



**Rocky Mountain
University
of Health Professions**

Entry Level Doctor of Occupational Therapy Student Fieldwork Handbook For Fieldwork Educators

**1800 S Novell Place
Provo, UT 84606**

**801-375-5125
866-780-4107 Toll Free
801-375-2125 Fax**

**www.rm.edu
info@rmuohp.edu**

Rocky Mountain University of Health Professions is accredited by the [Northwest Commission on Colleges and Universities](http://www.nca.org), 8060 165th Avenue NE Ste 200, Redmond, WA 98052-3981), an institutional accrediting body recognized by the Secretary of the US Department of Education.

The entry-level occupational therapy doctoral degree program has applied and has been granted Candidacy Status by the Accreditation Council for Occupational Therapy Education (ACOTE) of the American Occupational Therapy Association (AOTA), located at 7501 Wisconsin Avenue, Suite 510E Bethesda, MD 20814. ACOTE's telephone number c/o AOTA is (301) 652-AOTA and its web address is www.acoteonline.org. The program must have a preaccreditation review, complete an on-site evaluation, and be granted Accreditation Status before its graduates will be eligible to sit for the national certification examination for the occupational therapist administered by the National Board for Certification in Occupational Therapy (NBCOT). After successful completion of this exam, the individual will be an Occupational Therapist, Registered (OTR). In addition, all states require licensure in order to practice; however, state licenses are usually based on the results of the NBCOT Certification Examination. Note that a felony conviction may affect a graduate's ability to sit for the NBCOT certification examination or attain state licensure.

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Preface

Students in the Entry-level Doctor of Occupational Therapy (OTD) Program are officially students of Rocky Mountain University of Health Professions (RMU). Therefore, OTD students are expected to comply with the regulations and academic standards specified in the most current edition of the [RMU Handbook](#). The OTD Student Fieldwork Handbook provides information regarding policies, procedures, and requirements specific to the OTD Student Fieldwork Program. There are numerous helpful American Occupational Therapy Association (AOTA) resources available to all students, occupational therapy practitioners and Fieldwork Educators (FWEs) on the AOTA website. Students enrolled in the OTD Program are expected to be familiar with the information in the FW Handbook and acknowledge such by signing the forms found in the Fieldwork Information Data Management System (FIDMS). Copies of the forms are available upon request. All forms must be signed and submitted into the FIDMS.

Student Acknowledgment of OTD Program Policies and Procedures:

- Student Informed Consent
- Health Insurance Statement
- Consent for Release of Information
- Student Memorandum of Responsibilities

RMU reserves the right to change any provision or requirement, including fees, contained in this informational document at any time, with or without notice. Please read this handbook carefully. Questions related to the content of this manual should be directed to the Academic Fieldwork Coordinator and/or Program Director.

General University/ Program Contact Information:

Phone Number: 801.375.5125/ 866.780.4107 (toll-free) Fax 801.375.2125

Program Leadership Information:

Dr. Bryan Gee, Ph.D., OTD, OTR/L, BCP, CLA, FAOTA
Founding Chair, Department of Occupational Therapy
Founding Director, Entry-Level Occupational Therapy Program
bryan.gee@rm.edu
385-375-8757

Dr. Keren Shavit-Buckley, OTD, OTR/L, ATP
Academic Fieldwork Coordinator
Clinical Assistant Professor
keren.shavit-buckley@rm.edu
385-248-5589

Julia Stenquist, B.S.
Fieldwork and Capstone Administrative
Assistant
julia.stenquist@rm.edu
385-375-8369

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Section I: Goals and Standards of Fieldwork Education

Introduction

Welcome to the Rocky Mountain University (RMU) entry-level Doctor of Occupational Therapy (OTD) Student Fieldwork Program. The fieldwork program handbook is meant to orient students, Fieldwork Educators (FWEs), and faculty to FW policies and guidelines related to the requirements for fieldwork (FW) education in the RMU entry-level OTD Program.

Fieldwork education (FW) provides students with the skills and proficiency required for entry-level practice as a generalist occupational therapy practitioner. There is a strong emphasis on critical thinking and clinical reasoning in working with clients across the lifespan, in diverse practice settings, and among clients with various impairments and conditions impacting their ability to engage in meaningful occupations and quality of life. The RMU entry-level OTD Program is committed to preparing occupational therapy students who can successfully fulfill the responsibilities of assuming the professional role of an occupational therapist in an ever-changing healthcare environment.

In order to ensure that the OTD Fieldwork program and experiences reflect the sequence and scope of content in the curriculum design, in collaboration with faculty, fieldwork is a standing item on the OTD Program Agenda bi-monthly as well as the Curriculum Committee agenda monthly. This helps to strengthen the ties between didactic and fieldwork education. (C.1.1.1.)

RMU OTD students are required to review this manual and demonstrate the ability to uphold the policies before the start of their FW education experiences and to become familiar with the processes and responsibilities during the various FW education rotations.

Entry-Level OTD Program Description

Program Vision

The entry-level OTD program at RMU will become the premier source for innovative education (quality, delivery, and efficacy), clinical scholarship, and occupation-based clinical practice that meets the needs of an ever-changing, diverse population.

Program Mission

The mission of the entry-level OTD program is to develop employable occupational therapy practitioners who are diverse, knowledgeable, innovative, reflective, and able to affect and adapt to change through leadership, advocacy, outcomes-based practice, and clinical scholarship. Program faculty employ occupation-based practice and innovative teaching and learning interventions, resulting in the graduate's ability to navigate the ever-changing social and healthcare landscape while attending to diversity, disparities, and determinants of health and well-being for individuals, groups, and populations.

Curriculum Design

The primary content areas (themes) to be taught in the entry-level OTD program curriculum are occupation-based practice, evidence-based practice, social determinants of health and their impact on people's health, well-being, and quality of life (occupational being), diversity, equity, and inclusion among individuals, groups, and populations, engagement in clinical scholarship, psychosocial factors and their impact on occupations across the lifespan, intra/interprofessional practice, and self-awareness and professional development. These themes align with the program's mission to develop employable occupational therapy practitioners.

The entry-level OTD program has documented that the beliefs of the program regarding learning, the domains of learning, and the teaching and learning philosophy influence the type of instructional delivery, courses offered, how those courses are sequenced, and how student performance will be evaluated.

The program employs a limited-residency instructional delivery model, e-learning and distance learning infrastructure, support and expertise, direct access to interprofessional collaboration/partnerships, and the opportunity to recruit students from diverse backgrounds and geographical areas. The program consists of eight semesters. Learning experiences will include synchronous and asynchronous online learning, with intensive learning weeks on campus (2 times a semester) and FW education learning experiences. There are a total of 105 credit hours required for the successful completion of the program, including the credits earned for the 27 weeks of FW education. By design, the OTD program relies on the progressive clinical and academic model demonstrated in current RMU programs. The OTD program incorporates technological and clinical advances and contemporary educational theory. RMU is acknowledged for its excellence in faculty. However, educational programming recognizes that even with the best technology and curriculum, the heart and soul of the program are its students. The OTD program caters to highly motivated students who wish to participate actively in their education.

Program Philosophy

Humans are active beings whose physical, emotional, cognitive, social, and spiritual development is influenced by and through engagement in meaningful occupations (AOTA, 2020). Applying their capacity for intrinsic motivation for self-efficacy and determination, humans engage in occupation to impact their overall health, well-being, and their individual social, physical, and other contexts (Hooper, Krishnagiri & Price, 2020). Humans experience a process of continuous adaptation, which is a change in function that promotes survival and self-actualization. Biological, psychological, and environmental factors may disrupt the adaptation process throughout the lifespan, potentially resulting in dysfunction in their ability to participate and perform meaningful occupations (Hooper, Krishnagiri & Price, 2020). Occupational therapists are health

care professionals whose primary purpose is to address and prevent such disruptions through interventions that prevent, remediate, habilitate, and adapt (AOTA, 2020).

Occupational therapy is founded on the belief that occupation, specifically the dynamic interaction between occupation, the person, and their environment, is therapeutically powerful (AOTA, 2020). The therapeutic use of occupation can prevent and remediate dysfunction and elicit maximum adaptation. Occupational therapy is a process that promotes personal growth, meaning, and self-identity by engaging or re-engaging a person in their meaningful occupations by teaching the person new skills, re-designing the activity, or changing the contextual environment (AOTA, 2020).

The faculty in the entry-level OTD program aim to embody AOTA's vision, code of ethics, and standards of practice. The faculty in the entry-level OTD program believe students must understand the healthcare, political, cultural, and social systems that affect service provision today and in the future. Students must prepare themselves to explore new arenas for occupational therapy practice, advance practice in underserved areas, educate the community, and collaborate with others in service provision. The faculty in the entry-level OTD program believe that these are needed to provide excellent, client-centered care. Inter/intraprofessional training of occupational therapy students with various professions facilitates this collaboration with a spirit of collegiality and teamwork.

AOTA Occupational Therapy Fieldwork Education: Value and Purpose (AOTA, 2023)

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 “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 firsthand 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>

Fieldwork Education Experience Calendar

Type	Course	Required Credits	Semester
Level I A	OT 719	1	Semester 2 (Winter) (1 week)
Level I B	OT 729	1	Semester 3 (Summer) (1 week)
Level I C	OT 739	1	Semester 4 (Fall) (1 week)
Level II A	OT 750	7	Semester 5 (Winter) (12 weeks)
Level II B	OT 751	7	Semester 6 (Summer) (12 weeks)

Level I Fieldwork Education Experiences:

These are designed to reflect the content being delivered in courses at the time of the Level I FW rotation. In order to ensure that the fieldwork experience reflects the sequence and scope of content in the curriculum design, in collaboration with faculty, the AFWC and FW are a standing item on the Curriculum Committee agenda monthly. This strengthens the ties between didactic and fieldwork education. As needs or changes arise in the curriculum, the AFWC with program feedback can make the appropriate adjustments within the OTD FW program.^(C.1.1.)

Level II Fieldwork Rotations:

- 1) Students must complete 24 weeks of Level II fieldwork within 24 months following the completion of the didactic portion of the program. ^(C.1.12.)
- 2) If a student completes a Level II in an emerging practice setting, they must receive additional mentorship from a core/adjunct faculty member and the onsite fieldwork educator (FWE). ^(C.1.16.)

ACOTE Standards Related to Fieldwork

Fieldwork education is a crucial part of professional preparation and is best integrated as a component of the OTD program curriculum. The fieldwork experiences are designed to promote clinical reasoning and reflective practice, transmit the values and beliefs that enable ethical practice, and develop professionalism and competence in career responsibilities. Fieldwork experiences are implemented and evaluated for their effectiveness by the OTD program. The fieldwork education experience in the OTD program will provide the OTD student with the opportunity to carry out professional responsibilities under the supervision of qualified personnel serving as role models. The academic fieldwork coordinator will ensure the OTD program's compliance with fieldwork education requirements (AOTA, 2024).

2023 ACOTE Standards Related to Fieldwork Education	
C.1.1.	Ensure that the fieldwork experience reflects the sequence and scope of content in the curriculum design, in collaboration with faculty, so that fieldwork strengthens the ties between didactic and fieldwork education.
C.1.2	Document a process that ensures all students have access to site information and requirements, objectives, and performance expectations prior to the start of the fieldwork experience.
C.1.3.	Document that academic and fieldwork educators agree on fieldwork objectives prior to the start of the fieldwork experience. Document that all fieldwork experiences include an objective with a focus on the occupational therapy practitioner's role in addressing the psychosocial aspects of the client's engagement in occupation.
C.1.4.	Ensure that fieldwork written agreements are sufficient in number and provide varied practice experiences to allow completion of graduation requirements in a timely manner, in accordance with the policy adopted by the program as required by Standard A.3.3.
C.1.5.	Responsibilities of the sponsoring institution(s) and each fieldwork site must be clearly documented in the written agreement (electronic agreements and signatures are acceptable). Document the process and criteria for: <ul style="list-style-type: none"> · Selecting fieldwork sites. · Ensuring valid written agreements are signed by both parties and in effect prior to the onset and through the duration of Level I (e.g., field trip, observation, service-learning activities) and Level II fieldwork experience for all entities outside of the academic program.
C.1.6.	Ensure at least one fieldwork experience (either Level I or Level II) has a primary focus on the role of occupational therapy practitioners addressing mental health, behavioral health, or psychosocial aspects of client performance to support their engagement in occupations.
C.1.7.	Ensure that the ratio of fieldwork educators to students enables proper supervision and provides protection of consumers, opportunities for appropriate role modeling of occupational therapy practice, and the ability to conduct frequent assessment of student progress in achieving stated fieldwork objectives.
C.1.8.	Document a mechanism for evaluating the effectiveness of supervision (Level I and Level II fieldwork). Demonstrate support for enhancing supervision (e.g., materials on supervisory skills, continuing education opportunities, student well-being, cultural humility, and articles on theory and practice).
C.1.9.	Document a process for communication with the student and fieldwork educator throughout the fieldwork experience. Ensure all aspects of the student's progress and performance are addressed and the fieldwork educator is aware of resources that support student well-being.

2023 ACOTE Standards Related to Level I Fieldwork Education	
The goal of the Level I fieldwork experience in the OTD program is to introduce students to the fieldwork experience, to apply knowledge to practice, and to develop an understanding of the needs of clients (AOTA, 2020).	
C.1.10.	Ensure that fieldwork educators who supervise Level I fieldwork are informed of the curriculum and fieldwork program design and affirm their ability to support the fieldwork experience. This must occur prior to the onset of the Level I fieldwork. Examples 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.
C.1.11.	<p>Demonstrate that Level I fieldwork is provided to students and is not substituted for any part of the Level II fieldwork. Document mechanisms for formal evaluation of student performance.</p> <p>Level I fieldwork may be met through one or more of the following instructional methods:</p> <ul style="list-style-type: none"> · Virtual environments · Simulated environments · Standardized patients · Faculty practice · Faculty-led site visits · Supervision by a fieldwork educator in a practice environment <p>Document that all students have similar Level I fieldwork experiences (e.g., learning activities, objectives, assignments, and outcome measures).</p>

2023 ACOTE Standards Related to Level II Fieldwork Education	
The goal of Level II fieldwork in the OTD program is to develop competent, entry-level generalist occupational therapists. Level II fieldwork is integral to the program's curriculum design and must include in-depth experiences in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation and research, administration, and management of occupational therapy services. The OTD students will be exposed to a variety of clients across the lifespan and to a variety of settings (AOTA, 2020)	
C.1.12	Document a required minimum of 24 weeks' full-time Level II fieldwork. Documentation must specify if part-time completion is available as agreed upon by the site and the program. The length of the part-time program must be equivalent in length to a minimum of 24 weeks full-time. Ensure that the student can complete Level II fieldwork in a minimum of one setting if it is reflective of more than one practice area, or in a maximum of four different settings.
C.1.13.	<p>Document and verify prior to the start of the Level II fieldwork that the student is supervised by an occupational therapy practitioner who is:</p> <ul style="list-style-type: none"> · Adequately prepared to serve as a fieldwork educator. · Currently a licensed or otherwise regulated occupational therapist. · Has a minimum of 1 year full-time (or its equivalent) of practice experience as a licensed or otherwise regulated occupational therapist prior to the onset of the Level II fieldwork. <p>The fieldwork educator may be engaged by the fieldwork site or by the educational program.</p>

	Document and verify that students completing Level II fieldwork outside of the United States are supervised by an occupational therapist (regardless of title) who graduated from a program accredited by ACOTE, approved by WFOT, or 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.
C.1.14.	Ensure that Level II fieldwork supervision is direct and then decreases to less direct supervision as appropriate for the setting, the severity of the client's condition, and the ability of the student to support progression toward entry-level competence.
C.1.15.	Document a mechanism for requiring formal evaluation of student performance on Level II fieldwork.
C.1.16.	Document and verify that supervision provided in a setting where no occupational therapy services exist includes a documented plan for provision of occupational therapy services and supervision by a currently licensed or otherwise regulated occupational therapist with at least 3 years' full-time or its equivalent of professional experience prior to the Level II fieldwork. Supervision must include a minimum of 8 hours of direct supervision each week of the fieldwork experience. An occupational therapy supervisor must be available, via a variety of contact measures, to the student during all working hours. An on- site supervisor designee of another profession must be assigned while the occupational therapy supervisor is off site.

Level I A, B, & C Fieldwork Course Objectives

Level I FW provides the student with the opportunity to integrate academic knowledge with the application of skills at higher levels of performance and responsibility. Upon completion of Level I A, B & C FW experiences, students will achieve the following objectives. (C.1.3)

OT 719 LEVEL I A Fieldwork Course Objectives (C.1.3.,C.1.11.)

By the end of the level I A FW education experience, the student will:

1. Develop an understanding of the basic tenets and theoretical basis of occupational therapy.
2. Communicate and interact appropriately with clients, caregivers, and other professionals through written, verbal, and non-verbal means.
3. Develop an understanding of the importance of working collaboratively with occupational therapy practitioners and other healthcare and educational service providers.
4. Develop an understanding of the occupational therapy process (screening, evaluation, goal setting, intervention planning and implementation (preparatory vs occupation-based), re-evaluation, and/or discharge) in a pediatric setting.
5. Exhibit professional work behaviors, i.e., proper maintenance of practice environments, time management, ethical practice, cultural humility, respectful treatment of others, and reflective/empathetic practice.
6. Demonstrate the ability to identify psychosocial factors impacting a pediatric client's occupational performance.
7. Develop an occupational profile on a current pediatric client and share it in OT 717.

OT 729 LEVEL I B Fieldwork Course Objectives (C.1.3., C.1.11.)

By the end of the level I B FW education experience, the student will:

1. Develop an understanding of the basic tenets and theoretical basis of occupational therapy.
2. Communicate and Interact appropriately with clients, caregivers, and other professionals through written, verbal, and non-verbal means.
3. Develop an understanding of the importance of working collaboratively with occupational therapy practitioners and other healthcare and educational service providers.
4. Develop an understanding of the occupational therapy process (screening, evaluation, goal setting, intervention planning and implementation (preparatory vs occupation-based), re-evaluation, and/or discharge) in an adult setting.
5. Exhibit professional work behaviors, i.e., proper maintenance of practice environments, time management, ethical practice, cultural humility, respectful treatment of others, and reflective/empathetic practice.
6. Demonstrate the ability to identify psychosocial factors impacting an adult client's occupational performance.

7. Explore and discuss with the fieldwork educator what leadership and management opportunities are available in the current fieldwork setting and share them in OT 708 (if time allows).

OT 739 LEVEL I C Fieldwork Course Objectives (C.1.3., C.1.11., C.1.6.)

By the end of the level I C FW education experience, the student will:

1. Develop an understanding of the basic tenets and theoretical basis of occupational therapy.
2. Communicate and interact appropriately with clients, caregivers, and other professionals through written, verbal, and non-verbal means.
3. Develop an understanding of the importance of working collaboratively with occupational therapy practitioners and other healthcare and educational service providers.
4. Develop an understanding of the occupational therapy process (screening, evaluation, goal setting, intervention planning and implementation (preparatory vs occupation-based), re-evaluation, and/or discharge in a psychosocial setting.
5. Exhibit professional work behaviors, i.e., proper maintenance of practice environments, time management, ethical practice, cultural humility, respectful treatment of others, and reflective/empathetic practice.
6. Demonstrate the ability to identify psychosocial factors impacting a client's occupational performance (through creating an occupational profile with a fieldwork client and sharing in OT 726 if time allows).
7. Develop a treatment plan for a current client and share it in OT 728 (if time allows).

Level II A & B Fieldwork Course Objectives

Level II A & B FW education provides the student with the opportunity to integrate academic knowledge with the application of skills at higher levels of performance and responsibility. Upon completion of Level II A & B FW education experiences, students will achieve specific objectives. (C.1.3.)

OT 750 Level II A Fieldwork Course Objectives

By the end of the level II A FW education, the student will:

1. Implement the basic tenets of occupational therapy.
2. Demonstrate competency in evaluation procedures designed to identify problems related to a client's satisfactory participation in meaningful occupations.
 - a. Appropriately select and utilize observation, interview, and data from other assessments routinely used by the fieldwork facility.
 - b. Accurately record evaluation results.
3. Accurately interpret evaluation data and use that information in developing appropriate goals and intervention plans to incorporate current knowledge about occupation-based interventions, consistent with the evidence of best practice, and respect client priorities.
 - a. Identify and define problems/barriers related to participation in occupations in a way that is relevant and meaningful to clients.

- b. Identify factors from the social determinants of health that may impact a client's current or future functioning.
 - c. Develop specific therapy objectives that reflect a client's occupational priorities.
 - d. Collaborate with clients, caregivers, and clinical instructors in developing therapy intervention plans.
 - e. Articulate the clinical reasoning behind the selection of interventions used in the treatment plan.
- 4. Demonstrate proficiency in the analysis, adaptation, grading, and application of therapeutic activities in the evaluation and treatment of clients referred for occupational therapy.
- 5. Demonstrate effective oral and written communication skills as demonstrated by their documentation service provisions; interactions with clients, staff, and other professionals; and dissemination of information.
- 6. Demonstrate professional characteristics, including:
 - a. The ability to establish and sustain therapeutic relationships.
 - b. The ability to work as a member of the treatment team.
 - c. The ability to have respect for client confidentiality.
 - d. The ability to assume an active role in the student-supervisory relationship.
 - e. The ability to collaborate and engage in some supervisory activities with certified occupational therapy assistants through direct or simulated therapy activities.
 - f. The ability to self-reflect and adjust performance based on feedback from clients, fieldwork supervisors, or other members of the treatment team.
 - g. The ability to integrate evidence-based treatment and appropriate activities for client care.
- 7. Demonstrate the ability to identify psychosocial factors that are impacting a client's occupational performance and implement strategies/interventions for treatment.
- 8. Demonstrate sensitivity/value for diversity, equity, and inclusion as a part of the occupational therapy process and practice.
- 9. Demonstrate the ethical behavior expectations of the profession among all occupational therapy stakeholders in practice settings.
- 10. Identify and complete a site-specific project approved by the fieldwork educator to develop and enhance client care/intervention at the student's fieldwork site.
- 11. Conduct a comprehensive literature review on a critically appraised topic (CAT). The student will analyze and synthesize current research, evaluate the quality of evidence, and determine the implications for occupational therapy practice and intervention in their specific fieldwork practice setting.

OT 751 Level II B Fieldwork Course Objectives

By the end of the level II B FW education experience, the student will:

- 1. Implement the basic tenets of occupational therapy.
- 2. Demonstrate competency in evaluation procedures designed to identify problems related to a client's satisfactory participation in meaningful occupations.

- a. Appropriately select and utilize observation, interview, and data from other assessments routinely used by the fieldwork facility.
 - b. Accurately record evaluation results.
3. Accurately interpret evaluation data and use that information in developing appropriate goals and intervention plans to incorporate current knowledge about occupation-based interventions, consistent with the evidence of best practice, and respect client priorities.
 - a. Identify and define problems/barriers related to participation in occupations in a way that is relevant and meaningful to clients.
 - b. Identify factors from the social determinants of health that may impact a client's current or future functioning.
 - c. Develop specific therapy objectives that reflect a client's occupational priorities.
 - d. Collaborate with clients, caregivers, and clinical instructors in developing therapy intervention plans.
 - e. Articulate the clinical reasoning behind the selection of interventions used in the treatment plan.
4. Demonstrate proficiency in the analysis, adaptation, grading, and application of therapeutic activities in the evaluation and treatment of clients referred for occupational therapy.
5. Demonstrate effective oral and written communication skills as demonstrated by their documentation service provisions; interactions with clients, staff, and other professionals; and dissemination of information.
6. Demonstrate professional characteristics, including:
 - a. The ability to establish and sustain therapeutic relationships.
 - b. The ability to work as a member of the treatment team.
 - c. The ability to have respect for client confidentiality.
 - d. The ability to assume an active role in the student-supervisory relationship.
 - e. The ability to collaborate and engage in some supervisory activities with certified occupational therapy assistants through direct or simulated therapy activities.
 - f. The ability to self-reflect and adjust performance based on feedback from clients, fieldwork supervisors, or other members of the treatment team.
 - g. The ability to integrate evidence-based treatment and appropriate activities for client care.
7. Demonstrate the ability to identify psychosocial factors that are impacting a client's occupational performance and implement strategies/interventions for treatment.
8. Demonstrate sensitivity/value for diversity, equity, and inclusion as a part of the occupational therapy process and practice.
9. Demonstrate the ethical behavior expectations of the profession among all occupational therapy stakeholders practice settings.
10. Identify and complete a site-specific project approved by the fieldwork educator to develop and enhance client care/intervention at the student's fieldwork site.

11. Complete a comprehensive case study of a current patient under the student's care. The student will document and analyze the patient's history, presenting condition, evaluation findings, treatment plan, interventions, and outcomes.

Section II: Policy and Procedures for Fieldwork Education Experiences

Information and Guidelines for Students

Students are expected to familiarize themselves with the contents of this fieldwork handbook, including the guidelines for the FW education site and all policies related to FW education experience. In addition, below are specific requirements that students need to accomplish and/or be aware of:

Immunizations, Certifications, and Related Requirements

Before being allowed to participate in any FW education experience, students are required to submit or meet the following:

1. **Tuberculosis Screening:** The OTD program requires health screening for Tuberculosis prior to matriculation. Testing must be completed within the 12 months prior to matriculation and must be repeated if travel to a [high burden country](#) occurs between initial TB testing and matriculation. Acceptable testing methods include [two-step tuberculin skin testing](#) (TST) or TB blood testing (QuantiFERON®-TB Gold Plus or T-Spot testing). TB testing is required even in individuals with a history of Bacille Calmette-Guérin (BCG) vaccination (blood test recommended). If TB testing is positive, evaluation (and treatment if indicated) must be completed in accordance with [CDC guidelines](#). Following initial TB screening prior to matriculation, annual one-step tuberculin skin testing for purified protein derivative or TB blood testing is required thereafter.
2. **Vaccination Requirements:** Admitted students of the OTD program will receive vaccination forms regarding required vaccinations. Not all vaccinations or proof of immunity are required at the beginning of the program, but many are. The University allows vaccination exemptions and more information about the University's position on vaccination can be found at <https://rm.edu/vaccination-statement/>.
3. The OTD program requires the following vaccinations and testing (these are subject to change depending on public health concerns and fieldwork site requirements):
 - a. **Hepatitis B:** Must provide quantitative hepatitis B surface antibody (HBsAB) test results to validate immune status or proof of non-converter status following administration of two separate series. (*Please Note:* Nonconverters should contact the program for additional details)
 - b. **Tetanus/Diphtheria/Pertussis:** Record of having received 1 dose Tdap.
 - c. **2 MMR (Measles, Mumps, Rubella):** (only 1, if born before 1957) see [CDC scheduling guidelines](#).
 - d. Tuberculosis: skin test or negative chest radiographs (current for each year)
 - e. **Varicella:** Records of titer validating current immunity and/or 2-dose vaccine series being administered according to [CDC scheduling](#)

- [guidelines](#). (*Please Note:* a history of previous infection is not sufficient evidence of immunity)
- f. Current Year **Influenza** Shot
 - g. **COVID-19** prior to matriculation. (*Please Note:* [Click here for the CDC's definition of "fully vaccinated."](#))
4. Immunization Requirement Exception Process Appeals for exceptions to immunization requirements must be submitted prior to admissions, for incoming students, or as early as possible when the situation arises for currently enrolled students.
- a. Students must submit an [appeal request through RMU's Registrar's Office](#).
 - b. The appeal request will include the following required information:
 - i. Why the student is, or will be, unable to meet the immunization requirements;
 - ii. How the student plans to complete the OTD program, including the required 5 fieldwork experiences and the doctoral capstone experience, without the program's required immunizations.
 - c. Once the appeal is received by the Registrar's Office, the appeal will follow the "General Appeal Process" as outlined above.
 - d. OTD program administration, faculty, and students will adhere to the university's policy and procedure related to the appeals process. Refer to the current [University Handbook](#)

Additionally, students must maintain documentation of the following and have each item uploaded to their respective FW information data management system profile.

1. Health Insurance documentation – must be maintained while in the program
2. Cardiopulmonary Resuscitation (CPR) through the American Heart Association or American Red Cross (BLS Healthcare Provider Level)– must be maintained while in the program.
3. Blood Borne Pathogen Training
4. HIPAA training
5. Negative drug/alcohol screen as requested by FW education site.
6. A background check/clearance will be requested and required prior to beginning fieldwork level I and II experiences. Students are responsible for costs incurred with each background check. Background checks will stay valid for two years from the date of clearance unless otherwise specified by the fieldwork site. Failure to pass background check/clearance may result in forfeit of site placement and ability to sit for the NBCOT exam. If there are concerns, please contact the fieldwork coordinator and NBCOT at <https://www.nbcot.org/contact> or 301-990-7979.

Additional criminal background checks, laboratory testing, screenings, and/or certifications may be required by individual fieldwork education sites. If required, it is the responsibility of the student to fulfill and cover the cost of such.

RMU Vaccination Statement:

Rocky Mountain University of Health Professions (RMU) has an obligation to serve the public and promote the health and safety of the communities it serves. Our programs accomplish this in part by requiring vaccinations recommended by the Centers for Disease Control and Prevention (CDC) for Healthcare Workers (refer to the CDC website) as well as additional vaccinations specific to each program. The University requires vaccinations for students who will appear on campus or work with patients associated with required clinical coursework. The University acknowledges medical contraindications as well as religious exemptions to waive the vaccination requirement.

COVID-19 and Testing

OTD students must notify their program director and course instructor immediately if they have tested positive for COVID-19, especially if they test positive one week before or during an intensive learning week. Students are expected to follow [CDC guidelines](#) for vaccinations and boosters while completing the didactic portion of the OTD curriculum. For specific requirements related to COVID-19 management and vaccinations during fieldwork and doctoral capstone experiences, students must refer to the policy and procedure of the individual site. Not obtaining these may significantly limit available fieldwork education experiences and potentially delay or prevent graduation.

Fieldwork Student Memorandum of Responsibilities

Students accept responsibility and commit to compliance with required Immunizations, certifications, and other related requirements by completing and signing the Student Memorandum of Responsibilities prior to the first day of their level I and level II fieldwork experiences.

OTD Program Fieldwork Education Roles and Responsibilities

To facilitate a smooth and effective fieldwork education process, the OTD program has developed the following roles and responsibilities, which should be adhered to by all parties in the fieldwork education process.

Role of the Academic Fieldwork Coordinator

The AFWC is a full-time member of the OTD program's academic faculty, who is primarily responsible for overseeing and coordinating all FW education components of the OTD program. The AFWC works directly with the other program academic faculty, clinical faculty, fieldwork sites, and students to provide various structured clinical learning experiences to facilitate clinical competence. As AFWC, they represent the University, provide indirect supervision of OTD students during the fieldwork education rotations, and work directly with fieldwork educators.

Below are the key responsibilities of the AFWC:

Responsibilities:

1. Serves as the key contact person/liaison between the OTD program, faculty, and FW education sites.
2. Recruits, evaluates, and retains FW education sites.

3. Communicates regularly with FW education sites and FWEs in planning for the FW education experience.
4. Works with the FW education site and the University's academic administration to establish affiliation agreements that meet the needs of the University, student, and FW education site.
5. Schedules the dates and assignments for FW education experiences (Level I & II), including special scheduling (i.e., holidays, atypical arrangements, missed fieldwork educational time).
6. Assigns students to FW education sites (for all Level I & II).
7. Provides or facilitates professional development and training of the FWE(s) and/or FW education site.
8. Monitors and facilitates student progress toward individual and course goals/objectives during FW learning experiences.
9. Counsels students individually on performance and professional behavior issues during all FW education experiences.
10. Determines the final grades for all FW education experiences.
11. Evaluates the effectiveness of FWEs, student supervision, FW education sites, and the OTD program's FW education component.
12. Communicates information related to student FW performance to OTD program core faculty for program evaluation and curricular enhancements.
13. Maintains necessary/appropriate documentation related to student FW performance and the OTD program's FW education policies and procedures, courses, and compliance with accreditation standards.
14. Addresses any changes within the FW education site that may affect student's FW educational experiences.
15. Provides intervention, guidance, and problem-solving strategies for the student and FWE(s), when necessary. Determines an action plan when issues of substandard student performance and/or conduct arise.
16. Upon entry into the OTD program, AFWC provides access to all students to site information and requirements, objectives, and performance expectations to all established fieldwork sites PRIOR TO site selection and PRIOR TO starting the fieldwork experience. This information is stored in the Fieldwork Information Data Management System. (C.1.2.)

Role of the Fieldwork Education Site Coordinator

Below are some of the key responsibilities of the FW education site coordinator (note- FW education site coordinator and FWE may be the same professional).

Responsibilities:

1. Serves as the key contact person for the program's AFWC with planning for upcoming FW education experiences.
2. Facilitates the completion of the affiliation agreement with RMU.
3. Assures the program is provided with current FW education site and FWE information through the completion and update of the AOTA Fieldwork Data Form and/or other relevant documents.

4. Provides the program with current information regarding student prerequisite requirements (immunizations, laboratory tests, certifications, screenings, etc.). These documents will be accessed and maintained in the FW information data management system.
5. Selects Fieldwork Educators (FWE) to supervise and educate students based on the program's criteria for FWEs and delegate FW supervision of students to approved FWEs.
6. Provides or arranges for education and training of FWEs in collaboration with program's AFWC.
7. Informs the FWE(s) of all pertinent information for the program.
8. Oversees the orientation of the student at the FW education site.
9. Acts as a liaison between the student and FWE.
10. Supervises the AOTA Fieldwork Performance Evaluation (FWPE) for level II if needed.
11. Evaluates, in consultation with the AFWC, the effectiveness of the fieldwork education program and the facility's fieldwork educators.
12. Supervises the AOTA Student Evaluation of the Fieldwork Experience (SEFWE) if needed.
13. Maintains necessary/appropriate documentation for the fieldwork site's education program.

Role of a Level I Fieldwork Educator

A level I Fieldwork Educator has sufficient qualifications and affirms their ability to supervise a level I students, or is a licensed, currently licensed, or otherwise regulated occupational therapist, occupational therapy assistant, psychologist, physician assistant, teacher, social worker, physician, speech-language pathologist, nurse, or physical therapist with one or more years of clinical experience who is selected by the FW education site coordinator to directly supervise the OTD student. Through an Educator Attestation, Level I FW educators affirm their ability to support the FW experience. (C.1.10.)

This must occur before PRIOR TO the Level I FW. This FWE provides supervision to the student in the FW education site and delivers the data for the assessment of student performance. The FWE must be willing to work with students and be able to develop an appropriate environment for a learning experience at the FW education site.

Role of a Level II Fieldwork Educator

A level II Fieldwork Educator is a licensed occupational therapist with one or more years of clinical experience selected by the FW education site coordinator to supervise the occupational therapy student directly. To serve as a fieldwork educator, one must be adequately prepared, currently licensed or otherwise regulated as an occupational therapist, and have at least one year of full-time (or equivalent) practice experience as a licensed or regulated occupational therapist prior to the onset of Level II fieldwork. (C.1.13.)

The level II FWE is informed of the curriculum and FW program design and affirms its ability to support the FW education experience through the educator attestation. This must occur PRIOR to the Level II FW. The FWE provides supervision to the student at

the FW education site and provides feedback to the student regarding the student's performance through various assessments and evaluations. The FWE must be willing to work with the student and be able to develop an appropriate environment for a learning experience at the FW education site. It is recommended that the FWE complete the AOTA Fieldwork Educator Certificate Program (FWECP) and be a member of the AOTA. Level II fieldwork educators must also understand and sign the Fieldwork Level II Educator Attestation Form PRIOR to the FW education experience.

Responsibilities of the FWE

1. Meet requisite qualifications for serving as a FWE as required by the RMU and/or the fieldwork education site. (C.1.10., C.1.13.)
2. Collaborates with the AFWC, FW Education Site Coordinator, and with the student to identify appropriate objectives (integrating students, site, and course-specific) PRIOR TO the FW within the specific setting. (C.1.3.)
3. Identifies unique learning experiences, and provides the student with "hands-on" learning opportunities.
4. Understands the OTD program's curricular themes and curriculum and integrates those into the FW education experience. (C.1.1.)
5. Acknowledge and sign the FW Educator Attestation. (C.1.3)
6. Supervise the student appropriately to provide quality learning experiences in all appropriate areas of the patient/client management experience as well as research and administration as applicable. (C.1.14.)
7. Ensure that student learning does not compromise the delivery or safety of patient/client care
8. The Level I FWE provides both formal and informal feedback to the student regarding his/her performance on a regular basis and completes the Level I Fieldwork Evaluation of the Occupational Therapy Student form. For a FW level II education experience, FWE completes the FW Educator Attestation Form, including completing the Level II Fieldwork Update Form, a midterm and final evaluation using the Fieldwork Performance Evaluation (FWPE) tool and any additional AOTA and RMU-approved assessment tools. (C.1.15.; C.1.9.)
9. Communicates with the AFWC regarding student performance; identify problems in the student's performance and conduct (as soon as a behavior or problem is identified), communicate with the student regarding these issues, and plan remedial activities in collaboration with the AFWC and the student, if necessary. (C.1.9.)
10. Completes program-required documentation and final FW documentation within 72 hours after the completion of a student's FW education experience.
11. Makes an effort to address the varying needs of the FW student in terms of experience, learning style, progress within the curriculum, and interpersonal communication characteristics.
12. Models professional behaviors including, but not limited to, legal and ethical occupational therapy practice.

Role of the OTD Student

The student is responsible for taking an active role in directing his or her learning during all FW education experiences.

Responsibilities of the OTD Student:

1. Submit to the AFWC the OTD student's top three preferences (settings, facilities, geographical areas) for Level I A, B & C, and Level II A & B FW education site placement with all other required paperwork by appropriate deadlines.
2. The current Level II expectations for the OTD program is for students to complete two twelve-week, full-time rotations in two different settings with two different populations/practice areas. It is possible for students to complete the two Level II rotations in one setting as long as each 12 weeks is within a different practice area. It is also possible for a student to complete Level II rotations on a part-time basis and/or split a twelve-week rotation into two different practice areas. The student may be able to complete 24 weeks of Level II FW in up to four different practice areas. (C.1.12.)
These situations will be considered and approved by the AFWC AND OTD Faculty on a case-by-case basis. If approved by AFWC AND OTD Faculty, the AFWC will create addendums for each of the Level II FW Educator Attestation Forms for the FWEs in each setting where the student will be completing rotations. The addendums to the attestation forms will define the compliance and performance expectations of the student for each individual FW rotation (up to four). The addendums will serve as a contractual agreement and the documentation to ensure program and accreditation requirements and compliance. (C.1.12.)
3. Establishes a plan for transportation, food, housing, and other necessities associated with FW education experience. The OTD program highly recommends that students do not work during a full time fieldwork rotation as it may interfere with the FW education experience. If a student chooses to work, they must ensure that there are not any employment conflicts with the hours of the FWEs schedule.
4. Secure and wear the appropriate uniform/dress designated by each FW education site.
5. Read and abide by the policies, procedures, and standards of RMU, the OTD program, the FW education site, and the profession. This includes following FW education site and RMU policies and procedures regarding such items as confidentiality, conduct, dress, hours of attendance, etc.
6. Notify the FWE and AFWC when unable to attend the FW education site (this includes late arrival and early departure).
7. Make arrangements with the FWE to make up missed FW education time and notify the AFWC of these arrangements.
8. Demonstrate appropriate technical competence for the level of professional education achieved before a FW education experience.
9. Participate actively in the FW education process, and develop technical and professional skills, behaviors, and attitudes.

10. Consistently demonstrate behaviors that correspond with professional behaviors and core performance standards as noted in the [OTD Student Handbook](#).
11. Communicate any issues or concerns (as early as possible) during the weekly meetings with the FWE and during the FW education experience to the appropriate individual (FWE & AFWC). (C.1.9.)
12. Complete any and all assignments during each FW education experience as described in the syllabus for level I (OT 719, 729 & 739) and Level II (OT 750 & 751).
13. AOTA Fieldwork Data Form preferably filled out by site PRIOR TO student FW rotation, if not, student will offer assistance and it is to be completed PRIOR TO the last day of level II FW.
14. Provide formal and informal feedback to the FWE and AFWC regarding the FW learning experience.
15. Working with the FWE, the Level II Fieldwork Update Form will be completed in the Learning Management System (Canvas) during weeks 2, 4, 8, and 10 for Level II FW.
16. Make sure the fieldwork educator received the Level I Fieldwork Evaluation of the OT Student form.
17. Complete frequent communication with AFWC. Please see each FW syllabus for the outlined required communication.
18. Complete Student Evaluation of the Fieldwork Experience (SEFWE) for the appropriate rotation. These will be managed in the FW information data management system.
19. Complete the Evaluation of the AFWC as sent out by the department.
20. Create a 'Physical Agent Modalities Experience Tracking Form' when appropriate. Document date, type of modality applied, time of intervention, type of patient and get supervisor signatures for each modality session.

Fieldwork Advising

Students in the OTD program must participate in fieldwork advising, which is conducted by the AFWC regularly in either group or one-on-one formats. Fieldwork advising occurs during semesters 1 through 6 and encompasses all Level I and II fieldwork rotations.

This process ensures that students are placed in settings that provide exposure to various traditional and non-traditional practice areas, serving diverse populations.

Advising sessions may include, but are not limited to, the following topics:

1. Policies and procedures related to fieldwork
2. The role of fieldwork in occupational therapy education
3. Types of fieldwork placements and the settings where placements occur
4. Making placement decisions and selections using Exxat
5. Preparation for fieldwork
6. Debriefing and reflection after fieldwork experiences
7. Fieldwork performance

Fieldwork advising is designed to support students in achieving their professional development goals, ensuring readiness for diverse occupational therapy practice settings, and ensuring competencies related to entry-level practice.

Fieldwork Educator Benefits from RMU

At the end of the first successful FW education experience or DCE supervision/rotation and ongoing (at least 1 per year) supervision of RMU OTD students, RMU benefits include:

1. Access to RMU Online Medical Library
2. Certificate of completion for mentoring students with correct number of Professional Development Units for occupational therapy practitioners and contact hours for any professional outside the discipline of OT.

Affiliation/Written Agreements

Before an OTD student can participate in any FW education experience at a FW education site, an affiliation agreement must be fully executed with the FW education site. The AFWC forwards the FW education site affiliation agreement information to the appropriate offices for legal review and then to the Dean of the College of Rehabilitation Sciences for approval, and signatures. (C.1.5.) Occasionally clinical facilities require the completion of their facility's version of contracts with academic programs in lieu of or in addition to the RMU agreement. In such cases, the facility's contract should be reviewed by the AFWC, appropriate administrators, and legal counsel, if needed, before completion.

The OTD program maintains current information on fieldwork education sites with valid affiliation agreements in place in the FW information data management system. The AFWC references this information in preparation for placing students in appropriate facilities for FW education experiences. Copies of the fully-executed agreements are kept on file within the OTD program, the Office of the Vice President of Academic Affairs, and the FW information data management system. (C.1.5.)

The OTD program maintains a sufficient number of valid affiliation agreements that permits students to have enough sites available to complete their fieldwork experience from multiple, diverse practice areas in the fieldwork information data management system. Maintaining is accomplished by providing the FWE benefits listed above and the AFWC's relationship with the site coordinator. Recruiting new sites happens by AFWC, faculty, students, FWEs and others recommending sites or responding to AFWC requests for certain types. (C.1.4, C.1.5.)

Fieldwork Site Selection and Written Agreement Process

This section is in reference to ACOTE standard C.1.5.

1. Selection of Fieldwork Sites

Site Identification and Review

- Fieldwork (FW) sites are identified based on several sources, including the Academic Fieldwork Coordinator (AFWC) research, student requests, faculty/clinician referrals, other RMU programs, or existing professional networks.
- The AFWC solicits new sites, "available slots" with current sites, for student placement throughout the year. Using the Fieldwork Site Vetting Form, the AFWC gathers information from FW sites via email, video conferences, and phone calls.
- A list of sites with available slots is maintained in the FW information data management system (FIDMS), which is regularly updated and available to students at all times. (C.1.2.)
- Students are not permitted to contact FW education sites directly unless instructed by the AFWC.
- If a desired site is not listed, students may provide the site's contact information to the AFWC, who will then evaluate its suitability using the Fieldwork Site Vetting Form.

Site Evaluation

- The Fieldwork Site Vetting Form is used to ensure that potential sites meet the standards and criteria required for participation in FW education. This form evaluates the site's ability to provide quality educational experiences that align with RMU and the American Occupational Therapy Association (AOTA) standards. This is completed by the AFWC. The vetting process includes reviewing the type of setting, populations served, their vision, mission and culture. The AFWC also inquires about available/style of student supervision, caseload variety, and opportunities for hands-on learning.
- An AOTA Fieldwork Data Form is completed by the site with assistance from the AFWC, and student if needed. This data is stored in the FIDMS for student and program reference.
- The Fieldwork Vetting Form may also be used for regular reviews of sites and availability.

2. Site Approval

Communication with Site Coordinator/Fieldwork Educator

- Once the site is deemed appropriate, the AFWC connects with the Fieldwork Site to discuss expectations, available placement slots, and the alignment of student and site goals.
- The AFWC provides the site with the link to the internal webpage, OTD FW Resource Page, which includes the OTD Student Fieldwork Handbook, student fieldwork objectives for each of the 5 fieldwork rotations, the link to RMU Student Affairs Services, OTD Curriculum, regulatory information, etc.
- The AFWC collects detailed information on site policies, compliance requirements, and other site needs regarding student placements.

3. Obtaining the Affiliation Agreement

Agreement Documentation

- The AFWC initiates the process of securing a formal Affiliation Agreement with the FW education site. This agreement outlines the roles, responsibilities, and expectations of both the university and the FW site. The Affiliation Agreement process below **MUST** be complete **PRIOR TO** the start of any Level I or II FW.
- When using a standard Rocky Mountain University Affiliation Agreement, the AFWC will email the agreement to the site for review and completion. Once the site returns the signed agreement, the AFWC and their team forward it to the Academic Resource Manager. The Academic Resource Manager will review the document and submit it to the Dean of the College of Rehabilitation Sciences (CRS) for final approval and signature. Once the Dean of CRS signs the agreement, it is considered fully executed, and a copy will be sent to the facility for their records.
- If the facility uses its own version of an Affiliation Agreement, the AFWC will collect the agreement from the site and submit it to the Academic Resource Manager for review and the Dean's signature. Once signed, the AFWC will return the agreement to the site, following their specific process for completion. After the site finalizes the agreement, the AFWC will provide the fully executed document to the Academic Resource Manager for record-keeping.

Tracking and Management of Agreements

- All agreements are logged and stored in the FW information data management system, currently known as Exxat. This system includes features for tracking agreement expiration dates.
- When preparing for a placement, the Clinical Education Administrative Assistant will review and verify site agreements are in place and will not expire throughout the duration of the fieldwork experience.

4. Ongoing Site Management

Monitoring and Communication

- The AFWC maintains ongoing communication with FW sites to monitor the quality of student experiences and address any concerns that arise during the placement.

- Informal updates on site availability are conducted regularly to keep the FW information data management system current.

Tracking Expiration of Fieldwork Agreements

- The FW information data management system includes alerts for upcoming expiration dates of FW agreements. These alerts are set 3-6 months prior to the expiration date. The alert prompts the AFWC to renew agreements as needed to ensure compliance with university policies and accreditation compliance.
- The Clinical Education Administrative Assistant supports this process by providing reminders and assisting with the renewal documentation.

Basic FW Education Experience Exposure Requirements

Fieldwork placement decisions are guided by an effort to ensure student experiences address the following:

1. Management of patients/clients representative of those commonly seen in practice across the lifespan and the continuum of care.
2. Practice in settings representative of those in which occupational therapy is commonly practiced.
3. Interaction with occupational therapist role models whose practice is consistent with the program's philosophy of practice.
4. Opportunities for involvement in interdisciplinary care.
5. Other experiences that lead to the achievement of expected student outcomes. Students will plan with the AFWC for these types of FW education experiences. Examples of settings that may assist in accomplishing these goals may include at least two or more of the following:
 - a. Long-term care - mental & behavioral health settings (C.1.6.)
 - b. Home and community-based settings
 - c. Rehabilitation setting (inpatient or outpatient skilled nursing facilities)
 - d. A specialty area - hand therapy, industrial therapy, pediatrics, geriatrics, women's health, etc.
 - e. Other innovation or emerging settings

New Student Arrival and Related Information for Fieldwork Education Experience

The FW education site will receive an email with a link to the fieldwork information data system that includes the student's electronic profile and information from the OTD program. This link will provide information, including the OTD student's name, some background information about the student, and various other forms and instructions. The most current version of the OTD program's FW handbook with all relevant policies and procedures. This will include the curriculum and fieldwork program design so they can affirm their ability to support the fieldwork experience. (C.1.10.)

Student Phone Call/Email

The student will contact the FW education site AT LEAST two weeks before the FW education experience begins. At that time, the student will confirm information about hours, who to report to on the first day, directions to the facility, dress code, and any other necessary information.

Student Immunization

All OTD students must provide proof of immunizations in the FW information data management system no later than two months before beginning a FW education experience, or otherwise required by the site. A copy of these immunizations is maintained in the FW information data management system. The OTD student maintains all original copies. Immunizations must be current during all FW education experience periods. Students are responsible for providing this information to FW education sites if required.

CPR and First Aid

All OTD students must be certified in cardiopulmonary resuscitation (CPR) (BLS through American Heart Association). In some cases, professional rescuer certification through the American Red Cross may be acceptable. Certification must be current during all FW education experience periods. Verification of certification is maintained in the FW information data management system, and students are responsible for providing this information to FW education sites if required.

Student Health Insurance

The OTD program requires that students carry their own health insurance while enrolled in the program. Documentation is maintained in the FW information data management system. Students are responsible for providing this information to FW education sites if required by the facility.

Liability Insurance

Professional liability insurance will be provided by the RMU for all students in the amount of \$1,000,000 per incident. A copy of this can be obtained by request.

Supervision Requirements for Level I & Level II Fieldwork Education

Level I Fieldwork Educator Attestation Form confirms that the FWE has been informed of the curriculum and FW program design and affirm their ability to support the FW education experience. This must occur PRIOR TO the Level I FW education experience. (C.1.10.) The Level I FW Educator Attestation Form confirms that the occupational therapy student will be supervised by, but not limited to, a currently a licensed professional in the state where the FW level I experience will be occurring, or has sufficient qualifications and can affirm their ability to supervise level I students. (C.1.7) These can include, but are not limited to, occupational therapists and occupational therapy assistants, psychologists, physician assistants, teachers, social workers, physicians, speech-language pathologists, nurses, and physical therapists. (C.1.10.) The Level I experiences cannot substitute for any part of the Level II Fieldworks. (C.1.11)

Supervision of a Level II FW education experience will be by a currently licensed or otherwise regulated occupational therapist who has a minimum of 1 year full-time (or its equivalent) of

practice experience as a licensed or otherwise regulated occupational therapist before the onset of the Level II FWE. Level II fieldwork supervision is direct and then decreases to less direct supervision as appropriate for the setting and other factors. The AFWC will ensure the student supervisor is adequately prepared to serve as an FWE before the Level II FW. The supervising therapist may be employed by the FW education site or the educational program.

(C.1.13.; C.1.14.)

For both a Level I and level II fieldwork experience, the fieldwork educator will confirm via an educator attestation, prior to starting the fieldwork experience, that they meet the requirements to supervise an OTD student. (C.1.10.; C.1.13.)

For sites where no OT services exist, students are supervised daily on-site by another professional familiar with the role of occupational therapy and 8 hours of direct supervision should be provided weekly by an occupational therapist or occupational therapy assistant with at least three years of experience. The FWE will complete an addendum to the educator attestation mentioned above to confirm that they meet the requirements to supervise the OTD student. (C.1.16.)

Policies and Standards for Level II FW Student Supervision

1. Each FWE will confirm that they are currently licensed in the state where the FW level II experience will occur through the educator attestation form. (C.1.13)
2. The AFWC will utilize the AOTA Fieldwork Data Form, and store it in the FW information data management system, to ensure that each FWE has at least one year's professional experience for traditional FW level II education site or at least three years of experience in a setting where no OT services exist. (C.1.8, C.1.13; C.1.16)
3. The AFWC will collaborate with each FWE to ensure FWE is "adequately prepared" by: (C.1.8, C.1.13)
 - a. Providing access to OTD fieldwork handbook
 - b. Providing access to the 'Resource' page for fieldwork educators
 - c. Informing FWE of the [AOTA Fieldwork Educator Certification](#) program if they have not already done so
 - d. Encouraging FWE to attend continuing education related to FW supervision
 - e. Informing FWE of the AOTA Self-Assessment Tool for Fieldwork Educator Competency (SAFECON) as an excellent tool they can use to improve their skills as a FWE
 - f. Request the site indicates readiness of its FWE/s on the AOTA Fieldwork Data Form
 - g. Offer one on one meetings when needed to discuss the Role of the FWE and the resources above
4. To ensure a quality fieldwork experience with adequate supervision, the AFWC may utilize the AOTA Fieldwork Data Form, Educator Attestation Forms, Student Evaluation of the Fieldwork Experience, formal and informal student feedback, verbal and e-mail communication with FW Education Site Coordinators and/or individual FWE, and FW education site visits. (C.1.7; C.1.8.; C.1.10; C.1.13; C.1.14; C.1.15)

Medicare Guidelines Regarding Student Supervision

Please reach out to the Academic Fieldwork Coordinator to obtain the AOTA Student Supervision and Medicare Requirements Document.

Section III. Fieldwork Expectations

Core Performance and Technical Standard Policies for Occupational Therapy

Success in the OTD program at RMU is most likely to be achieved when students come prepared to participate fully in the educational process. This preparation includes and assumes that students enter the OTD program with a minimum level of ability in specific areas, termed “technical standards,” and will continue to develop those and additional skills and attitudes, called professional behaviors. The combination of technical standards and professional behaviors is referred to as the Core Performance Standards. Professional behaviors, in particular, will be assessed periodically throughout the program. Inability to meet any of the Core Performance Standards may result in needing a student learning action plan, probation, suspension, or dismissal from the program. The Core Performance Standards are listed below.

Technical Standards for Admission, Promotion, and Graduation

Occupational therapy is an intellectually, physically, and psychologically demanding profession. Students acquire the foundation of knowledge, attitudes, skills, and behaviors needed throughout an occupational therapist’s career. Those abilities that occupational therapists must possess to practice safely are reflected in the Technical Standards that follow. For successful completion of degree requirements, students must be able to meet these minimum technical standards with or without reasonable accommodation.

Observation Skills

Observation requires the functional use of vision, hearing, somatic sensations, and the use of common sense. Candidates must have visual perception, which includes depth and acuity. A student must be able to observe lectures, laboratory-dissected cadavers, and lecture and laboratory demonstrations. The student must be able to observe a patient accurately and observe digital and waveform readings and other graphic images to determine a patient’s condition. Candidates must be able to observe patients and be able to obtain an appropriate medical history directly from the patient or guardian. Examples in which these observational skills are required include: palpation of peripheral pulses, bony prominences, and ligamentous structures, visual and tactile evaluation for areas of inflammation and visual and tactile assessment of the presence and degree of edema. A student must be able to observe a patient accurately at a distance and close at hand, noting nonverbal as well as verbal signals.

Communication skills

Communication includes speech, language, reading, writing, and computer literacy. Students must be able to communicate effectively and sensitively and convey a sense of

compassion and empathy with patients to elicit information regarding mood and activities, as well as perceive non-verbal communications. Students must learn and demonstrate therapeutic use of self to create a meaningful relationship between the therapist and the patient to produce meaningful participation and progress in occupations that matter to the client. Occupational therapy education presents exceptional challenges in the volume and breadth of required reading and the necessity to impart information to others. Students must be able to communicate quickly, effectively, and efficiently in oral and written English with all members of the healthcare team. Students must be able to complete forms according to directions in a complete and timely fashion. Students must be able to use computer technology competently and in accordance with University standards (see [RMU Handbook](#)).

Therapeutic Use of Self

A student must possess the ability to consciously use their interpersonal side of the therapeutic relationship to facilitate an optimal experience and outcome for the client. At times, clients are in their most vulnerable state, which requires the student to create a meaningful relationship with the client in order to produce meaningful participation and progress in occupations that matter to the client. Students must be able to gather information, ask questions, and find similarities that harbor trust. The ability to establish a therapeutic relationship is essential to effect beneficial change in the client.

Motor/Psychomotor skills

Students must possess the sufficient motor function to elicit information from the patient examination by palpation, auscultation, tapping, and other evaluation maneuvers. Students must be able to execute movements required to provide general and therapeutic care, such as positioning large or immobile patients, use of therapeutic aids and prosthetics, and physically assisting patients with activities of daily living/instrumental activities of daily living, including but not limited to bathing, dressing, toileting, self-feeding, chores, community mobility, and transportation. Candidates must have the physical strength to perform cardiopulmonary resuscitation and emergency treatment to patients. These skills require coordination of both gross and fine muscular movement, equilibrium, and the integrated use of touch and vision.

Intellectual – Conceptual Integrative and Quantitative Analysis Abilities

To effectively solve problems, students must be able to measure, calculate, reason, analyze, integrate, and synthesize information in a timely manner. For example, the student must be able to synthesize knowledge and integrate the relevant aspects of a patient's history, physical examination, and laboratory data, provide a reasoned explanation for therapy, recalling and retain information in an efficient and timely manner. The ability to incorporate new information from peers, teachers, and the medical literature in formulating treatment and plans is essential. In addition, students must be able to comprehend three-dimensional relationships and understand spatial relationships of structures. Candidates must have the ability to use computers for searching, recording, storing, and retrieving information.

Behavioral/Social Attributes and Professionalism

A student must possess the psychological ability required for the full utilization of their intellectual abilities, for the exercise of good judgment, for the prompt completion of all responsibilities inherent to the diagnosis and care of patients, and for the development of mature, sensitive, and effective relationships with patients. Students must be able to tolerate physically and mentally taxing workloads and function effectively under stress. They must be able to adapt to a changing environment, display flexibility and learn to function in the face of uncertainties inherent in the clinical problems of patients. As a component of their education, students must demonstrate ethical behavior.

Specifically, students must be able to:

1. Attend and participate in classes for 30 or more hours per week during each academic semester. Classes consist of a combination of lectures, discussions, and laboratory and clinical activities. Classes are primarily delivered via technology with synchronous and asynchronous learning activities.
2. Use auditory, tactile, and visual senses to receive classroom instruction and to evaluate and treat clients/patients.
3. Read, write, speak, and understand English at a level consistent with successful course completion and development of positive client-therapist relationships.
4. Complete readings, assignments, and other activities outside of class hours.
5. Apply critical thinking processes to their work in the classroom and the clinic/community.
6. Exercise sound judgment during classes and in the clinic/community.
7. Participate in fieldwork experiences which typically require students to be present 40 or more hours per week on a schedule that corresponds to the operating hours of the fieldwork site.
8. Gather decision-making pieces of information during client assessment activities in class or in the clinical/community setting without the use of an intermediary (classmate, aide, etc.).
9. Perform treatment activities in class or in the clinical/community setting by direct performance or by instruction and supervision of intermediaries.
10. Sit for 2-10 hours daily, stand for one to two hours daily, and walk or travel for two hours daily. In clinical situations, alternately sit, stand, and walk up to 10 hours daily.
11. Frequently lift weights less than 10 pounds and occasionally lift weights between 10 and 100 pounds.
12. Occasionally, carry up to 25 pounds while walking up to 50 feet.
13. Frequently exert 75 pounds of push/pull force on objects up to 50 feet and occasionally exert 150 pounds of push/pull force for this distance.
14. Frequently twist, bend and stoop.
15. Occasionally squat, crawl, climb stools, reach above shoulder level, and kneel.
16. Frequently move from place to place and position to position at a speed that permits safe handling of classmates and clients/patients.
17. Frequently stand and walk while providing support to a classmate simulating a disability or while supporting a client/patient with a disability.

18. Occasionally climb stairs and negotiate uneven terrain.
19. Frequently use their hands repetitively with a simple grasp and frequently use a firm grasp and manual dexterity skills.
20. Frequently coordinate verbal and manual tasks with gross motor activities.
21. *Obtain and use private or public transportation to complete all required intensive learning weeks on the RMUoHP campus in Provo, Utah.*
22. *Obtain and use private or public transportation to complete all fieldwork rotations and the doctoral capstone experience.*

Student Professional Behaviors

The entry-level OTD program expects students to demonstrate ten professional behaviors important to their education and entry into the profession. Professional behaviors are attributes or characteristics that enhance the profession's core of knowledge and technical skills, ensuring the success of the profession. Occupational therapy educators subscribe to the American Occupational Therapy Association (AOTA) Code of Ethics and Standards of Practice to shape the professional behavior of students and faculty members. Students are expected to familiarize themselves with these principles and demonstrate them throughout their academic, fieldwork, and fieldwork. Additionally, students must continually monitor and appraise their professional behaviors and strive to reach optimal performance levels in the behaviors listed below. See for the AOTA Code of Ethics.

Expected Behaviors defined:

1. **Empathy:** The ability to accurately understand and respect the phenomenological world of another. The ability to attend to the feelings, experiences, and perceptions of others and consistently honor their autonomy. The ability to show care and compassion through behaviors, words and presence.
2. **Self-directed learning:** Is proactive in engaging learning experiences. Punctually attends scheduled meetings, actively contributes in required academic settings, and promotes the learning of self and others. Identifies needs and sources of learning; and continually seeks and applies new knowledge, behaviors, and skills.
3. **Communication and Interpersonal skills:** The ability to communicate and interact effectively using all modes of communication (verbal, nonverbal, written, online, etc.) with faculty, colleagues, clients, caregivers, families, intra- and inter-professionally.
4. **Professional and personal boundaries:** ability to recognize and manage personal and professional frustrations; balance personal and professional obligations and responsibilities; work with others cooperatively, demonstrate awareness of one's impact on others and manage self considerately, and effectively; and be responsive to contextual cues. Is flexible, demonstrates ability to professionally adapt to fluid, challenging, and ambiguous situations successfully.
5. **Cultural sensitivity and responsibility:** Ability to respect others and diverse

backgrounds through the displays of contextual and cultural humility by valuing the fundamental rights, dignity, and worth of all people. Demonstrating respect for all individual and cultural differences.

6. **Responsibility and integrity:** Ability to be accountable for behaviors and outcomes of personal and professional actions. Exhibits follow through on commitments to their education, community and social responsibilities. Is dependable, honest, respectful and demonstrates good judgment.
7. **Responsive to feedback:** Exhibits openness to feedback that challenges personal beliefs, views, and assumptions. Exhibits openness to feedback regarding academic and clinical performance. Examines and integrates feedback as appropriate to enhance professional competency.
8. **Professional presentation and comportment:** Exhibits professional conduct and demeanor, professionally represents the OT profession; also includes dress, hygiene and grooming as appropriate for setting.
9. **Stress management:** The ability to identify sources of stress and to develop and implement effective coping behaviors; this applies for interactions for: self, faculty/staff, classmates, patient/clients and their families, members of the health care team and in work/life scenarios.
10. **Effective use of time and resources:** The ability to manage time and resources effectively to obtain the maximum possible benefit.

Assessment of Professional Behavior

The OTD students and faculty will assess student professional behaviors throughout the various fieldwork experiences. The OTD Level II Self-Assessment of Professional Behaviors will help students recognize potential areas of improvement and create specific goals.

Learning Disabilities/Physical Challenges

RMU adheres to the Americans with Disabilities Act of 1990 which provides comprehensive civil rights protection for “qualified individuals with disabilities.”

If a student cannot demonstrate the skills and abilities outlined in this document, it is the responsibility of the student to reach out to the disability services office at the University to request reasonable accommodations. Reasonable accommodations refer to ways the University can assist students with disabilities in accomplishing these tasks (for example, providing extra time to complete an examination or enhancing the sound system in a classroom). Reasonable accommodation does not mean that students with disabilities will be exempt from completing certain tasks; it does mean that the OTD program will work with fieldwork education sites and students with disabilities to determine whether there are ways that we can assist the student toward successful completion of fieldwork education experience. It is ultimately the fieldwork education site’s decision whether the requested accommodations are reasonable.

Students preparing for a fieldwork education experience who have questions about this document or who would like to discuss potential accommodations/program modifications should contact the Committee on Inclusiveness via the department of Student Affairs via

the Director of Institutional Equity (DoIE), The specific process for accommodation is outlined in the [University Handbook](#).

Equal Access and Opportunity: Non-Discrimination Policies

Administrators, faculty, and staff at RMU are committed to providing equal access to education and employment opportunities to all regardless of age, race, religion, color, national and ethnic origin, gender, sexual orientation, disability, and military status. The University is also committed to providing equal access/opportunity in admissions, recruitment, course offerings, facilities, counseling, guidance, advising, and employment and retention of personnel and students. The administration is committed to implementing federal and state laws and regulations governing equal access/opportunity. It further extends its commitment to fulfilling the provisions of Title IX, Section 504 of the Rehabilitation Act, and the Americans with Disabilities Act (ADA). These non-discriminatory policies and practices are an integral part of the mission of the University, and the University Diversity, Equity, and Inclusion (UDEI) Committee and the Office Institutional Equity to help ensure that equal access and opportunity policies are followed.

Additionally, the University complies with Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, and Section 504 of the Rehabilitation Act of 1973. Internal inquiries regarding these policies, the filing of grievances, or grievance procedures on these matters may be directed to the RMU Office of Institutional Equity. External inquiries regarding federal laws and regulations concerning nondiscrimination in education or RMU compliance with those provisions may be directed to the Office of Civil Rights, U.S. Department of Education, 221 Main Street, Suite 1020, San Francisco, California 94105.

RMU adheres to the principles of Section 504 of the Rehabilitation Act of 1973, which provides that no otherwise qualified student with a disability shall, solely for the reason of his or her disability, be excluded from the participation in, be denied benefits of, or be subjected to discrimination in the program. RMU does not exclude qualified persons with disabilities from any course of study or any other part of the program. [Refer to the skills section for further explanation of what essential skills are necessary to function within a given health science discipline (see section 5 and Core Performance Standards and Expectations for OTD students in the [OTD Handbook](#)). RMU's students with disabilities must meet the requirements and levels of competency required of all students in the program. To assist students with disabilities in fulfilling these program responsibilities, every reasonable effort is made to accommodate the special needs of such students. All applicants with disabilities are advised of this policy at the time of their application and/or acceptance to the University. To formally request academic accommodations for disabilities, contact the Committee on Inclusiveness via the Department of Institutional Equity via the Senior Director of Institutional Equity, Title IX & ADA Coordinator). The RMU campus has wheelchair access to all areas, including the student lounge, conference rooms, classrooms, laboratories, and main lobbies. Restrooms are equipped for individuals with mobility challenges.

Students requiring special considerations during an FW education experience or doctoral capstone learning experience, or lab-required tasks will be required to pay for any extra expenses incurred by the University to meet these special needs. For example, if a female student's religious beliefs require that she perform an intervention-related task isolated from the male patient or colleague, the student will be responsible for paying the University for the rent on the extra room, the female instructor, and any other additional costs the fieldwork education site or doctoral capstone experience site occurs that the site deems necessary. An FW education site and doctoral capstone experience site have their own requirements and requested responsibilities of the student. Any FW doctoral capstone experience site has the right to refuse placement if that site feels the requested accommodations are not reasonable, fundamentally changes the FW doctoral capstone experience such that it is no longer representative of the field or degree, or that the request is a financial or administrative burden (for more detailed information please refer to the [RMU Handbook](#)).

For further information on nondiscrimination at RMU, please see Policy 3005: [Nondiscrimination and the Equity Resolution Process](#). For further information on academic accommodations, please see Policy 1060, Academic Accommodations.

Medical Conditions, including Pregnancy

Immediately upon medical confirmation, any medical condition that may impact the ability of a student to safely and fully participate in the educational experience should be reported to the student's academic advisor, AFWC, DCC, and/or Program Director. This will allow the planning of a learning experience that will ensure maximum safety for all concerned. Any condition that impairs a student from being able to meet the requirements of the FW education experience or doctoral capstone experience course may result in a delay in progression in the program. A student may request a delay or temporary withdrawal from the program and return without penalty at the point of their temporary exit.

Occupational Therapy Policies Related to Fieldwork Education Experience

Confidentiality

All students enrolled at RMU are required to review the following topics found within the [RMU Handbook](#) in accordance with federal and state laws, including:

- HIPAA Privacy & HIPAA Security [HIPAA Training](#)
- Code of Conduct (reviewed with students during orientation)
- Security and Confidentiality Statement (related to internet and email use) (reviewed with students during orientation)
- Family Educational Rights and Privacy Act (FERPA) (reviewed with students during orientation)

Students who do not complete compliance reviews and/or training will NOT be able to start their FW rotation until all trainings are complete.

HIPAA Guidelines for Fieldwork Assignments

Per HIPAA guidelines, students cannot report this information in FW assignments. (such as case study presentations):

- Name
- Location - includes anything smaller than a state, such as street address
- Dates – including date of birth, admission and discharge dates
- Telephone numbers
- Fax numbers
- Electronic e-mail addresses
- Social security numbers
- Medical record numbers
- Health plan beneficiary numbers
- Account numbers
- Certificate and/or license numbers
- Vehicle identification numbers and license plate numbers
- Device identifiers and their serial numbers
- Web Universal Resource Locators (URLs)
- Internet Protocol (IP) address numbers
- Biometric identifiers, including finger and voice prints
- Full face photographic images and any comparable images
- Any other unique identifying number, characteristic, or code

For written reports, the following information can be shared:

- Age (age 90 and over must be aggregated to prevent the identification of older individuals)
- Race
- Ethnicity
- Marital Status
- Date of injury, impairment, or illness
- Students, as well as therapists, often keep "working files" in their desk. This is still allowed under HIPAA guidelines. However, this information must be locked in a file cabinet when not in use and must be shredded when no longer needed.

Social Media

Students should use the following guidelines when using any type of social media:

1. Always use good judgment about content and respect privacy laws. Do not include confidential information about RMU, its faculty/staff, or its students.
2. Posts should include only appropriate language. Inappropriate language includes, but is not limited to, obscene or threatening language or defamation (hate speech) based on race, sex, gender, religion, national origin, age, or disability.
3. Do not post information, photos, or videos that will reflect negatively on you, your FW education site, your FWE, the RMU Department of Occupational Therapy, or University.
4. It is strongly advised to avoid participating in actions that may be harmful or have a negative impact on the reputation of RMU and the services it offers.

5. Engaging in social networking during facility work hours is strictly prohibited.
6. Do not post personal information that can be used to locate someone offline, such as: pictures, location, patient identifiers, ID badges, phone numbers, home/local addresses, birth dates, and email addresses.
7. Do not “friend” clients or caregivers on social media websites unless the friendship predates the clinical relationship. Do not “friend” your FWE until after the FW education experience is over.
8. Do not disclose confidential or derogatory information about the FW education site, its staff, or clients. Do not discuss personal opinions about the FW education site and/or its clients and staff.
9. Under current law, it is forbidden to disclose any personal health information, including imaging of patients, or to discuss patient cases on any social network or digital media. Such behavior is a direct violation of HIPAA guidelines.

Smart Device/Phone Use

Students should use official communication channels to communicate with their FWE. It is left to the discretion of the FWE whether or not they would like to provide personal phone numbers to students. Students should not use texting as a means of communication with their FWE unless this communication method has been approved by the FWE. During facility work hours, students should keep their cell phones muted and not engage in active cell phone activity.

Attendance during Fieldwork Education Experiences

Because FW education sites/FWE are charged not only with instructing students but also with providing assessment, including documenting proficiency and safety of student performance across a wide spectrum of care, there is a limit to both the quantity and quality of “make-up” hours/days available for missed clinical time (even “excused” time). The RMU OTD program has the following policies and expectations regarding student attendance for all fieldwork education courses: (OT 719, OT 729, OT 739, OT 750, & OT 751).

1. Students must complete 1 week/or equivalent level 1 FW education experience for each experience.
2. Students must complete 2 Level II FW rotations, 12 weeks full-time each for a total of 24 weeks of full-time Level II education experiences; therefore, the student should plan to be at the FW education site daily for the duration of the FW education experience, requesting no days off. If time is needed off, FWE approval is required. For any more than two days off, makeup time may be required. (C.1.12.)
3. Obviously, absences can occur. Whether due to illness, religious observance, bereavement, or other circumstances. More than three missed days must be made up. If the facility has weekend work hours, the day(s) can be made up on the weekend. If the facility has no weekend work hours, the day/s will be added to the end of the fieldwork rotation.
4. The only exception to the above is pre-approved ‘professional days’. Professional days will not have to be made up. Professional days must be pre-approved by the

FWE, AFWC and/or the faculty Capstone Advisor. “Professional days” include anything related to continuing education, professional development, etc.

5. Students must promptly contact the FWE to report any absences or late arrivals. The student should discuss the preferred method of contact with the FWE on the first day of the FW education experience.
6. The student must report any absences to the AFWC by entering them in the FW information data management system, within one hour of the usual start of the work day time.
7. The student must accommodate their schedule to that of the FWE and FW education site; this could include working evenings, weekends and holidays.
8. Level II FW education must be completed within 24 months of finishing OTD didactic coursework.
9. Part-time level II fieldwork will be permitted on a case by case basis.

A commitment has been made by the OTD program at RMU, the FW education site, and the student to fulfill the required hours for FW education experience. Students should demonstrate sound discretion when submitting time-off requests to the FWE/FW education site. Excessive time away from the FW education site will be evaluated by the AFWC and may result in a grade of ‘Incomplete’, ‘In-Progress’, or ‘Fail’ in the respective FW education experience.

Students should plan to be engaged in FW education experience full time, and therefore, employment during FW education experiences is not recommended. Students are expected, as a general rule, to work the “schedule” of the FWE, during full-time fieldwork education experiences. This may include (but is not limited to) alternate weekly schedules (four 10-hour days vs. five 8-hour days) and weekend/after-hours coverage. Students may be required to complete documentation, assignments, or patient information reviews at home after FW education site hours. The holiday schedule of the facility applies to FW education experiences.

Safety Policies and Procedures

Student Injury and Illness

Should a student become injured while at the FW education site, the student should follow the policies and procedures of the FW education site. This may include either obtaining a medical evaluation or declining it. Whether medical intervention was sought/obtained, or not, the student must contact the AFWC by cell phone the same day as the injury and should be documented in the FW information data management system. If the student sustains an injury or illness that prevents safe participation in the FW education experience, the student is no longer able to meet the Technical Standards for Occupational Therapy, and/or not able to meet the FW education site’s job description requirements, the student may need to leave the FW education experience until a full-duty medical release has been obtained.

University and FW education site policies related to COVID-19 exposure and/or illness continue to evolve and change. In general, students involved in FW education

experiences will follow the procedures of the FW education site. However, continuous understanding of, and adherence to, RMU policies on COVID-19 are the responsibility of the student. At a minimum, students must report COVID-19 exposure and/or illness to the AFWC and on the [RMU website](#)

Student Conduct

During the academic and FW education experience portions of the program, all students are required to abide by RMU's Student Conduct Policy stated in the [RMU Handbook](#). Students are also subject to the substance use policies set forth by their FW education sites.

Safety in Fieldwork Education Experience Site

All OTD students are required to complete training in the following areas:

1. Safety responsibilities, general safety rules, fire safety, possible hazards (biological, chemical, and radiation), hazard communication, MSDS, reducing hazard exposure, emergency response, and hazardous waste procedures.
2. Incident/accident reporting and investigation training.
3. Personal protective equipment and job safety.
4. Bloodborne Pathogens
5. Internet/Network Safety

Students are taught Standard Universal Precautions and FW education site safety during coursework. Students are also required to adhere to all safety policies and procedures set forth by the FW education site.

Communication between the Fieldwork Education Site and the OTD Student

Prior to the start of the FW education, the assigned student will directly contact the FWE by email or preferred means to ascertain information they will need to be successful at the FW education site.

Communication between Academic Fieldwork Coordinator and the Fieldwork Education Site

1. Prior to the start of the FW education experience, the FWE will have access to the following through the FW information data management system:
 - a. The AOTA Fieldwork Performance Evaluation (FWPE)
 - b. The Student Evaluation of the Fieldwork Experience (SEFWE) to be apprised of what the student will be reporting to the OTD program and future students
 - c. The OTD Fieldwork Handbook
 - d. The student's immunization record, TB test, professional liability insurance, and any other site-required student documentation, if requested
2. The AFWC may contact the Level II FWE periodically during the FW education experience, including email reminders for appropriate evaluations at mid-term, and final evaluation. (C.1.9.)
3. The AFWC may make FW education site visits to the FW education site anytime, while the student is at the FW site, and/or will do so at FWE's request.
4. The AFWC will collaborate with the FWE to maximize the learning process and troubleshoot any problems that may develop.
5. The FWE will complete the AOTA FWPE at both midterm and final.
6. Level II fieldwork sites are encouraged to contact the AFWC for any assistance or questions regarding the completion of the AOTA Fieldwork Data Form.

7. If the FWE or FW Education Site Coordinator has specific concerns regarding the *OTD Fieldwork Education program* please contact:
AFWC: Keren Shavit-Buckley, EdD, MS, OTR/L
Keren.Shavit-Buckley@rm.edu
8. If the FWE or FW Education Site Coordinator has specific concerns regarding the *OTD Program OR OTD Fieldwork Education program* please contact:
OTD Program Director: Dr. Bryan Gee, Ph.D., OTD, OTR/L, BCP, CLA, FAOTA
bryan.gee@rm.edu

Communication between the Fieldwork Educator and the OTD Student

This section is in reference to ACOTE Standard C.1.9.

During the fieldwork experience, it is expected that communication between the student and FWE will be ongoing, mutual, and constructive. The FWE should meet with the student weekly if needed to review progress on objectives and provide any feedback necessary outside of daily communications. The FWE has the responsibility to continuously assess student performance and recognize when the performance is at the correct level, above the expected level, or below the expected level. In the event the FWE determines that there is a problem, the student will have an opportunity to improve. It is possible that the a student learning action plan template could be implemented if needed. If the FWE has any concerns about the student's well-being, they have RMU Student Affairs contacts on the FWE Resource Page.

It is expected that students will take the responsibility to develop a good working relationship with their FWE. It is recommended that the student and the FWE set aside time during the day to discuss patient issues and progress in addition to weekly supervision meetings. The Student/Fieldwork Supervision Check-in Form can be used as a guide for weekly meetings.

Communication between the Academic Fieldwork Coordinator and the OTD Student

This section is in reference to ACOTE standard C.1.8.

In order to ensure good communication between the AFWC and the student:

- Students will check their RMU email regularly as well as the learning management system (Canvas).
- Students will communicate and update to the AFWC via Level II Update form in Canvas on weeks 2, 4, 8, and 10 via Canvas learning activities as assigned by the AFWC.
- Week 6 and 12 students (and FWE) complete formal assessments that will be viewable by the AFWC in the fieldwork information data management system.
- The student will communicate any absences on the FW information data management system, within one hour of normal FW reporting time.

- The AFWC will contact students during the FW education experience as needed for follow up on progress reports via FIDMS messages, e-mail, telephone, in person or through online reflection discussion assignments.
- Students are made aware of AFWC's weekly office hours from the syllabus.
- Students should contact the AFWC anytime for discussion or problem-solving. If a problem develops at any point, students should contact the AFWC immediately.
- The AFWC will be available during business hours M-F, 8 a.m. to 5 p.m. Evenings and weekends are reserved for emergencies only or issues that cannot wait to be resolved the next day. Alternate phone numbers will be provided if needed or alternate faculty members if AFWC unreachable.

IV. Recommendations for Student Fieldwork Education

Site Manual

The recommendations outlined in this section are designed to ensure a high-quality fieldwork experience for OTD students, fostering their professional growth and competence in real-world clinical settings. By adhering to these guidelines, fieldwork sites can provide structured, supportive, and enriching environments that prepare students for the demands of occupational therapy practice.

AOTA Recommended Contents for a Student Fieldwork Manual

The FWE/FW education site is encouraged to develop a student FW manual in order to provide a quality FW education experience. The following is AOTA-Recommended Content for a Student FW Manual:

1. Orientation Checklist
2. Assignments
3. Facility Safety Procedures/Codes
4. Any Behavioral or Site-Specific Objectives other than those on the FWPE
5. Week-by-Week Schedule of Responsibilities (see sample on pg. 51)
6. Facility Patient Confidentiality Information (Client Rights)
7. Guidelines for Documentation:
 - a. Completed samples of all forms (Important! Students learn best with examples)
 - b. Acceptable medical abbreviations.
 - c. Discharge plan
 - d. Billing
 - e. 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 FW education site
2. History of the FW education site
3. Department Information

- a. Policy and procedures
 - b. Mission statement
 - c. Organizational chart
 - d. Essential job functions
 - e. Dress code
- 4. Regularly Scheduled Meetings:
 - a. Dates\times
 - b. Purpose of meeting
 - c. Student/Supervisor weekly review
- 5. Special Client Related Groups\Programs
 - a. Purpose
 - b. Referral system
 - c. Operation
 - d. Transport
- 6. Patient Confidentiality Information (Patient Rights)
- 7. Guidelines for Documentation
- 8. Responsibilities of:
 - a. FWE
 - b. Student
 - c. Fieldwork Education Site Coordinator (if the position exists)
- 9. Performance Evaluation
- 10. Procedure and guidelines used in the evaluation of
 - a. Student
 - b. FWE
 - c. Fieldwork Experience

Material for the FW student manual can be gathered from other sources within the FW education site (e.g., employee handbooks, Human Resources Department, etc.)

FWE should feel free to call the academic programs that the FW education site has contracts with to get the names of nearby facilities that are similar to the FW education site. There is no need to have a separate handbook for students and FWE. The manuals can be the same.

Sample Week-by-Week Schedule of Responsibilities

Weekly Learning and Responsibility Schedule for Level II Fieldwork Education Experience

Week 1	Suggested Activity/Responsibility	Check as Completed
	Tour facility, complete required Orientation modules, read relevant dept P&Ps. Review content with a fieldwork educator (FWE).	
	Become familiar with electronic documentation and billing.	
	Observe assigned staff therapist with a minimum of the following: <ul style="list-style-type: none"> • Initial evaluation • Treatment intervention session • Write two progress notes 	
	Become familiar with facility records through chart review of one patient; the student will ask for clarification of all terminology that is not understood.	
	Attend treatment/team meetings as scheduled.	
	Administer two to three selected assessment tools, including gathering needed equipment and clarifying any areas of assessment protocol not understood.	
	Tentative assignment of two patients for next week.	
Week 2	Construct treatment plans for two assigned patients, identifying intervention methods appropriate for goals. Gain FWE approval of the plan before carrying out the intervention.	
	Independently determine appropriate assessment protocol for one new patient; complete and document assessment results with minimal assistance from FWE.	
	Complete all patient-related documentation with FWE feedback as needed.	
	Report in a team meeting the progress of assigned clients.	
	Shadow PT or SLP for half of one day.	
	Brainstorm ideas for an in-service to be given by students to OT staff in the last week of FW.	
Week 3	Student is assigned 3 to 4 clients, treating 2 of these independently. (after determination of competence by FWE) and 1-2 in co-treatment/shadowing of FWE.	
	Construct treatment plans for all assigned patients, identifying intervention methods appropriate for goals. Gain FWE approval of the plan before carrying out the intervention.	
	Lead any group treatment sessions.	
	Complete all patient-related documentation with FWE feedback as needed.	
	Shadow PT or SLP for half of one day.	

Week 4	Students are assigned 4-5 clients; 3-4 of which the student is treating independently. Continue reporting in team meetings, completing documentation on all assigned clients, leading group treatment, creating appropriate treatment plans, and gaining approval for the plans before implementing them with clients.	
	Meet with patient and/or family to review results of treatment, with minimal assistance from FWE.	
	All documentation is completed within the time frame required by the site.	
Week 5	Students are assigned 5-6 clients, treating 4-5 independently. Continue reporting in team meetings, completing documentation on all assigned clients, leading group treatment, creating appropriate treatment plans, and gaining approval for the plans before implementing them with clients.	
	Focus on broadening the complexity of clients.	
	Complete an evaluation using a new (to the student) assessment tool.	
	Co-treat with a COTA if available.	
	Utilize the assistance of a Rehab Tech, supervising the tech's interactions with the client.	
	Student and FWE will complete the Mid-term Fieldwork Performance Evaluation at the end of the week for review next week.	
Week 6	Students are assigned 6 to 8 clients (or whatever is considered to be 80% of entry-level therapist caseload). The student will treat all but the most complex of the clients independently. The determination of complex clients requiring FWE shadowing is to be determined jointly by the student and FWE.	
	Continue reporting in team meetings, completing documentation on all assigned clients, leading group treatment, creating appropriate treatment plans, and gaining approval for the plans before implementing them with clients.	
	Meet with FWE at the end of the week to complete the mid-term evaluation. Create goals for the rest of the FW education experience.	
	Determine in-service topic.	
Weeks 7-10	Students continue to treat patients as assigned, gradually assuming the entire caseload of the supervision therapist. With more complex clients, the FWE acts as a consultant, providing direction and assistance as needed.	
	The student demonstrates increased competency in specific assessments assigned and researches one to two additional assessments that would be appropriate in the facility.	

Weeks 11-12	Student continues to treat patients as assigned, assuming the entire caseload of the supervising therapist.	
	Present professional in-service to appropriate Rehab staff personnel.	
	Increase opportunities to supervise Techs and COTAs.	
	Student plans and prepares for closure with clients, providing treatment plans to other therapists as needed.	
	Student completes the AOTA Student Evaluation of the Fieldwork Experience form, providing feedback to the FWE in a professional manner.	
	FWE gathers supporting information from other therapists and staff as needed to complete the FWPE. FWE reviews the AOTA FWPE with the student.	

Creating Site-Specific Level II FW Education Experience Objectives

Creating site-specific objectives beyond the 'generic' objectives on the AOTA Fieldwork Performance Evaluation is encouraged. Site-specific objectives may be especially relevant for specialist fieldwork experiences, i.e. hand therapy, pediatrics using an SI approach, acute care that has a heavy ICU focus, lymphedema, work hardening, non-traditional community practice, etc.

When creating site-specific objectives, please keep the following in mind:

1. Collaborate with the AFWC by entering the objectives into the FW information data management system or emailing them to the AFWC.
2. Remember that the over-arching AOTA goal for Level II FW education experience is to develop independent generalist OT practitioners. It may not be realistic to expect full independence in all aspects of evaluation and intervention in specialty FW education sites, and the site-specific objectives should reflect that.

The link below is to AOTA's website page with specific examples of site-specific objectives by facility type, i.e. acute care, inpatient rehab, school system, mental health, etc:

<https://www.aota.org/Education-Careers/Fieldwork/SiteObj.aspx>

Here is an article on how to create collaborative fieldwork model student specific objectives:

<https://uca.edu/ot/files/2023/04/The-Collaborative-Model-of-Fieldwork-Education-A-Blue-print-for-Group-Supervision-of-Students.pdf>

V. Evaluation of Fieldwork and Student Learning Action Plans

Evaluation and Grading of Level I & Level II FW Education Experiences

OTD students are required to complete five clinical practice courses consisting of 27 total weeks of fieldwork education experience. Each of these courses is “Pass/Fail” in nature. The syllabus for each course describes the criteria for earning a “passing” grade.

Criteria include:

1. Maintaining and submitting appropriate documentation to AFWC/fieldwork information data management system by the established deadlines (CPR certification, vaccinations/laboratory tests, personal health insurance coverage, etc.)
2. Submission of any and all assignments/forms/documentation required by the AFWC preceding or following the FW education experience (evaluation of the FW education site/education experience, evaluation of the fieldwork educator, written case study assignment, etc.)
3. Compliance with all RMU Entry-Level OTD Program, and FW education site policies and procedures during the FW education experience (attendance, behavior, dress, etc.).

Evaluation and grading criteria for Level I FWs:

This section is in reference to ACOTE Standard C.1.11.

1. All 3 Level I FW education experiences will be 1 week or the equivalent.
2. Form to be completed by the FWE:
 - Level I Fieldwork Evaluation of the Occupational Therapy Student
3. Forms to be completed by the OTD student:
 - a. Student Fieldwork Self-Assessment Form - Level I
 - b. Student Evaluation of the Fieldwork Experience - Level I (SEFWE-I)

Evaluation and grading criteria for Level II FWs:

This section is in reference to ACOTE Standard C.1.15.

1. Both Level II FW education experiences will be 12 weeks full-time or the equivalent.
2. Form to be completed by the FWE:

Fieldwork Performance Evaluation (FWPE)

Scoring is as follows:

 - Scoring the FWPE at midterm is a Pass/Fail
 - Scoring the FWPE at the end of the FW education experience requires that all items included must be scored to receive a Pass
 - A sum score of 111 or higher will be required to receive a Pass on the FWPE
 - Scores of 1 on any of the items are not allowed to receive a pass on the FWPE

- Score of 3 or higher is required on the following items:
 - # 1 (Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations)
 - # 2 (Adheres to safety regulations and reports/documents incidents appropriately)
 - # 3 (Ensures the safety of self and others during all fieldwork-related activities by anticipating potentially unsafe situations and taking steps to prevent accidents) will all be required to receive a Pass on the FWPE for OTS

3. Forms completed by the OTD student:

- a. Student Self-Assessment of Professional Behaviors - Level II
- b. Student Evaluation of the Fieldwork Experience - Level II (SEFWE-II)

Formal evaluations of the student by the FWE in consultation with the AFWC should occur at “midterm” (for Level II) and at or near the end of each FW education experience (Level I & II). Identified deficits in student performance occurring during these assessments may result in the addition of student assignments, the extension of fieldwork education hours, and/or the establishment of additional goals/expectations, and may require a Student Learning Action Plan.

While information related to student performance is gathered from the FWE's comments, documentation, and grading/scoring, the responsibility for assigning the final FW education experience grade ultimately lies with the AFWC, which uses that information to objectively assign the ‘Pass’ or ‘Fail’ grade as appropriate.

Introduction and Purpose of the Student Learning Action Plan

The vast majority of FW education experiences go smoothly for the student and the FWE. In the event that issues arise with student performance, a student learning action plan will be put into place. The purpose of a student learning action plan is to facilitate student success during the FW education experience, and should not be viewed as a punitive measure. A student learning action plan will detail the expected student performance and give a date for the expected achievement of the objective. In addition, resources will be suggested so that students can take the initiative to improve their performance in the areas that need strengthening. It doesn't happen often but in extreme circumstances, a student will fail a FW education experience. A student cannot fail a fieldwork education experience more than once. If this occurs it will be evaluated by the Fieldwork Committee on a case by case basis.

Student Learning Action Plan Procedure for Fieldwork Education Experience

Determinants for the student learning action plan:

1. If the student does not follow the policies and procedures of the facility, including, but not limited to, violations of patient/facility confidentiality, patient safety, attendance, and professional behavior.
2. If the student does not abide by the American Occupational Therapy Association Code of Ethics of Beneficence, Nonmaleficence, Autonomy, Justice, Veracity, and Fidelity, or the Policies and Procedures Related to Student Conduct of the University.
3. If the student does not meet the objectives and goals of the FW education site, and the course, within an agreed-upon time frame, and the FWPE minimum score is not met.
4. If the student does not follow the verbal and/or written recommendations that have been given to the student by the FWE in an effort to improve patient care and treatment.
5. If the student does not fulfill all duties and verbal and/or written assignments made by the FWE within the agreed-upon time limit.

Student Learning Action Plan Procedure for FW Education Experience

1. The FWE and/or student will identify the problem(s) and attempt solution(s) with a specific documented goal(s). The use of a Student Learning Action Plan will be recommended.
2. The FWE will contact the AFWC by phone or e-mail indicating the problem(s).
3. Should the FWE and student be unable to develop a Student Learning Action Plan, the AFWC will meet with FWE and student and attempt to negotiate solution(s), and a Student Learning Action Plan will be used.
4. The AFWC will notify the student of options related to education, including the determination of whether switching the student to another FW education site is feasible and/or appropriate, withdrawing from the course, a timeline for repeating the course, and an effect on graduation date.
5. Goals and time frames must be documented with a copy to the student, AFWC, and FWE. All documentation is to be stored in the FW information data management system.

Withdrawal/Termination from FW Education Experience

Grounds for Termination of Fieldwork Education Experience:

1. If it is determined by the FWE that the student's behavior may cause harm to patients/clients, self, the FWE, or other employees of the FW education site, the AFWC will make an administrative referral to the University's Student Affairs for additional support and compass resources. The OTD student can email student affairs with further concerns or questions at Studentaffairs@rm.edu. If additional support and compass resources do not remediate the behavior, grounds for termination of the FW education experience may be the result.
2. Unsafe practice, substance abuse, and failure to complete expected requirements may result in termination of the FW education experience.

3. Insubordination, excessive tardiness, and/or risks to patient care may result in termination of the FW education experience.
4. Continued unsatisfactory performance, as evidenced by lack of achievement of all or part of the agreed-upon goals and objectives on the Student Learning Action Plan within the agreed-upon time limit may result in termination of the FW education experience.

Withdrawal/Termination Procedures for FW Education Experience:

1. A student request to withdraw from the FW education experience must be made in writing to the FWE with a copy to the AFWC, indicating reasons for withdrawal and the commitment to fulfill final patient-related obligations as determined by the FW education site. The AFWC will review the request for withdrawal, and the AFWC will communicate to the student their recommendations. Depending on the reasons given for withdrawal and the opinion of the FW education site, possible outcomes could include encouraging the student to stay at the current FW education site, locating an alternative FW education site, or completing the FW education experience at a different time, possibly delaying graduation. After fulfilling patient-related obligations, the student's withdrawal from the FW education site is complete.
2. Following a failed Student Learning Action Plan, an FWE request for the student to be withdrawn from FW education experience must be made in writing to the AFWC and in the FW information data management system, including reasons for termination. The FWE will then complete the following steps:
 - a. The student and FWE will meet to determine the professional obligations related to patient care that must be fulfilled prior to final exit.
 - b. The FWE and student will schedule an exit interview to ensure all patient care-related obligations have been met.
 - c. The FWE will contact the AFWC after the exit interview to confirm the separation of the student from the FW education site.
 - d. After completing steps 2a-c above, withdrawal from the FW education site is complete.

Note: All withdrawal meetings, goals, and actions taken must be documented and stored in the RMU FW information data management system and with RMU's Registrar's Office.

Student Well-Being

Rocky Mountain University's Department of Student Affairs is available to students to help with a variety of needs. They specialize in "Student Support & Resources, Student Leadership & Involvement, Accommodations for Disabilities, Civil Rights, Counseling Services, Student Health & Wellness, Student Advocacy, Student Crisis Management, and Student Success".

Section VI. References

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Section VII. Appendices *

*Full size Microsoft Word versions of the subsequent documents in this section are available upon request.