



Northwood Technical College  
Occupational Therapy Assistant  
Fieldwork Handbook

**OTA Fieldwork II  
SAMPLE OBJECTIVES**

C.1.1 Ensure that the fieldwork program reflects the sequence and scope of content in the curriculum design, in collaboration with faculty, so that fieldwork experiences in traditional, nontraditional, and emerging settings strengthen the ties between didactic and fieldwork education.

C.1.15 Document mechanisms for requiring formal evaluation of student performance on Level II fieldwork (e.g., the AOTA Fieldwork Performance Evaluation for the Occupational Therapy Assistant Student or equivalent).

<b>PERFORMANCE EVALUATION CRITERIA (ADOPTED AND ADAPTED FROM THE AOTA FIELDWORK PERFORMANCE EVALUATION)</b>	<b>SITE-SPECIFIC OBJECTIVES</b>	<b>LEARNING ACTIVITIES</b>
<b>FUNDAMENTALS OF PRACTICE</b>		
Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations.	<ol style="list-style-type: none"><li>1. Adheres to <a href="#">AOTA</a> Code of Ethics</li><li>2. Adheres to <a href="#">Wisconsin OTA licensure statutes</a></li><li>3. Follows all HIPPA policies and procedures for client privacy</li></ol>	<ul style="list-style-type: none"><li>• Accurate documentation</li><li>• Professional and therapeutic relationships with staff and residents</li><li>• Communication at team meetings is accurate and reflects competence</li><li>• HIPPA is maintained</li></ul>
Adheres to safety regulations and reports/documents incidents appropriately.	<ol style="list-style-type: none"><li>1. Follows universal precautions for infection control</li><li>2. Follows facility procedures and policies for safety</li></ol>	<ul style="list-style-type: none"><li>• Reports any incidents accurately following facility policy</li><li>• Reports incidents promptly</li><li>• Keeps environment safe</li><li>• Cleans up thoroughly after each session</li></ul>

	<ol style="list-style-type: none"> <li>Follows facility procedures for reporting injuries and contributes to the documentation of incidents as appropriate</li> <li>Contributes to a clean and safe working environment</li> <li>Selects appropriate treatment interventions and modifies/grades activities to ensure the safety of participants</li> </ol>	<ul style="list-style-type: none"> <li>Appropriately plans interventions and modifies as needed</li> </ul>
Ensures the safety of self and others during all fieldwork-related activities by anticipating potentially unsafe situations and taking steps to prevent accidents	<ol style="list-style-type: none"> <li>Uses proper body mechanics</li> <li>Follows resident's precautions</li> <li>Anticipates potential safety risks and removes harmful objects from the workspace</li> <li>Uses clinical judgment to determine if an individual's status changes could impact their safety or the safety of others</li> <li>Seeks assistance if a resident's behavior is beyond the level of expertise</li> <li>Discusses resident safety concerns with the onsite fieldwork supervisor</li> <li>Adheres to the facilities dress code</li> </ol>	<ul style="list-style-type: none"> <li>Leading 1:1 interventions/assessments</li> <li>Leading group interventions</li> <li>Leading group outings in the community</li> </ul>
<b>BASIC TENETS</b>		
Articulates the role of the OTA student in the fieldwork experience	<ol style="list-style-type: none"> <li>Communicates their student role in a clear, professional, easy-to-understand manner</li> <li>Articulates role as a student to residents, staff, and other relevant parties</li> </ol>	<ul style="list-style-type: none"> <li>Team meetings</li> <li>Professional interactions with other staff</li> <li>Implementing and planning interventions with other professionals</li> <li>Organizing activities</li> </ul>
Articulates the role of the profession to clients and other relevant parties clearly, confidently, and accurately.	<ol style="list-style-type: none"> <li>Communicates the role of an OTA at site in a clear, professional, easy-to-understand manner</li> <li>Articulates the OTA role at site to residents, staff, and other relevant parties</li> <li>Clearly communicates how the skills of an OTA can be used to enhance the role they are in at the site</li> </ol>	<ul style="list-style-type: none"> <li>Intervention planning</li> <li>Leading groups</li> <li>Advocacy project</li> <li>Assessment (if applicable)</li> </ul>

	4. Articulates how traditional OT can be incorporated in this setting	
<b>SCREENING AND EVALUATION</b>		
Obtains sufficient and necessary information about factors that support and hinder occupational performance from relevant sources throughout the evaluation process.	<ol style="list-style-type: none"> <li>1. Gathers appropriate and necessary information about the resident from the medical record</li> <li>2. Obtains information from the resident, resident's family, and/or caregivers using written reporting tools or interviews</li> <li>3. Observes the resident interacting with other residents and staff and documents relevant information</li> <li>4. Completes intake assessments as needed</li> <li>5. Clearly explains the importance of the information gathered</li> </ol>	<ul style="list-style-type: none"> <li>• Formal and informal interviews with residents</li> <li>• Chart reviews</li> <li>• <a href="#">NEW AOTA-Occupational-Profile-Template</a></li> <li>• Therapeutic lifestyle assessment</li> <li>• Interest surveys</li> <li>• Sensory Profile</li> </ul>
Establishes service competency in assessment methods, in accordance with setting procedures and applicable laws, by administering assessments accurately and efficiently to ensure findings are valid, reliable, and timely.	<ol style="list-style-type: none"> <li>1. Makes accurate and objective observations about the residents</li> <li>2. Objectively obtains information about resident</li> <li>3. Accurately documents information from observations and interviews</li> </ol>	<ul style="list-style-type: none"> <li>• Formal and informal assessments and screens</li> <li>• Therapeutic lifestyle assessment</li> <li>• Progress assessments</li> </ul>
Administers delegated assessments using appropriate procedures and protocols.	<ol style="list-style-type: none"> <li>1. Appropriately positions self to individual interviewing</li> <li>2. Uses a well-modulated voice</li> <li>3. Makes eye contact and has positive nonverbals</li> <li>4. The obtained information is relevant to the activity profession</li> <li>5. Follows directions accurately when giving and scoring delegated assessments</li> </ol>	<ul style="list-style-type: none"> <li>• Formal and informal assessments and screens</li> <li>• Therapeutic lifestyle assessment</li> <li>• Progress assessments</li> <li>• 1:1 interventions</li> <li>• Leading groups</li> </ul>
Assists with interpreting information in relation to the client's needs, factors, and performance.	<ol style="list-style-type: none"> <li>1. Relates information from assessments to appropriate areas within the department</li> <li>2. Relates information to occupations, roles, and routines of the resident</li> </ol>	<ul style="list-style-type: none"> <li>• Communicates results clearly with fieldwork educator</li> <li>• Clearly documents the results from assessments</li> </ul>

		<ul style="list-style-type: none"> <li>Implements knowledge of activity analysis and different diagnoses in interpreting results</li> </ul>
Reports results clearly, accurately, and concisely, reflecting the client's occupational performance.	<ol style="list-style-type: none"> <li>1. Reports information about residents' performance in care conferences and applicable team meetings</li> <li>2. The information reported is clear, accurate, concise, and reflects the client's occupational performance</li> </ol>	<ul style="list-style-type: none"> <li>Reporting at department and facility meetings</li> <li>Communication with family/caregivers</li> </ul>
<b>INTERVENTION</b>		
Articulates a clear and logical rationale for the intervention process based on the evaluation results and other relevant considerations.	<ol style="list-style-type: none"> <li>1. Clearly documents what activities would be appropriate for the resident</li> <li>2. Articulates rationale for services in an individual care plan</li> </ol>	<ul style="list-style-type: none"> <li>Communicates with fieldwork educator</li> <li>Clear documentation that justifies the need for services</li> </ul>
Under the supervision of and in cooperation with supervisor, uses professional literature to make informed intervention decisions.	<ol style="list-style-type: none"> <li>1. Implements researched interventions for improving engagement</li> <li>2. Articulates the importance of evidence-based activities for quality outcomes</li> </ol>	<ul style="list-style-type: none"> <li>Research evidence-based practice</li> <li>Implements researched intervention</li> <li>Utilizes continuing education opportunities</li> <li>Leads in-service opportunities</li> </ul>
Selects client-centered and occupation-based interventions that motivate and challenge the client to achieve established goals.	<ol style="list-style-type: none"> <li>1. Considers the resident's preferences that will motivate and challenge them</li> <li>2. Considers a variety of activities related to the meaningful occupations of the resident</li> <li>3. Selects activities that are a "just-right challenge"</li> </ol>	<ul style="list-style-type: none"> <li>Uses AOTA Occupational Profile and interviews to generate an intervention plan</li> <li>Uses information from assessments</li> </ul>
Implements client-centered and occupation-based intervention plans.	<ol style="list-style-type: none"> <li>1. Demonstrates a sequential and timely plan of treatment activities, taking into consideration the functional and emotional needs of the resident</li> <li>2. Prepares several alternative activities before the resident arrival</li> <li>3. Demonstrates flexibility when implementing activities to meet the changing needs of the clients</li> <li>4. Adheres to the schedule of activity times established with residents</li> </ol>	<ul style="list-style-type: none"> <li>Group interventions</li> <li>1:1 Intervention</li> <li>Community outings</li> <li>Expressive arts</li> <li>Team-based projects</li> <li>Sensory groups</li> <li>Traditional mental health groups</li> <li>Resident-driven activity planning</li> <li>Cooking groups</li> <li>Movement activities</li> </ul>

	5. Manages time well within the scheduled timeframe	
Modifies the task and/or environment to maximize the client's performance.	<ol style="list-style-type: none"> <li>1. Grades tasks appropriately to meet the needs of the resident</li> <li>2. Updates goals as needed in an individual care plan</li> <li>3. Adapts environment for optimal therapeutic benefits</li> <li>4. Considers assistive technology needs of each resident to help improve independence</li> </ol>	<ul style="list-style-type: none"> <li>• Group interventions</li> <li>• 1:1 Intervention</li> <li>• Community outings</li> <li>• Expressive arts</li> <li>• Team-based projects</li> <li>• Sensory groups</li> <li>• Traditional mental health groups</li> <li>• Resident-driven activity planning</li> <li>• Cooking groups</li> <li>• Movement activities</li> </ul>
Recommends modification or termination of intervention plan based on the client's status.	<ol style="list-style-type: none"> <li>1. Identifies the changing needs of the resident and consults with the care team regarding performance, concerns, or potential changes in service</li> <li>2. Clearly communicates to care team participation and changes in the status of resident</li> <li>3. Notifies resident and care team of discontinuation of services</li> </ol>	<ul style="list-style-type: none"> <li>• Group interventions</li> <li>• 1:1 Intervention</li> <li>• Community outings</li> <li>• Expressive arts</li> <li>• Team-based projects</li> <li>• Sensory groups</li> <li>• Traditional mental health groups</li> <li>• Resident-driven activity planning</li> <li>• Cooking groups</li> <li>• Movement activities</li> </ul>
Documents the client's response to services in a manner that demonstrates the effectiveness of interventions.	<ol style="list-style-type: none"> <li>1. Clearly documents staff attempts for the resident to come to activity and the resident's response to an invitation</li> <li>2. Accurately and objectively document the resident's participation in an activity</li> </ol>	<ul style="list-style-type: none"> <li>• Daily documentation</li> </ul>
<b>MANAGEMENT OF SERVICES</b>		
Demonstrates through practice or discussion the ability to collaborate with and assign appropriate tasks	<ol style="list-style-type: none"> <li>1. Involves staff in the creation and implementation of activities that are appropriate for the clientele</li> <li>2. Delegates appropriate tasks to staff and volunteers</li> <li>3. Provides constructive feedback</li> </ol>	<ul style="list-style-type: none"> <li>• Delegates appropriate tasks to staff or volunteers</li> <li>• Assists with administrative duties as needed</li> <li>• Modifies intervention approaches and/or behaviors accordingly based on daily/weekly meetings and after the midterm</li> </ul>

	4. Is open to staff feedback on performance	
Demonstrates through practice or discussion an understanding of costs and funding systems related to services, such as federal, state, third-party, and private payers.	<ol style="list-style-type: none"> <li>1. Completes accurate documentation for payment services</li> <li>2. Plans equipment and supply needs within budget limits</li> <li>3. Understands funding for department services</li> </ol>	<ul style="list-style-type: none"> <li>• Assists with ordering supplies</li> <li>• Clearly identifies funding sources for the department and facility</li> </ul>
Demonstrates knowledge about the organization.	<ol style="list-style-type: none"> <li>1. Clearly articulates an understanding of the organization</li> <li>2. Able to articulate and follow the mission, vision, and core values of the organization</li> <li>3. Demonstrates an understanding of structures and roles within the organization</li> <li>4. Displays a positive attitude and professional behavior toward the organization</li> </ol>	<ul style="list-style-type: none"> <li>• In-service presentations</li> <li>• Organizing community outings and developing community partnerships through outings</li> <li>• Create a needs assessment for the department</li> </ul>
<b>COMMUNICATION AND PROFESSIONAL BEHAVIORS</b>		
Communicates clearly and effectively, both verbally and nonverbally.	<ol style="list-style-type: none"> <li>1. Demonstrates positive active listening skills in interactions with others</li> <li>2. Displays positive nonverbal language</li> <li>3. Uses language appropriate to the level of the audience</li> <li>4. Is sensitive to others' differences when communicating (age, sexual orientation, gender identity, race and ethnicity, culture, and personal beliefs)</li> <li>5. Uses socially appropriate language</li> <li>6. Listens while others are speaking</li> <li>7. Speaks in a well-modulated voice</li> <li>8. Demonstrates ability to establish rapport during interactions</li> </ol>	<ul style="list-style-type: none"> <li>• Group interventions</li> <li>• 1:1 interventions</li> <li>• Department and facility meetings</li> <li>• Communication with family/caregivers</li> <li>• Communication with residents</li> <li>• Professionalism with staff and community members</li> <li>• Establishing therapeutic relationships</li> </ul>
Produces clear and accurate documentation	<ol style="list-style-type: none"> <li>1. Completes accurate documentation of resident participation</li> <li>2. Documentation of client participation is clear and accurate</li> </ol>	<ul style="list-style-type: none"> <li>• Documentation according to standards</li> <li>• The documentation clearly identifies participation and needs of caseload</li> <li>• Documentation is approved as appropriate</li> </ul>

	3. Completes documentation according to standards of job requirements	
Collaborates with supervisors to maximize the learning experience.	<ol style="list-style-type: none"> <li>1. Collaborates effectively with onsite fieldwork supervisor and OT practitioner supervisor</li> <li>2. Informs appropriate staff of changes or concerns in resident's performance</li> <li>3. Approaches supervisors when ready to assume more responsibility</li> <li>4. Receives constructive feedback and makes appropriate behavioral changes</li> </ol>	<ul style="list-style-type: none"> <li>• Student/supervisor weekly review document</li> <li>• Weekly meetings with Northwood Technical College supervisor</li> <li>• Interactions with facility staff</li> </ul>
Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with fieldwork educator(s) and others.	<ol style="list-style-type: none"> <li>1. Makes use of outside resources to gain knowledge</li> <li>2. Seeks out information and/or assistance as needed</li> </ol>	<ul style="list-style-type: none"> <li>• Research evidence-based practice</li> <li>• Implements researched intervention</li> <li>• In-service opportunities</li> <li>• Continuing education</li> </ul>
Responds constructively to feedback in a timely manner.	<ol style="list-style-type: none"> <li>1. Responds positively to questions, suggestions, and constructive feedback</li> <li>2. Accepts feedback and modifies behavior in response to the feedback</li> </ol>	<ul style="list-style-type: none"> <li>• Student/supervisor weekly review document</li> <li>• Weekly meetings with OT practitioner supervisor</li> <li>• Interactions with facility staff</li> </ul>
Demonstrates consistent and acceptable work behaviors.	<ol style="list-style-type: none"> <li>1. Demonstrates good attendance and is punctual</li> <li>2. Respects workspace, environment, and equipment</li> <li>3. Communication is valid, truthful, and relevant</li> <li>4. Manages personal affairs in a manner that does not interfere with professional responsibility</li> </ol>	<ul style="list-style-type: none"> <li>• Is punctual for the daily expectations</li> <li>• Cleans up environment</li> <li>• Student/supervisor weekly review document</li> </ul>
Demonstrates effective time management.	<ol style="list-style-type: none"> <li>1. Performs procedures, administers interventions and completes assigned work following established standards, policies, and procedures</li> <li>2. Meets deadlines</li> <li>3. Uses downtime to complete tasks</li> <li>4. Follows OTA program and organization dress code</li> <li>5. Displays proper hygiene</li> </ol>	<ul style="list-style-type: none"> <li>• Completes documentation on time</li> <li>• Displays proper hygiene</li> <li>• Prepared for daily expectations</li> </ul>

Manages relationships effectively through the therapeutic use of self and adjusts approach to meet the needs of clients and others.	<ol style="list-style-type: none"> <li>1. Is courteous and respectful in all interactions</li> <li>2. Demonstrates professionalism</li> <li>3. Accepts ambiguity</li> <li>4. Respects others' points of view</li> <li>5. Asks appropriate questions</li> </ol>	<ul style="list-style-type: none"> <li>• Student/supervisor weekly review document</li> <li>• Department and facility meetings</li> <li>• Professionalism in interactions with activity staff/volunteers and other disciplines</li> </ul>
Demonstrates respect for diversity factors of others.	<ol style="list-style-type: none"> <li>1. Demonstrates respect for all interactions with individuals without making assumptions</li> <li>2. Modifies the environment or activity based on differences in age, sexual orientation, gender identity, race and ethnicity, culture, and personal beliefs</li> <li>3. Uses appropriate and sensitive language when discussing resident's personal factors</li> </ol>	<ul style="list-style-type: none"> <li>• Uses socially appropriate language</li> <li>• Considers diversity in treatment planning</li> <li>• Modifies treatment interventions to meet the differences of all residents</li> </ul>

Modified from Denice Tucker, OTR, and Donna Honea, OTR, from Harris County Dept. of Education, Houston, Texas and Lana Ledet, OTR, UTMB/SAHS/OT, Galveston, Texas

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