

Commission on Education (COE)

Guidelines for Occupational Therapy Fieldwork Education

History and Purpose

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

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

Definition

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

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

1. The Fieldwork Experience

a. Description and Purpose

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

Fieldwork experiences shall meet requirements in accordance with the Standards for an Accredited Educational Program for the Occupational Therapist and/or the Standards for an

Accredited Educational Program for the Occupational Therapy Assistant. Fieldwork must reflect the sequence and scope of content in the curriculum design, so that fieldwork strengthens the ties between didactic and fieldwork education (ACOTE, 2023).

b. Scope

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

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

c. Fieldwork Site Development

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

- i.** The administrators of the fieldwork setting should collaborate with the academic program and demonstrate support for the fieldwork education program.
 - 1. A written agreement signed by both parties must be in place, delineating each party's requirements and responsibilities.
 - 2. Mutually agreed upon fieldwork objectives between the site and the academic program must be established before the start of a fieldwork program (see 1.c.vii).

During the development and approval process of the written agreement, the Fieldwork educator/site coordinator may begin preparations for receiving a fieldwork student in their setting. Academic fieldwork coordinators can support the development of new sites through workshops and collaborations and should be utilized as a resource.

- ii.** The fieldwork site should meet all existing local, state, and/or federal safety and health requirements, and should provide adequate and

efficient working conditions. The occupational therapy practitioner should comply with state regulations governing the scope of practice for the provision of occupational therapy.

- iii.** Adherence to standards of quality in regard to safety, health requirements, and working conditions may be verified through a review process by the academic program or by an established body such as The Joint Commission, the Commission on Accreditation of Rehabilitation Facilities (CARF), or a state regulatory board.
- iv.** Sufficient time should be allotted to fieldwork educators for student supervision activities (Drynan et al., 2022).
- v.** Space for client-related consultation, preparation, writing, in-service education, and research activities by occupational therapy practitioners and students should be provided.
- vi.** The fieldwork educator and student should have access to current professional literature and relevant publications, texts, and internet resources in support of evidence-based occupational therapy practice.
- vii.** In settings where occupational therapy services are already established, objectives regarding practice and education programs should be stated in writing, and should reflect the specific contribution occupational therapy makes to the overall agency. These objectives should also guide the development of learning objectives for the fieldwork experience. The partnering academic institution will work with the fieldwork site to provide resources to support best practice expectations, including for establishing objectives in settings where no occupational therapy services are provided.
- viii.** The fieldwork agency should recognize that the primary objective of the fieldwork experience is to foster the student's growth and development as an emerging occupational therapy practitioner.
- ix.** The educational value of the student fieldwork experience should be of primary importance. The experience can be mutually beneficial for the site and student, as a student often contributes current evidence-based perspectives, enhancement of existing services, and an opportunity to demonstrate the potential impact of a greater presence of occupational therapy professionals in a setting or area of practice.

d. Fieldwork Educator Preparation

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

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

- i. ACOTE requires that fieldwork educators be adequately prepared for the role. This preparation can occur in multiple ways, including but not limited to:
 1. Completion of the AOTA Fieldwork Educator Certificate Program.
 2. Completion of the [Self-Assessment Tool for Fieldwork Educator Competency](#) (AOTA, 2023).
 3. Attendance at continuing education events on the topic of practice education.
 4. Mentorship by an experienced fieldwork educator.
 5. Documented readings of articles and/or on clinical or fieldwork education.
 6. Completion of any modules or training materials provided by the academic program.
- ii. The academic fieldwork coordinator works with sites and fieldwork educators to provide resources that are consistent with curriculum design and the tenets of the profession of occupational therapy.

2. Expectations of Fieldwork Students

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

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

3. Fieldwork Models

Level I fieldwork can be completed through a variety of models based on the academic program curriculum, including virtual and simulated environments, standardized patients, faculty practice, faculty-led site visits, and supervision by a fieldwork educator in a practice environment (ACOTE, 2023).

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

According to Roberts (2023), these include:

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

One additional format of Level II fieldwork is fieldwork completed outside of the United States. For international fieldwork experiences, ACOTE (2023) Standards require the educator to be a graduate of a program accredited by ACOTE, approved by the World Federation of Occupational Therapists (WFOT), or be otherwise regulated in the country in which the students are completing fieldwork. The fieldwork educator must have at least 1 year of experience in practice prior to the onset of Level II fieldwork.

4. Supervision

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

a. Student Engagement in the Learning Process

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

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

- i.** During Level II fieldwork, performance evaluation should occur on an ongoing basis, in addition to the scheduled mid-term and final performance evaluation. The student should receive direct feedback on their performance status on an ongoing basis.
 - 1. Success is maximized when the educator empowers the student to describe their preferred supervision style and feedback methods.
 - 2. Formative assessment shall be provided to students on a weekly basis and recorded in written format, providing specific recommendations addressing observable behaviors. Best practice is a collaborative process, as described in section 4a.
 - 3. Supervision and feedback is intended to empower the student to demonstrate growth in performance, facilitate student self-reflection and self-awareness, and guide the student regarding strengths and opportunities for growth, based on site-specific objectives.
 - 4. The student's performance should be evaluated formally at mid-term and at the completion of the fieldwork experience. AOTA's Fieldwork Performance Evaluation (FWPE) was revised, and initial validation was published in 2020. This tool is available for use by academic programs with an annual subscription fee. Academic programs may opt to develop their own tool as a means to formally evaluate student fieldwork performance at mid-term and at the completion of a Level II fieldwork experience.
 - 5. It is recommended that the student self-assess performance at mid-term using the same evaluation tool that their educator will use to evaluate their performance. The student evaluation and fieldwork educator evaluation scores and comments should be compared and discussed, with particular attention paid to areas of discrepancy and congruence.
 - 6. When there are multiple supervisors, care should be taken to ensure that communication regarding student progress is shared among all supervisors and that all contribute to evaluating the student's progress.

b. Progress Monitoring During Fieldwork

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

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

- i.** Fieldwork educators should monitor student progress and match students' abilities with the demands of the setting by providing just-right challenges designed to maximize each student's individual learning needs.
- ii.** Weekly objectives, weekly logs and goals, mid-term self-assessment, and educator evaluation at mid-term provide data points for ongoing progress monitoring.
- iii.** If the student's performance is not progressing as anticipated by mid-term or at any point in the fieldwork experience, both the student and academic program must be notified immediately, and documentation concerning the student's progress and outcomes of interventions should be maintained.
- iv.** Fieldwork educators should initiate written learning contracts in conjunction with the academic fieldwork coordinator to provide clear expectations, strategies to support growth toward goals, and specific time frames for all students who are not meeting site-specific objectives on the anticipated timeline. In support of a strengths-based experience, these learning contracts are sometimes called *success plans*.
- v.** Learning contracts or success plans should also include possible consequences if goals are not met. Consistent documentation and review of progress is necessary.

5. Continued Assessment and Refinement of the Fieldwork Program**a. Fieldwork experiences should be implemented and evaluated for their effectiveness by the educational institution and the fieldwork agency.**

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

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

Resources

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