

## Occupational Therapy Fieldwork Educator's Manual

### San José State University

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#### Introduction

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Fieldwork education is the time for students to develop a professional identity by applying the knowledge and skills learned in school to authentic practice situations with clients, families, and colleagues. The fieldwork experience also helps the student develop collaborative, reflective and ethical practice, along with managerial, and leadership skills that are important as an entry-level practitioner. Fieldwork educators support students by modeling professional behaviors, fostering critical reasoning skills through their advanced practice understanding, giving students progressively more challenging experiences and responsibility, and providing critical feedback.

We appreciate that the fieldwork educator is not driven to mentorship by aspirations of prestige or monetary gain. However, there are rewards of mentoring Level I and Level II fieldwork students that extend to the fieldwork educator that include the knowledge of supporting professional development of the next generation of occupational therapy practitioners and by enhancing their knowledge of current practice trends as well as evidence-based practice. In addition, the fieldwork educator's effort for supervising Level II students is recognized by the National Board for Certification in Occupational Therapy (NBCOT) as meeting continuing education requirements.

This manual is designed to give you information to help you work with our *Level II* students. The descriptions are adapted in part from the Essential Guide to Occupational Therapy Fieldwork Education (Costa, 2004), and the COE Guidelines for an Occupational Therapy Fieldwork Experience – Level II (AOTA, 2013). We thank you for your important contribution to occupational therapy education, and your commitment to the success of our students.

#### Contact Us

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We recognize that the development of diverse and relevant fieldwork programs is dependent upon successful collaboration between the academic program and the fieldwork educator. Consistent and timely communication is necessary between the fieldwork educator(s), and the academic fieldwork coordinator at San Jose State University. If, at *any* time during the student's fieldwork experience you have any questions and/or concerns, please contact the academic fieldwork coordinator at: ph: 408-924-3078, fax: 408.924.3088 or [cinna.hunter@sjsu.edu](mailto:cinna.hunter@sjsu.edu) for assistance.

#### SJSU Fieldwork Participants

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The following descriptions outline the roles and responsibilities of each participant in the fieldwork experience. These descriptions are adapted in part from the COE Guide to Fieldwork Education (AOTA, 2013), and the Essential Guide to Occupational Therapy Fieldwork Education (Costa, 2004).

The **academic fieldwork coordinator** is the faculty person from the San Jose State University Occupational Therapy program who serves as a liaison between the academic setting, the fieldwork site, and the student. The primary responsibilities of the academic fieldwork coordinator are:

- Assignment of eligible students to a fieldwork experience and confirmation of assignment in writing to each fieldwork site
- Initiation and maintenance of written contracts or letters of agreement between the educational institution and the fieldwork site\*
- Maintenance of current files on each fieldwork site, including up to date fieldwork data forms, and facility forms
- Identification of new sites for fieldwork placement
- Orientation of students to the purpose of the fieldwork experience, instructing them on their roles and responsibilities, and providing them with any required forms
- Collaboration with the fieldwork placement site, including providing information on policies for withdrawal or failure of a student
- Communication through use of forms, student information packets, written, and verbal or electronic communication techniques to the fieldwork site.

\* A contract or facility agreement between the University and the clinical site must be in place before beginning any student placement. The academic fieldwork coordinator will initiate the contract/Memoranda of Understanding (MOU) process with you. The contract must be signed by the appropriate authority at your facility and returned to the institution for processing. You will also be emailed a Fieldwork Data Form, which requests general information about your facility, the setting, client population served, assessments and interventions, theoretical models, prerequisites for the student program, student information, and staffing profile. This form is to be completed and returned to the academic fieldwork coordinator. The information provided on this form serves as a database regarding your facility. The students have access to this information in preparation for the fieldwork experience.

The **clinical fieldwork coordinator**, also known as the **student coordinator**, is the individual at the clinical site responsible for the administrative functions of the site's fieldwork program. Depending on site regulations and/or business model, the owner or fieldwork educator may also be the individual designated to perform these functions. The administrative duties of the clinical fieldwork coordinator include:

- Collaborating with academic fieldwork coordinator for the development and implementation, (and when necessary, revision) of a meaningful fieldwork program
- Preparing, maintaining, and sending to the academic fieldwork coordinator information about the fieldwork placement site, including if the facility belongs to a larger organization, and/or facility-specific application requirements
- Establishing a student fieldwork program, usually in collaboration with other staff, which includes objectives of the fieldwork experience and student manual with goals, expectations, assignments, and additional fieldwork program requirements
- Obtaining from the academic program policy pertaining to withdrawal of a student from the fieldwork experience
- Scheduling students in collaboration with the academic fieldwork coordinator

- Informing the academic fieldwork coordinator if student interviews are required prior to confirmation
- Notifying the academic fieldwork coordinator of confirmation of student placement
- Organizing student's orientation to clinical setting and providing information such as health, safety and education requirements, work hours, dress code, and expectations
- Assigning students to a fieldwork educator and forwarding this information (including fieldwork educator credentials and license number) to the academic fieldwork coordinator
- Meeting periodically with the fieldwork educator(s) and the student to assess progress and discuss any issues and or concerns
- Notifying the academic fieldwork coordinator if concerns arise with a student that might lead to a failure or withdrawal from the fieldwork experience
- Reviewing mid-term and final evaluations with the fieldwork educator and the student
- Determining that final evaluation forms are complete, signed, and that the *originals* are mailed to the academic fieldwork coordinator
- Periodically reviewing contractual agreement between the fieldwork site and the academic institution, making sure these agreements are signed and up-to-date.

The **fieldwork educator**, clinical supervisor, preceptor, or student supervisor, is the individual responsible for direct student training at the fieldwork placement site. For Level II fieldwork, the clinical supervisor must be a registered Occupational Therapist with a minimum of one year of clinical experience in a practice setting. The responsibilities of the fieldwork educator include the following:

- Direct day-to-day supervision of the student
- Clearly defining expectations to the student
- Assigning clients to the student
- Supervising the student in the provision of OT services (evaluation, intervention, documentation, and oral reporting)
- Assessing the skill and knowledge level of the student
- Meeting regularly with the student to review performance and provide feedback
- Notifying the clinical fieldwork coordinator and the academic fieldwork coordinator if the student is not meeting expectations or problems arise
- Evaluating the student at mid-term and at the end of the fieldwork experience, identifying strengths, areas to work on, and methods to achieve success in these areas.

According to the COE Guidelines for an Occupational Therapy Fieldwork Experience – Level II (2012):

There are multiple sources of supervision guidelines that are applicable to Level II fieldwork. The first sources are state laws and state practice acts that govern the practice of occupational therapy. These documents will specify if there are any specific requirements for supervision that need to be upheld in that state. Another source of supervision guidelines are federal regulations such as Medicare that specify what type of supervision must be provided to fieldwork students in certain healthcare settings and with certain types of Medicare coverage. The AOTA Website is a good source for the most up-to-date information on Medicare regulations for student supervision. The ACOTE Standards specify that during Level II fieldwork, students must be supervised by a licensed or credentialed occupational therapy practitioner with at least 1 year of experience who is adequately

prepared to serve as a fieldwork educator. Further, the Standards state that supervision should initially be direct, and then progress to less direct supervision as is possible given the demands of the fieldwork site, the complexity of the client's condition being treated, and the abilities of the fieldwork student. The COE and Commission on Practice (COP) Fieldwork Level II position paper (COE/COP, 2012) additionally recommends that supervision of occupational therapy, and occupational therapy assistants in fieldwork Level II settings will be of the quality and scope to ensure protection of consumers and provide opportunities for appropriate role modeling of occupational therapy practice and that the supervising occupational therapist and/or occupational therapy assistant must recognize when direct versus indirect supervision is needed and ensure that supervision supports the student's current and developing levels of competence. (COE/COP, 2012)

The **student** is expected to collaborate with both the academic fieldwork coordinator and the fieldwork educator to ensure compliance with fieldwork experience requirements. Specific responsibilities include:

- Attending fieldwork orientation meeting conducted by the academic fieldwork coordinator, which provides a description of fieldwork expectations, registration procedures, policies for withdrawal, repetition and grading of the fieldwork experience, certification examination procedures and licensure procedures
- Providing a completed personal data sheet, resume, and copy of health record to Fieldwork Coordinator
- Completing all site requirements/preparation prior to commencing the fieldwork experience, and providing student health records, background check (if required), and CPR training records to the clinical setting
- Providing the contact information for the student's academic advisor to the fieldwork educator(s)
- Exhibiting professional behavior at all times during the clinical affiliation (i.e. arriving to work on time, following protocols as outlined by the facility, communicating in a professional manner with the supervisor and other professional staff at the fieldwork site, taking responsibility for his/her own work schedule, completing required assignments and duties in a timely manner)
- Active participation in the supervisory process, utilizing available resources, and taking responsibility for his/her own learning
- Maintaining copies of performance evaluation forms and student evaluations forms of the fieldwork placement, and ensuring that the final evaluations have been received and reviewed by the fieldwork coordinator

Palladino and Jeffries (2000) have developed a workbook designed to facilitate students taking responsibility for learning in Level I and Level II fieldwork. The book includes many forms which the student, clinical or academic supervisor can utilize to document skills, knowledge and clinical experience. Other student resources include: Occupational Therapy Fieldwork Survival Guide (Napier-Tibere & Haroun, 2004), and The Successful Occupational Therapy Fieldwork Student (Sladyk, 2002).

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## SJSU Occupational Therapy Curriculum, Themes and Student Objectives

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The curriculum is organized around the core principle of participation in occupation to promote health, wellbeing, and social inclusion. The curriculum is designed to enable students to acquire the knowledge and competencies necessary to become qualified as a generalist in occupational therapy practice within four semesters of graduate academic study and six months of supervised fieldwork experience.

A lifespan orientation to occupational therapy practice was chosen rather than organization according to traditional practice areas in order to emphasize the holistic nature of contemporary practice. Course content addressing professional behaviors and research/evidence-based practice provided throughout the curriculum assists students in advancing critical analysis and leadership skills.

The **curriculum** is composed of six clusters:

1. Occupation—the core of the profession
2. Foundations for occupational therapy practice
3. Professional development
4. Practice in the Community
5. Research and knowledge development
6. Practice of occupational therapy.

Six **curricular threads** reflect knowledge and skills that run through all courses in the curriculum. They include the following:

1. Integrating affective experiences: Skills in perceiving, understanding, and responding to the emotional contexts of interactions and performance of self and others
2. Embracing diversity: Self-reflection and awareness of one's own identity, values, attitudes, and prejudices. Skills in perceiving, understanding, respecting, and responding to others' diverse experiences, values, attitudes, and prejudices
3. Developing professional identity & leadership capacity: Understanding oneself as a professional through self-reflection, development of professional behaviors and engagement in professional activities
4. Becoming creators of knowledge: Understanding the development of knowledge and how one can contribute to the evolution of knowledge. Be a self-directed, independent learner and scholar
5. Understanding humans as occupational beings: Knowledge of the complexity and uniqueness of occupation in the human experience and the facilitation of occupational participation
6. Engaging and serving communities of practice, scholarship, and learning: Connecting, collaborating, and serving department, university, local, and global communities.

### *Curriculum Learning Outcomes*

1. Demonstrate effective oral and written communication skills
2. Demonstrate a capacity for problem solving and critical analysis
3. Understand and be able to articulate the nature of occupation, adaptive skills, and roles of productive living
4. Understand occupational therapy's theoretical base and models of practice
5. Articulate the importance of history and the philosophical base of the profession
6. Demonstrate knowledge and appreciation of the roles of sociocultural, socioeconomic, diversity factors, and lifestyle choices in contemporary society
7. Demonstrate the ability to apply occupational therapy theory, and standardized and non-standardized evidence-based assessments of clients' performance in all areas of occupation to achieve expected outcomes related to occupation
8. Provide occupationally-based interventions determined by the needs of the client and the evaluation data, in collaboration with members of the intervention team (client, family, caregivers, and health care providers)
9. Demonstrate professional behavior that upholds the ethical standards, values, and attitudes of the profession in establishing and maintaining a therapeutic relationship with clients
10. Demonstrate basic qualitative and quantitative research skills
11. Exhibit the ability to use appropriate advocacy and educational methods to address the needs of consumers
12. Apply principles of management and service delivery in the provision of occupational therapy to individuals and organizations.

### *Level II Fieldwork Student Objectives*

During each fieldwork experience, the student will:

1. Demonstrate appropriate workplace behaviors at all times (getting to work on time, adhering to facility dress codes, as well as follow all procedures directed by the fieldwork site)
2. Identify his/her professional knowledge, skills and behaviors, and work to strengthen performance
3. Identify his/her own learning style and use the fieldwork experience as a laboratory to continue the educational process in occupational therapy practice
4. Apply academic knowledge to the clinical interventions with clients
5. Recognize the theoretical intervention models used in the assigned agency and apply these models in practice
6. Collaborate with his/her supervisor in developing learning objectives to meet his/her individual needs
7. Assume responsibility to access the resources necessary to planning and performing assigned duties
8. Assume increasing amounts of responsibility for the care of clients, gradually requiring less supervision. At the end of the fieldwork experience, students

- should have the skills of a beginning therapist in that setting
9. Report orally on designated clients to supervisor, occupational therapy colleagues, and other staff members
  10. Submit complete and timely documentation, adhering to customary policy(ies) of the fieldwork site
  11. Develop interpersonal relationships conducive to therapeutic goals on a one-to-one (and group basis, if applicable)
  12. Utilize constructive feedback to develop a professional identity congruent with the ethics of the helping professions, yet unique to the individual practitioner; and
  13. Meet the specific behavioral objectives as written by the assigned agency

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## Fieldwork Processes

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Two levels of fieldwork education are established in the Standards of an Accredited Educational Program for the Occupational Therapist (Accreditation Council for Occupational Therapy Education, 2012).

**Level I fieldwork** is designed to develop a basic comfort level with and understanding of the needs of the clients. Level II fieldwork is required and designed to develop competent, entry-level, generalist occupational therapists.

**Level II fieldwork:** The Level II fieldwork experience shall be integrated into the program's curriculum design, and shall include an in-depth experience in delivering occupational therapy services to clients. Students will focus on the application of purposeful and meaningful occupation and research, and the administration and management of occupational therapy services. It is recommended that the student be exposed to a variety of clients across the life span and to a variety of settings. The fieldwork experience shall be designed to promote clinical reasoning and reflective practice. It should also transmit the values and beliefs that enable ethical practice, and to develop professionalism and competence.

The SJSU Occupational Therapy Level II fieldwork requirements correspond with the Accreditation Council for Occupational Therapy Education (ACOTE) Standards and Interpretive Guide (AOTA, 2011). Students are required to complete a minimum of six months of Level II fieldwork; generally 12 weeks in two clinical settings totaling 24 weeks of mandatory full-time experience.

The student may complete the Level II fieldwork experience in only one setting or a maximum of four different settings. This may also be on a full or part-time basis, but may not be less than half time as defined by the fieldwork site. The settings may be traditional and/or emerging practice settings. Even if the setting is not a classically defined psychosocial placement, psychological or social factors that influence client engagement in occupation should be understood and integrated into the student's experience. According to the Accreditation Council for Occupational Therapy Education (ACOTE) Standards and Interpretive Guide (2011), "...one fieldwork experience (either Level I or Level II) has as its focus psychological and social factors that influence engagement in occupation."

The student shall be supervised by an Occupational Therapist who meets state regulations for licensure (with at least 1 year full-time or its equivalent of practice experience subsequent to initial certification), and who is prepared to be a fieldwork educator. In a setting where there is no occupational therapist on site (ie, and emerging practice setting), the program must document that there is a plan for the provision of occupational therapy services. On-site supervision must comply with the plan and state credential requirements. The occupational therapist must have at least 3-years' full-time or its equivalent of professional experience. The student must receive a minimum of 8 hours of occupational therapy direct supervision per week, including direct observation of client interaction. Additionally, the clinical supervisor must be readily available for communication and consultation during work hours, and there must be an on-site supervisor designee while the occupational therapist is of-site. The supervisor designee may be from another profession. Such fieldwork shall not exceed 12 weeks.

During each clinical fieldwork experience, the student is assigned an **academic advisor**. This person may be the academic fieldwork coordinator or another faculty member from the academic program. The academic advisor is responsible for checking on the student's status during the affiliation. Typically, the academic advisor will contact the student and the clinical supervisor at the mid-term of the fieldwork experience. If problems or concerns are expressed at the time of contact, it is the academic advisor's responsibility to provide suggestions for resolution and to follow-up as appropriate with the student, fieldwork educator, and academic fieldwork coordinator.

Students are expected to meet all site requirements for their initial preparation including but not limited to health requirements (including all vaccinations and proof thereof), background checks, drug screens, respirator fit tests, HIPPA and other site training/orientation documentation at their cost (unless the facility provides on-site preparation activities). Generally, the student is responsible for providing their health records directly to the clinical site. SJSU requires a student health record to include: Last physical examination, Hepatitis B series, MMR, Chicken Pox vaccination or titer, Tetanus shot, current CPR, HIPPA/Infection Control Module (verified by instructor signature).

By the end of each fieldwork experience, the student is expected to be functioning with entry-level generalist skills. Students have the option of completing a third affiliation in a specialty area of their choice. If a student elects to complete a third affiliation, the dates of her graduation or eligibility to sit for the certification exam may be affected. Special arrangements can be made for a student to complete fieldwork on a part-time basis.

### *Scheduling and Confirmation of Students for Level II Fieldwork:*

Students from SJSU are scheduled for Level II fieldwork experiences on a year-round basis. Typically, scheduling dates follow those suggested by AOTA. However, the dates for fieldwork are subject to negotiation between the fieldwork facility and SJSU. A list of AOTA's suggested dates for fieldwork can be found at the AOTA web site, <http://www.AOTA.org>.

Requests for placement of students for Level II fieldwork will be emailed to the clinical coordinator at the fieldwork facility. Level II fieldwork requests are typically emailed 12 -15 months in advance of the time being requested. The request form asks that the clinical coordinator responds, either by accepting or rejecting the request, and returns one copy of the form by email or fax (408-924-3088).

A comment section is provided for additional communication. If an interview is required for the student prior to confirmation of the placement, this should be noted in the comment section. The student will be responsible for contacting the clinical coordinator and/or fieldwork educator to arrange any interviews. *It is important to respond to fieldwork requests as soon as possible.* If the student is not accepted, another placement will be sought. Once a student is confirmed by the fieldwork site, SJSU will email material to the site prior to the student's arrival. In addition, SJSU will send, via regular mail a cover letter of acceptance and the AOTA Fieldwork Performance Evaluation (FWPE) to the fieldwork site (this document cannot be emailed, or copied).

#### Holidays and Absences for Level II Fieldwork:

Holidays are granted to students in accordance with the policies of the fieldwork facility where the student is placed. Students from our program are allowed 3 days absence without penalty for illness or emergencies only. These 3 days are *not* intended for use as vacation days. The student is required to make up time if four or more days of the Level II Fieldwork experience are missed. Options for making up this missed time include weekend or evening hours, if appropriate, or additional days added to the end of the fieldwork experience. The fieldwork coordinator at SJSU should be notified if a student is required to arrange make up time.

#### Failure or Withdrawal of a Student from Fieldwork:

Occasionally a student will experience difficulty in meeting expectations during the fieldwork affiliation. Should this situation arise, the fieldwork educator should contact the student's academic advisor or the academic fieldwork coordinator as soon as possible. Depending upon the severity and nature of the problem(s), a corrective plan should be collaboratively developed for a satisfactory resolution. Bloxton (2001) recommends establishing a formal contract to indicate the seriousness of the situation, provide clear time frames, define consequences, and clearly specify expectations of student performance. Fieldwork educators are encouraged to identify specific objective problem areas, outline strategies for improvement, and establish specific weekly goals for the student.

Completion of the AOTA Fieldwork Performance Evaluation (FWPE) is a useful tool for identifying problem areas and defining specific expectations for satisfactory performance. All information pertaining to problem areas should be documented in writing. The academic advisor or academic fieldwork coordinator can provide the fieldwork educator with useful tools to work with the student. If a student repeatedly fails to meet fieldwork expectations, the clinical experience can be discontinued. Before failing a student, the FWPE must be fully completed, as objectively as possible, to be sure that scoring indeed reflects that the student has not met criterion levels for passing the fieldwork experience. A summary letter outlining the reasons for the discontinuation should be written by the fieldwork educator and forwarded to the academic fieldwork coordinator along with the completed FWPE.

A student can be withdrawn from fieldwork before the completion of the 12 weeks of affiliation if performance or behavior problems are substantial enough to warrant early discontinuance. The fieldwork educator should contact the academic fieldwork coordinator before discussing the option of extending the affiliation with the student. The fieldwork educator's primary responsibility is

patient care. The clinician has an ethical responsibility to ensure the welfare of the client population they are serving. Any student who puts the client at severe risk can be immediately terminated from the fieldwork affiliation. Typically, the breaching of patient confidentiality or putting a patient in danger of extreme physical injury is justification for immediate termination. The fieldwork educator should clearly identify for every student all facility policies regarding patient confidentiality and safety. If a student deviates from facility policy, a warning should be given along with additional clarification of expectations. Further negligence on the part of the student should result in discontinuation. The fieldwork educator should immediately contact the academic advisor or academic fieldwork coordinator if these issues arise during the student's affiliation. Written documentation of student's behavior should be provided to the academic program.

### *Americans with Disabilities Act- Accommodations During Fieldwork*

For the occupational therapy student with a disability, making the transition from the academic to clinical setting can present certain challenges. The Americans with Disabilities Act (ADA) of 1990 and the Rehabilitation Act of 1973 were passed to prevent discrimination against individuals with disabilities. These laws obligate educational institutions to "provide reasonable accommodations for a student's known disability in order to provide an equal opportunity for such a student to participate in the institution's services, programs, and activities" (Bersch, 1995, p. 3). The ADA also states that places of public accommodations (such as a hospital) must provide reasonable accommodations to allow individuals with disabilities to participate in its programs. If a clinical setting accepts student interns for fieldwork, this is considered a "program" which must provide access to the disabled (Kornblau, 1996). "Entering into a contractual agreement to serve as a fieldwork site for an occupational therapy educational program binds the site to the same rules and regulations of the educational institution as they relate to students with disabilities. This contractual agreement makes the site an extension of the educational institution" (Wells & Hanebrink, 1998, p. 39). Therefore, it is the responsibility of both the academic program and the clinical fieldwork setting to provide reasonable accommodations for students with disabilities.

The Americans with Disabilities Amendment Act of 2008 amended the Americans with Disabilities Act (1990). However, it retains the definition of "individual with a disability" as any person who has a physical or mental impairment, which substantially limits one or more of said person's major life activities (that include standing, lifting, bending, learning, reading, concentrating, thinking, communicating). The individual must have a record of such impairment or be generally regarded as having such an impairment. Some examples of physical and mental health impairments include, but are not limited to: epilepsy, orthopedic disorders/diseases/conditions, amputation, neurological dysfunction, vision or hearing deficits, respiratory or cardiovascular dysfunction, diabetes, mental retardation, emotional or mental illness, drug addiction, and learning disabilities. Not included are temporary and/or minor impairments. A transitory impairment is one that is expected to last 6 months or less.

An individual's protection under the ADA and Rehabilitation Act is triggered when that individual identifies himself/herself as having a disability and needing accommodation. With respect to fieldwork education accommodations, the initial responsibility is on the student to provide notice to the appropriate parties (Bersch, 1995). The academic fieldwork coordinator must abide by privacy laws and ADA confidentiality requirements which prohibit schools from disclosing information about a student's disability (Wells & Hanebrink, 1998). Once a student discloses a

disabling condition to the academic fieldwork coordinator and to the fieldwork educator/supervisor, it is the responsibility of both sites to develop reasonable accommodations for the fieldwork experience. Students who fail to disclose their disabilities forfeit the benefits that accommodations provide (Kornblau, 1995). Without needed accommodations, the student faces the possibility of falling behind or even failing an affiliation. However, accommodations cannot be retroactively applied.

Reasonable accommodations are those that reasonably and effectively achieve the goal of equal opportunity for participation. Accommodations must be based on individual need, not on categories of disabilities. However, no accommodation must be provided if to do so would "fundamentally alter the nature of the program or eliminate essential requirements of a program or licensing process" (Bersch, 1995, p. 5). Job duties that are fundamental to the position are considered "essential job functions." Essential functions must be performed, with or without the provision of accommodations. For example, an OTR's essential functions might be evaluating patients, developing intervention goals and programs, and reporting in team meetings. Reasonable accommodations include changes in the work environment or the way work is customarily performed that enable the disabled individual to perform the essential functions of the job. An example of a reasonable accommodation would be modified work schedules or providing a quiet space in which to complete documentation requirements of the facility. However, the clinical site or educational program is not required to provide accommodations that cause undue hardship. Undue hardship refers to accommodations that are unreasonably costly, disruptive, or fundamentally alter the nature or operation of the facility (Kornblau, 1995).

The most critical component of providing successful accommodations to disabled students is open communication between all concerned parties. Students with disabilities who are enrolled in the OT program at SJSU are apprised of their rights for accommodations as outlined by the ADA and Rehabilitation Act. The OT Department works closely with the Accessible Education Center (AEC) on campus to help student's identify special needs and requirements. Our students are strongly encouraged to disclose their disability to the fieldwork educator prior to beginning the fieldwork experience. They are advised to discuss and plan for accommodation needs with the clinical coordinator and/or fieldwork educator before starting the internship. Of course, specific accommodations will vary depending upon the disability and the individual needs of the student. As an example, a student with chronic back problems may not be able to perform maximum assist transfers. A reasonable accommodation of this disability might be requiring the student to demonstrate adequate knowledge of proper transfer technique by being able to train family members or guide other staff members in proper transfer technique. Reasonable accommodations for the student with learning disabilities might include providing a quiet space to document, permitting the student to audiotape supervisory meetings, or allowing extra time (which does not interfere with essential job functions) to complete necessary paperwork.

During a student's affiliation, if any problems or questions arise which pertain to providing accommodations, the fieldwork educator/supervisor should promptly contact the academic fieldwork coordinator. All concerned parties can work collaboratively to open lines of communication, propose solutions, and foster an environment geared toward success.

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## Preparing for your student

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The Essential Guide to Fieldwork Education-Resources for Educators and Practitioners (Costa, 2015) talks about supervision as: a process aimed at ensuring the safe and effective delivery of occupational therapy services and fostering professional competence and development. This is a cooperative process in which two or more people participate in a joint effort to establish, maintain, and or elevate a level of competence and performance. Supervision is based on mutual understanding between the supervisor and the supervisee about each other's competence, experience, education, and credentials. It fosters growth and development, promotes effective utilization of resources, encourages creativity and innovation, and provides education and support to achieve a goal.

Fieldwork educators who are responsible for supervising Level II fieldwork interns must meet state and federal regulations that define and govern practice. They must have at least 1 year of practice experience after being initially certified. In addition, they must be prepared to take on the role of supervising fieldwork students.

Clinical supervision of fieldwork students is considered a vital aspect of occupational therapy training. The fieldwork experience should be designed to provide ongoing support for student development including: Guided and graded learning experiences that foster student performance and clinical reasoning skills, specific site learning objectives, consistent formal and informal evaluation of the student's performance, and ongoing collaboration with the academic fieldwork coordinator. The student should have the opportunity to participate in all aspects of client care customary at that facility.

Different approaches to supervision may be indicated for different students. Also, different supervisors may gravitate towards a particular style or approach. There is no single correct way to handle every problem or situation. Several authors have identified certain techniques or approaches, which are useful for supervising students. The following section offers a brief description of suggested approaches and provides references for further inquiry.

### Approaches to Clinical Supervision:

Various models of occupational therapy clinical supervision have been described in the literature. Schwartz (1984) described a method of supervision of OT students on clinical affiliation based on stages of personality development (conscientious, explorer, and achiever). Schwartz proposes that "knowledge of a student's developmental level can aid the clinical supervisor in designing and fostering the learning experience" (p. 393).

Frum and Opacich (1987) describe four elements essential to the supervisory process: the supervisor, the supervisee, the relationship between these individuals, and the environment in which this interaction is occurring. The Frum and Opacich model describes students during fieldwork as going through three developmental stages: stagnation, confusion, and integration. The clinical supervisor functions to enhance students' growth within each developmental stage, promote transition from one stage to another, and evaluate performance.

Garrett and Schkade (1995) propose the use of the Occupational Adaptation Model of Professional Development (OAMPD) as a framework for describing and understanding the process through which students achieve identified fieldwork objectives. This model describes three classes of adaptive response behaviors available for student use: primitive, transitional, and mature. Despite different conceptual frameworks, all of these suggested supervision models identify the fieldwork educator's role as critical in facilitating student development during the transition from classroom to clinical setting. Knowledge related to the student's cognitive development, personality development, or adaptive response behaviors may enable the supervisor to design interventions to adapt the fieldwork experience that enhances student clinical growth and development.

### Defining the Characteristics of an Effective Fieldwork Educator

Several references in the occupational therapy literature discuss clinical supervision and education, including the identification of the characteristics of an effective clinical supervisor. Some of these references are listed in the bibliography. At a series of meetings, San Jose State University Occupational Therapy Clinical Council members developed a list of characteristics of the effective fieldwork educator. These are not necessarily their own, nor necessarily different from those in the literature, but representative of their personal experience. This information was compiled by Jean Still, MS, OTR, a former Fieldwork Coordinator at San Jose State University, and was provided in a previous OT Fieldwork Supervisors' Manual (1991). This is by no means an exhaustive list, nor is it intended to intimidate the novice supervisor. It is a guide to help in identifying strengths and weaknesses, and characteristics are identified, not necessarily in order of importance:

1. Good Communicator -active listener; asks open-ended questions; encourages problem solving; gives constructive, timely feedback, both verbally and written; open and honest.
2. Supportive/Sensitive -encourages questioning; enthusiastic; honest; objective; rewards good performance; empathetic; flexible; able to recognize students needs and adjusts structure to meet them; allows the student space for reflection (Appendix A)
3. Guides the learning process -from simple to complex, realistic assignments; willing to share knowledge and resources; able to explain clinical reasoning; encourages problem solving; motivates student to grow and learn; able to use diverse teaching strategies; recognizes different learning styles and adjusts accordingly
4. Organized -objectives are clear and realistic; provides adequate structure; sets aside time for supervision and respects that time; prepares for supervision sessions.
5. Competent clinician -serves as a positive role model; knows limitations; reliable and prompt; keeps up-to-date by reading professional literature and attending workshops.

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### Providing Feedback to the Student and the School

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The *AOTA Fieldwork Performance Evaluation (FWPE)* is to be completed by the fieldwork educator(s). The student must complete the *AOTA Student Evaluation of Fieldwork Experience (SEFWE)*.

The FWPE *must* be completed **both at 6 and 12 weeks (midterm and final)**. If the fieldwork educator has concerns at midterm, it may be helpful to informally score the FWPE again at 8 and 10 weeks. This helps clarify gains the student has made and can be used to set minimum standards of performance that must be met by the conclusion of the experience. This fosters communication

with the student and helps to avoid unanticipated results when the evaluation is scored for the final time at the conclusion of the 12-week fieldwork experience.

The SEFWE was designed to allow students to provide feedback about their fieldwork experience to the fieldwork educator, the academic fieldwork coordinator and other students in the fieldwork program. The SEFWE should be completed by the last day of the clinical experience. The form has the student discuss the structure of the fieldwork program (i.e. orientation, assignments, description of caseload, therapeutic interventions, and diagnostic categories). Perceptions of supervision, perceptions of academic preparation, and recommendations for changes or improvements to the overall fieldwork program are also discussed. The student is expected to complete the SEFWE *prior* to the final meeting with her clinical supervisor. The student shares his/her feedback with the fieldwork educator(s) and both/all parties sign the form. One copy remains at the fieldwork site, and one copy is returned to the academic program.

A meeting between the student and fieldwork educator(s) should be scheduled for review of both forms. Both the student and the clinical supervisor must sign the FWPE and the SEFWE. The originals of each form are to be mailed to the academic fieldwork coordinator (OT Department—SJSU). Copies of these forms should be kept by both the clinical coordinator, and the student. It is recommended that a letter be attached to the final FWPE that summarizes the student's performance during the fieldwork experience. The practice setting and client population should be identified and the student's particular strengths and areas for improvement described.

Grading for Level II fieldwork is credit/no credit at SJSU. SJSU uses the AOTA Fieldwork Performance Evaluation (FWPE) for the fieldwork educator to evaluate student performance in Level II fieldwork. The primary purpose of the FWPE is to measure entry-level competence of the occupational therapy student. The evaluation is designed to measure the specific occupational therapy process and was not designed to measure the specific occupational therapy tasks in isolation. The fieldwork educator(s) completes and submits the FWPE to the academic fieldwork coordinator at the completion of the internship.

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## Resources for Fieldwork Educators

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### *Models of Fieldwork Education- Supervision Approaches*

Historically, occupational therapists have used a **one-to-one approach** which, according to The Essential Guide to Occupational Therapy Fieldwork Education (Costa, 2015) is also termed the “**Traditional Apprenticeship Model**” (p.12) to fieldwork supervision. In this more traditional model, one fieldwork educator models expected behaviors and competencies for one student. The student gradually assumes greater responsibility for client care. This approach to supervision has become less viable in many current fieldwork settings. This is due primarily to the tremendous impact of managed care on health care delivery systems as well as the dramatic increase in the numbers of occupational therapy students needing fieldwork placements (Cohn & Crist, 1995). The managed care system has had a profound impact on the health care provider's practice environment. To reduce costs and streamline services, health care organizations (i.e. hospitals, private practices) have reduced work forces, tightened the scope of service, and redesigned

programs. While these changes have been designed to improve the delivery of health care services, they have also resulted in rigorous, stressful, and frequently disruptive work environments. Many health care programs have dissolved, merged, or reduced staffing patterns in order to remain competitive (Brayman, 1996). As a result, the role of the fieldwork educator in this new health care setting has changed. Cohn and Crist (1995) state that fieldwork educators "must ensure that occupational therapy students are well prepared to reason through the complex and changing demands of today's health care environment" (p. 105). The occupational therapist working in this new environment must be prepared to adjust to working in new settings with different populations and must be prepared to acquire new skills and adapt to changing technology (Brayman, 1996).

There is a great demand for occupational therapy fieldwork placements. The increased number of qualified occupational therapy students, and the addition of newly developed occupational therapy education programs nationwide, has made it difficult to secure fieldwork placements (Hamlin, MacRae & DeBrakeleer, 1995). Our changing health care system has placed further demands upon the availability of fieldwork sites. Cohn and Crist (1995) state that "as the essential bridge between academic and service delivery settings, fieldwork educators take a leading role in shaping the future of our profession by guiding new generations of occupational therapists through these changing times" (p. 105). Several alternatives to the traditional one-to-one supervision model have been suggested. A brief description of some alternative fieldwork education models follow. You are encouraged to review this information and refer to the bibliography for additional publications pertaining to these alternative models.

In the **1:2 Model** (Costa, 2015, p.12), the fieldwork educator/supervisor oversees two or more students at one time. This model must be carefully designed so that the students work closely together, collaborating to solve problems. The fieldwork educator must develop clear and concise objectives, teach problem solving skills, and provide learning activities for the students that will foster collaboration. Although at first this model may seem more labor intensive to the fieldwork educator, in actuality, the fieldwork educator frequently spends less overall time in supervision than in the one-to-one model. The students use each other as resources before taking issues to the fieldwork educator. Feedback tends to be non-threatening and easier to accept from a peer than from a supervisor. Students learn greater teamwork skills and gain expanded perspective as they utilize each other's knowledge base and problem solving skills.

In the **2:1 or Shared Clinical Placement Model** (Costa, 2015, p.12), two fieldwork educators/supervisors share the responsibility for providing supervision to one or more students. This may involve one fieldwork educator mentoring the student during the first six weeks of internship, followed by another supervisor mentoring during the latter half of the affiliation. Part-time OTR staff may share supervision responsibilities throughout the affiliation. Students have the opportunity to be exposed to multiple clinical styles and problem solving approaches. The supervisors have an opportunity to collaborate with each other over problems that arise and have someone with which to share supervisory responsibilities.

The **Role-Emerging Model** (Costa, 2015) is used where occupational therapy services are in development. The fieldwork educator may be hired by the site, or the academic program. The fieldwork educator is generally not at the site on a regular basis, but other qualified staff provide the supervision when the occupational therapy fieldwork educator is not on-site (p.13). When the OT fieldwork educator is part-time, other professional staff at the clinical setting must assume some degree of

responsibility for the supervision of the fieldwork student. The occupational therapy fieldwork educator must provide a minimum of 8 hours of direct supervision and must meet with the student weekly to discuss progress.

Bossers and Hartley (1999) studied students' reactions to fieldwork placements with part-time supervision. The results of this study found that the part-time supervision/ full-time student (PTT/FTS) model inherently challenges the student to take responsibility for their own learning needs. Students performed well if the following factors were present:

- autonomy (student needs to be self-directed)
- opportunities for hands-on practice
- positive student-educator relationship (p. 131)

For the model of the part-time supervisor to work successfully, non-OT personnel must be knowledgeable of OT services and must collaborate closely with the clinical supervisor. Students have the opportunity to work closely with other disciplines and develop team-building skills. In addition, provision of OT services has the potential to be expanded through involvement of a full-time student in the clinical program.

In the **Community Based Fieldwork Model**, student affiliations are arranged in community agencies that typically do not employ an occupational therapist. Often, a faculty member of the academic program provides supervision. This model must be well planned and organized before implementation. The faculty member and a team of students go out to a community setting and provide services to persons who do not have access to occupational therapy. This is often initiated as a Level I fieldwork experience but can develop into a Level II fieldwork experience over time. Students have the opportunity to work closely with faculty supervisors, and faculty value the opportunity to model professional skills and behaviors to students. Occupational therapy services are expanded to new areas. Recipient communities and agencies report continued interest and support for these programs (Rydeen, Kautzmann, Cowan & Benzing, 1995).

The **Remote OT Supervision Model** is similar to the community-based model. Students are placed in a setting that does not have occupational therapy services. A contracted occupational therapist provides supervision on a remote basis. The fieldwork program must be developed which clearly guides weekly learning objectives. Supervision is primarily provided "off-site" through phone calls. However, the clinical supervisor must provide a minimum of 8 hours of direct supervision and must meet with the student weekly to discuss progress. Frequently, more than one student will be placed in the affiliation setting. Students need to be carefully screened for appropriateness for this type of model and need to be fully prepared in advance of starting the affiliation. Herge & Milbourne (1999) present a self-directed learning model for Level I fieldwork. In this model a non-OT professional provided on-site supervision and faculty members were the fieldwork educators. Students were required to develop a learning contract which includes learning objectives, resources, and strategies to meet the objectives, evidence of accomplishment, a time line, and a description of the students' expectations of the off-site fieldwork educator and the on-site supervisor. The model was designed to facilitate the student's critical thinking skills, ability to define goals and to manage time effectively (Herge & Milbourne, 1999). The authors found that students moved from passive participation to initiation and became leaders within group meetings.

### Establishing a Clinical Education Program

If you are considering starting a student fieldwork program, there are some steps you should take in preparation (adapted from the Guidelines for an Occupational Therapy Level II Fieldwork Experience –AOTA. Available on-line.

- Conduct an analysis of the occupational therapy program(s) at your facility, including types of OT services provided, client population and caseload, and available learning opportunities.
- Review the potential costs and benefits of providing a fieldwork education program
- Assess your facility's philosophy and receptiveness toward a student program. Does your administration support the development of a fieldwork program?
- Contact AOTA and request a copy of the Commission on Education: Guidelines for an Occupational Therapy Level II Fieldwork Experience. This resource provides detailed information pertaining to the provision of fieldwork education.

Once these preliminary steps have been taken, contact an occupational therapy education program(s). Let them know of your interest in providing fieldwork experiences for their students.

### Developing a Student Program

The development of a student fieldwork program is the most critical component of establishing a successful fieldwork experience at your facility. The following steps are suggested for developing a student program:

- Develop performance objectives for your students. These objectives serve several purposes. They serve as a guide in planning learning experiences for the student and provide information to the student regarding performance expectations. You need to consider the objectives identified on the AOTA Fieldwork Evaluation for the OT since you will be using this form to evaluate your students.
- Ask yourself, "How can I achieve these objectives?" What educational experiences can be offered that will lead to the student learning expected skills? Identify goals and expected competencies for the student on a weekly basis.
- Think about your evaluation of the student. If your performance objectives are clearly delineated, the job of evaluating the student is greatly simplified. If you have specific objectives against which to measure the student's achievement, you can effectively counsel the student during supervisory meetings.
- Develop a student manual that outlines the weekly performance objectives. Also include general information to orient the student to policies and procedures of your facility. It is helpful to provide information pertaining to expectations of student behavior, specific student responsibilities, and any student assignments. Provide samples of documentation, weekly scheduling, the supervisory schedule, and patient evaluation tools/tests used at your facility.
- Develop essential functions of the job for a student intern. Describe the job with terms stating tasks to be performed versus methods to perform the tasks. Consider issues such as staff and client safety, therapeutic interaction and documentation needs when establishing essentials of the job (Wells & Hanebrink, 1998). Scott, Wells, and Hanebrink (1997) provide

examples of how essentials may be written and resources to address issues of providing equal opportunity to all students. Developing essential functions of the job will help the fieldwork site to determine accommodations needed for potential students. An excellent resource to utilize for development of a student program is The Reference Guide to Fieldwork Education and Program Development (Philadelphia Region Fieldwork Consortium, 1997).

## Appendix A

Student Manual: The American Occupational Therapy Association recommends the following content for a student manual (Costa, 2015):

1. Orientation outline
2. Assignments
3. Safety procedures and codes
4. Behavioral objectives
5. Week-by-week schedule of responsibilities
6. Patient confidentiality information (patient rights)
7. Guidelines for documentation
  - Samples of forms
  - Medical terminology
  - Billing
  - Discharge planning
8. Occupational Therapy Practice Framework: Domain and Process, 3<sup>rd</sup> Edition

There are also recommendations for additional information that can be added over time, and/or as your program expands (to include but not limited to):

1. Organizational chart of the fieldwork setting
2. History of the fieldwork setting
3. Department information
  - Policies and procedures
  - Essential job functions
  - Dress Code
4. Schedule of meetings
5. Specialty programs
6. Documentation guidelines

## Appendix B

### *Questions to promote reflection* (Canning, 1991)

- Can you talk more about that?
- Why do you think that happens?
- What evidence do you have about that?
- What does this remind you of?
- What if it happened this way?
- Do you see a connection between this and \_\_\_\_\_?
- How else could you approach that?
- What do you want to happen?
- How could you do that?

### *Affirmations that support reflection* (Canning, 1991)

- You can experiment and explore. I will help you.
- You can learn from what does not work for you.
- You can find a way that works for you when you are ready.
- You can change if you want to.
- You can grow at your own pace.
- You can know when you need and ask for help.
- You can feel your feelings.
- Your needs and reflections are important.
- I like talking to you like this.

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