

University of Central Arkansas, Level II Fieldwork Site Specific Objectives Checklist

Site: _____ Date: _____

Contact Person: _____ Phone #: _____

Email: _____ Fax #: _____

I. FUNDAMENTALS OF PRACTICE

FWPE item #1: Adheres consistently to American Occupational Therapy Association's Code of Ethics and Ethics Standards (AOTA 2020) and all federal, state, and facility regulations.

- Follows Medicare and Medicaid guidelines
- Respects client's privacy and adheres to social media policies
- Follows human subject research regulations
- Demonstrates concern for well-being and 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 and equitable manner (social justice)
- Complies with institutional rules, local, state, federal, international laws and AOTA documents applicable to profession of occupational therapy (procedural justice)
- Provides comprehensive, accurate, and objective information when representing profession (veracity)
- Treats colleagues and other professionals with respect, fairness, discretion, and integrity (fidelity)
- Other: _____

FWPE item #2: Adheres to safety regulations and reports/documents incidents appropriately.

- | | |
|---|--|
| <input type="checkbox"/> Record review | <input type="checkbox"/> Infection control |
| <input type="checkbox"/> OSHA/BBP | <input type="checkbox"/> Restraint reduction |
| <input type="checkbox"/> Medication side effects | <input type="checkbox"/> Fall prevention |
| <input type="checkbox"/> I.V./lines | <input type="checkbox"/> HIPAA |
| <input type="checkbox"/> Post-surgical protocols | <input type="checkbox"/> Swallowing |
| <input type="checkbox"/> ER codes/protocols | <input type="checkbox"/> w/c locks/bedrails/call button |
| <input type="checkbox"/> Food allergies | <input type="checkbox"/> Ambulation status |
| <input type="checkbox"/> Vital signs (BP, O2) | <input type="checkbox"/> Trach/Ventilator monitoring |
| <input type="checkbox"/> 1:1 for personal safety/suicide precautions | <input type="checkbox"/> Sharps count |
| <input type="checkbox"/> CPR certification | <input type="checkbox"/> Communication re: change in status |
| <input type="checkbox"/> Behavioral system/privilege level (e.g., locked area/unit, on grounds) | <input type="checkbox"/> Environment set up (no clutter, spills, unsafe items, etc.) |
| <input type="checkbox"/> Fire/evacuation/lockdown | <input type="checkbox"/> Other: _____ |

FWPE item #3: Ensures the safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents.

- Adheres to facility policies and procedures
- Thorough chart reviews/checks MD orders/checks precautions/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/body mechanics
- 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
 - Adjusting as needed
- Operates equipment according to training protocols
- Attends to professional boundaries in therapeutic use of self-disclosure
- Effectively limit sets and redirects client(s)
- Establishes safe group climate (reinforce expectations/group rules or contract)

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II. BASIC TENETS

FWPE items #4-6: Articulates the values, beliefs, and distinct perspective of the occupational therapy profession, the value of occupation as a method and desired outcome of occupational therapy, and the role of occupational therapy practitioners to clients and other relevant parties clearly, confidently, and accurately.

Communicates:

- Verbally
- Via written material (e.g., handout, article, sample job description, etc.)

Communicates about these 3 tenets with:

- | | | |
|---|---------------------------------------|--|
| <input type="checkbox"/> Client | <input type="checkbox"/> Aides | <input type="checkbox"/> MT |
| <input type="checkbox"/> Families | <input type="checkbox"/> MDs | <input type="checkbox"/> 3 rd party payers |
| <input type="checkbox"/> Significant others | <input type="checkbox"/> Nursing | <input type="checkbox"/> Regulatory bodies |
| <input type="checkbox"/> OTA | <input type="checkbox"/> LISCW | <input type="checkbox"/> General public (e.g., promotional materials, in-services) |
| <input type="checkbox"/> PT | <input type="checkbox"/> Psychologist | <input type="checkbox"/> Others: _____ |
| <input type="checkbox"/> PTA | <input type="checkbox"/> CRTS | |
| <input type="checkbox"/> SLP | <input type="checkbox"/> CRC | |
| <input type="checkbox"/> Teacher | <input type="checkbox"/> AT | |

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 and examples specific to person, organization, population (facility mission/level of care/service delivery)
- OTPF language (revised) verbally and in written work
- Current AOTA official documents/fact sheets
- Other: _____

Communicates re: OT/OTA roles using:

- Current AOTA official documents
- Federal and state laws/practice acts governing evaluation/intervention
- State laws/practice acts re: role of OT/OTA
- Other: _____

III. EVALUATION AND SCREENING

FWPE item #7: Articulates a clear and logical rationale for evaluation process based on client information, contexts, theories, frames of reference, and/or practice models.

- Describes reasoning based on client, condition, context, FOR/EBP
- Explains choice of occupation-based and/or client factors
- Discusses psychometric properties (validity and reliability) of assessment tool
- Other: _____

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FWPE item #8: Obtains sufficient and necessary information from relevant sources throughout the evaluation process.

- Thorough record or chart review
- Client interview
- Family and/or caregivers
- Service providers
- 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 and 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, referral source)
- Discussion of psychosocial factors that affect performance/disposition (e.g., motivation, adjustment, anxiety, self-concept, QoL/participation, etc.)
- Assessment instruments that address psychosocial factors that affect 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
- Other(s): _____

FWPE item #9: Selects relevant screening and assessment* tools based on various factors (*see assessment chart).

- Psychosocial factors
- Client condition
- Client priorities and needs
- Client concerns about occupational performance and participation
- Theoretical support
- Practice context
- Funding sources
- Evidence
- Cultural relevance
- 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
 - Acquisitional
 - MOHO
 - Psychodynamic
 - Occupational Adaptation
 - Cognitive Behavioral
 - Ecology of Human Performance
 - DBT
 - Rehabilitation
 - Sensory Processing
 - Clinical Reasoning
 - Developmental
 - Cognitive/Cognitive Disability
 - Motor Learning
 - Coping
 - Other: _____

FWPE item #10: Determines the client's occupational profile and occupational performance through interview and other appropriate evaluation methods (see assessment chart for specific tools/competency expectations).

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

FWPE item #12: Administers standardized and non-standardized assessments and surveys accurately and efficiently to ensure findings are valid and reliable.

- Follows to assessment tool protocols/procedures (format, script, item use, scoring, etc.)
- Adheres to time guidelines

FWPE item #13: Modifies evaluation procedures based on client factors and contexts.

- | | |
|--|--|
| <input type="checkbox"/> Utilizes a quiet space | <input type="checkbox"/> Cognitive status |
| <input type="checkbox"/> Breaks up evaluation into smaller parts | <input type="checkbox"/> Pain |
| <input type="checkbox"/> Provides multisensory instructions | <input type="checkbox"/> Language |
| <input type="checkbox"/> Fatigue | <input type="checkbox"/> Attention |
| <input type="checkbox"/> O2 sat/respiration rate | <input type="checkbox"/> Inability to perform task |
| <input type="checkbox"/> BP/heart rate | <input type="checkbox"/> Refusal |
| <input type="checkbox"/> Frustration tolerance | <input type="checkbox"/> Cultural beliefs, values, customs, expectations |
| <input type="checkbox"/> Anxiety | <input type="checkbox"/> Concerns re: safety (please specify): _____ |
| <input type="checkbox"/> Acuity | <input type="checkbox"/> Other: _____ |

FWPE item #14: Interprets evaluation results to determine client's occupational performance strengths and challenges.

- 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 #15: Synthesizes and documents the results of the evaluation process clearly, accurately, and concisely, using systematic methods to record the 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 and 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 #16: Articulates a clear and logical rationale for intervention process based on the evaluation results, contexts, theories, frames of reference, practice models, and evidence.

- Verbally in supervision sessions
- Verbally in client sessions
- Via written assignments (journal, case study)
- In patient/client education materials
- Via sharing EBP article reviews
- In written documentation
- In rounds/team meetings
- Via in-services
- Other: _____

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FWPE item #17: Establishes an accurate and appropriate client-centered plan based on the evaluation results, contexts, theories, frames of reference, and/or practice models.

- Creates relevant and measurable goals in collaboration with client and/or family/caregivers to incorporate client priorities, theory/frame of reference, evidence, and setting
- Recommends additional consultation and referrals
- 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 and 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
- Other: _____

FWPE item #18: Uses evidence from research and relevant resources to make informed intervention decisions.

- Critically Appraised Papers (CAPs)/Critically Appraised Topics (CATs) (www.aota.org/Educate/Research.aspx; <http://www.otcats.com/index.html>)
- Articles from peer reviewed journals (e.g., AJOT, OTJR, etc.,)
- Discussion/sharing of material learned via other sources (textbooks, OT Practice, coursework, association website searches, conferences, etc.) in supervision
- Condition/status
- Stated interests
- Beliefs and values
- Psychosocial needs
- Other: _____

FWPE item #19: Selects client-centered and occupation-based interventions that motivate and challenge the client to achieve established goals that support targeted outcomes.

- Stated interests
- Beliefs and values
- Psychosocial needs
- Other: _____

FWPE item #20: Implements client-centered and occupation-based intervention plans.

Includes the consideration of all client-centered components including:

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

FWPE item #21: Chooses and, if needed, modifies intervention approach to achieve established goals that support targeted outcomes.

- Create, promote (health promotion)
- Establish, restore (remediation, restoration)
- Maintain
- Modify (compensation, adaptation)
- Prevent (disability prevention)

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FWPE item #22: Modifies task and/or environment to maximize the client's performance.

- Adapting sequence of activity and 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), and context
- Other: _____

FWPE item #23: Modifies the intervention plan and determines the need for continuation or discontinuation of services based on the client's status.

- Accurately represents client progress verbally and 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 #24: Documents the client's response to services in a manner that demonstrates the effectiveness of interventions.

- Progress reports with quantitative data (goal attainment scaling, excel charts/graphing, reassessment, 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 #25: Demonstrates through practice or discussion the ability to collaborate with and assign appropriate tasks to, as indicated, the occupational therapy aide, or others to whom responsibilities might be assigned, while remaining responsible for all aspects of treatment.

- Collaborates with paraprofessionals, nurses' aides, and volunteers
- Describes or assigns duties to commensurate to educational level, assessed competency, federal and 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 to OTA (close, direct, line of sight)
- Provides reference for state statutes/regulations governing performance of services and definitions of supervision (www.aota.org/Practitioners/Licensure/StateRegs/Supervision/36455.aspx)
- Describes and/or engages in tasks with OTA relative to job description and/or scope of practice as defined by state guidelines (e.g., soliciting contributions to evaluation process and/or delegating implementing and adjusting intervention plan) in accordance with AOTA Official Guidelines for Supervision, Roles, and Responsibilities (www.aota.org/Practitioners/Official.aspx)
- Completes alternate assignment to meet objective (please describe or attach): _____

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FWPE item #26: Demonstrates through practice or discussion an understanding of costs and funding systems related to occupational therapy services, such as federal, state, third party, and private payers.

- Understands billing for occupational therapy services
- Describes options for client procurement of adaptive equipment
- 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 #27: Demonstrates knowledge about the organization.

- Articulates setting's mission and values
- Accreditation status and licensing
- Specialty certifications
- Schedules meetings/sessions according to facility expectations
- Begins and ends sessions on time
- Attends meetings on time
- Reports in meetings in concise manner
- Meets paperwork deadlines per policy and procedures
- prioritizes workload according to policies and caseload demands
- Uses time management strategies (checklists, templates, to-do list)
- Other: _____

FWPE item #28: Meets productivity standards or volume of work expected of occupational therapy students.

- 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 and in chart/record within:
 - 8 hours
 - 24 hrs
 - 1 week
- Other: _____

VI. COMMUNICATION AND PROFESSIONAL BEHAVIORS

FWPE item #29: Communicates clearly and effectively, both verbally and nonverbally.

- Communicates with clients, families, caregivers, colleagues, services providers, administration, or public
- Uses language appropriate to the recipient of information, including but not limited to funding and 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, and attire
- Utilizes setting's services for translators or translation of written materials when indicated/available
- Other: _____

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FWPE item #30: Produces clear and accurate documentation.

- All written communication is legible, using proper spelling, punctuation, and grammar
- Completes computerized and/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 #31: Collaborates with fieldwork educator(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 and identify possible avenues for changes or improvements
- Discusses and/or negotiates need for adjustments to supervisory relationship, performance expectations, caseload, and learning environment to improve quality of experience (e.g., reviews AOTA Fieldwork Experience Assessment Tool)
- Other: _____

FWPE item #32: Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with fieldwork educator(s) and others.

- Comes to supervision with list of questions/concerns and possible options for how to address them
- Takes initiative to meet with other members of team to understand their role/perspective
- Reviews testing materials/manuals on own prior to observing or administering
- Seeks out, reviews, and shares reading materials/articles on frames/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 #33: Responds constructively to feedback in a timely manner.

- Engages in mutual feedback exchange (e.g., listen, clarify, acknowledge feedback and/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 and seeks support from supervisor appropriate to context of supervisory relationship and 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 #34: Demonstrates consistent and acceptable work behaviors.

- Takes initiative to address workload management
- Demonstrates consistent work behaviors in both task and interpersonal interactions
- Attends to site cleanliness, safety, and maintenance of supplies as appropriate to role
- Comes prepared for meetings/sessions
- Takes responsibility to address areas of personal/professional growth
- Proactively plans for and requests appropriate supports or accommodations in manner consistent with federal law and site resources (e.g., open in communication, provides appropriate documentation, requests reasonable accommodation if indicated)
- Other: _____

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FWPE item #35: Demonstrates effective time management.

- Monitors, maintains, and adapts own schedule in accordance with site's priorities
- Organizes agenda or materials for meetings and sessions
- Conducts evaluation and/or intervention sessions within 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 #36: Manages relationships effectively through therapeutic use of self and adjusts approach to meet the needs of clients and others.

- Communicates concerns in 1st person manner (e.g. "I statement")
- 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) and motivate others (peers/colleagues/clients)
- Provides genuine encouragement to maximize client's participation/performance
- Provides timely and specific feedback
- Sets limits to maintain safety and support positive behavior/performance improvement

FWPE item #37: Demonstrates respect for diversity factors of others.

- Respects client's spiritual and lifestyle choices
- Demonstrates awareness of own background and sensitivity to worldviews of others (clients, family, colleagues)
- Refrains from imposing own beliefs and values on others
- Maintains clients' dignity
- Gathers information about clients' cultural values and/or spiritual beliefs
- Incorporates clients' values and beliefs into therapeutic interactions and interventions
- Considers clients socioeconomic and community resources and lifestyle when designing intervention plans and discharge planning
- Demonstrates tolerance for differences in others and willingness to work with all clients
- Other: _____

Other expectations not noted above: _____

Signature