Fieldwork Education Manual
2024-2025

2024-2025 East Carolina University Occupational Therapy Fieldwork Education Manual was reviewed and approved by the majority of faculty in the Department of Occupational Therapy on 10/9/2024.

ECU OT PROGRAM INFORMATION

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Fieldwork Coordination Team
The Fieldwork Coordination Team (FWCT) works with students, faculty, college administration, and clinical site coordinators/educators collectively to ensure the procurement, placement, documentation, and fulfillment of designated experiential learning and fieldwork experience requirements.

Academic Fieldwork Coordinator
The academic fieldwork coordinator (AFWC) is responsible for all policies and processes related to fieldwork experiences and oversees compliance with ACOTE fieldwork education requirements. The academic fieldwork coordinator (*or appointed faculty member)* serves as the course instructor for fieldwork courses.

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Academic Fieldwork Coordinator
The academic fieldwork administrative assistant works closely with the academic fieldwork coordinator to facilitate ongoing communication with fieldwork stakeholders to fulfill fieldwork-related processes, database management, and student compliance.

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ECU OT Program Vision & Mission

Department of Occupational Therapy Vision

We envision a future in which our graduates transform clients' lives through the power of occupations to promote health and well-being.

Department of Occupational Therapy Mission

The mission of the Department of Occupational Therapy is to develop occupational therapists who now and, in the future, will:

1. Understand the power of meaningful occupations and use occupational engagement across all contexts to enhance quality of life, improve health and well-being, and reduce health disparities.
2. Lead the delivery of collaborative and high-quality occupational therapy services with clients, professionals, and systems, supported by research and service.
3. Practice innovative, ethical, and evidence-based occupational therapy to transform clients' lives in the region and beyond.
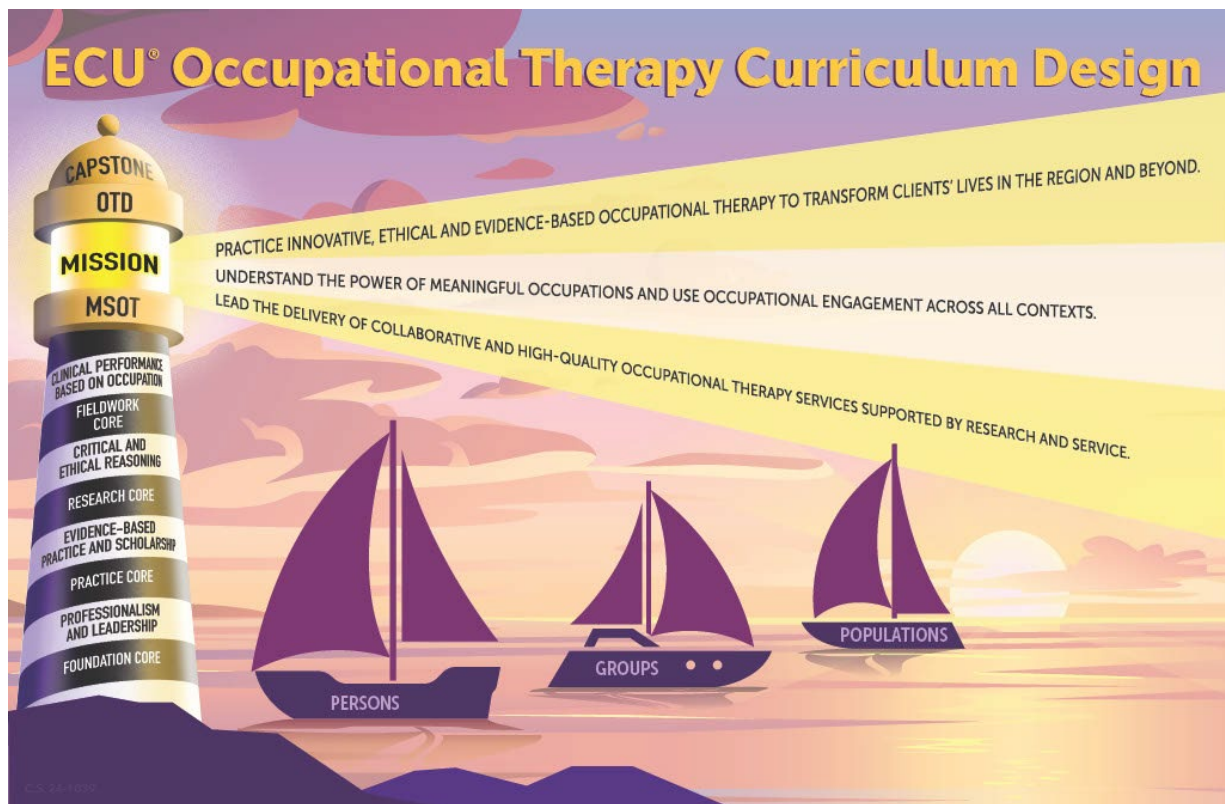
Curricular Themes

Theme 1: Clinical Performance based in Occupation
Theme 2: Critical and Ethical Reasoning
Theme 3: Evidence-Based Practice and Scholarship
Theme 4: Professionalism and Leadership

Fieldwork Relationship to Curriculum Design

The curriculum of the Department of Occupational Therapy's philosophy is based on transformative learning theory, that is we believe that students learn best through experience, reflection, social learning, and critical discourse. Throughout the didactic portion of the program, all faculty members use a variety of hands-on learning and community engagement activities. The fieldwork and capstone experiences are essential and crafted to align with the program vision: We envision a future in which our graduates transform clients' lives through the power of occupations to promote health and wellbeing. These experiences are critical for our mission where our program and students will be the beacon to the persons, groups, and populations in our world. We are developing occupational therapists who now, and in the future, will: (1) Understand the power of meaningful occupations and use occupational engagement across all contexts to enhance quality of life, improve health and well-being and reduce health disparities, (2) Lead the delivery of collaborative and high-quality occupational therapy services with clients, professionals, and systems, supported by research and service, and (3) Practice innovative, ethical, and evidence-based occupational therapy to transform clients' lives in the region and beyond. The capstone is the pinnacle of the lighthouse that ties all the components of the curriculum together.

The lighthouse of our curriculum design integrates the core elements of our curriculum and our four themes. The first semester of the curriculum begins with primarily **Theme 1 Clinical Performance-Based in Occupation** and **Theme 2 Critical and Ethical Reasoning** in our foundation core courses (OCCT 6010 Foundations of OT, OCCT 6011/6012 Occupation and Movement and Lab, OCCT 6013 Neurological Foundations of OT) and the first course in **Theme 3 Evidence-Based Practice and Scholarship** with our initial course learning research methodology (OCCT 6711 Evidence-based Occupational Therapy) in preparation for active involvement within the research process. **Theme 4 Professionalism and Leadership** is also introduced in OCCT 6014.

Immediately following in the next two semesters (semesters two and three), the foundation core and research core courses are built upon through a scaffolded process while the practice core courses that focus on conditions, assessment, and intervention are introduced. These Occupational Therapy Practice lecture/lab series courses (OCCT 6101/6151, 6201/6251, 7301/7351) focus on the areas of adult musculoskeletal needs, ages birth to 5, and mental health. It is during these two semesters that clinical skills and critical thinking are enhanced through the hands-on and experiential learning primarily within **Theme 1 Clinical Performance-Based in Occupation** and **Theme 2 Critical and Ethical Reasoning**. **Theme 3 Evidence-Based Practice and Scholarship** continues to develop as the students are integrated into evidence-based practice through research projects during OCCT 6713 Conducting Research in Occupational Therapy and then prepare and disseminate in OCCT 7714 Research Dissemination in Occupational Therapy. Having this development of skills in evidence-based practice lays the groundwork for critical thinking skills of discovery necessary to explore doctoral capstone possibilities, which begins in semester four. Semesters two and three also add **Theme 4 Professionalism and Leadership** to **Theme 1 Clinical Performance-Based in Occupation** and **Theme 2 Critical and Ethical Reasoning** through the integration of Level I Fieldwork experiences (OCCT 6801 & OCCT 6802). These experiences may be with either adult or pediatric populations aligning with the populations that the practice core courses this semester include. It is in semester three that the

students split into their respective tracks of Master of Science in Occupational Therapy (MSOT) and Doctor of Occupational Therapy (OTD).

Moving into semester four, the students in both programs will continue building on their clinical practices skills in the practice core lecture/lab courses that focus on areas of neurological-based impairments, cognitive deficits, and advanced adult practice skills as well as school age services (OCCT 7401/7451, 7501/7551) within **Theme 1** and **2** while developing skills in leadership and management (OCCT 6015 and OCCT 6106) within **Theme 3**. This semester will complete the practice core courses resulting in proficiency in a broad array of clinical skill training. During this semester, the OTD students will take OCCT 8901 Capstone Seminar I where they will begin exploring potential topics and begin their literature review to inform their gap analysis (**Theme 1-4** depending on area of focus).

While growing in their professionalism, leadership, critical and ethical reasoning, the final semester of the OTD didactic courses will provide an advanced foundation through OCCT 8017 Leadership and Advocacy (**Theme 4**) and advanced evidence-based practice skills through OCCT 8712 Evidence-Based Occupational Therapy II (**Theme 3**). During this semester, in the capstone development process the focus is on the completion of the preparatory activities prior to the 14-week capstone experience and project through OCCT 8902 Capstone Seminar II (**Theme 1-4**)

Following the last didactic semester, during semesters six and seven, is the application of clinical skills in their Level II Fieldwork courses (OCCT 8804 and OCCT 8805) integrating all four themes of the curriculum. The integration of **Theme 1 Clinical Performance based in Occupation** and **Theme 2 Critical and Ethical Reasoning** are applied in these two 12-week experiences. **Theme 3 Evidence-Based Practice and Scholarship** is woven in as students used evidence-based practice in their fieldwork experiences as doctoral students while **Theme 4 Professionalism and Leadership** is a focus as they transition from demonstrating student-level skills to entry-level skills. Aligning with the transformative learning theory, the ultimate culmination of all skills developed throughout the didactic coursework is demonstrated in the two-Level II Fieldwork experiences which follow our didactic coursework. Semester seven also includes completion of the capstone preparation (OCCT 8903) prior to the capstone experience (OCCT 8804) and project (OCCT 8805) in semester eight. This capstone experience is a 14-week experience that has individualized specific objectives and a capstone project. This experience is mentored and includes a formal evaluation mechanism where the student puts into practice the skills developed throughout our scaffolded curriculum design.

As indicated in the Curriculum Design, the capstone process for the doctoral students is driven by Boyer's (1990) Model of Scholarship. This model will guide the capstone development process, experience and project thus culminating in an in-depth exposure to clinical practice, research, program development and/or education. Aligning with the overarching application of transformative learning theory, three different areas of scholarship could be the focus of the capstone: (1) Scholarship of Discovery (participating in ongoing research or creating a new study), (2) Scholarship of Teaching (client/family education program, staff development program, or academic course development), and (3) Scholarship of Application (clinical practice or program development). These three areas are based on the university, college, and program mission and needs of our rural community and addressed through (1) expansion of innovative practice serving communities with high minority and economically

challenged populations, and (2) both local and national needs to build a strong cadre of occupational therapy educators, for professional occupational therapy programs and potentially public or community health education.

Each of our curriculum threads is embedded throughout the MSOT and OTD programs and uses foundation core, practice core, research core, and fieldwork core courses to foster advanced skills in the OTD students to meet the rigorous capstone requirements in the capstone core courses. The doctoral capstone opportunities will align with at least one of our curricular themes as indicated in our Curriculum Design: **Theme 1 Clinical Performance based in Occupation** (Scholarship of Application opportunities involving clinical practice and/or program development), **Theme 2 Critical and Ethical Reasoning** (Scholarship of Application opportunities in involving clinical practice and/or program development), **Theme 3 Evidence-Based Practice and Scholarship** (Scholarship of Discovery opportunities involving research), and **Theme 4 Professionalism and Leadership** (Scholarship of Teaching opportunities involving education). The capstone will be completed individually, with faculty mentorship, to demonstrate synthesis and application of knowledge gained throughout the curriculum and capstone process.

Fieldwork Design within the MSOT and OTD Course of Study

MSOT	OTD	Course Title	MSOT credits	OTD credits
Semester 1 – Fall (14 credits)				
OCCT 6014	OCCT 6014	Foundations of Occupational Therapy	4	4
OCCT 6011	OCCT 6011	Occupation and Movement	3	3
OCCT 6012	OCCT 6012	Occupation and Movement Laboratory	1	1
OCCT 6013	OCCT 6013	Neurological Foundations of Occupational Therapy	3	3
OCCT 6711	OCCT 6711	Evidence-based Occupational Therapy I	3	3
		Subtotal by Semester	*14*	*14*
Semester 2 – Spring (14 credits)				
OCCT 6101	OCCT 6101	Occupational Therapy Practice I (musculoskeletal / adult)	4	4
OCCT 6151	OCCT 6151	Occupational Therapy Practice I Laboratory (musculoskeletal / adult)	1	1
OCCT 6201	OCCT 6201	Occupational Therapy Practice II (pediatric 0-5)	4	4
OCCT 6251	OCCT 6251	Occupational Therapy Practice II Laboratory (pediatric 0-5)	1	1
OCCT 6713	OCCT 6713	Conducting Research in Occupational Therapy	3	3
OCCT 6801	OCCT 6801	**Fieldwork IA (MSOT/OTD)**	1	1
		Subtotal by Semester	*14*	*14*
MSOT	OTD	Course Title	MSOT credits	OTD credits
Semester 3 – Summer (8 credits)				
OCCT 7301	OCCT 7301	Occupational Therapy Practice III (mental health)	3	3
OCCT 7351	OCCT 7351	Occupational Therapy Practice III Laboratory (mental health)	1	1
OCCT 7714	OCCT 7714	Research Dissemination in Occupational Therapy	3	3
OCCT 6802	OCCT 6802	**Fieldwork IB (MSOT/OTD)** *(psychosocial)*	1	1
		Subtotal by Semester	*8*	*8*
Semester 4 – Fall (MSOT 12 credits, OTD 14 credits)				
OCCT 7401	OCCT 7401	Occupational Therapy Practice IV (neuro+cognition)	3	3
OCCT 7451	OCCT 7451	Occupational Therapy Practice IV Laboratory (neuro+cognition)	1	1
OCCT 7501	OCCT 7501	Occupational Therapy Practice V (school age)	3	3
OCCT 7551	OCCT 7551	Occupational Therapy Practice V Laboratory (school age)	1	1
OCCT 6015	OCCT 6015	Leading and Managing Occupational Therapy Services	3	3

OCCT 6016	OCCT 6016	Leading and Managing Occupational Therapy Services Laboratory	1	1
	OCCT 8901	Capstone Seminar I		2
		Subtotal by Semester	*12*	*14*
Semester 5 – Spring (MSOT 9 credits, OTD 9 credits)				
OCCT 6804		**Fieldwork IIA (MSOT)**	9	
	OCCT 8017	Leadership and Advocacy		3
	OCCT 8712	Evidence-Based Occupational Therapy II		3
	OCCT 8902	Capstone Seminar II		3
		Subtotal by Semester	*9*	*9*
Semester 6 – Summer (MSOT 9 credits, OTD 9 credits)				
OCCT 6805		**Fieldwork IIB (MSOT)**	9	
	OCCT 8804	**Fieldwork IIA (OTD)**		9
		Subtotal by Semester	*9*	*9*
		Total credits for graduation (MSOT graduates in July)	***66***	
Semester 7 – Fall (OTD 10 credits)				
	OCCT 8805	**Fieldwork IIB (OTD)**		9
	OCCT 8903	Capstone Seminar III		1
		Subtotal by Semester		10
Semester 8 – Spring (OTD 14 credits)				
	OCCT 8904	Capstone Experience		12
	OCCT 8905	Capstone Project (Dissemination)		2
		Subtotal by Semester		14
		Total credits for graduation (OTD graduates in May)		***92***

This description supports 2023 ACOTE Standard C.1.1

ECU Occupational Therapy Graduate Student Handbook
Accessible at https://ot.ecu.edu/resources/

Contains comprehensive information on:
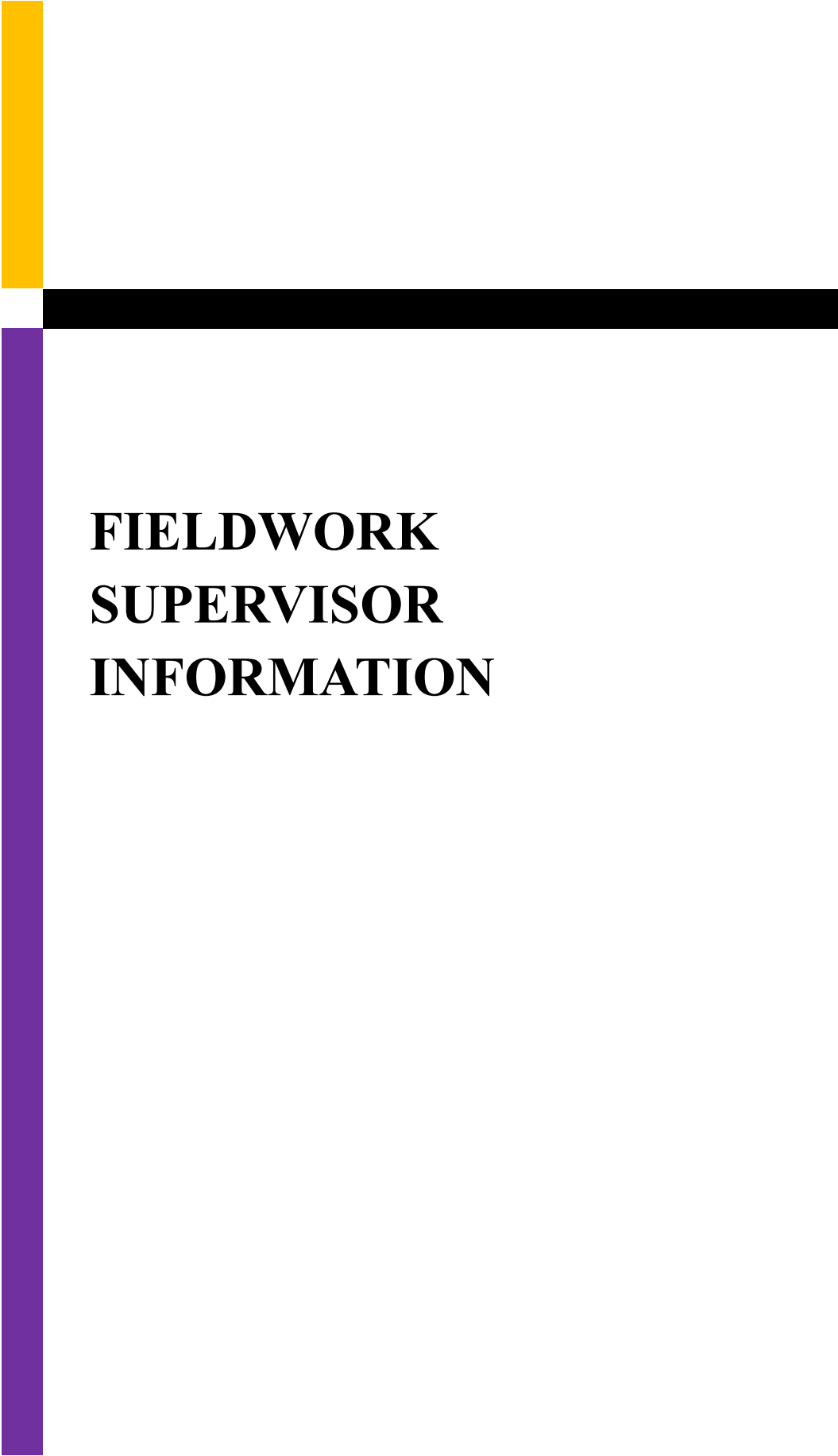
- **Department of Occupational Therapy Philosophy of Education**
- **Program of Study**
- **Curricular Themes Chart**
    - Outlines each of the four primary themes, the goals and objectives that define student learning outcomes, the courses that address each, and the instructional design used.
- **Curriculum Overview**
    - Outlines degree requirements for the MOST and OTD programs and provides the course catalog description for each course listed on the **Course of Study** table (*next page*).
- **Essential Functions and Technical Standards**
    - Establishes the expectations and requisite abilities considered necessary for professionals in the field of occupational therapy.
- **Criminal Charges and/or Convictions Before and During the Program**
- **Student Support Services**
    - Services provided through East Carolina University and the Department of Occupational Therapy to support the health and well-being of all students as well as retention of all students to create a diverse student population.
- **Certification and Licensure Information**

- **Occupational Therapy Graduate Student Responsibilities**
- **Guidelines on:**
  - Academic Integrity
  - Grading Guidelines and Appeals Process
  - Course/Program Withdrawals
  - Grievances
  - Program Feedback
  - Graduation
  - Professional Behavior Development and Implications
  - Professional Dress Code
  - Social Networking
  - Interdisciplinary Student Run Clinic

This description supports 2023 ACOTE Standard C.1.9

FIELDWORK SUPERVISOR INFORMATION

Occupational Therapy Fieldwork Education: Value and Purpose

The purpose of fieldwork education is to propel each generation of occupational therapy practitioners from the role of student to that of practitioner. Through the fieldwork experience, future occupational therapy practitioners achieve competence in applying the occupational therapy process and using evidence-based interventions to meet the occupational needs of a diverse client population. Fieldwork experiences may occur in a variety of practice settings, including medical, educational, research, administrative, and community-based programs. Moreover, fieldwork placements also present the opportunity to introduce occupational therapy services to new and emerging practice environments.

Fieldwork experiences constitute an integral part of the occupational therapist and occupational therapy assistant education curricula. Through fieldwork education, students learn to apply theoretical and scientific principles learned from their academic programs and to address actual client needs within the context of authentic practice environments. During fieldwork experiences, each student develops competency in the occupational therapy process to ascertain clients' occupational performance needs, to identify supports or barriers affecting health and participation, and to document interventions provided. Fieldwork education also provides opportunities for the student to develop advocacy, leadership, interprofessional education, and managerial skills in a variety of practice settings while incorporating principles of evidence-based practice and client-centered care. Finally, students develop a professional identity as an occupational therapy practitioner, aligning their professional judgments and decisions with the American Occupational Therapy Association (AOTA) Standards of Practice (AOTA, 2021) and the Occupational Therapy Code of Ethics (AOTA, 2020).

As students proceed through their fieldwork experiences, performance expectations become progressively more challenging. *Level I fieldwork* experiences occur concurrently with academic coursework, and the goal is to "introduce students to the fieldwork experience, to apply knowledge to practice, and to develop understanding of the needs of clients" (AOTA, 2018, p. 63). Moreover, Level I is designed to enrich "didactic coursework through directed observation and participation in selected aspects of the occupational therapy process" (AOTA, 2018, p. 64).

Level II fieldwork experiences occur at or near the conclusion of the didactic phase of occupational therapy curricula and are designed to "develop competent, entry-level, generalist practitioners" (AOTA, 2018, p. 65). Level II fieldwork features "in-depth experience(s) in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation" (AOTA, 2018, p. 65). For the occupational therapist student, there is an additional exposure to "research, administration, and management of occupational therapy services" (AOTA, 2018, p. 65). Students should be

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"exposed to a variety of clients across the lifespan and to a variety of settings" (AOTA, 2018, p. 65).

The value of fieldwork transcends the obvious benefits directed toward the student. Supervising students enhances fieldwork educators' own professional development by providing exposure to current practice trends, evidence-based practice, and research. Moreover, the experience of fieldwork supervision is recognized by the National Board for Certification in Occupational Therapy and many state regulatory boards as a legitimate venue for achieving continuing competency requirements for occupational therapy practitioners.

Another benefit to fieldwork sites that sponsor a fieldwork education program is the recruitment of qualified occupational therapy personnel. Through the responsibilities expected during Level II fieldwork, occupational therapy staff and administration are given the opportunity for an in-depth view of a student's potential as a future employee. In turn, an active fieldwork program allows the student, as a potential employee, to view first-hand the agency's commitment to the professional growth of its occupational therapy personnel and to determine the fit of their professional goals with agency goals. The fieldwork program also creates a progressive, state-of-the-art image to the professional community, consumers, and other external audiences through its partnership with the academic programs.

In summary, fieldwork education is an essential bridge between academic education and authentic occupational therapy practice. Through the collaboration between academic fieldwork coordinators and fieldwork educators, students are provided the opportunity to achieve the competencies necessary to meet the present and future occupational needs of individuals, groups, and, indeed, society as a whole.

References

American Occupational Therapy Association. (2018). 2018 Accreditation Council for Occupational Therapy Education (ACOTE®) Standards and interpretive guide (effective July 31, 2020). *American Journal of Occupational Therapy, 72*(Suppl. 2), 7212410005. https://doi.org/10.5014/ajot.2018.72S217

American Occupational Therapy Association. (2020). AOTA 2020 occupational therapy code of ethics. *American Journal of Occupational Therapy, 74*(Suppl. 3), 7413410005. https://doi.org/10.5014/ajot.2020.74S3006

American Occupational Therapy Association. (2021). Standards of practice for occupational therapy. *American Journal of Occupational Therapy, 75*(Suppl. 3), 7513410030. https://doi.org/10.5014/ajot.2021.75S3004

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History and Purpose

The initial intent of this document is to describe the desired characteristics of a fieldwork placement for occupational therapy and occupational therapy assistant students in Level II fieldwork education. It is intended to be a reference document that articulates the desired attributes of a fieldwork setting to maximize students' learning in context. It is not a document of standards for fieldwork education, and programs are not mandated to follow these guidelines.

This document was originally prepared by the Loma Linda Fieldwork Council at the request of the American Occupational Therapy Association's (AOTA's) Commission on Education (COE) and approved by the COE on April 15, 1985. The document was revised by the AOTA Fieldwork Issues Committee in 1992, and by the COE in 2000 and 2012. In 2024, a COE committee reviewed the document and determined that Level I and Level II fieldwork should be combined in one document in support of accessibility of information. This current version is the product of that 2024 review and revision.

Definition

The Accreditation for Occupational Therapy Education (ACOTE®) Standards (2023) describe fieldwork as "… a crucial part of professional preparation and is best integrated as a component of the curriculum design" (p. 36).

In occupational therapy education, fieldwork is the mechanism used to bridge the theoretical foundations of practice learned in the classroom, with application through practice in the field. Providing students with preparation for evidence-based practice and meeting the needs of society for occupational therapy services begins at the start of the occupational therapy program and extends through the last day of fieldwork clinical practice (Mason et al., 2020).

The Fieldwork Experience

Description and Purpose

"The fieldwork experience is designed to promote professional reasoning and reflective practice, transmit the values and beliefs that enable ethical practice, and develop professionalism and competence in career responsibilities" (ACOTE, 2023, p. 36). Through the fieldwork experience, students learn to apply theoretical and scientific principles learned in the didactic portion of the academic program to address client needs and develop a professional identity as an occupational therapy practitioner within an interprofessional context. Level I and Level II fieldwork experiences are scaffolded to support a student's development toward becoming an entry-level practitioner.

Fieldwork experiences shall meet requirements in accordance with the Standards for an Accredited Educational Program for the Occupational Therapist and/or the Standards for an Accredited Educational Program for the Occupational Therapy Assistant. Fieldwork must reflect the sequence and scope of content in the curriculum design, so that fieldwork strengthens the ties between didactic and fieldwork education (ACOTE, 2023).

Scope

The fieldwork placements should provide the student with experience that reflects the sequence and scope of content in the curriculum design, in collaboration with faculty, so that fieldwork strengthens the ties between the didactic and fieldwork experience (ACOTE, 2023). It is important that the entry-level occupational therapy practitioner is able to gather, synthesize, and frame interventions from an occupational perspective whether the client is a person, group, or population (AOTA, 2020c). It is essential that practitioners address mental health, behavioral health, or psychosocial aspects of client performance to support client engagement in occupations as a part of this experience (ACOTE, 2023).

1. Although Level I fieldwork is curriculum dependent, the 16 weeks for the occupational therapy assistant student and 24 weeks for the occupational therapy student should expose students to a variety of clients across the lifespan and to a variety of settings (ACOTE, 2023).
2. In all settings, psychosocial factors influencing engagement in occupation must be understood and integrated for the development of client-centered, occupation-based outcomes.

Fieldwork Site Development

When developing a fieldwork experience for a new site, the academic program begins by reaching out to the prospective fieldwork site to determine whether there is interest in developing a collaborative fieldwork program. If so, the academic program will meet with the site supervisors/management to determine whether the site can ensure continuity between didactic coursework and the fieldwork education. After that is determined, the academic program initiates the process of developing a written agreement between both parties.
   1. The administrators of the fieldwork setting should collaborate with the academic program and demonstrate support for the fieldwork education program.

      a. A written agreement signed by both parties must be in place, delineating each party's requirements and responsibilities.
      b. Mutually agreed upon fieldwork objectives between the site and the academic program must be established before the start of a fieldwork program (see 1.c.vii). During the development and approval process of the written agreement, the Fieldwork educator/site coordinator may begin preparations for receiving a fieldwork student in their setting. Academic fieldwork coordinators can support the

development of new sites through workshops and collaborations and should be utilized as a resource.

2. The fieldwork site should meet all existing local, state, and/or federal safety and health requirements, and should provide adequate and efficient working conditions. The occupational therapy practitioner should comply with state regulations governing the scope of practice for the provision of occupational therapy.

3. Adherence to standards of quality in regard to safety, health requirements, and working conditions may be verified through a review process by the academic program or by an established body such as The Joint Commission, the Commission on Accreditation of Rehabilitation Facilities (CARF), or a state regulatory board.

4. Sufficient time should be allotted to fieldwork educators for student supervision activities (Drynan et al., 2022).

5. Space for client-related consultation, preparation, writing, in-service education, and research activities by occupational therapy practitioners and students should be provided.

6. The fieldwork educator and student should have access to current professional literature and relevant publications, texts, and internet resources in support of evidence-based occupational therapy practice.

7. In settings where occupational therapy services are already established, objectives regarding practice and education programs should be stated in writing, and should reflect the specific contribution occupational therapy makes to the overall agency. These objectives should also guide the development of learning objectives for the fieldwork experience. The partnering academic institution will work with the fieldwork site to provide resources to support best practice expectations, including for establishing objectives in settings where no occupational therapy services are provided.

8. The fieldwork agency should recognize that the primary objective of the fieldwork experience is to foster the student's growth and development as an emerging occupational therapy practitioner.

9. The educational value of the student fieldwork experience should be of primary importance. The experience can be mutually beneficial for the site and student, as a student often contributes current evidence-based perspectives, enhancement of existing services, and an opportunity to demonstrate the potential impact of a greater presence of occupational therapy professionals in a setting or area of practice.

Fieldwork Educator Preparation

Level I fieldwork can be supervised by a variety of professionals, including but not limited to: currently licensed or otherwise regulated occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, physicians, speech-language pathologists, nurses, and physical therapists (ACOTE, 2023).

Fieldwork educators responsible for supervising Level II Fieldwork occupational therapy students shall meet state and federal regulations governing practice, have a minimum 1-year of full-time practice experience, and be adequately prepared to serve as a fieldwork educator. If supervising in a setting without occupational therapy services, the fieldwork educator must have a minimum of 3 years of full-time practice experience (ACOTE, 2023).

1. ACOTE requires that fieldwork educators be adequately prepared for the role. This preparation can occur in multiple ways, including but not limited to:

    a. Completion of the AOTA Fieldwork Educator Certificate Program.
    b. Completion of the Self-Assessment Tool for Fieldwork Educator Competency (AOTA, 2023).
    c. Attendance at continuing education events on the topic of practice education.
    d. Mentorship by an experienced fieldwork educator.
    e. Documented readings of articles and/or on clinical or fieldwork education.
    f. Completion of any modules or training materials provided by the academic program.
2. The academic fieldwork coordinator works with sites and fieldwork educators to provide resources that are consistent with curriculum design and the tenets of the profession of occupational therapy.

Expectations of Fieldwork Students

Students are responsible for complying with site requirements as specified by the fieldwork site (this can be included in a student handbook developed by the fieldwork site or other mechanism). Fieldwork objectives established between the academic and fieldwork educators must be set prior to the start of the fieldwork experience. This may include completion of prerequisites (health requirements, background checks, HIPAA training, orientation to site documentation system, etc.) and attention to state regulations impacting student provision of client services. In addition to providing the required occupational therapy services to clients, students are also responsible for active participation in the supervision process, which can include the creation, review, and completion of learning objectives; completion of assigned learning activities and assignments; proactive and ongoing communication with the assigned fieldwork educator; continual self-assessment and reflection; and participation in formal and informal assessments directed by the fieldwork educator.

By the end of the Level II fieldwork experience, the student should demonstrate the attitudes and skills of an entry-level practitioner, including assumption of responsibility for independent learning.

Fieldwork Models

Level I fieldwork can be completed through a variety of models based on the academic program curriculum, including virtual and simulated environments, standardized patients, faculty

practice, faculty-led site visits, and supervision by a fieldwork educator in a practice environment (ACOTE, 2023).

A number of models of fieldwork education are used in Level II fieldwork education practice. The model utilized by a site should be a function of the nature of practice at the fieldwork site, the learning needs of the students, and the competencies of the fieldwork educator. Although one-to-one models continue to be most commonly used in Level II fieldwork, alternate models are increasingly used with a variety of settings and practices (Roberts, 2023).

According to Roberts (2023), these include:

- *One-to-one:* One student is paired with one fieldwork educator. This is a traditional apprenticeship model.
- *Collaborative:* Two or more students work with a single fieldwork educator. This model allows more collaboration, cooperation, and near-peer mentoring between students, allowing students to become less dependent on frequent direct supervision from their fieldwork educator.
- *Multiple Mentorship:* One or more students work with a team of fieldwork educators who share responsibility for supervision, mentoring, and evaluating the students. This model allows for fieldwork educators who do not work full- time, or have smaller but unique specialty caseloads, to participate in fieldwork education and share their unique experiences with students. It also allows students to have access to more practitioners, more variety of practices, and/or unique practices that would be inaccessible in an exclusively one-to- one supervision model.
- *Faculty-led mentorship:* One or more students is placed in a fieldwork setting where a faculty member from the sponsoring academic program is on-site and provides the fieldwork education. This model allows students and faculty to engage directly in the learning process and eliminates the need and demand for a supervisor to be assigned from the facility.
- *Fieldwork where no OT services exist*: Students complete fieldwork in a setting that does not have a permanent, full-time, established occupational therapy practice. The focus for student development in a setting like this is on developing both direct practice skills and program development skills. ACOTE (2023) specifies that fieldwork educators must have at least 3 years of experience post-certification, provide 8 hours of direct supervision per week, and provide other indirect supervision or support as needed, including availability during all scheduled work hours. While the primary fieldwork educator is not on-site, a staff member at the practice setting must be available for day-to-day supervision for the fieldwork students. Fieldwork educators in these settings may be employees of the practice setting, consultants, or employed by the academic program to provide service and fieldwork education at the site.

  One additional format of Level II fieldwork is fieldwork completed outside of the United States. For international fieldwork experiences, ACOTE (2023) Standards require the educator to be a graduate of a program accredited by ACOTE, approved by the World Federation of Occupational Therapists (WFOT), or be otherwise regulated in the country

in which the students are completing fieldwork. The fieldwork educator must have at least 1 year of experience in practice prior to the onset of Level II fieldwork.

Supervision

Although Level I supervision may vary in accordance with objectives and site requirements; ACOTE (2023) standards indicate that Level II supervision should initially be direct, and then progress to being less direct as appropriate for the site, setting, the severity of the client's condition, and the ability of the fieldwork student to support progression toward entry-level competence.

1. **Student Engagement in the Learning Process**
   In all settings, students should collaborate with their fieldwork educator to identify learning objectives that support their didactic learning and can stem from the site-specific learning objectives for the individual fieldwork site. This may be accomplished by establishing weekly goals and identifying strategies that will support progress toward these goals. Throughout the fieldwork, students and educators should engage in reflection on student strengths and growth areas, in support of continued goal setting and transparency in student and educator perceptions on progress. This approach fosters a self-directed learning process for the student.

   For Level II fieldwork, the use of weekly logs or other forms of documentation of mentoring and reflective processes is highly recommended. This documentation includes student and educator perspectives on successes and challenges in a given week, affording the opportunity to reflect and set goals for the upcoming week. Additionally, it serves to identify potential discrepancies between educator and student perspectives on areas of strength or areas for improvement. Individualized education has been shown to maximize student performance outcomes (Crawford & Hanner, 2022).

   During Level II fieldwork, performance evaluation should occur on an ongoing basis, in addition to the scheduled mid-term and final performance evaluation. The student should receive direct feedback on their performance status on an ongoing basis.

   a. Success is maximized when the educator empowers the student to describe their preferred supervision style and feedback methods.
   b. Formative assessment shall be provided to students on a weekly basis and recorded in written format, providing specific recommendations addressing observable behaviors. Best practice is a collaborative process, as described in section 4a.
   c. Supervision and feedback is intended to empower the student to demonstrate growth in performance, facilitate student self-reflection and self-awareness, and guide the student regarding strengths and opportunities for growth, based on site-specific objectives.
   d. The student's performance should be evaluated formally at mid-term and at the completion of the fieldwork experience. AOTA's Fieldwork Performance Evaluation (FWPE) was revised, and initial validation was published in 2020. This

tool is available for use by academic programs with an annual subscription fee. Academic programs may opt to develop their own tool as a means to formally evaluate student fieldwork performance at mid-term and at the completion of a Level II fieldwork experience.

e. It is recommended that the student self-assess performance at mid-term using the same evaluation tool that their educator will use to evaluate their performance. The student evaluation and fieldwork educator evaluation scores and comments should be compared and discussed, with particular attention paid to areas of discrepancy and congruence.

f. When there are multiple supervisors, care should be taken to ensure that communication regarding student progress is shared among all supervisors and that all contribute to evaluating the student's progress.

2. **Progress Monitoring During Fieldwork**

It is the role of the fieldwork educator to model for the student as well as to let the student experience the moment, react, and reflect afterward. The occupational therapy learning process begins with experiences on Level I fieldwork that build off the didactic learning experience. The opportunities afforded to students through spontaneous, day-to-day interactions, feedback, and guided or self-directed reflection allow them the freedom to learn and grow as they enter Level II (Simon, 2022). The importance of monitoring progress is evident in the literature, and students need to be kept apprised of their areas of strength and need on a regular basis.

During Level II fieldwork, more time spent in direct contact with the student allows for a more formalized approach to providing feedback.

a. Fieldwork educators should monitor student progress and match students' abilities with the demands of the setting by providing just-right challenges designed to maximize each student's individual learning needs.

b. Weekly objectives, weekly logs and goals, mid-term self-assessment, and educator evaluation at mid-term provide data points for ongoing progress monitoring.

c. If the student's performance is not progressing as anticipated by mid-term or at any point in the fieldwork experience, both the student and academic program must be notified immediately, and documentation concerning the student's progress and outcomes of interventions should be maintained.

d. Fieldwork educators should initiate written learning contracts in conjunction with the academic fieldwork coordinator to provide clear expectations, strategies to support growth toward goals, and specific time frames for all students who are not meeting site-specific objectives on the anticipated timeline. In support of a strengths-based experience, these learning contracts are sometimes called *success plans*.

e. Learning contracts or success plans should also include possible consequences if goals are not met. Consistent documentation and review of progress is necessary.

3. **Continued Assessment and Refinement of the Fieldwork Program**

Fieldwork experiences should be implemented and evaluated for their effectiveness by the educational institution and the fieldwork agency.

1. The academic fieldwork coordinator representing the educational institution should regularly evaluate learning opportunities offered during fieldwork to ensure that settings are equipped to meet curricular goals and ensure student exposure to psychosocial factors, occupation-based outcomes, and evidence-based practice.
   a. This may be accomplished through regular communication (e.g., meetings, emails, phone calls, written correspondence, etc.) between the academic fieldwork coordinator and faculty, and ongoing communication regarding the academic program's curriculum design with the fieldwork site. In addition, the fieldwork site should have an opportunity to inform the didactic program preparation.
   b. Fieldwork site evaluation for Level II may occur through:

      i. AOTA Student Evaluation of Fieldwork Experience (SEFWE)
      ii. Review of the Self-Assessment Tool for Fieldwork Educator Competency (AOTA, 2023)
2. The fieldwork site should regularly evaluate the effectiveness of its fieldwork program to ensure that students are able to meet learning objectives and deliver ethical, evidence-based, and occupation-centered intervention to clients. The learning objectives should be reviewed regularly to maximize the effectiveness of the fieldwork experience and create new opportunities. Supervisors are encouraged to participate in routine evaluations of their effectiveness in the supervisory role.

Resources

Accreditation Council for Occupational Therapy Education. (2023). *2023 Accreditation Council for Occupational Therapy Education (ACOTE®) Standards and Interpretive Guide.* https://acoteonline.org/accreditation-explained/standards/

American Occupational Therapy Association. (n.d.). *Fieldwork educator's certificate workshop.* https://www.aota.org/education/fieldwork/fieldwork-educators-certification-workshop

American Occupational Therapy Association. (2020a). *AOTA Fieldwork Performance Evaluation for the Occupational Therapy Assistant Student.* https://www.aota.org/education/fieldwork/fieldwork-performance-evaluation

American Occupational Therapy Association. (2020b). *AOTA Fieldwork Performance Evaluation for the Occupational Therapy Student.* https://www.aota.org/education/fieldwork/fieldwork-performance-evaluation

American Occupational Therapy Association. (2020c). Occupational therapy practice framework: Domain and process (4th ed.). *American Journal of Occupational Therapy, 74*(Suppl. 2), 7412410010. https://doi.org/10.5014/ajot.2020.74S2001

American Occupational Therapy Association. (2023). S*elf-assessment tool for fieldwork educator competency.* https://www.aota.org/-/media/corporate/files/educationcareers/fieldwork/featchartmidterm.pdf

Crawford, E. J., & Hanner, N. (2022). The intentional fieldwork education model: Guiding fieldwork educators toward intentionality and competency to enhance student learning. *Journal of Occupational Therapy Education, 6*(1). https://doi.org/10.26681/jote.2022.060115

Drynan, D., Eichar, K., Chahal, P., & Boniface, J. (2022). Time use in occupational therapy fieldwork education: a pilot Delphi study to identify time use items. *The Clinical Supervisor, 41*(1), 88-103. https://doi.org/10.1080/07325223.2022.2048159

Mason, J., Hayden, C. L., & Causey-Upton, R. (2020). Fieldwork Educators' Expectations of Level II Occupational Therapy Students' Professional and Technical Skills. *The Open Journal of Occupational Therapy*, *8*(3), 1–16. https://doi.org/10.15453/2168-6408.1649

Roberts, M. (2023). Models of Level II Fieldwork Supervision. In DeIuliis, E. & Hanson, D. (Ed.), *Fieldwork Educator's Guide to Level II Fieldwork.* Thorofare, NJ: SLACK, Inc.

Simon, R.L. (2023). Taking Advantage of Emerging Learning Opportunities On site. In DeIuliis, E. & Hanson, D. (Ed.), *Fieldwork Educator's Guide to Level I Fieldwork.* Thorofare, NJ: SLACK, Inc.

Self-Assessment Tool for
Fieldwork Educator Competency (SAFECOM)

REVISED 2023

Fieldwork education is a vital component in preparing students for entry level occupational therapy practice. The role of the fieldwork educator (FWE) is to facilitate the progression from occupational therapy student to entry-level practitioner. Competency in the role of the FWE promotes the practitioner's pursuit of excellence in working with students and ensures the advancement of the profession.

Purpose

The SAFECOM was designed to be utilized by FWEs as a tool to provide a structure for self-reflection and assessment of their perceived level of competence and to identify areas for further development and improvement of their skills. It reflects occupational therapy domain and process as outlined in the Occupational Therapy Practice Framework: Domain and Process Fourth Edition. The SAFECOM can be utilized to support the development of the skills necessary for effective fieldwork supervision. Use of this assessment tool is intended to be the foundation from which FWEs can create a professional growth plan with specific improvement strategies and measurable outcomes to advance development in the role of FWE. The SAFECOM is intended to be used for professional development only. It is not intended to be used as a performance appraisal; however, the FWE may choose to include goals articulated in their fieldwork educator professional development plan in their annual professional goals.

Who Should Use the Tool

The SAFECOM is designed to be used by FWEs at all levels of expertise who supervise students. While the tool is primarily oriented toward occupational therapy practitioners (OTPs) who directly supervise occupational therapy assistant (OTA) students and/or occupational therapy (OT) students during level II fieldwork, it can easily be applied to the supervision of students during level I fieldwork and supervision of non-occupational therapy students. It can also be utilized by other professionals in preparation for and during clinical education supervision.

Content

The SAFECOM includes the following features:

1. FWE competencies in the areas of professional practice, education, supervision, evaluation, and administration.

2. Likert scale to aid in self-assessment.

3. Comment section to articulate personalized strengths and areas that need improvement.

4. A professional development plan template which can be used to articulate goals, and record and track a plan of action for professional growth.

Directions

FWEs should determine the relevance of each competency to the role of the OTP in their

setting. Circle the number on the Likert scale (see below) that correlates with the perceived level of competence for each item. Some competency statements may not be applicable in every practice setting and/or state. Refer to state and local guidelines and AOTA resources such as "Guidelines for Supervision, Roles, and Responsibilities During the Delivery of Occupational Therapy Services. The comments section can be used to highlight strengths, areas that need improvements, etc. Once the competencies are assessed it is helpful to prioritize the competency areas that need improvement. Write objective goals with clear timelines for each of the selected areas and identify realistic strategies that can be utilized to meet each of the goals.

Likert Scale:

5 = High level of competence: Extensive knowledge, ability, and skill in the identified area.

4 = Moderately high level of competence: Good knowledge, ability, and skill in the identified area.

3 = Average level of competence: Some knowledge, ability, and skill in the identified area.

2 = Low level of competence: Minimal knowledge, ability, and skill in the identified area.

1 = No level of competence: No knowledge, ability, and skill in the identified area.

Occupational therapy practitioners are adept in assessing, planning, and implementing practical and meaningful continuous quality improvement plans. It is this attribute, plus a desire to support the growth of future practitioners, that motivates OTPs to seek methods for gaining and maintaining their competence as FWE. We hope this tool is helpful in guiding fieldwork educators on a journey of self-appraisal and professional development. It meets the immediate need of defining basic competencies of fieldwork educators. It is in this spirit that the SAFECOM was drafted and offered as a means for better serving the needs of individuals and the future of occupational therapy education and practice.

A copy of the tool can be downloaded at: https://www.aota.org/-/media/corporate/files/educationcareers/fieldwork/featchartmidterm.pdf

Originally developed in 1997 by the COE Fieldwork Issues
Committee. Revised in 2009 by the Commission on Education:
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American Occupational Therapy Association. (2016). *OT/OTA student supervision and Medicare requirements*. https://www.aota.org/ education/fieldwork/medicare/requirements-for-student-supervision

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American Occupational Therapy Association. (2018) *Fieldwork education module 1: Preparing to become a fieldwork educator.* American Occupational Therapy Association Continuing Education.

American Occupational Therapy Association. (2018) *Fieldwork education module 2: Working with OT and OTA students during level I and level II fieldwork*. American Occupational Therapy Association Continuing Education.

American Occupational Therapy Association. (2018) *Fieldwork education module 3: Fieldwork career paths*. American Occupational Therapy Association Continuing Education.

American Occupational Therapy Association. (2022). Occupational therapy fieldwork education: Value and purpose. *American Journal of Occupational Therapy, 76*(Suppl. 3), 1-3. https://doi.org/10.5014/ajot.2022.76S3006

American Occupational Therapy Association (2020). Occupational therapy practice framework: Domain and process (4th edition). *American Journal of Occupational Therapy, 74*(Suppl. 2), 821-882, https://doi.org/10.5014/ajot.2020.74S2001

American Occupational Therapy Association. (2020) Guidelines for supervision, roles, and responsibilities during the delivery of occupational therapy services, *American Journal of Occupational Therapy, 76*(Suppl. 3), 1-7. https://doi.org/10.5014/ ajot.2020.74S3004

American Occupational Therapy Association. (2020). Occupational therapy code of ethics. Bethesda, *American Journal of Occupational Therapy, 74*(Suppl. 3), 1-13. https://doi.org/10.5014/ajot.2020.74S3006

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Costa, D. (Ed.) (2015). Essential guide to occupational therapy fieldwork education: Resources for today's educators and practitioners 2nd edition. American Occupational Therapy Association.

Costa, D. (2007) Clinical supervision in occupational therapy: *A guide for fieldwork and practice*, American Occupational Therapy Association.

Dunn, L. S., Arias, S., Beyer, A., Hermes, E., & Radcliff, S. (2020). Student Perspectives of the Effective Behaviors of Occupational Therapy Level II Fieldwork Educators. *Journal of Occupational Therapy Education, 4* (4). https://doi.org/10.26681/jote.2020.040408

Napier, B. (2011). *Occupational therapy fieldwork survival guide: A student planner*. American Occupational Therapy Association. doi.org/10.7139/2017.978-1-56900-418-0

Potvin, M., Coviello, J. M., Rothacker, E., Taylor, C., Pettigrew, T., Thomas, M., & Lockhart- Keene, L. (2021). Clinical and Professional Reasoning Development in Level II Fieldwork: Occupational Therapy Assistant Students' Perception. *Journal of Occupational Therapy Education, 5* (3). https://doi.org/10.26681/jote.2021.050311

AOTA Recommended Content for a Student Fieldwork 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:
   o Completed samples of all forms
   o Acceptable medical abbreviations
   o Discharge plan
   o Billing
   o 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
   o Policy and procedures
   o Mission statement
   o Organizational chart
   o Essential job functions
   o Dress code
4. Regularly Scheduled Meetings:
   o Dates\times
   o Purpose of meeting
5. Special Client Related Groups\Programs
   o Purpose
   o Referral system
   o Operation
   o Transport
6. Patient Confidentiality Information (Patient Rights)
7. Guidelines for Documentation
8. Responsibilities of:
   o Fieldwork educator
   o Student
   o Fieldwork coordinator (if position exists)

9. Performance Evaluation
   Procedure and guidelines used in the evaluation of
   - Student
   - Fieldwork Educator
   - Fieldwork Experience

Material for your student manual can be gathered from other sources within your facility (e.g., employee handbooks, Human Resources Department, etc.) Feel free to call the academic programs that you have contracts with to get the names of nearby facilities that are similar to your site. Call those facilities and see if they are willing to share their student manual with you.
Don't feel that you need to have a separate manual for students and fieldwork educators. The manuals can be the same.

10/2/2000

Fieldwork Educator Resources
AOTA Resources

Official Documents: https://www.aota.org/practice/practice-essentials/aota-official-documents
Fieldwork Management: https://www.aota.org/education/fieldwork
Medicare and OT Students: https://www.aota.org/education/fieldwork/medicare-requirements-for-student-supervision

American Occupational Therapy Association. (1998). *The fieldwork experience assessment tool (FEAT).* https://www.aota.org/-/media/corporate/files/educationcareers/fieldwork/featchartmidterm.pdf

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American Occupational Therapy Association. (2018). Fieldwork level II and occupational therapy students. *American Journal of Occupational Therapy,* 72(Suppl. 2), 7212410020. https://doi.org/10.5014/ajot.2018.72S205

American Occupational Therapy Association. (2023). Self-assessment tool for fieldwork educator competency. AOTA. https://www.aota.org//media/corporate/files/educationcareers/fieldwork/certificate/safecom.pdf

ACOTE Resources

ACOTE Standards (2023). https://acoteonline.org/download/5856/?tmstv=1727444226

ACOTE Standards (2018). https://acoteonline.org/download/3751/?tmstv=1727444226

General Resources

*Resources listed in this section are reflective of the research available on various fieldwork related topics and are not specific to the ECU OT program's educational philosophy or curriculum.

Hanson, D., & DeIuliis, E.D. (Eds.) (2023). *Fieldwork Educator's Guide to Level I Fieldwork*. Slack Incorporated.

Hanson, D., & DeIuliis, E.D. (Eds.) (2023). *Fieldwork Educator's Guide to Level II Fieldwork*. Slack Incorporated.

Supervision Resources

Andonian, L. (2017). Occupational therapy students' self-efficacy, experience of supervision, and perception of meaningfulness of Level II fieldwork. *The Open Journal of Occupational Therapy, 5*(2). https://doi.org/10.15453/2168-6408.1220

DeCleene, K. E., Ridgway, A. J., Bednarski, J., Breeden, L., Mosier, G. G., Sachs, D., & Stephenson, D. (2013). Therapists as Educators: The Importance of Client Education in Occupational Therapy. *The Open Journal of Occupational Therapy, 1(*4). https://doi.org/10.15453/2168-6408.1050

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Grenier, M.-L. (2015). Facilitators and barriers to learning in occupational therapy fieldwork education: Student perspectives. *American Journal of Occupational Therapy, 69*(2), 6912185070p1. https://doi.org/10.5014/ajot.2015.015180

Mason, J., Hayden, C. L., & Causey-Upton, R. (2020). Fieldwork Educators' Expectations of Level II Occupational Therapy Students' Professional and Technical Skills. *The Open Journal of Occupational Therapy, 8(*3), 1-16. https://doi.org/10.15453/2168-6408.1649

Inclusive Teaching and Learning

Inclusive Teaching and Learning for Occupational Therapy Experiential Education Resource – this is a robust resource that covers a very wide-range of topics to aid fieldwork educators in creating supportive environments and strategies. This was shared with Academic fieldwork Coordinators at the 2023 AOTA Academic Leadership Council to be shared as an open resource for fieldwork educators.

Escher, A., McCombs, K., Morales, I., & Kaldenberg, J. (2023). *Inclusive teaching and learning for occupational therapy experiential learning.* Boston University Department of Occupational Therapy. https://www.bu.edu/sargent/files/2023/04/Inclusive-Teaching-and-Learning-for-OT-Experiential-Education.pdf

AOTA Inspire 2023 presentation about the development of the tool: https://www.aota.org/-/media/corporate/files/educationcareers/alc-2023/inclusive-teaching-experiential-learning.pdf

Student Wellness & Readiness for Fieldwork

Brown, T., Williams, B., & Etherington, J. (2016). Emotional intelligence and personality traits as predictors of occupational therapy students' practice education performance: A cross- sectional study. *Occupational Therapy International, 23*, 412–424. https://doi.org/10.1002/oti.1443

Campbell, M. K., Corpus, K., Wussow, T. M., Plummer, T., Gibbs, D., & Hix, S. (2015). Fieldwork educators' perspectives: Professional behavior attributes of Level II fieldwork students. *The Open Journal of Occupational Therapy, 3*(4). https://doi.org/10.15453/2168-6408.1146

Karp, P. (2020). Occupational Therapy Student Readiness for Transition to the Fieldwork Environment: A Pilot Case Study. *The Open Journal of Occupational Therapy, 8*(4), 1-14. https://doi.org/10.15453/2168-6408.1719

Lavin, K. A. (2018). Use of a Journal Club During Level II Fieldwork to Facilitate Confidence and Skills for Evidence-Based Practice. *The Open Journal of Occupational Therapy,* 6(4). https://doi.org/10.15453/2168-6408.1475

Thomure, R. (2023). Use of Formal and Informal Strategies to Manage Stress During Level II Occupational Therapy Fieldwork. *The Open Journal of Occupational Therapy, 11*(4), 1-9. https://doi.org/10.15453/2168-6408.2158

Professionalism and Entry-Level Competence

Stone D., & Heen, S. (2015) *Thanks for the feedback: The science and art of receiving feedback well.* Penguin Books.

Sullivan, T. M., & Thiessen, A. K. (2015). Occupational Therapy Students' Perspectives of Professionalism: An Exploratory Study. *The Open Journal of Occupational Therapy, 3*(4). https://doi.org/10.15453/2168-6408.1154

Wallingford, M., Knecht-Sabres, L. J., Lee, M. M., & St. Amand, L. E. (2016). OT Practitioners' and OT Students' Perceptions of Entry-Level Competency for Occupational Therapy Practice. *The Open Journal of Occupational Therapy, 4*(4). https://doi.org/10.15453/2168-6408.1243

Civility, Cultural Humility, and Accommodation Needs

Bolding, D. J., Dudley, T., Dahlmeier, A., Bland, L., Castro, A., & Covarrubias, A. (2020). Prevalence and types of incivility in occupational therapy fieldwork. *Journal of Occupational Therapy Education*, *4*(1). https://doi.org/10.26681/jote.2020.040111

Brown, T., & Norris, C. (2019). *Navigating cultural differences between fieldwork educators and Students* [University of North Dakota]. *Occupational Therapy Capstones.* https://commons.und.edu/ot-grad/406

DeIuliis, E. D., & Saylor, E. (2021). Bridging the Gap: Three Strategies to Optimize Professional Relationships with Generation Y and Z. *The Open Journal of Occupational Therapy, 9*(1), 1-13. https://doi.org/10.15453/2168-6408.1748

Ozelie, R., Bock, J., Gervais, S., Schneider, L., & Silhavy, C. (2022). Is It Reasonable? Reasonable and Unreasonable Accommodations for Occupational Therapy Students in Clinical Settings. *The Open Journal of Occupational Therapy, 10*(2), 1-15. https://doi.org/10.15453/2168-6408.1913

Mentorship Models

Gallagher, R. G., & Hamed, R. (2022). Benefits of peer-mentorship for entry-level occupational therapy students: A descriptive study. *The Open Journal of Occupational Therapy*, *10*(4), 1–10. https://doi.org/10.15453/2168-6408.1946

Grenier, M.-L. (2015). Facilitators and barriers to learning in occupational therapy fieldwork education: Student perspectives. *American Journal of Occupational Therapy, 69*(Suppl. 2), 6912185070. https://doi.org/10.5014/ajot.2015.015180

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This description supports 2023 ACOTE Standard C.1.8.

EXPERIENTIAL LEARNING INTRODUCTION

Fieldwork Manual Introduction

Experiential Learning Overview

Mandatory Engagement Requirements

Criteria for Student Participation in Experiential Learning Opportunities

Occupational Therapy Fieldwork Manual Introduction

The purpose of this manual is to orient relevant stakeholders to the current policies, procedures, expectations, paperwork and resources associated with experiential learning and fieldwork education throughout the entry-level graduate occupational therapy (OT) programs at East Carolina University (ECU) (*master's and doctoral*). Stakeholders may include, but are not limited to, occupational therapy students and faculty, fieldwork coordination team members, clinical placement site coordinators and educators, and ECU College of Allied Health Sciences administrators. Please read this manual carefully, and reference it when needed, as its contents govern the successful engagement and completion of experiential learning and fieldwork education components of both programs.

The Department of Occupational Therapy reserves the right to update and/or revise information, resources, and guidelines in this manual at any time during the academic year. Changes or additions will be shared with students when they become effective, and students will be expected to adhere to all established guidelines. Students will review and acknowledge understanding of the contents of this manual at the start of each academic year using the *student attestation page.*

It is important to remember that the Occupational Therapy Graduate Student Handbook is a separate resource that provides students and stakeholders with information about program expectations and guidelines; faculty credentials; and important resources. The Student Handbook's content governs student enrollment in the entry-level occupational therapy graduate program.

This description supports 2023 ACOTE Standard C.1.2

Experiential Learning Overview

The occupational therapy curriculum at ECU includes a variety of integrated experiential learning opportunities in the form of both course-related activities (*hands-on learning, community engagement activities, designated labs, student run clinic)* and fieldwork-specific educational experiences. These experiences are designed to provide students with the opportunity to apply the skills and knowledge learned through classroom lectures, assigned readings, evidence-based research, and classroom activities while in a clinical or community setting.

Course-integrated Experiential Learning
Students will be exposed to a number of course-integrated experiences throughout the curriculum. These experiences afford students the opportunity to learn directly from clinical providers and recipients of service through observation, practical application, and assignment completion. When these experiences are completed in settings that require a clinical affiliation and/or site-specific onboarding requirements, the Fieldwork Coordination Team assists faculty in the administrative aspects of these visits, using many of the same processes outlined below for structured fieldwork education.

Fieldwork Curriculum and Experience
The sequence of the curriculum ensures a comprehensive relationship between didactic preparation and practical clinical experiences. Students will complete four fieldwork-specific courses that provide

more extensive immersion into clinical or community-based settings under the supervision of an assigned fieldwork educator at an affiliate site. The academic fieldwork coordinator (AFWC) will work with faculty to assure that fieldwork site selection and student assignment to field experiences differ in population, setting type, and /or practice area to further student development towards entry-level practice competency.

Fieldwork experiences are an integral aspect of the educational process in both the master's and doctoral curriculums. These experiences provide students with the opportunity to explore, develop and apply skills in the four Themes of our curriculum (1) clinical performance based in occupation, (2) critical and ethical reasoning processes, (3) engagement in evidence-based practice and scholarship, and finally (4) development of professionalism and leadership. Fieldwork provides an opportunity for students to translate learned content into a variety of occupational therapy practice settings.

This description supports 2023 ACOTE Standard C.1.1

Mandatory Engagement Requirements for Students

Meeting Attendance

Students must attend all fieldwork-related meetings, regardless of their association with a scheduled course. If there is a conflict, the student must work with the academic fieldwork coordinator (AFWC), prior to the scheduled meeting, to outline an alternate method of obtaining content shared during the meeting.

Requirement Completion

It is the student's responsibility to thoroughly read and execute all experiential learning and fieldwork related requirements. While the fieldwork coordination team is always available to assist students with program and site-related requirements, it is not their responsibility to complete requirements on the student's behalf. There are many processes and resources in place through Canvas and Exxat to help students navigate expectations and timelines. Students are expected to demonstrate self-initiative in using the resources provide or request assistance in a timely manner. It is important to note that if requirements are not submitted as requested, it could at best delay the start of an experience, or at worst result in the termination of an experience.

Fieldwork Attendance Policy

The student's schedule is based on the work schedule of the assigned fieldwork educator *not* the University schedule. The student is responsible for maintaining the assigned fieldwork schedule including prompt attendance and adherence to site and program requirements for reporting and making up absences.
The only acceptable reasons for absence include:
- Unexpected illness/COVID isolation requirements
- Emergency situations
- Necessary medical appointments *(ones that cannot be scheduled outside of FW hours)*
- Adverse weather events

In the event of an absence**,** it is the student's responsibility to complete the following:
- Notify the fieldwork educator and site coordinator about the cause of the absence.
- Email the fieldwork coordination team at ecuot.fw@ecu.edu.
- Log the absence, and its cause, in Canvas.
- Enter a reason for the missed time in the time log in the weekly supervision form.
- In certain situations, the student may need to secure and share a physician's note for the absence (*appointments, illnesses exceeding 2-days in duration*).
- A copy of the plan must be provided to the fieldwork coordination team via Canvas.

ECU Missed Time Policy

All missed time must be made-up. Exceptions to this requirement, if allowed by the academic fieldwork coordinator, will be based on site need/policy.
- *For **Level I Fieldwork**:* missed time that puts the student below 30 hours of contact time at the site will need to be made up. The student will work with the academic fieldwork coordinator and site coordinator to determine how that will occur.
- *For **Level II Fieldwork**:* regardless of site policy wording, excused absences must comply with the reasons listed above, and a maximum of three days across the Level II experience can be approved. Beyond that, the student will work with the academic fieldwork coordinator and site coordinator to determine how additional missed time is made-up, regardless of the reason for the absence.

Upon return from absence, students will collaborate with the fieldwork educator and site coordinator to determine how the absence will be made up.

As a rule, scheduled personal time or vacation time (*outside of holiday observance or site closure*) is not allowed during fieldwork. If the student has a rare occurrence where personal time off *might be justifiable*, explicit permission must be sought, in writing, through the academic fieldwork coordinator, as far in advance of the situation as possible. *If permission for time off is granted by the academic fieldwork coordinator or program chair*, a formal plan for making up that time must be negotiated and approved by the program and site in advance.

Management of state/federal holidays are contingent on fieldwork educator schedule and fieldwork site policy.
- If the day is a paid holiday for the fieldwork educator, it is not an absence that needs to be made up by the student.
- If the holiday is part of the fieldwork educator's regular work schedule, the student will continue to follow that schedule.

Failure to comply with any of the regulations outlined above is a serious matter that could impact the completion of the fieldwork experience and attainment of curriculum requirements. Students are reminded that compliance with these expectations and processes are an aspect of academic integrity.

Fieldwork Dress Code

Students should review the Guidelines for Professional Dress Code in the OT Graduate Student Handbook. These guidelines should be adhered to in the absence of specific guidance from the

fieldwork site. It is the student's responsibility to ascertain site-specific requirements for each fieldwork site and wear the appropriate attire. Students should bring their ECU OT name badge and discuss with the fieldwork site if that or a site-specific badge will be worn. Cleanliness, professionalism, good taste, and safety are primary considerations. Therapeutic use of self includes professional presentation to clients in manner, dress, and appearance.

Fieldwork Assignments

Students are responsible for completing assignments as outlined in Exxat, various Canvas course modules (*Developmental Fieldwork OCCT 7777 and FW specific course modules),* course syllabi, and their assigned fieldwork site.

Students should expect that they will need to dedicate time outside of their scheduled fieldwork hours to complete assignments, look up evidence-based practice information, prepare interventions, etc. Depending on the fieldwork site, these may be very time-consuming demands.

Recommendations Regarding Paid Work or Volunteer Hours During Level II Fieldwork

Due to the demands of fieldwork and its importance in completion of program requirements for graduation, we *strongly recommend* that students NOT engage in work outside of this fieldwork experience. Attempting to split time, energy and focus during this final critical stage of the OT curriculum can significantly impede a student's ability to meet the expectations and standards of the site and could even result in a failing score on the AOTA Fieldwork Performance Evaluation (FWPE). **Students need to consider that failing a fieldwork course means dismissal from the program.*

HIPAA and Confidentiality

Students must obtain site permission to take any client-based paperwork from the fieldwork facility. Guidelines of HIPAA and confidentiality must be followed if any paperwork is taken offsite for any reason (*e.g., use the individual's initials rather than name and delete all other identifying information such as social security number, patient ID #, etc.)* or when sharing fieldwork related experiences in answering questions in Canvas for assigned discussion boards.

Criteria for Student Participation in all Experiential Learning Opportunities

The following are required for participation in any experiential learning opportunity completed at a clinical or community-based affiliate site.

Fieldwork Platform Requirements

Enrollment in all required platforms, including those used by ECU and its clinical affiliates, for the completion and verification of experiential learning requirements (*known as "onboarding"*). Students are fully responsible for any/all costs associated with required platforms. Students are fully responsible for *continually* monitoring and updating requirements in all platforms. Submission of accurate information to these systems is a mandatory requirement. While the fieldwork coordination team will provide guidance and oversight in the use of assigned platforms, it is the student's responsibility to thoroughly read and execute all site-related requirements for onboarding. If a site requires specific documentation be completed by the educational program, the student is responsible for providing the Fieldwork Coordination Team with those materials and coordinating their completion.

Fieldwork Platform Overview

As part of student orientation and throughout the first semester, students should become familiar with the resources available in the *EXXAT Prism Fieldwork Database* and Canvas OCCT 7777 *Developmental Fieldwork Module*. These platforms contain a vast amount of information regarding the fieldwork process (*in general*) and fieldwork sites and placements (*in particular*). The Canvas *OCCT 7777 Developmental Fieldwork Module* is "non-curricular" course which means that students have access to this platform throughout the entire program. Many routine questions can be answered using the resources provided in this course module.

Platform Estimated Costs

It is important that students understand that they will be required to purchase several **data repository systems** for use in preparing for and completing experiential learning requirements while in the master's and doctoral programs at ECU. The approximate cost of the combined systems can be found on the [ECU OT Program Website](). Many of these costs are incurred during the first semester of the program, but clinical affiliate platform costs may occur in conjunction with fieldwork assignments.

> **Current Systems used by the OT program**: EXXAT Prism, CastleBranch
> **Current systems in use by clinical affiliate sites**: Rotation Manager, My Clinical Exchange.
> *Students will be required to upload and/or complete compliance requirements in these site-specific platforms as indicated by the site (in addition to processes outlined below for Canvas/Exxat).*

Platform Specifics

Exxat Prism Contains

- *Fieldwork Clinical Sites:* informational overview of ECU's most frequently used clinical and community-based affiliate sites. Materials stored in association with sites include:
    - *Site-provided information*: AOTA data forms, site-specific objectives, student learning objective acknowledgements, onboarding requirements, contracts, personnel information
    - *Student-provided information*: Student Evaluation of Fieldwork Experience (SEFWE), Level I Site Evaluation.

- ▪ ***Site-specific onboarding requirements:*** these are being continually built into the system during each semester as clinical sites provide onboarding guidance. When available, students' complete requirements within EXXAT during the onboarding process for experiential learning or fieldwork. **Some of the onboarding process is also managed through Canvas.*
- ▪ ***Interactive Affiliation map:*** can be used to search affiliations by site name, location, setting type, or practice area.
- ▪ ***Student preferences***: students are able to view, rank and submit a wish list for Level I and Level II FW rotations during their first and third semesters in the program.
- ▪ ***Student Demographic Information:*** students enter demographic information for use in assigning FW placements and sharing with FW sites.
- ▪ ***Compliance documentation:*** students upload all programmatic and onboarding requirements for review by the fieldwork coordination team. Secure sharing of specified requirements with sites can be completed by the fieldwork coordination team or student from this section via the *share profile* function.
- ▪ ***Learning Activities:*** students are assigned required activities during both Level I and Level II fieldwork courses for completion in Exxat. These may include, but are not limited to, professionalism inventories and goals; fieldwork supervisory forms and timesheets; and student performance/site experience evaluations.

Canvas - OCCT 7777 Developmental Fieldwork Module contains:

- ▪ ***General Forms, Annual Training, and projected Fieldwork Rotation dates:*** frequently used forms and training process are accessible. Area Health Education Center (AHEC) housing information is provided for student use. Projected rotation periods for all current cohorts are listed.
- ▪ ***Platform Overviews:*** general information about programmatic and clinical platforms being used for experiential learning and fieldwork.
- ▪ ***FW Site Video Tour module:*** student-developed videos of placement sites that have been used in the last few years.
- ▪ ***FW Overview Instruction by Cohort:*** the fieldwork coordination team schedules instructional classes throughout the first and second semester to help orient students to all fieldwork-related processes, requirements, and data repositories. Class recordings of these session are made available to students in this module.
- ▪ ***FW Selection Process:*** general overview of OT practice setting descriptions (*supplemental to what is learned in courses*); clinical prerequisite information; and student-led Fieldwork Panel Presentations that are hosted annually to answer questions regarding fieldwork sites, settings, populations, and expectations.
- ▪ ***Onboarding assignments:*** students complete onboarding assignments in this module to streamline accessibility, review, and retrieval of information across the fieldwork continuum.

Professional Requirements

The development of professional behaviors is a cornerstone of the educational experience within the OT graduate programs. While ethics and academic integrity are readily recognized as expected professional behaviors, professionalism is conceptualized by the faculty as an expanded, holistic endeavor tied to the development of skills and competencies essential to the safe and effective

delivery of occupational therapy services. OT graduate students are expected to develop behaviors and habits expected of a professional occupational therapist and demonstrate them in experiential learning environments (*course-based and fieldwork-related*).

To achieve this, student behavior must meet educational, professional, and ethical standards throughout the duration of the program. As aspiring occupational therapy professionals, students are required to abide by and uphold the American Occupational Therapy Association (AOTA) Code of Ethics. During fieldwork experiences, students work under the professional license of the practicing therapist. Therefore, they must understand and abide by state licensure regulations and guidelines as well.

Students must ensure they are able to continually meet the Essential Functions and Technical Standards set by the OT graduate program. Any changes in status that would (1) endanger the health, safety, or well-being of clients, clinical staff, fellow students, faculty, or the student themselves, or (2) require consideration for establishment of reasonable accommodations for fieldwork engagement, must be reported to the academic fieldwork coordinator, program chair, and appropriate program director immediately. Student must review the Essential Functions and Technical Standards (*found in the OT Graduate Student Handbook*) and sign the attestation form indicating their ability to meet program expectations either with, or without, reasonable accommodations. If a student identifies the need for accommodation(s), they must follow the process outlined in the Guidelines for Student Accommodations section below to discuss needs with ECU Disability Support Services.

Students must ensure satisfactory compliance with the Department of Occupational Therapy's Academic Guidelines and Procedures outlined in the ECU OT Graduate Student Handbook.

Guidelines for Student Accommodations

Change in Status and ADA Accommodation

If a student identifies the need for reasonable accommodation(s) during fieldwork experiences they must submit a formal request through Disability Support Services (https://dss.ecu.edu/) and the request must be approved for the accommodation request to be valid. Personal disclosure of special needs or preferences is *not sufficient* for accommodations to be established at a fieldwork site. Students must follow ECU's University Policy regarding the Americans with Disabilities Act (ADA) if reasonable accommodations are needed during Level I or Level II fieldwork experiences.

It is important to recognize that fieldwork accommodations often differ from academic accommodations due to setting demands and performance expectations in the practice environment. It is essential that the student collaborates with the academic fieldwork coordinator, and faculty as needed, to consider what challenges they may face during their assigned experiential learning and/or fieldwork experience. Since experiential learning and fieldwork requirements vary throughout the OT graduate programs, students are required to renew their accommodation letter with Disability Support Services each semester and upload a copy to the *Compliance* section of Exxat.

For the academic fieldwork coordinator to initiate discussion of student needs with assigned fieldwork placement sites, written approval must be given by the student. This can be accomplished using the OT

departments FERPA release form. Signing this form is voluntary process. If signed, the release allows the academic fieldwork coordinator to initiate contact with a fieldwork site to determine if the accommodation(s) outlined in the letter from DSS can be supported by the site/educator during the fieldwork experience. If not signed, students do have the option to send their accommodation information directly to the site and discuss if the accommodation(s) outlined in the letter from DSS can be supported by the site/educator.

It is important to know that disclosure of accommodation needs cannot occur prior to placement assignment or acceptance by the site. This is based on ADA regulations. It is also at the site's discretion as to whether the requested accommodation(s) can be supported. If a site indicates that they are not able to support some/all of the requested accommodation(s), there are two options: (1) the student can decide to proceed with the placement with limited or no accommodations (*as indicated by the site)* or (2) the student can forfeit the placement and request that the academic fieldwork coordinator works to secure a new fieldwork site in as timely a manner as possible. It is important for students to understand that securing fieldwork sites, especially for Level II placements, can be difficult. Finding replacement sites, within time constraints, can result in change(s) to setting type, location, supervision approach, and even start/end dates.

Timely contemplation and action to address the need for accommodation(s) is very important. As outlined above, it is the student's responsibility to work with the academic fieldwork coordinator and Disability Support Services specialist to properly identify and manage accommodation needs according to appropriate guidelines when the need first arises. The process for establishing accommodations can be lengthy. Documentation to support the accommodation request often needs to be obtained from a healthcare provider which can take time. While we understand that there are times that new needs arise during Level II fieldwork, accommodations granted while fieldwork is underway are *not* retroactive in nature and still at the site's discretion to approve.

University Policy states
"East Carolina University seeks to comply fully with the Americans with Disabilities Act (ADA). Students requesting accommodations based on a covered disability must go to the Department for Disability Support Services, located in 138 Slay Building, to verify the disability before any accommodations can occur." The telephone number is 252-737-1016; https://accessibility.ecu.edu/students/

ECU seeks to comply fully with the Americans with Disabilities Act. Reasonable accommodations will be made for students with verifiable disabilities. In order to take advantage of available accommodations, students must be registered with the Department for Disability Support Services located in Slay 138, 252-737-1016, Fax: 252-737-1025, E-mail dssdept@ecu.edu.

Compliance Requirements
Mandatory Requirements
The following must be kept current in accordance with all established timelines and dues dates in Exxat.
- Immunization records

- Criminal Background Check (CBC) clearance
- Drug Screening (DS) clearance
- Proof of health insurance coverage
- Proof of current CPR certification (*only American Heart Association is accepted*)
- Proof of ECU Health Insurance Portability and Accountability Act (HIPAA) training
- Proof of ECU Infectious Disease training (*Blood Borne Pathogen, etc...*)
- Proof of Core Orientation training (*NC Consortium of Clinical Education & Practice*)
- Proof of site-specific requirement completion
- ECU Fieldwork Education Manual (*signed attestation form*)
- ECU Student Handbook (*signed attestation form*)
- ECU OT Program Essential Functions & Technical Standards (*signed attestation form in Student Handbook*)
- ECU Curriculum requirements (*pre-requisite course completion*)
- ECU Disability Support Services Accommodation Letters (*link to expanded information*)

Criminal Charges and/or Convictions Before and During the Program

It is critical that students understand their current and/or history of criminal charges and/or convictions can impact the process of becoming an occupational therapist. Criminal charges and/or convictions may limit a student's ability to participate in required off-site activities for academic courses and research processes, or fieldwork placements. Criminal charges and convictions may not be accepted at these locations depending on the nature of the offense, clinical sites' policies, and/or our department's ethical decisions. In addition, criminal charges and convictions may prevent a graduate from taking the National Board for Certification in Occupational Therapy exam and/or obtaining state licensure.

Students with a criminal history may inquire with the program chair to determine how criminal charges and convictions may influence their ability to complete the program. Those students may also inquire with the National Board for Certification in Occupational Therapy and the North Carolina Board of Occupational Therapy (*or other appropriate state occupational therapy licensure board*) to determine the impact of their criminal charges and convictions on their ability to take the exam and become certified and licensed as an occupational therapist. It is the responsibility of the student to report the following to the program chair:

1. A criminal history that the student has prior to applying to the program must be reported on the program application AND reported to the program chair, and shared with the fieldwork coordination team, within 2 days of beginning class.
2. If any criminal charge or conviction occurs between time of application and the first day of class, this must be reported to the program chair, and shared with the fieldwork coordination team, within 2 days of beginning class.
3. If at any time during the program a student has a new criminal charge, conviction, or any other reason a flag would appear on a criminal background check (CBC), the student must report it to the program chair, and share it with the fieldwork coordination team, within 5 days of occurrence to determine how it will impact the student's participation in experiential learning aspects of the program.

A student participating in aspects of the program with a criminal history that is unreported can be a violation of the particular site and can damage or eliminate the department's relationship with the site. A lack of report of the information above can be seen as an ethical violation and can result in removal from the programs.

Drug Screening and Criminal Background Check Policy

All students will complete a criminal background check (CBC) and drug screen (DS) in the first semester of the program. Costs associated with ordering a CBC or DS are the responsibility of the student, this includes the cost of reordering if required at any time throughout the program. Common reasons for renewal include:

- Individual sites may request a new DS or CBC within a set timeframe for onboarding purposes.
- Individual sites may request a new DS or CBC if the student has a leave of absence during the program.
- Program or individual sites may request a new DS or CBC if there is a concern that warrants further investigation.
- Student's initial results were inconclusive (*dilute negative reading for DS*) or flagged (*CBC or DS*).

The student, the fieldwork coordination team, and the College of Allied Health Science (CAHS)s privacy officer can see the *completion* status of the background check or drug screening via CastleBranch. While the fieldwork coordination team can see that results are *negative* or *flagged*, it is important to note that they do not directly review the results of any criminal background checks or drug screenings unless authorized to do so by the student or the CAHS privacy officer. The fieldwork coordination team is also not authorized to send results of these screenings to the sites directly, only the student or privacy officer (*with student's consent to release*) can fulfill this requirement.

If a student's background check or drug screen are *flagged* by CastleBranch, the student must contact the fieldwork coordination team to navigate next steps. A general policy overview is provided below and more detailed instructions regarding paperwork management is accessible in the *Compliance* section of Exxat. The decision regarding approval to complete any experiential learning (*course-based or fieldwork-related*) is at the discretion of the clinical or community-based site where the experience will take place.

Ultimately, it is the student's responsibility to ensure that they have clearance to attend any assigned experiential learning opportunity provided during their OT graduate program (*MSOT/OTD*). Therefore, it is imperative that any student who has a flagged background check or drug screen track this process to its completion for each assigned experiential learning opportunity.

Tips for the day of screening

It is important to be properly prepared for your drug screening appointment. The following is recommended: eat a good meal two to four hours prior to the appointment and limit your fluid intake to 12 ounces of fluid, one hour prior to the screening. If you are someone who normally consumes large amounts of fluid during the day, it is important to moderate your fluid intake on the day of your screening and void (urinate) one to two times prior to the appointment to rid the body of excess fluid.

The body is constantly producing urine, so it should not take long to produce a good specimen under the conditions detailed above.

Flagged Criminal Background Check

A *flagged* Criminal Background Check is one that comes back with an indication that there is an item in need of review. Some flagged items can be automatically cleared by the ECU privacy officer upon receipt of the report through CastleBranch (*ex. minor traffic violation*). Other more serious violates will require review by an ECU legal representative and site designated representative for experiential learning opportunities (*course-based or fieldwork-related*). Examples of flaggable issues include, *but are not limited to*, citations for underage drinking, illegal activities that were not prosecuted criminally but resulted in community service (*shoplifting*), felony level speeding, DUI/DWI, offenses with convictions, and others. It is important to note that items on the CBC stay there for 7-10 years. Students have reported to us offenses that they were told were "*expunged from the record*" by their legal counsel, but they often still showed up as a flag on the CBC. Regardless, if an issue is found during the search it will need to be addressed following the process below.

General process overview:

Upon notification of a *flagged* criminal background check, the student will reach out to the fieldwork coordination team and review the instructions in the *Compliance* section of Exxat. The student will work with the fieldwork coordination team, and faculty as needed, to identify sites where the results will need to be sent. The student will provide this site information to the privacy officer, using the *College of Allied Health and Science - Release of Information* template accessible in Exxat. Once received, the CAHS privacy officer will forward it to the site's designated representative for review.

Students are allowed to provide the CAHS privacy officer with a letter of explanation to be sent along with the background report for consideration during the review process. The privacy officer monitors this process and will forward any requests for additional information, or decisions made by the site, to the student and the fieldwork coordination team. Students will comply with requests or upload a copy of the decision response to the *Flagged CBC/DS - ECU Release of Information Consent* area in Exxat.

If **approved,** the student is cleared to proceed as planned; if **not approved**, the student must set-up a meeting with the academic fieldwork coordinator to discuss next steps. If the fieldwork coordination team was not included on the notification, the student must forward the email to ecuot.fw@ecu.edu, in addition to uploading the decision in Exxat.

It is critical that students do not wait until the last minute to initiate or verify completion of this process as it may negate their ability to complete course related requirements or fieldwork experiences. The academic fieldwork coordinator may not be able to locate a replacement site in time for the fieldwork experience, or there may not be a reasonable alternative for delivery of course information that is provided during planned experiential learning visits. If these situations arise, it could result in a reduction in course grade or the inability to complete program requirements necessary to continue in the program.

This process will need to be revisited every semester the student is in the program to ensure all experiential learning sites learning (*course-based or fieldwork-related*) are provided the opportunity to review the *flagged* background check. Once a site clears a student, that decision remains valid for the duration of the program and additional requests for clearance are not required, unless there is a new event during the student's enrollment or the site changes their onboarding process.

Flagged Drug Screen

A flagged drug screen includes either a ***positive*** result or a ***dilute negative*** result. Neither of these outcomes are considered passing and will prevent students from engaging in experiential learning. Additional steps are required for these two outcomes. Upon notification of a *flagged* drug screen, the student will reach out to the fieldwork coordination team and review the instructions in the *Compliance* section of EXXAT.

Initial Testing Positive Result

The academic fieldwork coordinator will reach out to the College of Allied Health Sciences (CAHS) privacy officer for further guidance. The program chair and appropriate program director will be notified for their awareness. Based on the findings shared in the report, the privacy officer <u>*may*</u> contact the student to schedule a second screening, or to notify the student of next steps in keeping with university guidance.

If provided the option to complete a second screening, the student will be responsible for completing this process within <u>two days</u> of notification, and only one retest opportunity will be allowed during the program. Failure to screen again in the allotted timeframe will be treated as a second positive test result and the student will need to make an appointment to meet with the academic fieldwork coordinator, program chair, and appropriate program director.

Initial Testing Dilute Negative (Specific Gravity Urine) Result

A dilute negative (*or specific gravity*) test result is due to dilution of the urine specimen provide for the drug screen. This can occur *intentionally* through adulteration (*water added to the specimen*) or through intentional over-hydration *(common method used by drug users to flush something from the system/hide drug use*). This result can also occur *unintentionally* through over-hydration (*when the donor is worried about being able to produce a sample for testing*). Regardless of the reason for the result, the student will be required to retest within 2 days of receiving this result, and only one retest opportunity will be allowed for this result. Failure to screen again in the allotted timeframe will be treated as a second failed test result and the student will need to make an appointment to meet with the academic fieldwork coordinator, program chair, and appropriate program director.

Retest Ordering

To set-up a new screening, the student will access the CastleBranch portal to place the new order and will go to LabCorp to complete the test requirements. https://portal.castlebranch.com/EP48

Retest Negative Result

If the retest for either circumstance above is negative, the student will work with the fieldwork coordination team, and faculty as needed, to identify sites where the results will need to be sent. The student will provide this site information to the privacy officer, using the *College of Allied Health and Science - Release of Information* template accessible in Exxat. Once received, the CAHS privacy officer can forward the report to the site's designated representative for full review.

Students are allowed to provide the CAHS privacy officer with a letter of explanation to be sent along with the drug screening results for consideration during the review process. Sites may require additional information from the testing site (*more detailed lab results*) or additional information from the student (*lists of medications/copy of prescriptions*) to make a final determination.

The privacy officer monitors this process and will forward any requests for additional information, or decisions made by the site to the student and the fieldwork coordination team. Students will comply with requests or upload a copy of the decision response to the *Flagged CBC/DS - ECU Release of Information Consent* area in Exxat. If *approved*, the student is cleared to proceed as planned; if *not approved*, the student must set-up a meeting with the academic fieldwork coordinator to discuss next steps. If the fieldwork coordination team was not included on the notification, the student must ensure a copy of the request for information/decision is forwarded to ecuot.fw@ecu.edu, in addition to uploading in EXXAT.

It is critical that students do not wait until the last minute to initiate or verify completion of this process as it may negate their ability to complete course related requirements or fieldwork rotations, The academic fieldwork coordinator may not be able to locate a replacement site in time for the fieldwork experience, or there may not be a reasonable alternative for delivery of course information that is provided during planned experiential learning visits. If these situations arise, it could result in a reduction in course grade or the inability to complete program requirements necessary to continue in the program.

This process will need to be revisited every semester the student is in the program to ensure all experiential learning sites learning (*course-based or fieldwork-related*) are provided the opportunity to review the *flagged* drug screen. Once a site clears a student, that decision remains valid, for that site, for the duration of the program and additional requests for clearance are not required, unless something new occurs while the student is enrolled in the program or the site changes their onboarding process.

Retest Positive Result

If the second test is positive or dilute negative again, the student must make an appointment within two days to meet with the Academic Fieldwork Coordinator and Department Chair.

FIELDWORK CURRICULUM

Level I Fieldwork

Level II Fieldwork

Successful Completion of Fieldwork Requirements

Level I Fieldwork Overview

Level I Fieldwork experiences are designed to aid the student in developing a basic comfort level with understanding of the needs of occupational therapy service recipients through the observation of and participation in selected aspects of the occupational therapy process. Level I fieldwork also provides students with opportunities to apply theory to practice; add to their technical skill repertoire; apply their clinical knowledge; observe and research the use evidence-based approaches to care; and demonstrate appropriate interprofessional, ethical, and professional behavior. These experiences will take place in settings *primarily* throughout North Carolina. Level I experience is designed and implemented following Accreditation Council for Occupational Therapy Education (ACOTE®) Standards.

Each student will participate in two distinct Level I fieldwork courses embedded within the second (*Level IA*) and third (*Level IB*) semesters of the ECU OT program that correlate with the didactic coursework. Each course is comprised of a Level I Fieldwork experience; scheduled seminars that address fieldwork onboarding and professional development; and coursework that facilitates integration and dissemination of knowledge gleaned during the fieldwork experience. Students must successfully complete Level I fieldwork courses to progress to Level II Fieldwork; *no part of Level I fieldwork can be substituted for any part of Level II fieldwork.*

> *Level IA placements* occur at a variety of locations in traditional or non-traditional settings that serve a range of clients across the age continuum. A concerted effort is made to keep the setting and population of this experience different from the student's Level II placements to maximize the diversity of exposure to the practice of OT.

> *Level IB placements* are in settings where the role of the qualified supervisor is in addressing mental health, behavioral health, or psychosocial aspects of client performance to support their engagement in occupations. Due to constraints with securing face-to-face clinical experiences with this focus for all students, the instructional method for this placement may include virtual environments, simulated experiences, standardized patients, faculty practice, and/or faculty-led site visits. A wide- range of Student-to-fieldwork educator ratios are acceptable for this experience.

While the instructional method may vary between the Level I experiences, both are designed to be comparable in rigor (*duration, learning objectives, assignments, and outcome measures*) for all students. A wide- range of Student-to-fieldwork educator ratios are acceptable for these experiences, if the ratio reported is outside of program expectations for a Level I experience (*based-on setting type*), the fieldwork coordination team will reach out to the site coordinator and/or primary fieldwork educator to ensure that the ratio allows for protection of consumers, opportunities for appropriate role modeling of occupational therapy practice, and the ability to conduct adequate assessment of student progress in achieving stated fieldwork objectives.

During Level I experience, we encourage fieldwork educators to integrate students as active participants within the setting. Hands on learning promotes growth in their ability to understand how individual client needs and environmental contexts guide treatment planning, implementation, and

evaluation. It encourages students to use their knowledge of occupation, occupation analysis, and the occupational therapy process. It helps the student utilize therapeutic use of self in communicating and engaging with the client to achieve therapeutic outcomes. It opens the opportunity to discuss how theoretical/scientific principles and the techniques of OT evaluation, remediation, compensation, and education are used to assist recipients of care in enhancing their occupational performance. It provides tangible insight into the balance needed between technical skills, interprofessional capacities, theoretical knowledge, and a commitment to scientific inquiry.

A wide range of qualified supervisors may fulfill the role of being a Level I fieldwork educator. Examples of these roles include, but are not limited to, currently licensed, or otherwise regulated occupational therapists and occupational therapy assistants, psychologists, physician, assistants, teachers, social workers, physicians, speech-language pathologists, nurses, and physical therapists. For Level I educators who hold a license in their professional specialty, there is no minimum experience requirement.

Individuals who agree to serve as a Level I educator are sent the **FWI – ECU Program Design and Student Learning Objective (SLO)** packet for review, completion, and signature. Packet return, prior to the beginning of the Level I experience, is required, and supports compliance with the following ACOTE requirements:
- It documents agreement on fieldwork student learning objectives prior to the start of the experience. *C.1.3.*
- It determines if the fieldwork educator has a primary focus on addressing mental health, behavioral health, or psychosocial aspects of client performance to support their engagement in occupations. *C.1.6.*
- It provides the academic program with the student-to-fieldwork educator ratio for the experience. *C.1.7.*
- It provides fieldwork educators with access to resources that support the enhancement of supervision and the ability to share specific needs with us. *C.1.8.*
- It is an important component in the fieldwork educator-program communication continuum during Level I fieldwork. *C.1.9.*
- It ensures fieldwork educators are informed of the curriculum and fieldwork program design and affirm their ability to support the fieldwork experience. *C.1.10.*

This description supports 2018 ACOTE Standards
This description supports 2023 ACOTE Standards C.1.1.; C.1.3.; C.1.6.; C.1.7.; C.1.8.; C.1.9.; C.1.10.; C.1.11.

Level I Fieldwork Courses, Relationship to the Curriculum Design, and Objectives
Fieldwork Courses
OCCT 6801 - Fieldwork IA
Course Description
Examination of the roles of occupational therapists in a variety of settings with a focus on evaluation, treatment planning skills, exploration, and development of creative applications of

therapeutic occupation. The study of foundational principles and characteristics of professionalism and ethical practice as they relate to clinical practice environments.

Relationship to the Curriculum Design
OCCT 6801 is offered in the second semester and a part of the Fieldwork of the program. OCCT6801 is built on the requisite knowledge, essential habits, types of clinical reasoning, and roles and responsibilities of the occupational therapists learned from the Foundation Core; understanding clinical conditions and their implications, appropriate use of assessments, and intervention planning and implementation, advanced reasoning, therapeutic use of self, adapting and grading of interventions, and recognizing the impact of the context and environment learned from the Practice Core in the second semester; foundations of evidence-based practice and understanding of the research process and common methodologies learned from the Research Core. OCCT 6801 addresses the relevant Goals and Objectives of three curricular themes: Theme 1 – Clinical Performance based in Occupation, Theme 2 – Critical and Ethical Reasoning, and Theme 4 – Professionalism and Leadership.

This description supports 2023 ACOTE Standards C.1.1.

OCCT 6802 - Fieldwork IB

Course Description
Examination of the roles of occupational therapists in settings which focus on behavioral health, psychological, or social factors in relation to human occupation. Evaluation, treatment planning skills, exploration, and development of creative applications of therapeutic occupation. The study of foundational principles and characteristics of professionalism and ongoing professional development through competency-based goal setting.

Relationship to the Curriculum Design
OCCT 6802 is offered in the third semester and a part of the Fieldwork of the program. OCCT6802 is built on the clinical skills and abilities concurrent with the Practice Core, own ethical and professional lens in reflective habits, understanding of professionalism and ethics, management of uncertainty, self-reflection, and feedback integration learned from the Fieldwork; requisite knowledge, essential habits, types of clinical reasoning, and roles and responsibilities of the occupational therapists learned from the Foundation Core; understanding clinical conditions and their implications, appropriate use of assessments, and intervention planning and implementation, advanced reasoning, therapeutic use of self, adapting and grading of interventions, and recognizing the impact of the context and environment learned from the Practice Core; foundations of evidence-based practice, understanding of the research process and common methodologies, and research activity engagement learned from the Research Core. OCCT 6802 addresses the relevant Goals and Objectives of three curricular themes: Theme 1 – Clinical Performance based in Occupation, Theme 2 – Critical and Ethical Reasoning, and Theme 4 – Professionalism and Leadership.

This description supports 2023 ACOTE Standards C.1.1.; C.1.6

Level I Fieldwork Student Learning Objectives *(Level IA and IB)*
Upon completion of the course, the student will be able to:
1. Participate in directed observation.
2. Observe, discuss, participate, and/or plan selected aspects of the occupational therapy process, as determined by the supervising qualified professional (which can include profession types outside of OT). This can include: completion of the occupational profile, administration of screenings/assessments, intervention planning, intervention implementation, discharge planning/recommendations, and/or documentation of services.
3. Demonstrate the ability to identify the global psychosocial needs of clients and discuss with the fieldwork educator (fieldwork educator) how to address those needs in a client-centered way that addresses occupational performance.
4. Demonstrate adherence to AOTA's Occupational Therapy Code of Ethics in a Level I fieldwork experience.
5. Demonstrate adherence to safety regulations and use of sound judgment to ensure safety in a Level I fieldwork experience.
6. Observe and discuss use of clinical reasoning and reflective practice can be used to understand, analyze, and develop professional skills needed as an occupational therapist.
7. Demonstrate professionalism and emerging competence in this area as it relates to supervised performance during fieldwork experiences.
8. Receive evaluation of demonstrated clinical and professional performance in a Level I fieldwork experience.
9. In discussion with fieldwork educator and/or assigned coursework, identify the various domains of occupational therapy evident during the Level I experience, and how these inform care for the client.
10. In classroom setting, critically discuss the OT process experienced within the assigned setting.

This description supports 2023 ACOTE Standards C.1.3

Level I Fieldwork Engagement Recommendations

Students are actively learning how to apply models of practice and frames of references, complete assessments and interventions for pediatric and adult populations, and complete proper documentation. Exposure to experiential learning within the curriculum provides them with opportunities to apply clinical reasoning and evidence-based approaches to care when working with patients in our College of Allied Health Sciences (CAHS) interprofessional, student run clinic. We ask that students be encouraged to collaborate and actively engage in the fieldwork setting to the greatest extend possible, not just observe. We hope over the course of the fieldwork experience students will participate in many, if not all the activities listed below:
• Participate in selected components of *at least* one client evaluation; have student discuss and/or practice documenting the results of the screening/assessment to receive feedback.
• Discuss goal writing; have student attempt to develop or update goal(s), as appropriate.
• Assist with transfers and mobility of clients; have students identify and implement safety precautions and proper body mechanics (*if applicable to the setting/delivery method*).

- Discuss (*or develop*) and implement at least a portion of an intervention session (*individual or group*).
- Write a progress/intervention documentation note for at least one session in acceptable professional report format to receive feedback.
- Participate in service planning meetings or other opportunities presented at the site.
- Demonstrate professionalism, as expected of an occupational therapist, within the setting.

*We understand and respect that there may be limitations to what students can actively engage in during this Level I fieldwork experience based on the practice setting, client population, and method of fieldwork delivery.

Level I Fieldwork Evaluation Processes *(Level IA and Level IB)*
Evaluation of Student Performance during Level I Fieldwork Experience

Since Level I fieldwork is positioned within the curriculum to support the translation of requisite knowledge and skills learned within the classroom to the practice environment, evaluation of student performance focuses on initial demonstration of competency expectations that will be required for successful completion of Level II fieldwork. The **AOTA Level I Fieldwork Competency Evaluation for OT Students**, which is designed to complement performance expectations of the AOTA Level II Fieldwork Performance Evaluation for the OT Student, is used by the fieldwork educator to evaluate student performance. Performance components assessed include fundamentals of practice, foundations of occupational therapy, professional behavior, screening and evaluation, and intervention. The evaluation form has been converted into a multi-user form in Exxat. Students complete the demographic section and move the form forward to the fieldwork educator at the start of the Level I experience. The fieldwork educator will receive an email that provides them with a unique link to complete the evaluation. Educators are asked to set aside time on the student's final day to meet with the student to review the evaluation ratings. Once finalized, the educator submits the form and the academic fieldwork coordinator can then review the evaluation in Exxat and provide a grade in Canvas. The academic fieldwork coordinator will conduct individual conferences with students, site coordinators, and/or fieldwork educators on an *as needed basis* if clarification or additional information is needed. A copy of this evaluation is stored in Exxat, it is accessible to the student and program.

This description supports 2023 ACOTE Standards C.1.1.; C.1.6.; C.1.9; C.1.11.

Student Evaluation of Fieldwork Experience

Students complete the **ECU FWI Site Evaluation Form** which provides information to a variety of audiences, the site, the educator, the academic fieldwork coordinator, and future students. Information collected details setting type and pace, supervision ratio, and ratings on supervision and experience outcomes. Students are asked to provide an overview of their experience in relation to direct observation/hands-on experience; interventions observed/implemented; assessments observed/implemented; and site-specific assignments completed. Additionally, input to assist future students with preparing to meet Level I practice and professional expectations at this site, and feedback to the site for any recommendations to enhance student learning are captured in this evaluation. Information gathered in this evaluation supports program assessment of student learning objective fulfillment and is accessible within Exxat as a resource for students to use during the

fieldwork selection process. Fieldwork educator receives a unique link from Exxat that allows them to review, sign, and download a copy of the form. The academic fieldwork coordinator will conduct individual conferences with students, site coordinators, and/or fieldwork educator on an *as needed basis* if clarification or additional information is needed.

This description supports 2023 ACOTE Standards C.1.2.; C.1.6.; C.1.7.; C.1.8.

Level I Fieldwork Course Grading Guidelines

Overall course grade is based on quality and completion of onboarding requirements; performance on course assignment(s), discussions, and presentations; competency rating for Level I fieldwork experience, student adherence to professional behavior expectations; and classroom attendance and participation (*details are outlined in each course syllabus*).

Students must receive a grade of "C" or better to pass this course. A report of unsafe behavior, ethical concerns, or a failure to complete the fieldwork experience expectations can result in failure of the course. Guidelines governing grade requirements, assignment of incomplete grades, student grade appeals, course/program withdrawals, and student grievances are accessible in the ECU OT Graduate Student Handbook.

Level II Fieldwork Overview

Aligning with the transformative learning theory, the ultimate culmination of all skills developed throughout the didactic coursework is demonstrated in the two-Level II Fieldwork experiences which follow our didactic coursework. Level II fieldwork is designed to provide students with extended practice opportunities for skill exploration, technique refinement, advanced knowledge acquisition, and critical thinking experiences pertinent to the provision of occupational therapy services. These opportunities provide students with in-depth experiences in integrating theory and practice while developing the entry-level skills needed to deliver occupational therapy services safely and effectively. Fieldwork is also fundamental to the development and execution of the professional behavior skills and interprofessional collaboration capabilities needed for interaction with a variety of stakeholders, across the healthcare continuum. In addition to applying the occupational therapy process with consumers, students can begin acting as change agents and exploring roles in research, administration, advocacy, and management of occupational therapy services while at each fieldwork site. These experiences will take place in settings *primarily* throughout North Carolina.

Since the primary aim of Level II fieldwork is to provide students with the opportunity to practice and master skills necessary to function as competent generalist entry-level occupational therapists, the occupational therapy faculty agree that it is critical for the student to have completed all preparatory coursework prior Level II fieldwork. Students must be in strong academic standing as evidenced by having (1) a minimum GPA of 3.00 and (2) completed all coursework with no more than two "C's" earned during the program. The only exception to these requirements is faculty and Department Chair approval for program continuation following student petition. Details can be found in the [ECU OT Graduate Student Handbook.](#) Any student who has completed coursework on a part-time basis or who, for any reason, have not completed courses in the typical sequence of the master's or doctoral program curriculum, will submit verification of courses completed and a schedule for completion of remaining fieldwork prerequisites to the academic fieldwork coordinator prior to the confirmation of Level II fieldwork placements.

Level II fieldwork experience is designed and implemented following Accreditation Council for Occupational Therapy Education (ACOTE®) Standards which require a minimum of 24 weeks' full-time Level II fieldwork. Each student will participate in two distinct, 12-week, Level II fieldwork courses embedded within the two semesters directly following completion of didactic coursework. For master's program students, Level II fieldwork occurs in the fifth (*Level IIA*) and sixth (*Level IIB*) semesters, and for doctoral program students, Level II fieldwork occurs in the sixth (*Level IIA*) and seventh (*Level IIB*) semesters. Each course is comprised of a Level II fieldwork experience and coursework that ensures ongoing communication with the fieldwork coordination teams and facilitates monitoring of student progress throughout the fieldwork experience. While the onboarding requirements, supervision structures, and caseload requirements may vary between Level II sites, both Level II experiences are designed to be comparable in rigor to the greatest extent possible (*duration, learning objectives, assignments, and outcome measures*). Students must successfully complete Level II fieldwork courses to be eligible for graduation; ***no part of Level I fieldwork can be substituted for any part of Level II fieldwork.***

While students are off campus for the duration of the fieldwork semesters, they are required to adhere to general University policies (*e.g. immunization and health insurance coverage*) and complete all ECU OT Program specific requirements outlined in the course syllabus, Canvas, and Exxat. They must also adhere to site policies for student participation, follow the assigned fieldwork educator(s) schedule to complete 12weeks' full-time Level II experience, and actively engage in communication with the fieldwork coordination team, as needed throughout the placement, via email, phone, and/or virtual meetings.

Each Level II experience is scheduled to occur at one site for the duration of the experience but may be comprised of more than one practice area and students may be supervised by more than one fieldwork educator. Information regarding supervisory ratio is sought at various intervals in the fieldwork process. Once obtained, the assigned fieldwork educator information is entered into Exxat and reviewed by the academic fieldwork coordinator to determine (1) if the expected ratio is outside of program expectations for a Level II experience (*based-on setting type*) or (2) whether the ratio may impact the student's ability to perform effectively in the setting. If either concern is identified, the fieldwork coordination team will reach out to the site coordinator and/or primary fieldwork educator to ensure that the ratio allows for protection of consumers, opportunities for appropriate role modeling of occupational therapy practice, and the ability to conduct adequate assessment of student progress in achieving stated fieldwork objectives.

If both Level II fieldwork experiences occur at the same site, the practice area and/or population for each experience will be separate and distinct. Additionally, a concerted effort is made to minimize duplication between Level I and Level II practice settings but on occasions where this occurs, due to site cancellations or reservation restrictions, the academic fieldwork coordinator prioritizes making the experiences as diverse as possible to maximize student learning and capacity for entry-level competence. This is accomplished by varying the site, location, population, and/or setting type (*hospital, community-based, private practice*), to the greatest extent possible.

While not typical of our placement process, if circumstances arise that require a student to be assigned to more than site during the completion of one (*or both*) of the Level II experiences, the total number of sites, for the combined 24-week requirement, will not exceed four sites.

While not typical for our program, the program chair may approve the completion of fieldwork requirements on a part-time basis to meet student or site-based circumstances. However, as outlined in the [ECU OT Graduate Student Handbook](#), students must complete both Fieldwork IIA and Fieldwork IIB within 24 months of the start of Fieldwork IIA to graduate from the program. The expectation for weekly completion in a part-time placement configuration must be equal to, or greater than, a .5 FTE at the assigned site. The academic fieldwork coordinator will collaborate with the clinical site to document how student learning objectives will be met, and performance evaluation will occur. The length of the part-time experience must be equivalent in length to a minimum of 24 weeks full-time, in keeping with the fieldwork site's usual and customary personnel policies.

At present, students are not offered the option to complete a Level II fieldwork experience in settings where no OT services exist or outside of the United States. If an occasion were to arise where that

might be considered as an option, the academic fieldwork coordinator would work with the OT program chair and each program director (*master's and doctoral*) to develop the requirements and document the processes used to ensure ACOTE standards would be met.

This description supports 2023 ACOTE Standards A.3.3.; C.1.1.; C.1.7.; C.1.11.; C.1.12; C.1.13; C.1.16.

Fieldwork educators may be engaged by the fieldwork site or by the educational program, but occupational therapy practitioners supervising students for Level II fieldwork must be a currently licensed or otherwise regulated occupational therapist with at least 1 year of full-time practice experience (*or its equivalent*). To ensure compliance, date of licensure/certification and current standing are verified through the issuing states regulatory board for licensure and NBCOT for certification (*if applicable*). If an issue with licensure standing or practice experience duration are identified during the verification process, the fieldwork coordination team contacts the site coordinator to discuss if the issue can be managed at the site-level through a change in the supervision configuration. If this is not an option, a new site may need to be secured for the student to fulfill the fieldwork requirement.

Individuals who agree to serve as a Level II educator are sent the **FWII – Fieldwork Educator Intake & SLO** packet for review, completion, and signature. Packet return, prior to the beginning of the Level II experience, is required, and supports compliance with the following ACOTE requirements:

- It asks fieldwork educators to send site performance expectations (*site-specific objectives, weekly expectation outlines, student FW manual/handbook, etc..)* that can be stored in Exxat and shared with students*. C.1.2.*
- It documents agreement on fieldwork student learning objectives prior to the start of the experience. *C.1.3.*
- It determines if the fieldwork educator has a primary focus on addressing mental health, behavioral health, or psychosocial aspects of client performance to support their engagement in occupations. *C.1.6.*
- It provides the academic program with the student-to-fieldwork educator ratio for the experience. *C.1.7.*
- It provides fieldwork educators with access to resources that support the enhancement of supervision and the ability to share specific needs with us. *C.1.8.*
- It is an important component in the fieldwork educator-program communication continuum during Level I Fieldwork. *C.1.9.*
- It gathers fieldwork educator specific information required prior to the onset of Level II fieldwork. It identifies how the occupational therapy practitioner has prepared to serve as a fieldwork educator. Provides the state/number of their OT license and their NBCOT certification number (*if applicable*) which support verification of current standing. It identifies how many years (*and/or months*) of practice experience the fieldwork educator has. *C.1.13.*
- It establishes fieldwork educator agreement that Level II fieldwork supervision can be structured to ensure direct supervision, which decreases to less direct 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. C.1.14.

- It provides an initial overview for the fieldwork educator regarding the student assessment components integrated into the Level II fieldwork experience (*structured weekly supervision form completion; FWPE use at midterm/final; and SEFWE submission by student*). C.1.8.; C.1.15.

This description supports 2023 ACOTE Standards C.1.2.; C.1.3.; C.1.6. - C.1.10.; C.1.13. – C.1.15.

Level II Fieldwork Courses, Relationship to the Curriculum Design, and Objectives
Fieldwork Courses
  OCCT 6804 (MSOT) & OCCT 8804 (OTD) - Fieldwork IIA
  OCCT 6805 (MSOT) & OCCT 8805 (OTD) - Fieldwork IIB

Course Description *(same for all courses):*
Demonstration of the knowledge and clinical skills required for occupational therapists. Focuses on practicing and mastering skills required to function as a competent, entry-level occupational therapist. Prerequisite completion of all didactic coursework, to include OCCT 6801 and OCCT 6802.

Relationship to the Curriculum Design
MSOT Level II Fieldwork Courses
OCCT 6804 - Fieldwork IIA
OCCT 6804 is offered in the fifth semester and a part of the Fieldwork of the program. OCCT 6804 is built on the clinical skills and abilities concurrent with the Practice Core, own ethical and professional lens in reflective habits, understanding of professionalism and ethics, management of uncertainty, self-reflection, and feedback integration learned from the Fieldwork; requisite knowledge, essential habits, types of clinical reasoning, roles and responsibilities of the occupational therapists, program development, advocacy, interventions addressing health disparities, and a broader understanding of professional issues learned from the Foundation Core; understanding clinical conditions and their implications, appropriate use of assessments, and intervention planning and implementation, advanced reasoning, therapeutic use of self, adapting and grading of interventions, and recognizing the impact of the context and environment learned from the Practice Core; foundations of evidence-based practice, understanding of the research process and common methodologies, and research activity engagement and dissemination learned from the Research Core. OCCT 6804 addresses the relevant Goals and Objectives of three curricular themes: Theme 1 – Clinical Performance based in Occupation, Theme 2 – Critical and Ethical Reasoning, and Theme 4 – Professionalism and Leadership.

OCCT 6805 - Fieldwork IIB
OCCT 6805 is offered in the sixth semester and a part of the Fieldwork of the program. OCCT 6805 is built on the clinical skills and abilities concurrent with the Practice Core, own ethical and professional lens in reflective habits, understanding of professionalism and ethics, management of uncertainty, self-reflection, feedback integration, and transformation into entry-level practitioners learned from the Fieldwork; requisite knowledge, essential habits, types of clinical reasoning, roles and responsibilities of the occupational therapists, program development, advocacy, interventions addressing health disparities, and a broader understanding of professional issues learned from the Foundation Core;

understanding clinical conditions and their implications, appropriate use of assessments, and intervention planning and implementation, advanced reasoning, therapeutic use of self, adapting and grading of interventions, and recognizing the impact of the context and environment learned from the Practice Core; foundations of evidence-based practice, understanding of the research process and common methodologies, and research activity engagement and dissemination learned from the Research Core. OCCT 6805 addresses the relevant Goals and Objectives of three curricular themes: Theme 1 – Clinical Performance based in Occupation, Theme 2 – Critical and Ethical Reasoning, and Theme 4 – Professionalism and Leadership.

OTD Level II Fieldwork Courses
OCCT 8804 - Fieldwork IIA
OCCT 8804 is offered in the sixth semester and a part of the Fieldwork of the program. OCCT 8804 is built on the clinical skills and abilities concurrent with the Practice Core, own ethical and professional lens in reflective habits, understanding of professionalism and ethics, management of uncertainty, self-reflection, and feedback integration learned from the Fieldwork; requisite knowledge, essential habits, types of clinical reasoning, roles and responsibilities of the occupational therapists, program development, advocacy, interventions addressing health disparities, a broader understanding of professional issues, grant writing, evidence-based management, and capacity building learned from the Foundation Core; understanding clinical conditions and their implications, appropriate use of assessments, and intervention planning and implementation, advanced reasoning, therapeutic use of self, adapting and grading of interventions, and recognizing the impact of the context and environment learned from the Practice Core; foundations of evidence-based practice, understanding of the research process and common methodologies, research activity engagement and dissemination, and scholarly development learned from the Research Core. OCCT 8804 addresses the relevant Goals and Objectives of three curricular themes: Theme 1 – Clinical Performance based in Occupation, Theme 2 – Critical and Ethical Reasoning, and Theme 4 – Professionalism and Leadership.

OCCT 8805 - Fieldwork IIB
OCCT 8805 is offered in the seventh semester and a part of the Fieldwork of the program. OCCT 8805 is built on the clinical skills and abilities concurrent with the Practice Core, own ethical and professional lens in reflective habits, understanding of professionalism and ethics, management of uncertainty, self-reflection, feedback integration, and transformation into entry-level practitioners learned from the Fieldwork; requisite knowledge, essential habits, types of clinical reasoning, roles and responsibilities of the occupational therapists, program development, advocacy, interventions addressing health disparities, a broader understanding of professional issues, grant writing, evidence-based management, and capacity building learned from the Foundation Core; understanding clinical conditions and their implications, appropriate use of assessments, and intervention planning and implementation, advanced reasoning, therapeutic use of self, adapting and grading of interventions, and recognizing the impact of the context and environment learned from the Practice Core; foundations of evidence-based practice, understanding of the research process and common methodologies, research activity engagement and dissemination, and scholarly development learned from the Research Core. OCCT 8805 addresses the relevant Goals and Objectives of three curricular themes: Theme 1 – Clinical Performance based in Occupation, Theme 2 – Critical and Ethical Reasoning, and Theme 4 – Professionalism and Leadership.
This description supports 2023 ACOTE Standards C.1.1

Level II Fieldwork Student Learning Objectives *(same for Level IA and IB)*

1. The student will articulate and apply the basic tenets of occupational therapy in the provision of occupational therapy to individuals served by the fieldwork site.
2. The student will interact, communicate, and collaborate with all stakeholders in the continuum of care, consistent with the needs of the individuals and practice focus of the FW site.
3. The student will display professional behaviors that are consistent with the ethics, values, and responsibilities of an occupational therapy professional, across all levels of engagement at the fieldwork site.
4. The student will demonstrate the ability to identify the psychological and social needs of individuals being served and address those needs in a client-centered way.
5. The student will articulate and apply appropriate theories, models of practice, and frames of reference during the evaluation of individuals served by the fieldwork site.
6. The student will select, apply, interpret, and document standardized and non-standardized screening and assessment tools appropriate to the individuals served by the fieldwork site.
7. The student will develop and implement therapeutic intervention plans based on research evidence, theoretical perspectives, models of practice, and frames of reference appropriate to the individuals served by the fieldwork site.
8. The student will deliver occupational therapy services within the context of, and through methods appropriate to, the fieldwork site.
9. The student will demonstrate effective clinical reasoning when making recommendations or referrals for specialists, community resources, and/or discharge from services.
10. The student will develop strategies for effective, competency-based legal and ethical supervision of occupational therapy and non–occupational therapy personnel, as appropriate to the fieldwork site.
11. The student will use current research and professional literature to aid decision making in the design and delivery of occupational therapy services.

This description supports 2023 ACOTE Standards C.1.3

Level II Fieldwork Student Progress Processes (Level IIA and Level IIB)

This section includes an overview of the processes used to assess, monitor, and navigate issues related to student progress and retention during Level II fieldwork. Detailed instructions are included where appropriate. There is a link provided in each course syllabus to the Fieldwork Manual to ensure students and educators have access to the most current instructions related to these processes.

1. **Weekly Supervision Form (WSF)**
2. **AOTA Fieldwork Performance Evaluation (FWPE)**
3. **Goal Attainment Scaling (GAS)**
4. **AOTA Student Evaluation of Fieldwork Experience (SEFWE) and Supervisor Rating**

Weekly Supervision Form (WSF)

This form is used to encourage clear communication and expectations between the student and fieldwork educator on a regular basis and is a process to assist with student retention and success. Fieldwork educators are asked to set aside 10-15 minutes weekly to discuss strengths, areas for growth, the plan for the coming week, and determine whether the student is on track for completion of Level II

fieldwork expectations. This form is embedded in Exxat and follows a set workflow that is initiated by the student, moves via email to the fieldwork educator, and is accessible in Exxat for review by the academic fieldwork coordinator. Submission is scheduled for Sunday evening in weeks 1-5 and weeks 7-11. A form is not completed in week 6 or 12 when the Fieldwork Performance Evaluation (FWPE) is completed.

A copy of this form is sent to the Level II fieldwork site prior to student arrival *for educator awareness of the process* but the process is otherwise managed electronically via email, through the Exxat fieldwork database. We will honor the use of site-specific forms, there is a place withing the ECU weekly supervision form to upload site-specific forms for both the student and educator.

Exxat Workflow Process

The student will access and complete this form in Exxat each week, selecting the fieldwork educator who provided supervision for that week.
- If there is more than one fieldwork educator, students should discuss with the fieldwork educators who will receive the form each week for completion.
- Students will verify that educator contact information is added to Exxat (*Coursework > Course Activities tab*) prior to starting a new form. Once added the educator will be visible in the "Select Preceptor" drop-down at the end of the form.

Once the student submits the form, the educator will receive a link from notifications@exxat.com.
- If an email does not arrive in the educator's inbox, please check the spam/junk folder. If the email is not there either, we ask that you provide the notifications@exxat.com email address to your IT department in case receipt is blocked by an organizational firewall.
- Educators can request a copy of the link through ecuot.fw@ecu.edu

There are several mandatory questions that the fieldwork educator is asked to complete each week that allow the academic fieldwork coordinator to assess the students' progress during fieldwork.
- The first two questions provide ongoing input regarding how much of the caseload the student assumed that week and the level of supervision (*direct vs. indirect*) required during the delivery of those services.
- The final question asks the educator to identify if there any concerns regarding professional behavior, safety, clinical performance, communication, and/or clinical reasoning that may impact the student's ability to successfully complete the fieldwork experience.
    - If the answer to this question is "yes", the educator is prompted to provide details regarding the areas of concern and strategies for improvement that have been discussed/implemented with the student.
    - Early notification facilitates communication aimed at supporting student learning, growth, and improvement and mitigates instances where the student and/or academic fieldwork coordinator are not made aware of large-scale concerns that will impede the student's ability to receive a passing score for the fieldwork experience. Receiving this type of notification in the final one to two weeks limits the options for deploying strategies that could benefit student success.
    - If a concern is raised through this question on the form, the academic fieldwork coordinator will reach out to the student, fieldwork educator, and FWC to discuss

student needs and determine whether an **informal** or **formal** approach is most appropriate.

Formal and Informal Approaches to Student Performance Concerns

Informal approach involves identifying and employing new strategies to help the student progress in areas that can be difficult to navigate in the transition into the workplace. Common areas of struggle include: receiving feedback, communicating needs, documentation speed and conciseness, assuming independence in managing the caseload, meting productivity demands, navigating expectations of multiple fieldwork educators involved in oversight, etc.. Progress will be tracked using the weekly supervision form and virtual/phone check-ins as needed.

Formal approach is the development of a **learning contract.** If the site has a template that can be used, if not ECU has a template**.** Site-Specific Objectives (SSO) are a useful means for identifying areas of performance where growth is needed to use in the learning contract. If the site does not have SSOs, the site coordinator and fieldwork educator will work with the academic fieldwork coordinator to outline expectations and timelines for the learning contract. Since student failure to meet expectations set forth in a learning contract can result in an early dismissal from fieldwork, the academic program must be included in the counseling process associated with a learning contract. A copy of the contract must be provided to the academic program for both signature and tracking purposes. Stakeholders will set up a weekly meeting to discuss progress and determine if changes to the learning contract are needed. During this process, the academic fieldwork coordinator will work with faculty, as warranted, to provide additional support to the student. This process will be documented in the intervention section of Exxat.

Downloading the WSF from Exxat

A copy of the form can be downloaded **from Exxat** by either the fieldwork educator or student once the fieldwork educator has provided input.

By Educator: Prior to submitting the form
- **Save** the form
- Click **Preview** in the top right corner
- Click **Download**

By Student: After educator completion or academic fieldwork coordinator review
- Go to **Learning Activities** from the Exxat home page
- Find **Weekly Supervision Form** in your list
- Click the **Pending School Review** or **Reviewed** button
- Click **Preview** in the top right corner
- Click **Download** in the top right corner

Time Log Guidelines

As part of the WSF requirement, students will maintain a time log of total hours for the week. We do not track that a certain number of hours are completed for Level II, but we do need to be able to show that the students engaged in twelve "full-time" weeks of fieldwork at the site. We recognize that "full-time" may look different across settings, we use the site's designation for full-time (*ex. in many County Schools, 35 hours per week is full-time*).

Time counted toward weekly total include:
- Time spent onsite engaged in direct client care (*can be via alternative service delivery methods like telehealth/consultation*)
- Preparation for client care/documentation
- Participation in team meetings
- Preparation and participation in assignments assigned by the educator (*such as a case study presentation, literature review for conducting evidence-based practice, journal club, etc.)*
- Supervised collaboration with OTAs
- Shadowing other team members to enhance knowledge of the individual roles of the client-care team, etc.

Please note that time spent on evenings and weekends preparing for the workday or doing extra project related work are not counted as time towards the weekly total or 12-week requirement.
- The only time that hours of this nature may be considered is during the advent of unusual circumstances (*such as tropical storms/flooding, pandemic, etc..),* and this will be determined on a case-by-case basis with the academic fieldwork coordinator and OT program chair.

We do ask that if the educator has a schedule that is consistently less than 40 hours per week (*ex. educator works four 8-hour days or 32 hours per week)* that sites consider if there are additional learning opportunities that can be arranged to maximize student learning. *This is *not a requirement,* rather a *request* that benefits student growth towards becoming an entry-level provider.
- Students can be with a different educator for those additional days/hours.
- Students can shadow other provider/personnel types to learn about interprofessional collaboration, management, transdisciplinary processes, etc...

Successful completion of all fieldwork requirements is a prerequisite to both program completion (graduation) and national certification exam eligibility. Therefore, it is *strongly recommended* that any student who is having personal and/or professional challenges that affect the quality or safety of their clinical performance should contact the academic fieldwork coordinator immediately. Once notified, the academic fieldwork coordinator will work with the student and clinical site to determine the what the primary concern is, and if an informal or formal approach is needed. We encourage students to remember that we are here as a support mechanism throughout the fieldwork experience, but we cannot help with challenges we do not know about.

As outlined in the [Criteria for Student Participation in Experiential Learning Opportunities](#) section, students are responsible for ensuring that they can meet the Essential Functions and Technical Standards required for the OT graduate program they are completing (MSOT/OTD). Any time there is a

change in status, the academic fieldwork coordinator, program chair, and program director must be notified. Students alone can interface with the Disability Support Services for assistance with accommodations. We are here to provide guidance and support but cannot initiate this process for the student. For additional information regarding the accommodation process, review the Professional Requirements section.

This description supports 2023 ACOTE Standards A.3.3., C.1.9.; C.1.14.; C.1.15.

AOTA Fieldwork Performance Evaluation (FWPE)

Formal evaluation of student performance is completed in week six (*midterm form*) and week twelve (*final form*) of Level II fieldwork using the electronic Fieldwork Performance Evaluation (FWPE) in Formstack. This form is developed and maintained by AOTA.

- Please note, midterm and final evaluations forms are separate and stored in different folders within Formstack, so please carefully review the instructions below to ensure that the proper forms are being accessed and utilized.
- While separate forms, the midterm form feeds specific information into the final evaluation form, so if you do not receive the final evaluation reminder and are unable to access it through the link provided after the midterm submission, please contact us directly at ECUOT.FW@ecu.edu so we can send you a blank version of the final evaluation form. * Please do not reuse the initial midterm evaluation link.
- A primary change from the paper version of this evaluation form is that there are now only 37 rating areas (*there were previously 42*) and there is no longer a Pass/Fail score at midterm. The 111-score mentioned in the instructions is for the final evaluation only as the overall passing score for the fieldwork experience.
- We do ask that comments are provided at both midterm and final evaluation rating periods to help the students understand what they are doing well and where they need to focus greater attention and effort.

For training on the use or scoring of this form, please visit the AOTA Fieldwork Performance Evaluation (FWPE) webpage: https://www.aota.org/Education-Careers/Fieldwork/performance-evaluations.aspx
- **Students** - please review to the *Training video* in the "Students" section.
- **Educators** – please review the *How to Administer video* in the "Fieldwork Educators" section.
- There are pdf files on how to use Formstack to complete the eval; the category areas for the evaluation; and rating/scoring guidelines.

Midterm evaluations specifics (Completed by the end of Week 6).

The student and educator will receive an email providing individual access to the FWPE between weeks four and five. This email is sent directly from the Formstack database. If the student or educator do not receive this email, please check junk/spam folders. If it is not there either, please contact your IT department as site firewalls may block receipt of the email. The address the email is sent from is noreply@formstack.com . If neither option above provides you with access, please reach out to us at ecuot.fw@ecu.edu and provide an alternative email address we can enter in Formstack.

Within the email, there is a link to access the mid-term evaluation form.

Student – Student completes this as a self-assessment to help facilitate self-awareness and allow for reflection on opportunities for professional growth during the second half of their fieldwork placement. Students follow the instructions provided in Canvas to ensure proper and timely completion. Students should have access to the form during the midterm evaluation review meeting so self-perceptions and variations in rating are part of the conversation.

Educators – Have two options for completing the form. (1) the form can be completed and "submitted" in Formstack prior to the review meeting with the student, or (2) there is an option to "save" a form in progress* which allows for information to be added or adjusted during the review meeting (*adding strategies, clarifying areas for improvement, etc..*). If the educator opts to save progress, you should be prompted to enter an email address at which time Formstack sends an email with a link to the saved version. ***Please note the save function has not always been reliable in the past and neither the educational program nor AOTA can provide reproduce the link to your saved version.***

- An alternative option is to use the FWPE Rater Template that is included in both the introduction and FWPE overview emails sent to the educator. Student can also access the form on Canvas and share it, or the educator can request a copy by emailing ecuot.fw@ecu.edu

Formstack is built to allow only one evaluation form submission for each student. If there are multiple educators providing supervision, please work collaboratively on ratings and feedback. The FWPE Rater Template mentioned above can be useful.

- The student will verify who that **primary** supervisor will be, and they will be entered into Formstack to receive notification emails and complete the FWPE forms.
- If there will be a complete change in who the primary supervisor will be for the midterm and final ratings, please let us know in advance of week 5 as we will need to help facilitate the transition process in a specific way to allow for transfer of the midterm evaluation to the new fieldwork educator.

To ensure proper generation of the **Fieldwork Supervision Certificates** for the educators not receiving direct notifications from Formstack, please mark **"Yes"** to the question "*Are there additional fieldwork educator's working with the student?*" in the demographic section of the midterm FWPE. To properly divided supervision weeks, please enter the information as indicated below and verify that the number of weeks listed collectively add up to the total duration of the FW experience (*typically 12 full weeks*)

- In the **"*Personal Information*"** section of the FWPE
  - Be sure that the *"Total numbers of weeks"* only reflect the number of weeks that the primary educator is directly supervising the student.
  - Be sure that the remaining "*number of weeks*" are listed in the "*additional fieldwork educator box*" following the additional educator's information.
- ***helpful instructions are provided below/in the submission areas on the FWPE, see below.*

PERSONAL INFORMATION

STUDENT OR FIELDWORK EDUCATOR*

[▲▼]

Who is completing the evaluation

COLLEGE OR UNIVERSITY

[   ]

Student's college or university

STUDENT NAME*

[   ] [   ]

First Name   Last Name

STUDENT EMAIL*

[   ]

FIELDWORK EDUCATOR NAME*

[   ] [   ]

First Name   Last Name

FIELDWORK EDUCATOR'S EMAIL*

[   ]

TOTAL NUMBER OF WEEKS

[▲▼]

Please only enter the supervision time that the fieldwork educator listed above provided. If there are multiple FW educators, the remainder of the time is entered into the "Additional Fieldwork Educator" box as instructed. **Total combined FW educator supervision time should equal 12 weeks (discuss unique circumstances with AFWC).

ARE THERE ADDITIONAL FIELDWORK EDUCATOR(S) WORKING WITH THIS STUDENT?

◉ Yes ○ No

Additional Fieldwork Educator(s)

PLEASE ENTER ADDITIONAL FIELDWORK EDUCATOR(S) NAME, CREDENTIALS, EMAIL AND NUMBER OF WEEKS*

[   ]

"Number of weeks" is the supervision time the additional FWE provided

Midterm Rating Guidelines

Please remember that there is no designated pass/fail score for the midterm. Please carefully review the rating guidelines in the FWPE instructions and remember the midterm is rated in relation to the student's overall performance from week 1 to week 6 in relation to what you expect them to be doing at the END of fieldwork, in week 12. Consider where on the continuum they are in reaching the end goal of being an independent, entry-level generalist practitioner, *not* how well they have intermittently performed isolated or portioned aspects of the process.

For midterm scores, please remember 2's are very appropriate on this evaluation, with maybe a few 1's or 3's, and the occasional 4 based on student performance.
  ▪ If the student has a substantial number of 1s's, or a score that is below 75, please contact the academic fieldwork coordinator to discuss areas of performance deficiency and strategies for implementing improvements. While we will be looking for notification of issues in the last question on the WSF, please do not hesitate to reach out directly if there are any concerns. We prefer to manage issues as early as possible.

Following submission of the midterm FWPE

The student and fieldwork educator will receive the ==**midterm notification email.**== This is illustrated in the screen shot below.

- Attached to the email is a PDF version of the submission; please note that the PDF is *not* sent to the other individual (*student or fieldwork educator*).
- Please be sure to retain a copy of this email as there is an embedded hyperlink that allows access the final FWPE evaluation (*see highlighted area under the red arrow in the screenshot*).
- While it says a reminder email will be sent, that function is auto generated by Formstack and has not always worked properly. Please save the mid-term notification email.
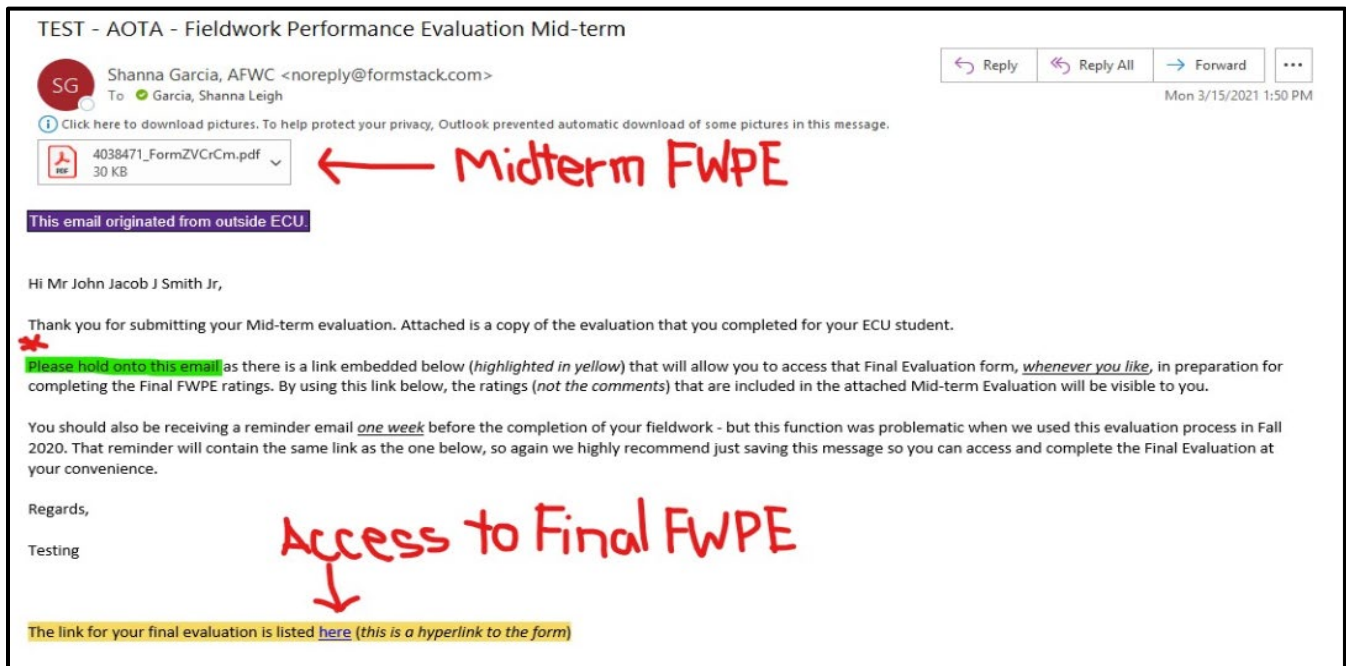
Final Evaluations Specifics (Completed by the end of Week 12).

The final FWPE form is accessed using the link in the midterm email as illustrated above, or by using the link in the reminder email sent for Formstack. Using this link will allow the demographic information and midterm ratings to be visible in the final form. As mentioned previously, please do not re-use the initial link you received to access the Midterm FWPE. Reusing the form will not allow for carry-forward of midterm ratings and it will be saved/labeled as a second midterm rating form which will then need additional steps to manage.

We ask that the final FWPE meeting occur no later than the second to last day of the experience. We make every effort to review all submissions prior to student departure from the site, so earlier submission is beneficial in allowing the academic fieldwork to complete this process. We do understand that this will not be feasible at every site due to patient care priorities.

Scoring reminders

Please remember that there are three contingencies to students earning a "pass" for the Level II experience during the final evaluation:

- Student must earn *a "3" or above* in the "Fundamentals of Practice section*" (first three questions about Ethics, Safety, Judgment*).
- Student must earn *a "2" or above* in all other rating areas.
- Student must earn an *overall score of 111 or above.*

Qualitative feedback is just as important as the quantitative ratings. Please provide comments that can benefit the student with continued growth. If a student receives a "2" in any area on the final, we ask that the fieldwork educator please provide constructive feedback so that the student is aware of the deficiency they need to focus on in preparation for their next Level II fieldwork or as they transition to being an entry-level provider.

Fieldwork Supervision Certificates

Formstack automatically generates the Fieldwork Supervision Certificate for the *primary* fieldwork educator based on what is entered in the *"Total numbers of weeks"* box following the educator's name and credentials in the "Personal Information" section. The primary fieldwork supervisor should receive the certificate within 60 minutes of evaluation submission, if it is not received, please contact us at ecuot.fw@ecu.edu

Fieldwork Supervision Certificates for "additional fieldwork educator's" need to be manually entered in Formstack system. Inclusion of all requested information in the "additional fieldwork educator information" box is important for accurate processing. If the number of weeks indicated in these places changed from midterm, and you forgot to update prior to final evaluation submission, please contact us at ecuot.fw@ecu.edu

This description supports 2023 ACOTE Standards C.1.9.; C.1.15.

Goal Attainment Scaling (GAS)

Students have developed individualized professional development goals that they monitored for achievement and progress throughout Level II fieldwork. We ask educator's to review and assess the students level of attainment in meeting these goals.

Process in Exxat

The fieldwork educator will receive an email from notifications@exxat.com with a link to the goals and the rating instructions in week eleven. In the form, the fieldwork educator will review the attainment levels descriptions and select the level attainment rating (-2 to +2) that best illustrates the student performance for each goal as of week twelve. Once both ratings are entered, the fieldwork educator will Submit the form so that the ratings are available for student and academic fieldwork coordinator review. *We ask that these are completed <u>prior</u> to the student leaving the site,* in keeping with FWPE submission.

- *Please note, the student may or may not mention these throughout FWII*, please do not be concerned if they do not. These are personally identified areas for growth and self-efficacy.

- These are not a graded aspect of FWII, rather provide an opportunity for the students to build professionalism behaviors that support autonomous practice.

Student Evaluation of Fieldwork Experience (SEFWE)

Site portion

The student will have this completed and ready to share with the fieldwork educator during the final meeting. Full instructions and deadlines for completion are available in Canvas.

Process in Exxat:
Once the student submits the form, the educator will receive a link from notifications@exxat.com. The educator will review and sign the form. The educator can follow the same process outlined in the Weekly Supervision Form section to download a copy for the site to maintain. Once the form is submitted, the academic fieldwork coordinator will be able to review and publish the form in Exxat. Once the form is published it can no longer be download by the student or educator. If a copy is needed, please email a request to ecuot.fw@ecu.edu

A copy of this form is maintained for accreditation purposes by the academic program.
- ***Site*** forms are shared with current students to increase awareness of FWII expectations.

Supervisor portion

The student will complete a supervisor rating form for each fieldwork educator who is listed on the FWPE. Full instructions and deadlines for completion are available in Canvas. Students are given the option whether they want to share their ratings with each educator or have the feedback only accessible by the fieldwork coordination team.

- ***Supervisor*** forms are maintained for program needs. These are not visible to other students and the selection made regarding sharing of the form will be honored. Based on the input, the academic fieldwork coordinator will set-up a meeting with the student to further discuss areas of concern noted. Since feedback is essential to professional growth, informal sharing of the information back to the site coordinator will be discussed with the student.

This description supports 2023 ACOTE Standards C.1.8.; C.1.9.; C.1.14.; C.1.15.

Level II Fieldwork Course Grading Guidelines

Successful completion of Level II fieldwork experience is evidenced by acceptable performance on all course-related requirements, demonstration of expected professional behaviors, and attainment of a "pass" rating for the Fieldwork Performance Evaluation (FWPE).

The academic fieldwork coordinator is responsible for assignment of course credit and grade for each Level II Fieldwork. Student grade determination is based on overall performance during completion of fieldwork-related requirements. It is important that students understand that quality and timeliness of

requirements listed below can impact the final fieldwork course grade. Fieldwork courses follow the same 10-point grading scale as didactic courses in the curriculum.

Students must
1. Complete all onboarding processes in accordance with site/program-required due dates and standards.
2. Complete all course-related requirements as outlined in the course syllabus and Canvas course module. Assignments must be turned in using the platform indicated for each assignment which could include any of the platforms outlined in the Fieldwork Platform Overview section. It is the responsibility of the student to properly communicate issues with the fieldwork coordination team.
3. Fieldwork educator and student versions of the AOTA Fieldwork Performance Evaluation (FWPE) (midterm/final) must be accessible in Formstack by the academic fieldwork coordinator.
    - Per the evaluation guidelines, any time a student exhibits unsatisfactory behavior in a substantial number of tasks or their potential to achieve entry-level competence by the end of fieldwork is in question, contact with the academic fieldwork coordinator is required.
    - If concerns require development of a formal plan for improvement, the plan will be in writing and signed by the student, fieldwork educator, academic fieldwork coordinator, and site coordinator (i*f applicable*). Attainment of competency in all identified areas must be reached (*in addition to meeting FWPE requirements*) for successful completion of fieldwork.
    - A sum score of 111 or higher is required to receive a "pass" on the FWPE.
4. Meet the required 12-week *full-time* fieldwork minimum for each FW or a combined 24-week minimum if circumstances dictate a departure from standard fieldwork delivery configuration.
5. Provide all supervisory forms and complete all course assignments in accordance with set due dates and in compliance with the directions provided.
6. Demonstrate adherence to all professional and ethical behavior standards set-forth by the program, clinical site, AOTA, and ACOTE.

General Fieldwork Grading and Passing Guidelines

Students who (1) do not complete a fieldwork experience, or (2) are asked to leave a fieldwork experience for any reason (*in particular poor performance or *disruptive behavior*), or (3) earn a less than passing grade on any fieldwork experience, *will receive an "F" for that fieldwork experience*.

*Disruptive behavior includes any professional and/or ethical behavior that interferes with the safe evaluation/treatment of patients/clients, or that negatively impacts the daily routines and duties associated with the fieldwork experience. Examples of such behaviors include, *but are not limited to*, using cell phones or other electronic devices at inappropriate times; refusing or negatively reacting to clinical feedback; not following the fieldwork site's policies and procedures; unethical behaviors such as submitting falsified documentation; questioning authority; bullying patients/clients, significant others, staff, volunteers, or others; frequently being absent or late with or without notifying the fieldwork educator and academic fieldwork coordinator; and making threats or

personal insults. *This is not an exhaustive list*. Professional and ethical behaviors are evaluated based on the AOTA Code of Ethics, site-specific regulations, the guidelines set forth in the ECU OT Graduate Student Handbook, and all ECU standards.

Petition to Repeat a Failed Fieldwork Experience

If a student fails *any fieldwork experience,* Level I or Level II, the student must petition, in *writing*, to repeat the failed fieldwork course. The petition must include the reason for failure and a plan of action for how this situation will be avoided during a future fieldwork placement.

The academic fieldwork coordinator will discuss the reason for failure with the fieldwork site and analyze the reason(s) provided in conjunction with the Essential Functions and Technical Standards of the program. Site-identified performance deficit(s) and areas for remediation identified in relation to the Essential Functions and Technical Standards will be included in the discussion with faculty during the petition process.

The student *may, at the discretion of the faculty and approval by the Department Chair*, be allowed to repeat the fieldwork course. Depending on the findings of the faculty during the petition process, contingencies may be outlined that the student will need to address prior to commencement of an additional fieldwork opportunity. In this instance, the student will be required to meet with faculty within a specified timeframe to discuss progress and lessons learned in the remediation period and how this will allow them to be successful in their next fieldwork placement.

If faculty agree that all contingencies outlined as part of the petition process have been fully met and the student has demonstrated sufficient insight and initiative in developing strategies for success moving forward
1. The department will secure a placement to ensure that previously identified performance deficits can be fully assessed for competence.
2. The location of the repeated fieldwork experience will be at the discretion of the academic fieldwork coordinator with input from other faculty members.
3. A contract between the student, program chair, and academic fieldwork coordinator may be developed and implemented during the repeated fieldwork course to ensure continued growth and development towards areas of concern identified during the failed fieldwork experience. Successful achievement of any established requirements must be met in addition to the typical requirements for passing the fieldwork experience.

If the faculty determine that the cause of the failure does not warrant allowance of an additional fieldwork, the student is dismissed from the program.

A maximum of one fieldwork course (*Level I or Level II*) may be repeated beyond the course of study requirements. If a repeated fieldwork is allowed and a second fieldwork course failure occurs, the student is dismissed from the program without further opportunity for petition.

Graduate Student Grade Appeals

The details about the appeal process are provided in the current Graduate School Catalog (https://registrar.ecu.edu/about-catalog/).

Communication Process for Level I and Level II experiences

Approximately 7-8 weeks prior to Fieldwork Commencement

Level I and Level II fieldwork (*same process*)

The fieldwork coordination team sends an introduction letter to the fieldwork site coordinator that provides programmatic updates, outlines compliance requirements in need of management, and shares pertinent course and student related documents. At a minimum, the following administrative materials are sent with this email:

1. AOTA Data Forms – the fieldwork coordination team requests an update of this information from the fieldwork site annually. The fieldwork coordination team uses this form to determine fieldwork site capacities and students can view this form when completing their wish lists for Level I and Level II placements. Forms are maintained in Exxat.

2. Student Data Forms – students initially complete and upload this form to Exxat prior to their first Level I fieldwork. It contains basic demographic and emergency contact information, education details, accommodation needs, and self-assessment information (*strengths, areas for growth, learning and communications styles, supervision and feedback preferences, etc..*), and previous fieldwork and OT-related volunteer experience. If a student identifies the need for accommodations, the fieldwork coordination team attaches a copy of the letter from Disability Support Services and requests that the site responds regarding the ability to support the requested accommodations.

3. Fieldwork Syllabus – contains program and course related information for both the fieldwork educators and students. Provides a link to this manual for information outside the scope of a typical course syllabus. Students have direct, electronic access to this document through the fieldwork experience via the Canvas.

4. ECU Liability Form – this includes a copy of the current liability coverage for student participation in experiential learning at affiliated sites.

5. Level I – ECU Program Design and Student Learning Objective (SLO) Packet _or_ Level II - Fieldwork Educator Intake and Student Learning Objective (SLO) Packet *the packet specific to the rotation level will be included for the site coordinator with an explanation that it is also sent to the FWEd approximately four weeks prior to the start of fieldwork and must be completed and returned prior to the start of the Level II experience. This form collects a variety of information that supports adherence to fieldwork related ACOTE standards. We ask site coordinators to forward this form to the FWEd(s) if already assigned and assist with managing the completion and return of this form.

6. ECU OT Graduate Fieldwork Manual – link and short overview of information it contains; fieldwork education, student well-being resources, and details about the Level I AOTA Competency Evaluation or the Level II Fieldwork Performance Evaluation (FWPE) process (*based on rotation type*).

7. Resources – this includes access to the AHEC digital library and any opportunities for free continuing education related to fieldwork supervision. This section may change between uses based on resource availability.

Approximately 3-4 weeks prior to Fieldwork Commencement

The fieldwork coordination team sends an introduction letter to the fieldwork educator that provides programmatic updates, outlines compliance requirements in need of management, shares pertinent course and student related documents/information, and provides direct contact information for communications throughout the fieldwork process. At a minimum, the following administrative items are reviewed in and/or sent with this email:

Level I Fieldwork

1. Level I - ECU Program Design and Student Learning Objective (SLO) Packet– *this packet must be completed and returned by the fieldwork educator, prior to the start of the Level II experience. This form collects a variety of information that supports adherence to fieldwork-related ACOTE standard: documents agreement on fieldwork student learning objectives prior to the start of the experience; determines if the fieldwork educator has a primary focus on addressing mental health, behavioral health, or psychosocial aspects of client performance to support their engagement in occupations; it indicates the student-to-fieldwork educator ratio for the experience; provides fieldwork educators with access to resources that support the enhancement of supervision and the ability to share specific needs with us; and it ensures fieldwork educators are informed of the curriculum and fieldwork program design and affirm their ability to support the fieldwork experience.

2. Student Data Forms – students initially complete and upload this form to Exxat prior to their first Level I fieldwork. It contains basic demographic and emergency contact information, education details, accommodation needs, and self-assessment information (*strengths, areas for growth, learning and communications styles, supervision and feedback preferences, etc..*), and previous fieldwork and OT-related volunteer experience. If a student identifies the need for accommodations, fieldwork educators are made aware that the DSS Accommodation Letter was sent to the site coordinator. They are asked to collaborate with the site coordinator to confirm whether the requested accommodations can be met at the site.

3. Fieldwork Syllabus – contains program and course related information for both the fieldwork educators and students. Provides a link to this manual for information outside the scope of a typical course syllabus. Students have direct, electronic access to this document through the fieldwork experience via the Canvas.

4. ECU OT Graduate Fieldwork Manual – link and short overview of information it contains; fieldwork education, student well-being resources, and details about the Level I - AOTA Fieldwork Competency Evaluation. Informs educator of the requirement and process for completion using Exxat. Students will enter the demographic information into the form in Exxat on the first day of the FWI placement. Once submitted, a link to the form is sent to the

fieldwork educator via email. Once submitted, the form is accessible for review by the academic fieldwork coordinator in Exxat.

Level II Fieldwork

1. Fieldwork II – Fieldwork Educator Intake and Student Learning Objective (SLO) Packet– *this packet must be completed and returned by the fieldwork educator, prior to the start of the Level II experience. This form collects a variety of information that supports adherence to fieldwork related ACOTE standard: it asks fieldwork educators to send site performance expectations (*site-specific objectives, weekly expectation outlines, student FW manual/handbook, etc..)* that can be stored in Exxat and shared with student; it documents agreement on fieldwork student learning objectives prior to the start of the experience; determines if the fieldwork educator has a primary focus on addressing mental health, behavioral health, or psychosocial aspects of client performance to support their engagement in occupations; it indicates the student-to-fieldwork educator ratio for the experience; provides fieldwork educators with access to resources that support the enhancement of supervision and the ability to share specific needs with us; It gathers fieldwork educator-specific information required prior to the onset of Level II fieldwork (*licensure number, years/months of practice experience)* and gathers information on how the OT practitioner has prepared to serve as a fieldwork educator;
   it ensures fieldwork educators are informed of the curriculum and fieldwork program design and affirm their ability to support the fieldwork experience; it establishes fieldwork educator agreement that Level II fieldwork supervision can be structured to ensure direct supervision, which decreases to less direct 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.
2. Student Data Forms – students update these prior to Level II fieldwork and upload the form to Exxat. It contains basic demographic and emergency contact information, education details, accommodation needs, and self-assessment information (*strengths, areas for growth, learning and communications styles, supervision and feedback preferences, etc..)*, and previous fieldwork and OT-related volunteer experience. If a student identifies the need for accommodations, fieldwork educators are made aware that the DSS Accommodation Letter was sent to the site coordinator. They are asked to collaborate with the site coordinator to confirm whether the requested accommodations can be met at the site.
3. Fieldwork Syllabus – contains program and course related information for both the fieldwork educators and students. Provides a link to this manual for information outside the scope of a typical course syllabus. Students have direct, electronic access to this document through the fieldwork experience via the Canvas.
4. ECU OT Graduate Fieldwork Manual – link and short overview of information it contains; fieldwork education, student well-being resources, and details about the Level II - AOTA Fieldwork Performance Evaluation (FWPE) and FWPE Rater Template. Informs educator of the midterm and final evaluation requirement and provides a short overview of key process elements. The rater form can be helpful if there are multiple fieldwork educators for one student, or if the primary educator wants to work on a progressive draft and not rely on Formstack sending a new link each time they save progress. Also details the Weekly Supervision Form. Fieldwork educators are made aware that this process has an automated workflow

through Exxat that students initiate each week. Once submitted, a link to the form is sent to the fieldwork educator via email. Once submitted, the form is accessible for review by the academic fieldwork coordinator in Exxat.

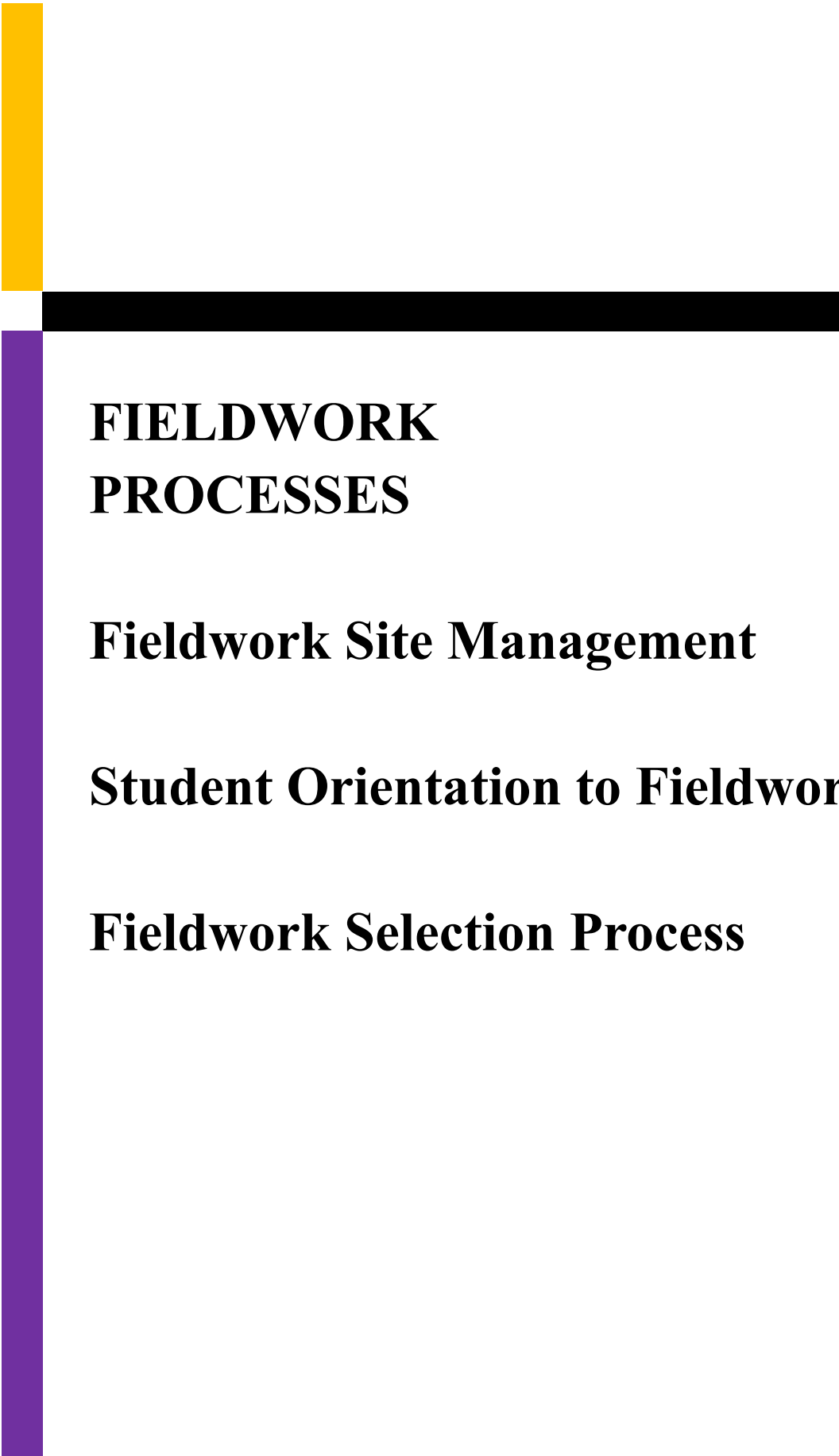**Throughout the Fieldwork Experience**
Level I Fieldwork
1. During traditional 1-week experiences there is no formal communication with the fieldwork educator due to the short duration of the experience. If a fieldwork coordinator reaches out with questions or concerns, answers are provided as quickly as possible using the method most appropriate to the need (*email, phone call, virtual Teams meeting*). If the communication relates to student performance or behavior, the issue is documented in the Intervention section of Exxat, the issue is discussed with relevant stakeholders (*as appropriate to the issue*), and plan of action is established.
2. During non-traditional experiences, ongoing with communication is based on the setting type, delivery structure, and site needs.

Level II Fieldwork
1. In week one, students submit two professional development goals to address during their fieldwork experience. Once reviewed by the academic fieldwork coordinator, the student can add ratings as little or often as they like during the fieldwork experience.
2. In weeks one to five, and seven to eleven, the academic fieldwork coordinator reviews the Weekly Supervision Form on Exxat and monitors the need for direct communication with the student and/or fieldwork educator/coordinator based on student progress. See Weekly Supervision Form overview for detailed instructions regarding form completion and process for managing notification of concerns.
3. Every other week, students are required to submit a discussion board post addressing a designated topic related to the delivery of care in their setting. Students must review and reply to a minimum of one other student. These discussions provide insight into settings that a student may be scheduled for next, or ones they did not have an opportunity to see.
4. Between weeks four and five, the academic fieldwork coordinator sends an email to the students and fieldwork educators providing a detailed overview of the FWPE process using Formstack, general reminders about midterm expectations and scoring, and AOTA training links. The academic fieldwork coordinator then enters students and fieldwork educators in the Formstack Portal. Everyone receives a unique link to a blank copy of the midterm form via email. Once submitted, the form is accessible for review by the academic fieldwork coordinator in Formstack and the individual who submitted the form receives a copy of the submission and link to the final evaluation form. The academic fieldwork coordinator monitors the need for direct communication with the student and/or fieldwork educator based on midterm rating and educator comments. ***If the student receives a substantial number of 1's (8 or more) or an overall score lower than 75, the student and educator will be contacted to discuss student needs moving forward.*

5. Between weeks ten and eleven, the academic fieldwork coordinator sends an email to the students and fieldwork educators asking them to verify they have access to FWPE final form, reminding them about requirements for passing, and providing instructions regarding the AOTA fieldwork supervision certificate process.

6. In week eleven, the student enters a final attainment rating for their professional development goals in Exxat. Once submitted, a link to the form is sent to the fieldwork educator via email. Once submitted, the form is accessible for review by the academic fieldwork coordinator in Exxat.

7. In week twelve, student and educator Fieldwork Performance Evaluations (FWPE) are completed in Formstack. Students complete the Student Evaluation of Fieldwork Experience (SEFWE) in Exxat, which is reviewed and signed by the fieldwork educator. Students complete a Supervisor Rating Form for each fieldwork educator they were supervised by. All forms are reviewed by the academic fieldwork coordinator. The fieldwork coordination team ensures copies of all forms are stored in Exxat. *If the student does not receive a passing grading, additional communication will be initiated with the site to discuss the outcome.* See Successful Completion of Level II Fieldwork section for additional information.

8. In week thirteen, the fieldwork coordination team will communicate with fieldwork educators to ensure they received their fieldwork supervision certificate.

This description supports 2023 ACOTE Standards C.1.3.; C.1.8.; C.1.9; C.1.13.; C.1.15.

FIELDWORK PROCESSES

Fieldwork Site Management

Student Orientation to Fieldwork

Fieldwork Selection Process

Fieldwork Site Management

Site Availability

The fieldwork coordination team will monitor the *Sites* section of Exxat and the Department of Health Sciences (DHS) Active Agreements spreadsheet to ensure that the distribution of clinical affiliate sites available for fieldwork are sufficient in number and provide varied practice experiences to allow completion of graduation requirements in a timely manner in support of the **Graduation Guidelines** outlined in the ECU OT Graduate Student Handbook. Reports can be pulled from Exxat that allow for ongoing review of sites contained in the database, with options to filter by settings. This report can be cross-referenced with the contract spreadsheet accessible in Exxat to verify that sites within each setting type have a valid contract in place. The fieldwork coordination team reviews the contract spreadsheet regularly to identify contracts in need of renewal, discusses those sites to determine site utilization needs, and coordinates with the College of Allied Health Sciences (CAHS) contract manager to request necessary contract renewals.

Fieldwork Reservations

Around the start of each new calendar year, the fieldwork coordination team begins the process of securing placement reservations for fieldwork experiences in the following academic year. Over the course of several months, the fieldwork coordination team communicates with established clinical and community-based affiliate sites (*via Exxat*) to determine the number of placement reservations that each facility can offer during the established fieldwork rotation dates for that academic year. The fieldwork coordination team closely manages this reservation process to facilitate variety in practice populations, setting types, and site locations for each cohort of students. Exxat offers a variety of ways to track site coordinator access, placement offers, and setting types by fieldwork experience which allows for ongoing assessment of needs and consolidated tracking of communication efforts.

If issues arise in securing the necessary number of placement reservations (*slots*) needed for a specific fieldwork experience, the fieldwork coordination team assesses the reservations offered, reviews student profile and fieldwork advising notes, and analyzes which of the established sites have yet to offer reservation slots. A list is generated of potential placement options, and sites are contacted directly to determine availability to fill those needs. Every effort is made to secure the necessary number of placement reservations for each fieldwork experience prior to initiating the student preference selection process (i.e. *wish list*) with students in Exxat (*mid-fall for Level I and late spring for Level II*). Within this process, there are placeholder options available for sites that have unique reservation processes (*direct requests, specific timing, out-of-state locations)* that preclude them from being visible as specific options during the wish list process. If any of these placeholder options are used as a primary placement for a student, the fieldwork coordination team works directly with the student to develop a priority list of sites to contact directly.

For each cohort, the fieldwork coordination team uses a placement spreadsheet to track and manage fieldwork-related information. Information maintained here includes site names, settings, and personnel (*coordinator and educators*) for all four fieldwork experiences for each student within the cohort. As the cohort moves through the curriculum, updates are made to track site confirmations; fieldwork educator verification; contract status, notes regarding placement changes/ modification

(*dates, locations, FWEd, supervision type, settings, etc.*.), and student specific issues that require ongoing attention (*accommodation letter management, CBC/DS clearance, Covid vaccine exemptions, etc.*.). A separate tab is used to manage *potential site options* gleaned through fieldwork advising with students and/or the wish list placeholder process described above.

Fieldwork Site Selection Process

If new sites are needed to fill gaps in placement reservations, or optimize learning opportunities that align with the Vision, Mission and Educational Philosophy of the program, the academic fieldwork coordinator will work with pertinent stakeholders to explore options for new clinical or community-based site/setting options. Once sites are identified, or if new sites reach out to the program and express interest in supervising fieldwork students, the fieldwork coordination team will research available information about the site. This may include any of the following, a review of any published information about the site (*business website, Facebook page, online reviews*), review of existing contracts with DHS, input from faculty, students, or clinical partners that have interacted with the site, contact with alumni who are associated with the site, or input from ECU departments who may already send students to the site for experiential learning.

Based on initial site review results, the fieldwork coordination team may opt to send out our New Site Letter which provides an overview of our fieldwork experience types (*Level I/II*), shares what we require for partnership (*to support accreditation compliance*), details our reservation process, asks for site-related documents regarding site fieldwork processes (*to share with students in Exxat*) and outlines additional supervisory and evaluation materials that will be sent if site is interested in partnering for fieldwork. Additional communication, in the form of emails, phone conversations, or virtual meetings, are pursued based on the sites continued interest and their feasibility for meeting our Level I and/or Level II fieldwork requirements. A site visit may occasionally be scheduled if there are questions regarding site fit for meeting objectives.

If, following site review and communication to establish fit, both the OT program and site wish to establish a partnership for fieldwork, the fieldwork coordination team begins the process of adding the site to Exxat and obtaining materials/information needed to ensure compliance with fieldwork accreditation standards. This includes establishment of a written agreement; obtaining information on personnel (*roles, locations, contact information, credentials, etc.*.) and associating personnel with site locations and functions implemented through Exxat (*reservations requests, placement notifications and confirmations, etc.*.); and obtaining site-related fieldwork information (*onboarding requirements, AOTA Data Forms, weekly expectations, site-specific objectives, student fieldwork manuals, etc.*.). As information is obtained, it is uploaded to Exxat and made visible to students for their review during the wish list process for fieldwork placement selection.

With each fieldwork onboarding cycle (*Level I and Level II*), the fieldwork coordination team reviews all site-provided onboarding materials (*uploaded by students in Canvas*) and compares the information to the materials and processes contained in Exxat. This helps to ensure that information accessible by students in Exxat is up to date for sites routinely in use for fieldwork experiences. The OT fieldwork coordination team uses a shared email account (ecuot.fw@ecu.edu) to support timely responses to a fieldwork stakeholder needs and allow for tracking of important fieldwork issues.
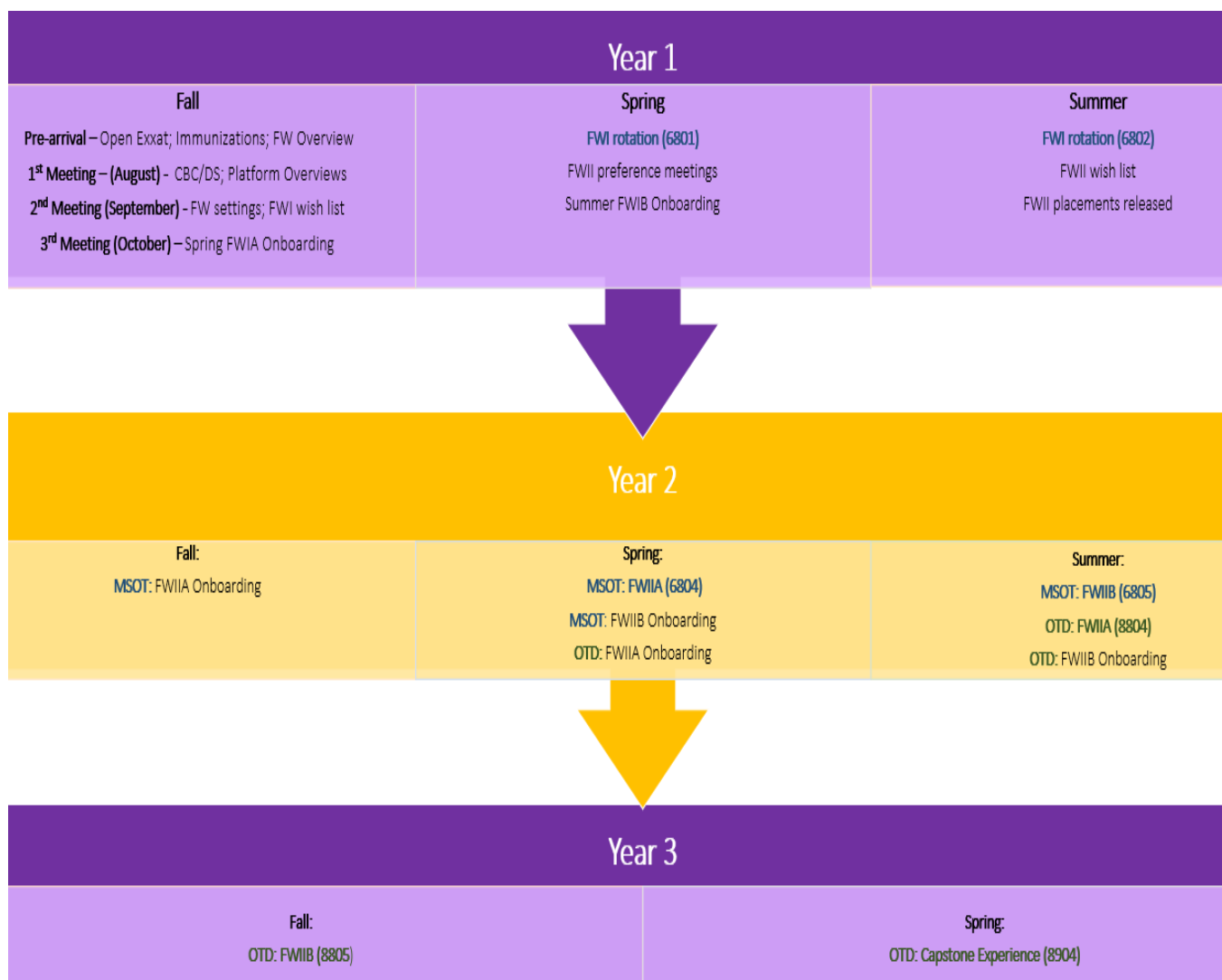
Written Agreements

As mentioned above, execution and timely renewal of written agreements between ECU and sites is a priority for the fieldwork coordination team. Compliance with agreement execution, prior to the start of any experiential learning opportunity OT students participate in, is essential for meeting not only accreditation requirements but also ensures that students are covered under the ECU professional and general liability insurance policy when engaged at affiliated sites.

Written agreements are managed by personnel in the College of Allied Health Sciences (CAHS) and Department of Health Sciences (DHS); not at the departmental level. Two types of agreements are utilized by DHS (1) the ECU initiated University Affiliation Agreement (UAA), and (2) the site-initiated Agency Agreement (AA); type used is determined by site. Since written agreements are managed at the Health Sciences level, the format and required content related to responsibilities of the sponsoring institution(s) and each fieldwork site is determined by the agreement type and cannot be modified at the OT program level.

Agreement management through DHS supports the OT fieldwork teams efforts to maintain a sufficient number and variety of practice experience options for experiential learning (*course and fieldwork related*) since agreements are written to cover all entity locations and as many of the health science specialties as possible. This is of particular benefit when new site opportunities are needed emergently due to last minute site cancellations that threaten fulfillment of fieldwork requirements for individual students.

This description supports 2023 ACOTE Standards C.1.2.; C.1.4.; C.1.5.

Fieldwork Process Sequence

Year 1		
Fall	**Spring**	**Summer**
Pre-arrival – Open Exxat; Immunizations; FW Overview	FWI rotation (6801)	FWI rotation (6802)
1st Meeting – (August) - CBC/DS; Platform Overviews	FWII preference meetings	FWII wish list
2nd Meeting (September) - FW settings; FWI wish list	Summer FWIB Onboarding	FWII placements released
3rd Meeting (October) – Spring FWIIA Onboarding		

Year 2		
Fall:	**Spring:**	**Summer:**
MSOT: FWIIA Onboarding	MSOT: FWIIA (6804)	MSOT: FWIIB (6805)
	MSOT: FWIIB Onboarding	OTD: FWIIA (8804)
	OTD: FWIIA Onboarding	OTD: FWIIB Onboarding

Year 3	
Fall:	**Spring:**
OTD: FWIIB (8805)	OTD: Capstone Experience (8904)

Student Orientation and Advising of the Fieldwork Process

Student Advising

Student advising occurs throughout the fieldwork curriculum; formally in semesters 1,2, and 4 (*master's*) and 5 (*doctoral*); informally in semesters 3,5,6,7. Specifics regarding the timing and aim of formal advising processes are detailed in the Student Orientation section below.

All notes pertaining to student advisement and/or student progress throughout the fieldwork experience are maintained in the *Student* section of Exxat. If concerns arise during the fieldwork process an *Intervention* will be opened where notes, documents, and follow-up meetings are added and maintained. Interventions are closed in the system upon resolution. Additional details regarding the navigation of student progress issues during Level II fieldwork are accessible in the Level II Fieldwork Student Progress Processes section.

Students are encouraged to schedule advising meetings, whenever needed, to discuss student specific concerns regarding placements, changes in status that impact the ability to meet the Essential Functions and Technical Standards (accessible in the Student Handbook), or clinical accommodation needs. Additional details regarding the Accommodation process are accessible in the Guidelines for Student Accommodations section.

Student Orientation

Student involvement in the fieldwork process occurs throughout enrollment in the OT program. Information regarding the fieldwork process and student compliance requirements (*immunizations, trainings, handbook review/attestation, housing/lease considerations, platform costs and establishment dates, etc.)* are shared prior to student arrival through the New Student Newsletters and the online OT Student Orientation Course. Early access to information allows students to complete administrative/compliance aspects of fieldwork at their convenience prior on-campus arrival. Students are given the fieldwork coordination teams' contact information and are encouraged to reach out with questions while completing compliance requirements.

A brief overview of fieldwork is included in the mandatory, on-campus OT program orientation. Students are made aware that there are several mandatory fieldwork meetings scheduled within the first semester.

Semester 1

The semester focuses on orienting the students to the sequence and scope of fieldwork content within the OT program curriculum designs to help them understand how fieldwork is used to strength the ties between didactic and fieldwork education. Students are made aware that faculty work collaboratively to provide feedback and input to the fieldwork coordination team to support the fieldwork process. Information is exchanged through the professional behavior assessment process, academic student advising, and student performance during didactic, experiential learning (student run clinic and course-embedded, community-based outings), and competency-based assessments (lab). Fieldwork education advising is conducted through planned group and individual meetings (*outlined below*), and on an *as-needed* basis.

Mandatory meetings focus on delivery of the following information.
- *Meeting 1* – students are given more in-depth information regarding fieldwork expectations, timelines, and placement selection processes; an overview of course-based experiential learning and the onboarding associated with it; platform specific guidance on accessing fieldwork site information; an overview of what the non-curricular OCCT 7777 Fieldwork Development course on Canvas contains; and complete the process of ordering their drug screen and criminal background check through CastleBranch.
- *Meeting 2* – students are provided with specific instructions on how to navigate all areas of Exxat that contain the site related information that will aid them in learning more about each of our current fieldwork partner sties. In general, accessible information includes fieldwork type offered, locations, settings, populations, onboarding requirements, data forms, and any site objectives, performance expectations, and previous student assessments we have on file for

the site. The academic fieldwork coordinator works with leadership of PTE to set up a peer-to-peer presentation and Q&A session which is led by 2nd and 3rd year students. Students share their knowledge of fieldwork settings and answer questions about fieldwork and the placement process from a student perspective. These fieldwork panel discussions are recorded and available for access on Canvas. The wish list process in Exxat opens in conjunction with this meeting.

- *Meeting 3* – students Level I placements are published prior to this meeting. Students receive detailed instructions on how the onboarding process is structured and are taken on a virtual tour of the platforms used for completion of onboarding requirements (Exxat, Canvas). Due dates are provided so student know when to initiate onboarding during their holiday break. Onboarding begins no later than eight-weeks prior to the start of any scheduled rotation. The same process is used for each iteration of fieldwork to facilitate consistency for students, fieldwork sites/personnel, and the fieldwork coordination team.

Semester 2
Students are enrolled in OCCT 6801 Fieldwork Level IA this semester; course specific information is accessible in the Level I Fieldwork Curriculum section. This course is comprised of in-person classes, Level IA onboarding and fieldwork experience, and individual advising meetings to discuss student specific concerns, questions and preferences related to Level II fieldwork placements. Ongoing communication occurs between students, the fieldwork coordination team, and fieldwork sites/personnel throughout the Level IA fieldwork process. Onboarding for Level IB begins in this semester.

Semester 3
Students are enrolled in OCCT 6802 Fieldwork Level IB this semester; course specific information is accessible in the Level I Fieldwork Curriculum section. This course is comprised of in-person classes, Level IB onboarding and fieldwork experience, and *as-needed* advising meetings. Ongoing communication occurs between students, the fieldwork coordination team, and fieldwork sites/personnel throughout the Level IB fieldwork process.

Semester 4
Master's program students are completing their final didactic requirements this semester. These students have a scheduled advising meeting with the fieldwork coordinator to finalize goal attain scaling (GAS) of Level II professional development goals. Onboarding for Level IIA begins in this semester. Ongoing communication occurs between master's program students, the fieldwork coordination team, and fieldwork sites/personnel throughout the onboarding process.

Semester 5
Master's program students are enrolled in OCCT 6804 and complete Level IIA fieldwork during designated rotation dates. They follow the fieldwork attendance guidelines set-forth in the Mandatory Engagement Requirements section. Students' complete fieldwork course requirements outlined in the Level II Curriculum section and course syllabus. Onboarding for Level IIB begins in this semester. Ongoing communication occurs between students, the fieldwork coordination team, and fieldwork sites/personnel throughout the Level IIA experience and Level IIB onboarding processes.

Doctoral program students are completing their final didactic requirements this semester. These students have a scheduled advising meeting with the fieldwork coordinator to finalize goal attain scaling (GAS) of Level II professional development goals. Onboarding for Level IIA begins in this semester. Ongoing communication occurs between master's program students, the fieldwork coordination team, and fieldwork sites/personnel throughout the onboarding process.

Semester 6

Master's program students are enrolled in OCCT 6805 and complete Level IIB fieldwork during designated rotation dates. They follow the fieldwork attendance guidelines set-forth in the Mandatory Engagement Requirements section. Students' complete fieldwork course requirements outlined in the Level II Curriculum section and course syllabus. Ongoing communication occurs between students, the fieldwork coordination team, and fieldwork sites/personnel throughout the Level IIB experience. The academic fieldwork coordinator reports fieldwork requirement completion status to program director for graduation purposes.

Doctoral program students are enrolled in OCCT 8804 and complete Level IIA fieldwork during designated rotation dates. They follow the fieldwork attendance guidelines set-forth in the Mandatory Engagement Requirements section. Students' complete fieldwork course requirements outlined in the Level II Curriculum section and course syllabus. Onboarding for Level IIB begins in this semester. Ongoing communication occurs between students, the fieldwork coordination team, and fieldwork sites/personnel throughout the Level IIA experience and Level IIB onboarding processes.

Semester 7

Master's program students are enrolled in OCCT 8805 and complete Level IIB fieldwork during designated rotation dates. They follow the fieldwork attendance guidelines set-forth in the Mandatory Engagement Requirements section. Students' complete fieldwork course requirements outlined in the Level II Curriculum section and course syllabus. Ongoing communication occurs between students, the fieldwork coordination team, and fieldwork sites/personnel throughout the Level IIB experience. The academic fieldwork coordinator reports fieldwork requirement completion status to program director for graduation purposes.

This description supports 2023 ACOTE Standards A.3.5.; C.1.1.; C.1.2.; C.1.9.; C.1.14.

Fieldwork Selection and Placement Process

General Process Overview

The fieldwork coordination team uses information gathered (1) from students regarding fieldwork interests, and (2) input from faculty regarding student performance as outlined in the Student Orientation and Advising of the Fieldwork Process section. This information, used in conjunction with fieldwork reservation availability, aids in the determination of fieldwork placement assignments for each student. Input from faculty is of particular importance when assigning students to setting where dual setting, population, or supervisory approaches are employed. While the fieldwork coordination team monitors the general student-to-FWEd ratio and placement configuration details offered by each

site to ensure placements offered can support proper assessment of student progress, practice modeling, and achievement of fieldwork objectives, it is important to consider individual student needs in placing students in environments with unique configurations.

Wishlist Process

The academic fieldwork coordinator conducts the wish list and site placement process in Exxat as outlined below.

> **Level IA and IB Fieldwork** – wish lists are opened in early October for review by the incoming cohort (*i.e. 1ˢᵗ year students*), placements are made by mid-October, the slate is sent to faculty for review/input, and confirmations are sent to each site where students are slated for placement.

> **Level IIA and IIB Fieldwork** – wish lists are opened in mid-June for review by the 2ⁿᵈ year students, placements are made by mid-July, the slate is sent to faculty for review/input, and confirmations are sent to each site where students are slated for placement.

Placement Visibility

Placements are made visible to students in Exxat (*i.e. published*) when most sites have confirmed, this is done to minimize the need to *resort* placements after release to students, due to cancellations. If there are students who have a placeholder as their site in Exxat, the fieldwork coordination team follows the process outlined in the Fieldwork Reservation section above to secure a placement location. Every effort is made to have all sites finalized and published within 6-8 weeks of wish list completion.

In general, placement assignment will be released to students at the following timeframes:
> *Level IA and IB Fieldwork* - before the end of the first semester.
> *Level IIA and IIB Fieldwork* – before the beginning of the fourth semester.

Onboarding Requirements

Approximately 8 weeks prior to any scheduled experiential learning experience (*classroom-based or fieldwork),* onboarding requirements are completed by the student. Requirements are uploaded into the appropriate data repository systems in preparation for the learning experience.

> **ECU Required platforms** *(detailed outline in Fieldwork Platform Requirement section)*
>   - **EXXAT** *-* houses student demographic information, immunizations, annual training certificates, and site-specific clinical requirements.
>   - **CastleBranch (CB)** - houses Drug Screening (DS) and Criminal Background Checks (CBC) results.
>
> **Site-Specific platforms**
>   - **Rotation Manager (RM)** - everyone will use for classroom-based learning at ECU Health and intermittently for other fieldwork site assignments.
>   - **My Clinical Exchange (MCE) –** some students may use based on fieldwork site assignments.
>   - Additional system(s) – if used by a site where experiential learning occurs (*classroom-based or fieldwork*).

As outlined on the [Fieldwork Process Sequence](#) diagram, onboarding requirements are often completed outside of the semester in which the fieldwork rotation is scheduled. Students will need to be actively engaged in all onboarding processes occurring in all required data repository systems, based on assigned due dates. Failure to complete requirements or communicate about their status to the fieldwork coordination team in a timely manner can result in the loss of the experiential learning opportunity (*classroom-based or fieldwork*), resulting in failure of the course to which that experience is assigned.

Important Factors in the Fieldwork Placement Process

Students are responsible for all financial and logistical implications of fieldwork experiences. Based on the complexity of this process, students must understand that special consideration in the assignment of fieldwork experiences cannot be based on individual financial need, lack of transportation, lack of housing, marital/relationship status, special event plans (*weddings, reunions, etc..*), future career desires, etc.

Arrangements for appropriate housing during all fieldwork placements are the sole responsibility of the student. The NC Area Health Education Center (AHEC) is a resource available to all students who need to locate temporary housing throughout NC during fieldwork experiences. Students should access the AHEC FAQ's document housed in Canvas OCCT 7777 to ensure proper completion of their application. Payment for this service is managed through their student accounts and must be managed by the Student Services Coordinator/AHEC Coordinator in the College of Allied Health Services.

Planning and assignment of Level II fieldwork experiences focuses on providing students with a collective set of placements that facilitate their growth and development as entry-level, generalists. Considerable contemplation goes into to assigning students to practice settings and site types (*hospital, clinic, schools, community-based, etc.)* that will support their capacity to deliver care to a wide range of recipients, across the lifespan continuum. An aspect of the placement process is providing students with the opportunity to share their site, setting, and population interests during the wish list process. This information is useful to the academic fieldwork coordinator in matching students to clinical experiences that are of interest to the students which can be a supportive factor towards improved student performance during fieldwork. Students are encouraged through the [advising process](#), course content, and various peer-to-peer materials and activities, to learn as much as possible about the populations, settings and site demands before making their preference selections. While we understand that housing and financial considerations are important for most students, selections based on location alone may not be a good fit for student needs and learning potential. Additionally, students are reminded that there is no guarantee that they will be placed at sites identified on their wish list. The academic fieldwork coordinator, in conjunction with faculty input, will make the final decision regarding all fieldwork placements.

- Level II Fieldwork experiences are arranged primarily within North Carolina; exceptions may be authorized by the academic fieldwork coordinator but will be based on faculty input regarding overall student performance. See [New Site Fieldwork Placement Guidelines](#) section below.
- Any fees charged by a facility or state are the student's responsibility to pay; there have been situations in which out-of-state surcharges have occurred.

It is also important to understand that provision of fieldwork opportunities by clinical and community-based affiliate sites are a completely voluntary endeavor. While it is mandatory that students complete these fieldwork experiences as a requirement for program completion and board certification eligibility, sites and their personnel are not obligated to provide fieldwork opportunities, nor are they paid to do so. This is of particular importance when a site cancels and a fieldwork replacement is needed, especially on short notice. Securing a new site prior to the scheduled start date of a fieldwork rotation is not something that the academic fieldwork coordinator can guarantee. Site availability has been steadily decreasing with the increase of additional occupational therapy programs across the state, and socioeconomic constraints, such as impacts of the pandemic and ever-changing healthcare reimbursement demands. These complexities, and others, may result in a delayed fieldwork placement which, in turn, can impact program completion and graduation. The fieldwork coordination team will work as quickly as possible to minimize the impact, but students again need to be aware that the location and setting of new placements may be very different from what was initially slated for that rotation, and again may not be in keeping with the student's identified preferences.

Students should also be aware that while we have identified specific dates for the fieldwork rotation to start and end, flexibility to shift those dates is critical to ensuring that all 24-weeks of required fieldwork participation is feasible and to minimize the loss of the fieldwork experience altogether. Therefore, students need to manage personal obligations appropriately in relation to timeframes before, during, between, and/or after fieldwork rotations. The fieldwork coordination team does not plan fieldwork experiences around individual student requests for personal situations that would require an adjustment of the fieldwork dates, fieldwork working hours, etc. This is due to the demand it would create for the fieldwork site coordinator, and/or educator(s). In contrast, fieldwork sites may need to adjust the start date, end date, or daily work schedule configuration on short notice. This means that while there are "*scheduled*" gaps of time before and after most fieldworks, if a site needs to adjust the fieldwork schedule, the student must be able to accommodate on short notice, or risk losing the fieldwork placement. Therefore, it is important that students avoid planning significant life events, structured vacations, trips where internet access is limited, etc. during these timeframes.

Fieldwork Placements

The fieldwork coordination team works directly with the fieldwork sites to determine their availability and willingness to take students each year. Keep in mind that fieldwork sites do not offer fieldwork placements during all rotation timeframes (A/B) or for all fieldwork types (Level I/Level II). Unless otherwise approved by the academic fieldwork coordinator, students are NOT authorized to contact sites directly to request fieldwork placement opportunities on behalf of the ECU programs. *The exception to this policy* is outlined in the New Site Fieldwork Placement Guidelines section below.

As stated above, the academic fieldwork coordinator makes all final decisions regarding fieldwork placements. Factors that influence placement assignments include (1) students individual educational and learning needs, (2) site requirements/expectations, and (3) clinical site utilization needs to ensure longevity of clinical and community-based partnerships for experiential learning. Again, it is important that students recognize that fieldwork is a complex process that requires the fieldwork coordination team to balance and navigate the needs, expectations, and requirements of multiple stakeholders (*OT program, ACOTE, fieldwork sites & personnel, and individual students*). While student interests are

obtained as part of this process, students must understand that the primary goal in assigning fieldwork placements is to ensure exposure to experiential learning opportunities that support the development of students in becoming a well-rounded, entry level practitioners as outlined in the Important Factors in the Fieldwork Placement Process section above.

New Site Fieldwork Placement Guidelines

A student who is interested in establishing a new fieldwork site must meet with the academic fieldwork coordinator to obtain permission and instructions for doing so. This is to be considered an *exception* to the typical process and not a standard request. Much work has been done to establish each of current fieldwork written agreements and priority is given to reservation slots offered by clinical and community-based partners who regularly provide fieldwork supervision. Use of such established sites allows for better student access to fieldwork site information, OT programs ability to monitor preparedness of educators and assist students with site compliance (onboarding) requirements, and site's familiarity with our fieldwork curriculum and processes.

Students will not contact any facility on behalf of ECU or the OT Program before receiving permission and instructions from the academic fieldwork coordinator. Taking such actions can void any possibility of the student's placement at that location and can be viewed as a conflict of interest. Continued pursuit of this nature can be viewed as disruptive and inappropriate behavior and can result in removal from the program. If a student is given permission to contact a site, there are only two pieces of information we need the student to obtain: (1) if the site takes out-of-state students for fieldwork, and (2) who the point of contact is for setting up the fieldwork opportunity.

Unique Placement Request Guidelines

Request for Two Out-Of-State Level II Fieldwork Placements
It is our established practice to consider students requests for one Level II fieldwork experience out-of-state, but determination is based on site availability with established sites, student progress within the curriculum, and faculty support for that option. In general, it is preferred that the Level IIB rotation is used for this option. This can vary based on site, setting, and contracting requirements. If a Level IA rotation occurs out-of-state, the student will be expected to return to North Carolina for the second rotation. Any exceptions to this policy would need to be discussed and approved by the program chair.

Fieldwork Placements at Sites Where a Students' Family Member Is Employed
We have an established precedence of not sending students to fieldwork sites where they have a family member employed, regardless of whether that individual would be positioned to have oversight or input during the fieldwork experience. This precedence is based on faculty discussion and agreement that this type of arrangement could lead to a perceived conflict of interest, which is not in the students, fieldwork educators, or OT programs best interest. Any exceptions to this policy would need to be discussed and approved by the program chair.

Use of an Out-Of-State Site for Level I Fieldwork Placement

Consideration for seeking an out-of-state contract for a Level I rotation would be limited to necessity, from a program standpoint and would only be considered once the academic fieldwork coordinate completed the Level I fieldwork planning cycle to determine the need for such an option.

This description supports 2023 ACOTE Standards C.1.2.; C.1.13.

Attestation Page for the Department of Occupational Therapy Fieldwork Manual

I, _____, have received a copy of the *Department of Occupational Therapy Fieldwork Manual* for the academic years _____. I understand that I am responsible for the information contained in this *FW Manual* and will abide by the guidelines, procedures, and expectations, as stated in this manual. I also understand that at any time the Department of Occupational Therapy may add to, or change, the contents of this manual. I understand that whenever I am sent a notification that the *FW Manual* has been revised, I am responsible for updating my signature page in Exxat. This signature page indicates that I have reviewed and understand the new and/or revised guidelines.

I also acknowledge that this *FW Manual* contains important information relevant to the orientation, placement, preparation (onboarding), attendance, completion, grading, and appeal processes related to fieldwork education. Because this may be the only source of such information, and will be referred to by occupational therapy faculty, academic fieldwork coordination team members, clinical fieldwork site coordinator and educators, and College of Allied Health administration, I understand that I must know how to access this *FW Manual* and navigate its contents throughout my professional program.

_____   _____

Signature   Date