Chatham University  
Master of Occupational Therapy Program  
Level II Fieldwork Behavioral Objectives  
(for use with the AOTA Fieldwork Performance Evaluation for the Occupational Therapy Student [2002])

I. FUNDAMENTALS OF PRACTICE

1. Adheres to ethics: Adheres consistently to the American Occupational Therapy Association Code of Ethics and site’s policies and procedures including when relevant, those related to human subject research.
   - Behavior reflects an understanding of the priorities reflected in the AOTA Code of Ethics (2010)
   - Adheres to HIPAA policies and confidentiality.
   - Respects client/patient’s rights of privacy in all spoken communications (no corridor, elevator, cafeteria consultations).
   - Is cognizant of privacy precautions with regard to all written and virtual communications (including but not restricted to: handwritten and computer documentation, telephone, social media).

2. Adheres to safety regulations: Anticipates potentially hazardous situations and takes steps to prevent accidents.
   - Utilizes appropriate infection control precautions and procedures at all times.
   - Maintains clear and orderly work area by returning equipment and supplies to appropriate storage location to prevent injury/accident.
   - Follows facility policies in response to emergency code or drill situations.
   - Aware of and appropriately implements precautions relative to individual clients/conditions.
   - Incorporates proper body mechanics to ensure personal safety and well-being.
   - Chooses interventions that are safe and appropriate (for client’s age, cognitive and emotional level, sensorimotor, and/or psychosocial status).

3. Uses judgment in safety: Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.
   - Provides supervision of clients at all times.
   - Appropriately uses equipment and procedures after proper training.
   - Seeks and is receptive and responsive to supervision and feedback to ensure client safety.
   - Functions within constraints of facility policies and procedures.

II. BASIC TENETS

4. Clearly and confidently articulates the values and beliefs of the occupational therapy profession to clients, families, significant others, colleagues, service providers, and the public.
   - Explains the role of OT within the practice setting, in terms and language that are clearly understood by the recipient.

5. Clearly, confidently, and accurately articulates the value of occupation as a method and desired outcome of occupational therapy to clients, families, significant others, colleagues, service providers, and the public.
   - Clearly communicates the importance of incorporating occupations into the client’s intervention plan.
   - Explains the value of chosen activity and how it is relevant to client’s life and occupations.
   - Explains the client’s daily occupations and the use of client-centered activities within the context of the practice setting.
6. Clearly, confidently, and accurately communicates the roles of the occupational therapist and occupational therapy assistant to clients, families, significant others, colleagues, service providers, and the public.
   - Articulates the differences in role delineation for an OT, OTA, and other service providers within the practice setting.
   - Uses current AOTA official documents to analyze roles and responsibilities of OTs and OTAs in the practice setting.

7. Collaborates with client, family, and significant others (as appropriate) throughout the occupational therapy process.
   - Explains the use of the occupational profile within the context of the client’s intervention plan.
   - Establishes treatment priorities and goals in collaboration with client and significant others.
   - Reviews progress with client, family, and significant others (as appropriate) at regular intervals.
   - Initiates communication and collaboration with other members of the team.

III. EVALUATION AND SCREENING

8. Articulates a clear and logical rationale for the evaluation process.
   - Provides client with appropriate explanation of purpose and scope of the evaluation process and assessment tools used.
   - Articulates professional reasoning involved in the evaluation process (including information related to client, condition, context, practice model, frame of reference, and/or evidence).

9. Selects relevant screening and assessment methods while considering such factors as the client’s priorities, context(s), theories, and evidence-based practice.
   - Identifies conditions and precautions associated with diagnosis and functional level of assigned clients.
   - Selects appropriate screening and assessment tools, based on facility/organizational practices and the client’s status, diagnoses, and complications.
   - Articulates appropriate rationale for selection of screening and assessment tools (including client condition, past/current/future contextual considerations, evidence, and psychometric properties of tool).

10. Determines client’s occupational profile and performance through appropriate assessment methods.
    - Compiles a thorough occupational profile through client interview, family/caregiver/staff interview (as appropriate) and review of related documentation.
    - Verbalizes an understanding of the client’s previous level of occupational performance.
    - Articulates thorough analysis of client’s current level of occupational performance.

11. Assesses client factors and context(s) that support or hinder occupational performance.
    - Utilizes correct procedures for assessing client factors, performance skills, areas of occupation, contexts and environments, performance patterns, and activity demands.
    - Identifies client strengths and concerns and the impact on performance.
    - Discuss possible discharge plans with the client during the evaluation.

12. Obtains sufficient and necessary information from relevant resources such as client, families, significant others, service providers, and records prior to and during the evaluation process.
    - Interviews client or caregiver (as appropriate) to obtain relevant information during evaluation.
    - Elicits input from other team members relative to the client’s performance/situation.
• Gathers relevant information from client’s chart or record.
• Identifies contraindications and precautions.

13. Administers assessments in a uniform manner to ensure findings are valid and reliable.
• Is knowledgeable of and adheres to procedures for administering standardized and unstandardized assessments accurately.
• Makes accurate and objective observations during the assessment.
• Maintains objectivity in observing and assessing areas when standardization is not an option.

14. Adjusts/modifies the assessment procedures based on client’s needs, behaviors, and culture.
• Identifies the need for modification to optimize client’s performance and comfort.
• Modifies approach and method of data gathering according to client/family needs.
• Modifies the environment as necessary to obtain best response from client.
• Adjusts methods of assessing performance areas when complications or restrictions exist.

15. Interprets evaluation results to determine client’s occupational performance strengths and challenges.
• Determines correct neurological and functional levels based on evaluation results.
• Converts raw scores into meaningful information, according to assessment guidelines.
• Relates assessment findings to client’s occupational performance.

16. Establishes an accurate and appropriate plan based on the evaluation results, through the integration of multiple factors such as client’s priorities, context(s), theories, and evidence-based practice.
• Discusses evaluation findings and areas of priority with client/family/significant others.
• Sets long-term goals that are attainable for the client, based on diagnosis and realistic assessment of the client’s strengths limitations, and priorities.
• Sets short-term goals that are specific, objective, and measurable.
• Discusses evaluation results, intervention priorities, goals, and evidence relevant to the case with the fieldwork educator.
• Incorporates client goals and priorities into the plan of care.

17. Documents the results of the evaluation process that demonstrates objective measurement of client’s occupational performance.
• Follows site specific procedures for documenting evaluations accurately and thoroughly.
• Summarizes evaluation findings clearly and concisely in written and verbal formats.
• Documents time, frequency, duration and location of OT services in recommendations.

IV. INTERVENTION

18. Articulates a clear and logical rationale for the intervention process.
• Completes thorough treatment plans for client.
• Discusses basis for intervention decisions with fieldwork educator.
• Articulates the relationship of proposed interventions to the occupational performance of the client in context of client and/or family needs/routines.
• Prioritizes problem areas and addresses foundation skills needed for treatment.

19. Utilizes evidence from published research and relevant resources to make informed intervention decisions.
• Performs literature searches on relevant topics.
• Reads, interprets, and applies evidence to justify interventions.
• Discusses applicability of evidence to case with fieldwork educator.
• Uses information from other resources (textbooks, coursework, conferences, consultation with others) to justify interventions.

20. **Chooses occupations** that motivate and challenge clients.
   • Considers client’s preferences and priorities when identifying treatment activities to accomplish a specific goal.
   • Considers client’s home environment and family routines when developing home programs.

21. **Selects relevant occupations** to facilitate clients meeting established goals.
   • Verbalizes to fieldwork educator how the selected activity will facilitate the client’s goal attainment.
   • Identifies and uses activities designed to improve client’s performance in the home or discharge environment.
   • Recognizes and appreciates the importance of utilizing a variety of therapeutic approaches and activities to address goals.

22. **Implements intervention plans that are client-centered.**
   • Incorporates client’s priorities into established goals and intervention plans.
   • Considers all client factors including, but not limited to, the functional, emotional, spiritual, and psychological needs of the client and family when planning treatment activities.
   • Adapts activities to meet the client’s physical, cognitive, behavioral, and psychosocial status.

23. **Implements intervention plans that are occupation-based.**
   • Articulates awareness of the client’s various life roles in selecting activities.
   • Selects interventions that are meaningful and relevant to the client.
   • Implements an intervention plan that considers client and/or family needs and routines.

24. **Modifies task approach, occupations, and the environment** to maximize client performance.
   • Grades and modifies treatment activities to provide effective treatment for the client’s current status, preferences, and values.
   • Prepares alternative activities in case the client rejects or is unable to engage in the planned activity.
   • Demonstrates flexibility to change from one activity to another when the client’s performance warrants such.
   • Selects activities considering client’s abilities to promote progress with “just right challenge”.
   • Makes recommendation to fieldwork educator about changes in treatment approach in response to fluctuations in client’s condition.

25. **Updates, modifies, or terminates the intervention plan** based upon careful monitoring of the client’s status.
   • Recognizes and reports (verbally and in writing) changes in the client’s physical, emotional, cognitive, and/or psychosocial status and adjusts the plan to promote optimal progress.
   • Updates plan at required intervals.
   • Recommends changes in goals to fieldwork educator based on improvement or regression in client’s condition/behavior.
   • Recognizes a plateau in therapy and suggests changes in the client’s intervention plan.
   • Prepares client, family, and team members for discontinuation of therapy.
26. **Documents client’s response** to services in a manner that demonstrates the efficacy of interventions.
   - Promptly and accurately completes documentation at required intervals.
   - Includes client’s perception of progress in documentation.
   - Able to prioritize and identify relevant information for inclusion in documentation.

IV. **MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES**

27. **Demonstrates through practice or discussion the ability to assign** appropriate responsibilities to the occupational therapy assistant and occupational therapy aide.
   - Directs the OTA/therapy aides in performing patient care activities in accordance with standards of practice and supervisory guidelines.
   - Articulates the varied roles of the OTA in different practice settings to the fieldwork educator.
   - Uses appropriate AOTA documents to identify and analyze the roles and responsibilities of the OT and OTA in the specific practice setting.
   - Identifies state practice requirements for the performance and supervision of OT personnel.

28. **Demonstrates through practice or discussion the ability to actively collaborate** with the occupational therapy assistant.
   - Verbalizes process for collaboration with the OTA within the specific practice setting.
   - Collaborates with the OTA about intervention ideas based client’s goals.

29. **Demonstrates understanding of the costs and funding** related to occupational therapy services at this site.
   - Ensures that client care time is used productively.
   - Accurately completes documentation with correct billing codes for reimbursement.
   - Articulates an understanding of purchasing costs of adaptive equipment/devices, durable medical equipment, etc.
   - Articulates an understanding of the reimbursement system at the site (i.e., fee-for-service, prospective payment system, pay for performance, etc.)
   - Identifies sources of funding for OT services at site (i.e., insurance, private pay, pro bono services, grants, IDEA, etc.).
   - Identifies reimbursement sources and eligibility criteria (i.e., state/federal monies, 3rd party insurers, Workers Compensation, self-pay, IDEA, etc.).

30. **Accomplishes organizational goals** by establishing priorities, developing strategies, and meeting deadlines.
   - Arrives promptly to scheduled meetings and treatment sessions.
   - Begins and ends intervention sessions on time.
   - Schedules client intervention time to make optimal use of treatment time.
   - Completes assignments by scheduled deadlines.
   - Utilizes unscheduled time productively to increase learning.
   - Effectively uses time management strategies (calendar, checklists, to do lists) to ensure timely completion of responsibilities.
   - Prepares in advance for meetings and treatments.
   - Prioritizes workload according to policies and caseload demands.
   - Notifies fieldwork educator when problems arise.

31. ** Produces the volume of work** required in the expected time frame.
    - Adjusts work pace to accommodate increased workload.
• Provides assistance to other staff members.
• Is self-directed in managing schedule to meet workload/caseload.

V. COMMUNICATION

32. Clearly and effectively communicates verbally and nonverbally with clients, families, significant others, colleagues, service providers, and the public.
• Uses clear and appropriate language to explain assessment, treatment, goals and rationale to clients, families, team members, and funding/regulatory agencies.
• Gauges use of terminology to level of understanding of person with whom communicating.
• Uses active listening strategies (restates/paraprphrases) to ensure both parties have shared understanding of information/plan.
• Effectively uses multiple modes of communication (verbal, written, nonverbal).
• Makes and maintains appropriate eye contact.
• Is cognizant of and attends to physical boundaries/body space.
• Demonstrates professional presentation/demeanor in facial expression, posture, grooming, and attire.
• Takes into account cultural differences, health literacy and language barriers of clients and families (providing handouts and information in first language).
• Utilizes site’s services for translators or translation of written materials when indicated/available.
• Contributes clear, accurate and concise reports/feedback in team meetings.

33. Produces clear and accurate documentation according to site requirements.
• Completes computerized and/or handwritten documentation per site protocols/formats.
• Uses approved institutional terminology/abbreviations.

34. All written communication is legible, using proper spelling, punctuation, and grammar.
• Produces legible handwritten and or computer generated documents using proper spelling, punctuation and grammar.
• Uses technology when available to check work (grammar, spelling).
• Uses strategies such as proof reading, reading aloud, checking against template, asking colleague/peer to proof read if feasible.

35. Uses language appropriate to the recipient of the information, including, but not limited to funding agencies and regulatory agencies.
• Uses language appropriate to the client, family, caregiver, team members, outside agencies, and community programs.
• Appropriately uses terminology consistent with the OT Practice Framework (2014).
• Gauges use of terminology to level of understanding of person with whom communicating.
• Utilizes examples to illustrate meaning/intent (verbal/demonstration).
• Considers cultural/language differences and uses available resources to ensure understanding.

VI. PROFESSIONAL BEHAVIORS

36. Collaborates with supervisor(s) to maximize the learning experience.
• Consistently checks in to clarify expectations.
• Asks questions when uncertain, using discretion in wording and timing.
• Asserts need to schedule supervisory meetings.
• Notifies fieldwork educators of unusual occurrences or circumstances.
• Recognizes communication styles of self and fieldwork educator; adjusts style as needed to promote optimal communication.
• Demonstrates receptiveness to and follow through with feedback and input from fieldwork educator.
• Collaborates with fieldwork educator regarding readiness to assume more responsibility, requiring less supervision.

37. **Takes responsibility for attaining professional competence** by seeking out learning opportunities and interactions with supervisor(s) and others.
   • Attends regularly scheduled staff meetings and in-service opportunities in practice area.
   • Collaborates with fieldwork educator to participate in additional learning opportunities and observations.
   • Effectively utilizes time to seek out, review, and share information and resources relevant to clients/setting/practice trends/etc.
   • Seeks out answers to questions and takes initiative in acquiring knowledge.
   • Actively seeks feedback on performance.
   • Comes to supervisory sessions prepared with questions/concerns and possible solutions to address problems.

38. **Responds constructively to feedback.**
   • Assumes responsibility for actions and behaviors.
   • Incorporates suggested changes in treatment or approach immediately, as directed by fieldwork educator.
   • Generalizes fieldwork educator’s suggestions to other situations.
   • Responds to constructive feedback with openness and willingness to hear feedback.
   • Demonstrates commitment to learning by identifying goals and actions to improve behavior/performance in collaboration with fieldwork educator.

39. **Demonstrates consistent work behaviors** including initiative, preparedness, dependability, and work site maintenance.
   • Takes initiative to address workload management with fieldwork educator.
   • Is prepared, punctual and follows schedule for departmental and caseload-related responsibilities.
   • Attends to site cleanliness and safety and maintenance and storage of supplies as appropriate to role.

40. **Demonstrates effective time management.**
   • Completes documentation/paperwork within designated timelines.
   • Develops and implements efficient schedule for assigned workload.
   • Conducts evaluation and intervention sessions within allotted time including set-up and clean-up.
   • Uses free time constructively.
   • Requests additional responsibilities as free time becomes available.
   • Arrives on time to fieldwork, meetings, and client sessions.
   • Monitors, maintains, and adapts own schedule in accordance with site’s schedule/priorities.
   • Completes learning activities/assignments by due dates.

41. **Demonstrates positive interpersonal skills** including but not limited to cooperation, flexibility, tact, and empathy.
   • Establishes rapport and maintains an atmosphere conducive to positive interactions with clients and team members.
   • Demonstrates flexibility to support own learning and department/site priorities (i.e., extra effort, arriving early/staying late if necessary).
• Demonstrates tact and empathy when dealing with clients and their families.
• Communicates concerns clearly, calmly, and in a timely manner.
• Demonstrates ongoing awareness of impact of own behavior and actions on others.
• Demonstrates effective use of self-disclosure and therapeutic use of self to build rapport, establish alliances, and motivate others (peers/colleagues/clients/family members).
• Sets limits to maintain safety and support positive behavior/performance improvement.

42. **Demonstrates respect for diversity factors** of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices.
• Demonstrates awareness of own background and sensitivity to worldviews of others (clients, families, colleagues).
• Refrains from imposing own beliefs and values on others.
• Demonstrates respect for clients and families without prejudging or making assumptions about the family environment, culture, religion, etc.
• Demonstrates respect for program personnel without prejudging or making assumptions.
• Considers client’s socioeconomic and community resources as well as lifestyle when designing intervention plans and discharge recommendations.

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