post-surgical
☐ infection control
☐ fall prevention
☐ swallowing Behavioral
☐ food allergies
☐ ambulation status
☐ behavioral system/privilege level (e.g., locked area/unit, on grounds)
☐ 1:1 for personal safety/suicide precautions
☐ sharps count
☐ environment set up (no clutter, spills, unsafe items, etc.)
☐ OSHA/BBP
☐ I.V./lines
☐ ER codes/protocols
☐ restraint reduction
☐ HIPAA
☐ w/c locks/bedrails/call button
☐ Vital signs (BP, O2)
☐ Trach/Ventilator monitoring
☐ Fire/Evacuation/Lockdown
☐ CPR certification
☐ Communication re: change in status
☐ 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 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
☐ 3rd party payers ☐ regulatory bodies ☐ general public (e.g., promotional materials, in-services)
☐ Others:

Communicates about these 3 tenets in:

☐ client intervention/education ☐ in-services, brochures, bulletin boards, media announcements, etc.
☐ meetings ☐ documentation/correspondence
☐ 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, and outcome):

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

III. EVALUATION AND SCREENING

FWPE items #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:
☐ PEO  ☐ Sensory Integrative
☐ Biomechanical  ☐ NDT
☐ Behavioral  ☐ Functional Group Model
☐ Acquiesced  ☐ MOHO
☐ Psychodynamic  ☐ Occupational adaptation
☐ Cognitive Behavioral  ☐ Ecology of Human Performance
☐ DBT  ☐ Rehabilitation
☐ Sensory Processing  ☐ Clinical Reasoning
☐ Developmental  ☐ Cognitive/Cognitive Disability
☐ Motor Learning  ☐ Coping
☐ Other:
☐ 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,
referred by)
☐ 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/modify assessment procedures based on client needs, behaviors, and cultural variables such as:
☐ fatigue  ☐ O2 sat/respiration rate  ☐ BP/heart rate  ☐ frustration tolerance
☐ anxiety  ☐ acuity  ☐ cognitive status  ☐ pain
☐ language  ☐ attention  ☐ inability to perform task  ☐ refusal
☐ cultural beliefs, values, customs, expectations
☐ concerns re: safety (please specify):
☐ 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 finding (e.g., CAT: http://www.otcats.com/template/index.html; or CanChild (www.canchild.ca/en/canchildresources/educationalmaterials.asp#CriticalReview)
☐ uses structured method to review evidence (journals, case studies, consensus of experts)
☐ creates realistic plan reflective of accurate understanding of client abilities and potential
☐ sets goals consistent with client priorities, theory/frame of reference, evidence, & setting
☐ 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 clear & 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:
- 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)
- ☐ Other:

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

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

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

FWPE item #31: Produces the volume of work required in the expected time frame:
- ☐ is self-directed in managing schedule to meet workload/caseload
- ☐ gathers necessary evaluation data within allotted amount of time – specify:
- ☐ completes evaluation write-up with documentation co-signed & in chart/record within:
  - ☐ 8 hours
  - ☐ 24 hrs
  - ☐ 1 week
  - ☐ other:
FWPE item #31(con’t): Produces the volume of work required in the expected time frame:

☐ 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:

☐ completes progress note documentation within expected time period of:

☐ completes (specify number) of evaluations:

   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)

☐ make 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 items #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
☐ 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 item #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:
University of Central Arkansas, Level II Fieldwork Site Specific Objectives Checklist

**FWPE item #40:** Demonstrates effective time management:
- ☐ Monitors, maintains & adapts own schedule in accordance w/ site’s priorities
- ☐ Organizes agenda or materials for meetings & sessions
- ☐ Conducts evaluation &/or intervention sessions w/in allotted time, inclusive of set-up/clean-up
- ☐ Arrives on time to work, meetings, client sessions
- ☐ Completes documentation/paperwork in timely manner
- ☐ Completes learning activities by due dates

**FWPE item #41:** Demonstrates positive interpersonal skills including but not limited to cooperation, flexibility, tact, and empathy in social interactions w/ clients/patients, peers & colleagues:
- ☐ Communicates concerns in 1st person manner (e.g. “I statements”)
- ☐ Remains calm when conveying point of view when conflict arises
- ☐ Compromises as needed when negotiating workload
- ☐ Demonstrates flexibility to support own learning or department mission (e.g., extra effort, stay late if needed, etc.,)
- ☐ Demonstrates ongoing awareness of impact of own behavior on others
- ☐ Displays positive regard for others
- ☐ Demonstrates effective use of 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 item #42:** Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices:
- ☐ Demonstrates awareness of own background and sensitivity to worldviews of others (clients, family, colleagues)
- ☐ Refrains from imposing own beliefs & values on others
- ☐ Maintains clients’ dignity
- ☐ Gathers information about clients’ cultural values &/or spiritual beliefs
- ☐ Incorporates clients’ values & beliefs into therapeutic interactions & interventions
- ☐ Considers clients socioeconomic & community resources & lifestyle when designing intervention plans & discharge planning
- ☐ Demonstrates tolerance for differences in others & willingness to work w/ all clients

**Other expectations not noted above:**

_____________________________________________________

Signature

Adapted from NEOTEC Inc.