



Occupational Therapy Assistant Site Specific Objectives for Level II Fieldwork

Learning objectives are used by the fieldwork site/fieldwork educator to guide the Level II fieldwork experience; and provide methods to address learning; provide objectives that may be used to evaluate the student at midterm and the final; and ensure entry-level competence for the student at the specific fieldwork site.

The following areas are aligned with the AOTA Fieldwork Performance Evaluation for the Occupational Therapy Assistant student. Please use the indicated areas to add additional learning objectives, and assessments utilized at your fieldwork site.

Facility: _____

Date: _____

Contact/Fieldwork Educator: _____

Phone: _____

Email: _____

Please sign below:

Signature

Please indicate below the areas in which additional site-specific objectives were added:

1		10		20		30	
2		11		21		31	
3		12		22			
4		13		23			
5		14		24			
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Site Specific Objectives for Level II Fieldwork

FUNDAMENTALS OF PRACTICE

1. Adheres to the American Occupational Therapy Association's Code of Ethics and all federal, state, and facility regulations. Examples: Medicare, Medicaid, client privacy, social media, human subject research

- Verbalizes the importance of the Occupational Therapy Code of Ethics
- Demonstrates concern for well-being & safety of recipients of services (beneficence)
- Intentionally refrains from actions that cause harm (nonmaleficence)
- Respects right of individual to self-determination (autonomy, confidentiality)
- Provides services in fair & equitable manner (social justice)
- Complies with institutional rules, local, state, federal, international laws & AOTA documents applicable to profession of occupational therapy (procedural justice)
- Provides comprehensive, accurate, & objective information when representing profession (veracity)
- Treats colleagues & other professionals with respect, fairness, discretion, & integrity (fidelity)
- Advocates as needed for clients and clients' families

Other: [Click or tap here to enter text.](#) _____

2. Adheres to safety regulations and reports/documents incidents appropriately. Examples: fire safety, OSHA regulations, body substance precautions, emergency procedures. Demonstrates through follow-through/completion/awareness of:

- Follows all safety precautions and procedures/ Consistent in compliance with safety standards
- Aware of & addresses situations with regard to safety
- Resolves safety issues

Other: [Click or tap here to enter text.](#) _____

3. Ensures safety of self and others during all fieldwork related activities by anticipating potentially unsafe situations and taking steps to prevent accidents. Uses sound judgment in regards to safety of self & others during all fieldwork-related activities as demonstrated by:

- Appropriate use of equipment
- Aware/alert to the safety needs of the client
- Recognize & reduce potential hazards and prevents injuries
- Awareness of situational safety concerns
- Plans in advance for the unanticipated
- Adheres to intervention and client condition contraindication and precautions
- Grades and modifies intervention safely
- Awareness of/acknowledges consequences if poor safety judgement occurs
- Intervention planning includes safety awareness
- Correctly assesses safety situations and identify resolutions

Other: [Click or tap here to enter text.](#) _____

BASIC TENETS

4. Articulates the values, beliefs, and distinct perspectives of the occupational therapy profession to clients and other relevant parties clearly, confidently, and accurately. Examples: families, caregivers, colleagues, service providers, administration, the public. Confidently explains the profession; beliefs; values; able to use examples and language appropriate for audience with:

- States an awareness of occupational therapy philosophy and impact on clients
- Knowledgeable in sharing information about the philosophy of occupational therapy with: clients; families; Rehab team; Teachers; aides; 3rd party payors; general public
- Incorporates occupational therapy values, beliefs, and distinct nature into intervention
- Demonstrates an awareness and understanding of OTPF: Domain and Process

Other: [Click or tap here to enter text.](#) _____



5. **Articulates the value of occupation as a method and desired outcome of occupational therapy to clients and other relevant parties clearly, confidently, and accurately.** Examples: families, caregivers, colleagues, service providers, administration, the public

- Explains the value, purpose, and rationale for OT services to client, spouse, family, significant other, colleagues, team members, and community members
- Introduces self and occupational therapy information confidently
- Educates others about occupational therapy

Other: [Click or tap here to enter text.](#)

6. **Articulates the role of occupational therapy practitioners to clients and other relevant parties clearly, confidently, and accurately;** as a collaborative team according to state laws & practice acts

- Verbalizes &/or demonstrates awareness of occupational therapist/occupational therapy assistant roles
- Explains OT role clearly and correctly (identifying similarities and differences) to all audiences
- Demonstrates an awareness and understanding of when to seek guidance of occupational therapist

Other: [Click or tap here to enter text.](#)

SCREENING AND EVALUATION

7. **Obtains sufficient and necessary information about factors that supports/hinders occupational performance from relevant sources throughout the evaluation process.** Under the supervision of & in collaboration with the OT. Examples: record or chart reviews, client, family, caregivers, service providers

- Reviews records and gathers appropriate information, including interests, beliefs, values
- Consistent and thorough in data collection through review of records, formal and informal assessment and observation, and methods including but not limited to: other clinicians, parents/families; teachers; social/educational/psychological evaluations
- Reports gathered data accurately, timely, and in an organized manner to supervisor

Other: [Click or tap here to enter text.](#)

8. **Establishes service competency in assessment methods, in accordance with setting procedures and applicable laws, by administering assessments accurately and efficiently to ensure findings are valid, reliable, and timely.**

Examples: record or chart reviews, observations, interviews, standardized and non-standardized assessments

- OTAS demonstrates task performance as desired following instruction
- Consistent in observation of client behavior
- Recognizes assessment tools as appropriate for clients based on client factors, abilities, and needs
- Correctly administers assessments as indicated to the standard required for service competence

Other: [Click or tap here to enter text.](#)

9. **Administers delegated assessments using appropriate procedures and protocols.** Examples: standardized and non-standardized assessments, interviews, and observations

- Attains service competence in a timely manner with facility given assessments
- Follows all assessment procedures and protocols correctly and safely
- Demonstrates responsibility for initiating/utilizing indicated assessments, *as follows*:

Facility Assessment Methods/Evaluations:

Occupational performance – ADL; IADL; Education; Work; Play/Leisure

OTPF – Performance skills & patterns; Client factors; roles; values; beliefs

Activity analysis & activity demands

Facility Specific Assessments (i.e. standardized assessments):

[Click or tap here to enter text.](#)

Other: [Click or tap here to enter text.](#)

10. **Assists with interpreting information in relation to the client's needs, factors, and performance.** Examples: record or chart reviews, observations, interviews, standardized and non-standardized assessments. Includes the consideration of psychosocial factors.

- Initiates and participates in collaboration with supervisor
- Correctly identifies client's conditions, needs and abilities



- Accurately reports observations to supervisor
- Seek information/clarification/assistance from supervisor as needed
- Recognizes the need to utilize standardized analysis procedures (when applicable)
- Assists in scoring these *specific assessments*: [Click or tap here to enter text.](#) _____

Psychosocial & Sociocultural

- Accurately identifies occupations related to psychosocial needs enabling client participation in everyday life activities
- Identify the social determinants of health that impact the client

Other: [Click or tap here to enter text.](#) _____

11. Reports results clearly, accurately, and concisely, reflecting the client's occupational performance.

- Reports/summarizes clear, concise, and relevant data
- Identifies and does not report irrelevant data
- Provide complete details of client's assessments
- Written reports legible and forms fully completed

Other: [Click or tap here to enter text.](#) _____

INTERVENTION

12. Articulates a clear and logical rationale for the intervention process based on the evaluation results and other relevant considerations. Examples: contexts, theories, frames of references, practice models, and evidence

- Initiates in collaboration with supervisor
- Intervention plan/implementation based on evaluation results and contexts of client
- Interventions reflect evaluation data
- Interventions are within the OT scope of practice
- Able to articulate at age appropriate level for client (including varying interactions to children, adults, families, elders)
- Able to justify and apply frames of references, practice models, and evidence for interventions

Other (can include site specific FOR/Theoretical model): [Click or tap here to enter text.](#) _____

13. Under the supervision of and in cooperation with an occupational therapy practitioner, uses professional literature to make informed intervention decisions. Examples: textbooks, journal articles, other relevant and reliable informational resources

- Utilizes Evidence Based Practice when choosing interventions
- Actively seeks knowledge from professional literature to guide intervention

Other: [Click or tap here to enter text.](#) _____

14. Selects client-centered and occupation-based interventions that motivate and challenge the client to achieve established goals.

- Activities are determined based on client's needs
- Time frames for intervention session and overall duration of service appropriate for setting and client needs
- Interventions are: client-centered; client driven; occupation based; chosen to provide appropriate challenge

Psychosocial & Sociocultural

- Interventions chosen relate to & address client's psychosocial needs for participation in everyday life activities
- Interventions are based on & appropriate as related to the social determinants of health that impact the client

Other: [Click or tap here to enter text.](#) _____

15. Implements client-centered and occupation-based intervention plans.

- Plan is: client centered and client driven; reflects assessment data; identifies priorities determined by client
- Provides safe and effective client centered and occupation-based intervention
- Incorporates input from family or significant other or other professional, as appropriate
- Prior plan approved as appropriate for pace and progression towards entry-level competence & in a timely manner
- Service delivery area readied prior to client arrival, as appropriate, and in a timely manner



- Plan demonstrates appropriate scheduling of client and appropriate to treatment activity

Psychosocial & Sociocultural

- Plan includes consideration of all of client's psychosocial needs for participation in everyday life activities
- Appropriate for clients' level of health literacy
- Mindful/inclusive of client's social determinants of health

Other: [Click or tap here to enter text.](#)

16. Modifies the task and/or environment to maximize the client's performance. Examples: upgrades/downgrades task; arranges client's workspace for optimal performance

- Correctly identify changes in client's needs and abilities; changes activities appropriately if unsuccessful
- Grades &/or adapts activities to motivate and challenge client
- Prepares materials and environment before interventions, as appropriate
- Addresses client concerns regarding activity performance
- Identify various intervention activity options on analysis of data
- Modifies activities/equipment/environment to address client conditions
- Flexible with changing planned activities
- Initiates with supervisor discussion regarding modifying plan
- Utilizes appropriate equipment for activities
- Modifies goals appropriately and timely
- Progresses client activities appropriately
- Identifies behaviors or situations that warrant modification

Other: [Click or tap here to enter text.](#)

17. Recommends modification or termination of intervention plan based on the client's status.

- Recognizes and responds appropriately to client fatigue, distress, or status changes
- In collaboration, identifies appropriate transition within continuum of care; states awareness of other settings appropriate to continue provision of occupational therapy services
- Demonstrates of when to seek change in &/or cease service provision to meet client's ongoing needs

Other: [Click or tap here to enter text.](#)

18. Documents the client's response to services in a manner that demonstrates the effectiveness of interventions.

- Follows facility/site requirements and format
- Meets 3rd party payor requirements as needed
- Uses appropriate OT based language, acceptable abbreviations, and correct spelling and grammar
- Complete, detailed, concise and accurate
- Includes all required and applicable information
- Completes documentation in a timely manner
- Billing is accurate
- By midterm notes require minimal revision
- Follows all confidentiality standards
- As allowed, goals written are relevant, occupation-based, achievable and measurable

Other: [Click or tap here to enter text.](#)

MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES

19. Demonstrates through practice or discussion the ability to collaborate with and assign appropriate tasks to, as indicated, the occupational therapy aide or others to whom responsibilities might be assigned. Examples: paraprofessionals, nurses' aides, volunteers

- Demonstrates an understanding of roles
- Interactions are appropriate with support staff

Other: [Click or tap here to enter text.](#)

20. Demonstrates through practice or discussion an understanding of costs and funding systems related to occupational therapy services, such as federal, state, third party, and private payers. Examples: billing for OT services, inventory and ordering of supplies for OT services, and options for client procurement of adaptive



equipment.

- Billing is accurate and reflects services provided
- States and demonstrates an understanding of process for equipment provision and/or recommendation prior to client discharge from OT
- Verbalizes understanding of 3rd party payor policies and procedures regarding billing and equipment
- Educates clients and families to funding guidelines and requirements

Other: [Click or tap here to enter text.](#)

21. Demonstrates knowledge about the organization. Examples: mission and vision, accreditation status, licensing, specialty certifications

Other: [Click or tap here to enter text.](#)

22. Meets productivity standards or volume of work expected of occupational therapy assistant students.

Other: [Click or tap here to enter text.](#)

COMMUNICATION AND PROFESSIONAL BEHAVIORS

23. Communicates clearly and effectively, both verbally and nonverbally. Examples: clients, families, caregivers, colleagues, service providers, administration, the public

- Recognizes impact of non-verbal communication (eye contact, voice tone/pace/volume, facial expressions, gestures)
- Offers two-way communication
- Contributes in group efforts/discussions equally
- Effectively communicates to complete client & family education
- Expresses self in a manner that encourages dialogue (direct, polite, clear, asks questions of others, etc.)
- Practices active listening

Other: [Click or tap here to enter text.](#)

24. Produces clear and accurate documentation.

- Documentation includes correct spelling, punctuation, grammar,
- Demonstrates adherence to HIPAA & electronic health documentation requirements
- Documentation and reporting of the treatment & treatment plan is complete according to setting and facility.
- Documentation is concise and accurate
- Documentation is completed in a timely fashion
- Uses documentation time efficiently
- Meets payor source guidelines as required
- Documentation is written in terms understandable to other disciplines

Other: [Click or tap here to enter text.](#)

25. Collaborates with fieldwork educator(s) to maximize the learning experience.

- Initiates communication with FEW
- Asks for feedback about performance
- Identifies own strengths and challenges
- Consistently and appropriate participation in supervisor-student relationship
- Identifies possible solutions to problem situations
- Prepares for collaboration on treatment plan through identifying activities and appropriate treatment options

Other: [Click or tap here to enter text.](#)

26. Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with fieldwork educator(s) and others.

- Interact appropriate with support staff
- Seeks further information about populations, interventions, family needs, and conditions
- Integrates into rehabilitation team or department
- Demonstrate awareness and participate in total quality management
- Demonstrate awareness for and support local, state, and national association activities



Other: [Click or tap here to enter text.](#)

27. Responds constructively to feedback in a timely manner.

- Asks for feedback about performance
- Modifies performance based on feedback received
- Adjusts behavior in response to cues and direction from supervisor, staff, and the environment
- Acknowledges feedback without defensiveness

Other: [Click or tap here to enter text.](#)

28. Demonstrates consistent and acceptable work behaviors. Examples: punctuality, initiative, preparedness, flexibility, dependability, professional appearance

- Punctual, or early, and communicate appropriately as needed
- Consistent in attendance
- Willing to come early/stay late
- Independently reviews material as needed to be prepared
- Manages due dates and tracks requirements
- Consistently follows facility dress code
- Cooperative in schedule group work or changes in schedules

Other: [Click or tap here to enter text.](#)

29. Demonstrates effective time management. Examples: plans ahead, adheres to schedules, completes work in expected timeframe

- Arrives on time
- Uses time throughout work day effectively
- Starts & stops treatment sessions appropriately
- Adapts to other's schedules as needed
- Adjust priorities based on requirements of FW site
- Completes administrative duties in a timely manner
- Monitors and prioritizes duties appropriately

Other: [Click or tap here to enter text.](#)

30. Manages relationships effectively through therapeutic use of self and adjusts approach to meet the needs of clients and others.

- Develop and maintain rapport with patient.
- Adjust own interactions based on the need of the client and the treatment session
- Develop boundaries/ability to set appropriate limits with patients.
- Provide appropriate validation, support, and feedback to patients as needed.
- Utilizes personality, insights, perceptions, and judgments as part of the therapeutic process

Other: [Click or tap here to enter text.](#)

31. Demonstrates respect for diversity factors of others. Examples: culture, socioeconomic status, beliefs, identity

- Demonstrates through their interactions and communication the acceptance of others
- Is respectful in all interactions with all staff, clients, families, and groups
- Incorporates the context of culture into the OT process for their clients
- Demonstrates an understanding of the social determinants of health affecting clients and the provision of occupational therapy
- Respectful and open to diverse backgrounds and ideas in the treatment setting.
- Seeks to understand the patient's perspective and context when collaborating in treatment.
- Careful to not impose one's own beliefs and values on clients.

Other: [Click or tap here to enter text.](#)