



DEPARTMENT OF OCCUPATIONAL THERAPY

# Level I and Level II Fieldwork Manual

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## **Fieldwork Policies and Procedures**

Both Level I and Level II fieldwork are required by the Accreditation Council for Occupational Therapy (ACOTE) Standards and Interpretive Guide (2023). For a complete review of the fieldwork ACOTE guidelines, students are referred to section C.1.0 through section C.1.16, available at: <https://www.aota.org/~media/Corporate/Files/EducationCareers/Accredit/StandardsReview/2023-ACOTE-Standards-Interpretive-Guide.pdf>

Students participate in fieldwork experiences that are designed to provide opportunities to integrate classroom theory and technique into actual treatment environments. All fieldwork assignments are arranged through the academic fieldwork coordinator (AFWC). Students are responsible for all travel expenses to and from Level I and Level II placements, as well as expenses for any special field trips or assignments in conjunction with the placements.

Because occupational therapy fieldwork placement settings are a premium resource of Xavier University, this resource must be used responsibly. Many contractual educational agreements contain a clause that requires Xavier University to certify that only fully prepared and qualified students can be placed for fieldwork at the facility.

Following the successful completion of Level II fieldwork, professional-level graduates must apply for certification and licensure before practicing in any state as an occupational therapist. A felony conviction may make a person ineligible to sit for the national certification examination and/or state licensure. Students with such a history should contact the National Board for Certification in Occupational Therapy, Inc. (NBCOT) at [www.nbcot.org](http://www.nbcot.org) and relevant licensing bodies to determine their personal situation.

### **Fieldwork Placements**

Any fieldwork facility used to fulfill Level I and Level II requirements must have a contract in place with Xavier University Occupational Therapy Department. To ensure an adequate number of fieldwork sites, fieldwork will be located throughout Ohio and the United States. Students, who are accepted into the Occupational Therapy Program, acknowledge that placement may occur where travel up to 60 minutes one way during Level I or Level II fieldwork is required. Students should be aware that relocation for three-six months for Level II fieldwork may be necessary. The student may provide the AFWC with names of facilities that the student is interested in but may not contact or arrange any portion of the fieldwork experience. The student cannot complete fieldwork at a site in which he/she has previously volunteered or worked or have a friend, family friend or relative working at the time of the student's fieldwork placement. Failure to disclose this information or relationship will result in automatic dismissal and/or failure from the site.

### **Occupational Safety and Health Administration Standards for Universal Precautions, Blood-Borne Pathogens and Specific Communicable Diseases**

In keeping with requirements established by fieldwork sites for protection against serious communicable diseases to which healthcare personnel and clients are frequently exposed, the Department of Occupational Therapy adopts the following policy. Students are required to place the following items into VPS before the beginning date of Level I fieldwork experience of their third semester in the OTD Program. If the documentation is not submitted or is incomplete, the student may not report to the fieldwork site as scheduled. This may delay the completion of the course requirements within the time allotted for that semester.

**The following is to be uploaded to VPS prior to participating in any Level I or Level II fieldwork experiences:** Students are to make a personal scanned copy of all items prior to uploading to VPS, so that an electronic copy is retained for the student's personal file. Progression to fieldwork is contingent upon the turning in of all required paperwork to VPS. Note: Any missing or absent documentation, initially or upon annual update, for whatever reason may restrict or prohibit placements to fieldwork sites for Level I and/or Level II.

***Initial (one time only) documentation required***

- a. Documentation of dates of either initial vaccination or booster shot for Measles, Mumps, and Rubella, or dates of actual illnesses with these diseases.
- b. Physician's documentation of proof for Hepatitis B vaccination. All students must have completed the series of three shots for the Hepatitis B vaccination and provided documentation of the dates.
- c. Physician's documentation of proof of the TDap vaccination.
- d. Physician's documentation of proof of the varicella (chicken pox) vaccination.
- e. Documentation of full COVID-19 vaccination and booster.

***Initial documentation PLUS documentation of annual updates***

- a. Physician's documentation of proof of Tuberculosis Test (TB) (two-step test or blood draw). All students must have completed the two-step TB test or blood draw and provided documentation of the dates and results of this test to VPS **before** participating in the first Level I fieldwork experiences. Any student with a positive TB test result must provide documentation from a physician that a chest x-ray has been performed to verify the student is not considered at risk for transmitting tuberculosis to any clients while on fieldwork. Documentation showing re-testing every 12 months must be submitted to VPS.
- b. Documentation from a physician of **annual** history and physical exam indicating the student is free from any communicable disease.
- c. Seasonal flu vaccine

***As required by the fieldwork site***

- a. The fieldwork site may require a drug screen before or during the fieldwork placement. This is required by the student and may be an additional expense that the student will incur.

Note: Any missing or absent immunization documentation, initially or upon annual update, for whatever reason (e.g. allergies, religious) may restrict or prohibit placements to fieldwork sites for Level I and/or Level II.

***Passport***

You will be required to obtain and have a passport before OCTD 714. The passport must not expire within 6 months of travel. At this time, OCTD 714 is a Level I fieldwork placement in which all students will travel internationally.

***Universal Precautions/Blood-Borne Pathogens***

During the fall semesters in the Occupational Therapy Program, students will receive classroom instruction in universal precautions/blood-borne pathogens; this is repeated every fall semester. Annual review of this material assures compliance with the fieldwork contractual agreements that this information is being provided during the same calendar year of their Level I & II fieldwork experiences.

***Cardiopulmonary Resuscitation (CPR) Certification***

Infant, child, and adult CPR certification must remain current throughout the Level I and Level II fieldwork experience dates. Students will provide documentation of the CPR certificate to VPS. Students may

also be provided an opportunity to receive CPR certification on campus. Copies of the above documentation will be maintained in VPS and may be forwarded to Level I and/or Level II fieldwork sites prior to scheduled arrival date. Each student bears the personal responsibility of adhering to the renewal updates for CPR certification.

### ***Criminal Background Check***

Because nearly all fieldwork sites require criminal background checks on all persons including students who render services at their facility, it is the policy of the Department of Occupational Therapy that all students will have a criminal background check completed before participating in Level I or Level II fieldwork experiences. A criminal background check is also required before community experiences and lab experiences for OTD courses. Failure to maintain current updates on the same will result in a grade of zero for related assignments with no make-up offered or available. The cost of the background check and fingerprinting is the responsibility of the student. Fingerprinting is a required part of the annual process. If a student is concerned about potential information disclosed from a background check, he/she should discuss this issue with his/her faculty advisor and/or the AFWC. A criminal background may impact eligibility for certain fieldwork sites, eligibility to take the NBCOT certification exam and/or eligibility for state credentialing. The student is responsible for requesting the initial background check and the sending of annual updates to the Department; plus, uploading a copy to the electronic repository. If the documentation is not submitted and uploaded, or is incomplete, the student may not report to the fieldwork site as scheduled. This may delay the completion of the course requirements within the time allotted for that semester.

### ***Office of Inspector General (OIG)***

It is the policy of the Department of Occupational Therapy that all students will have an OIG completed before participating in Level I or Level II fieldwork experiences. The Department of Health and Human Services Office of Inspector General provides an exclusion database that consists of individuals convicted of Federal healthcare fraud, patient abuse, licensing board actions, and default of health education assistance loans. Clearance of the OIG database will allow the student to participate in Level I and/or Level II within a federally funded health care program. To determine OIG clearance, all students will access the Office of Inspector General website link provided, and type in last name, first name. This form will then be printed and uploaded to the electronic repository by the student. <https://exclusions.oig.hhs.gov/>

### ***Additional requirements***

Some Level II sites may require a drug screening test and/or a state-specific background check, an assumed student expense.

### **Student Health Insurance**

In order to participate in fieldwork experiences, all students must show proof of personal health or medical insurance coverage. Students may opt out of purchasing student health insurance through Xavier University for coverage while on fieldwork but are required to own personal health insurance. This policy number is to be recorded on the *Student Personal Data Sheet*; one copy of which is maintained in the Department student file with copies also sent to fieldwork site placements.

### **Liability Insurance for Students**

All occupational therapy students will be assessed a liability insurance fee when registering for terms in which they will participate in Level I and Level II fieldwork. This is a mandatory assessment fee and cannot be waived. However, if students wish to purchase an individual liability insurance policy in addition to the University's group coverage, they may do so.

## **Right to Privacy**

In keeping with the Family Education Rights and Privacy Act (FERPA, 1974), the University and Department of Occupational Therapy are not permitted to release student personal data without written permission from the student. A release of information form, *Fieldwork Consent Form*, will be provided to the student to sign before beginning Level I fieldwork. This notice is to advise the student that a fieldwork site may require disclosure of certain personal information. The required information may include a criminal background check, drug screening, medical testing and/or disclosure of any registered accommodations or disabilities.

## **Health Insurance Portability and Accountability Act (HIPAA)**

The Health Insurance Portability and Accountability Act (HIPAA) was enacted by Congress in 1996 to protect confidential medical information. Under HIPAA, all faculty and students are expected to comply with federal and facility-based guidelines regarding access to and use of patient or client health information. Fieldwork sites require students to be trained according to HIPAA standards before their involvement in the fieldwork settings. This training will occur each fall semester and reviewed annually. If a student violates HIPAA guidelines while on fieldwork, the fieldwork site has the right to dismiss the student immediately. The student will receive a failing grade for that fieldwork rotation, and have to repeat the fieldwork course at a different setting when and if one becomes available, provided the failing grade is the first failure and not the second as that will result in a dismissal from the Xavier University Occupational Therapy program. Depending on the severity of the violation, actions taken could include criminal charges by the facility and dismissal from the Occupational Therapy program, with or without having a previous fieldwork failure.

## **Student Success**

The *Office of Academic Support* provides support services to facilitate learning. The Office of Academic Support has two main purposes: tutoring and disability services. The tutoring services include subject-specific tutoring, drop-in sessions, study skills assistance, and Supplemental Instruction (SI). For students with documented disabilities, services include accommodations such as extended time on exams, reduced distraction testing environment, note-taking assistance, and assistive technology. Services are provided in a positive and encouraging environment, which promotes appreciation for diversity and *cura personalis*. Students can contact the Office of Academic Support at 745-3280 to set up an appointment.

### *Students with Disabilities*

Any student who feels he/she may need an accommodation based on the impact of a documented disability should notify the course instructor and contact Cassandra Jones in the Office of Academic Support at 745-3280 or e-mail [jonesc20@xavier.edu](mailto:jonesc20@xavier.edu) to coordinate reasonable accommodations.

### *Wellness Support*

Life at college can get very complicated. Students sometimes feel overwhelmed and lost, experience anxiety or depression, struggle with relationship difficulties, or diminished self-esteem. However, many of these issues can be effectively addressed with help from the Health and Wellness Counseling Services (located in the HUB, first floor), staffed by experienced, professional psychologists, social workers, and counselors, who are attuned to the needs of college students. The services are FREE and completely confidential. Find out more at <http://www.xavier.edu/health-wellness/counseling/index.cfm> or by calling (513) 745-3022.

## Level I Fieldwork

Level I fieldwork is an integral part of the occupational therapy curriculum at Xavier University. Level I fieldwork experiences (OTD 614, 712, 714) are designed to interconnect occupational therapy with the study of development across the life span. Level I fieldwork experiences provide opportunity for observation of occupational therapy practice and intervention process. Students are assigned to clinical fieldwork rotations reflective of birth through geriatric age groups during each semester. Course includes participation in two on-campus seminars, per semester, to discuss ACOTE standards for Level I fieldwork, service delivery models and settings, the impact of setting on practice, inter and intra-professional team relationships, referral to specialists, and relevant ethical issues. Supervisory relationships will be explored, professional behavior further developed, and self-reflection via journaling on Canvas. Initial skill development for evaluation, planning, and implementing treatment will be emphasized through interaction with clients and practitioners while under the close supervision of an occupational therapy practitioner or other professional. Level I fieldwork assignments may vary in length and placement site; however, the majority of these experiences will occur within a one-hour travel radius of Xavier University and may require six hours or more per week for 12 weeks at the fieldwork site. Students may be assigned Level I fieldwork sites based on availability and specific client populations per accreditation standards. Students will not be placed at a facility where they have previous experience or another type of conflict of interest. Adherence to the appropriate dress code for the fieldwork site is expected and required. Students are expected to follow their supervisor's schedule, regardless of the University closing. If there is a snow emergency, the student should use his/her judgment as to whether or not one can safely travel during certain emergency levels. If the student stays home he/she is expected to make the time up at the convenience of the fieldwork educator. If there is an announced level 3 snow emergency declared for the community, a student is not expected to go to fieldwork.

### Definition and Purpose

ACOTE (2023) states:

The *AOTA* Standards describe the goal of Level I fieldwork "to introduce students to the fieldwork experience, and develop a basic comfort level with an understanding of the needs of clients." Level I fieldwork is not intended to develop independent performance, but to "include experiences designed to enrich didactic coursework through directed observation and participation in selected aspects of the occupational therapy process."

Services provided at Level I fieldwork sites may be provided to a variety of populations through a variety of settings. Experiences may include those directly related to occupational therapy, as well as other situations to enhance an understanding of the developmental stages, tasks, and roles of individuals throughout the life span. Daycare centers, schools, neighborhood centers, hospice, homeless shelters, community mental health centers, and therapeutic activity or work centers are among the many possible sites. Level I fieldwork may also include services management and administrative experiences in occupational therapy settings, community agencies, or environmental analysis experiences. Populations may include disabled or well populations, age-specific or diagnosis-specific clients.

Qualified personnel for supervision of Level I fieldwork may include but are not limited to, academic or fieldwork educators, occupational therapy practitioners, psychologists, physician assistants, teachers, social workers, physicians, nurses, physical therapists, speech language pathologists, etc. The supervisors must be knowledgeable about occupational therapy and cognizant of the goals and objectives of the Level I fieldwork experience.

Level I fieldwork learning experiences align with the Occupational Therapy Program's philosophy and is part of the required curriculum of the Occupational Therapy Program. The relationship of Level I fieldwork to the curriculum is described below.

### **Abbreviated Program Philosophy Statement**

We believe:

- Humans are biopsychosocial beings who are transformed by participation in occupation.
- Meaningful occupations shape human beings and provide a bridge to health and wellness.
- Occupational therapists form a dynamic relationship with service participants to realize their occupational potential.
- Best practice in occupational therapy is client-centered, occupation-based, evidence-based, and grounded in sound ethical principles.

Furthermore, our student-centered focus on learning is driven by our belief that students are self-directed, active learners who construct their knowledge in authentic contexts.

The sequence of our curriculum is based upon a developmental model that builds knowledge and skills to form competent, caring & ethical practitioners.

### **Relationship to Curriculum Design**

- Serves as a student-lived experience; integration of all curriculum threads and application of previous and current didactic course content in authentic clinical situations
- Students navigate experience paying special attention to curricular threads (occupation-based, client-centered, ethically-grounded, and evidence-based intervention); occupational therapy process with application of a variety of clinical reasoning skills; and roles of practitioner, educator, researcher, and manager
- Interpersonal communication and supervisory relationship skills are developed via authentic interaction with clients, supervisor, and intra- and interdisciplinary team members
- Confluence and promotion of occupational justice inherent in the learning experience
- Key aspect of the course continues to be self-reflection whereby the student explores the impact of this experience on personal and professional growth and development

### **Objectives of Level I Fieldwork**

Upon completion of Level I fieldwork, the student will:

1. Demonstrate a basic level of knowledge and appreciation of the role of sociocultural, socioeconomic, and diversity factors and lifestyle choices in contemporary society to meet the needs of persons, groups, and populations. (ACOTE Standard B.1.2)
2. Explain the process of theory development in occupational therapy and its desired impact and influence on society. (ACOTE Standard B.2.2)
3. Explain the meaning and dynamics of occupation and activity, including the interaction of areas of occupation, performance skills, performance patterns, activity demands, context(s) and environments, and client factors. (ACOTE Standard B.3.2)

4. Demonstrate sound judgment in regard to safety of self and others and adhere to safety regulations throughout the occupational therapy process as appropriate to the setting and scope of practice (ACOTE Standard B.3.7)
5. Demonstrate a basic level of therapeutic use of self, including one's personality, insights, perceptions, and judgments, as part of the therapeutic process in both individual and group interaction. (ACOTE Standard B.4.1)
6. Utilize basic clinical reasoning to facilitate occupation-based interventions that address client factors (ACOTE Standard B.4.3)
7. Recommend and provide direct interventions and procedures to persons, groups, and populations to enhance safety, health and wellness, and performance in occupations (ACOTE Standard B.4.10)
8. Effectively communicate with patients, families, communities, and members of the interprofessional team in a responsive and responsible manner that supports a team approach to the promotion of health and wellness. (ACOTE Standard B.4.23)
9. Demonstrate basic knowledge of the principles of interprofessional team dynamics to perform effectively in different team roles to plan, deliver, and evaluate patient and population-centered care as well as population health programs and policies that are safe, timely, efficient, effective, and equitable (ACOTE Standard B.4.25)
10. Demonstrate a basic level of knowledge of various reimbursement systems and funding mechanisms (e.g., federal, state, third party, private payer), appeals mechanisms, treatment/diagnosis codes (e.g., CPT®, ICD, DSM® codes), and coding and documentation requirements that affect consumers and the practice of occupational therapy (ACOTE Standard B.4.29)
11. Demonstrate a basic level of understanding of the ethical and practical considerations that affect the health and wellness needs of those who are experiencing or are at risk for social injustice, occupational deprivation, and disparity in the receipt of services (ACOTE Standard B.7.1)
12. Demonstrate ability to address psychosocial factors that influence engagement in occupation. (ACOTE Standard C.1.3) *“Psychosocial as pertaining to the influence of social factors on an individual's mind or behaviour, and to the interrelation of behavioral and social factors” (Martikainen et al., 2002, p. 1091).*

The site may also list additional site-specific objectives and:

13. Address practice in behavioral health, or psychological and social factors influencing engagement in occupation (ACOTE Standard C.1.6)

### **Orientation to Level I Fieldwork**

The Level I course syllabus will outline and define specific assignments and experiences. Typically, each Level I fieldwork course offers weekly fieldwork experiences. The format and length of each fieldwork experience vary and are coordinated by the AFWC and the fieldwork educator. Generally, a seminar is followed by twelve weeks of fieldwork experiences after which it is followed by a second seminar upon completion of the Level I fieldwork experience.

## **Student Performance Policy and Procedure**

Student performance will be evaluated as an ongoing process, with formal assessment by the fieldwork educator and a learning plan established by the student at the beginning and the end of each fieldwork placement.

During any given fieldwork rotation, the fieldwork educator may routinely hold informal meetings with the student to give and receive feedback on student performance. The AFWC will be notified by the fieldwork educator of any problems. The AFWC advises students regarding academic matters as well as other issues related to the fieldwork experience. The fieldwork educator advises students during supervision at the fieldwork facility. Before the final evaluation, the fieldwork educator completes the evaluation form provided by the AFWC and the student completes the status of the learning plan. The fieldwork educator meets with the student to discuss the final evaluation results and results of the student's learning plan. The evaluation and learning plan are signed by the fieldwork educator and the student and the evaluation is then sent to the AFWC for review. The evaluations are reviewed to identify students' strengths and areas to be strengthened to better prepare for future fieldwork experiences. The evaluations are filed in the Department of Occupational Therapy individual student file.

Faculty of concurrent courses may require additional assignments to be completed during Level I fieldwork placement to successfully meet the requirements of the academic course. These assignments will be explained in the above-named course syllabus (along with weight toward academic course grade). Academic faculty requiring these assignments will collaborate with students and fieldwork educators as needed toward the completion of the assignments.

## **Grades and Evaluation for Level I Fieldwork**

Grades for Level I fieldwork are pass/fail and will be recorded on the academic record by "S" (satisfactory) or "U" (unsatisfactory). The student must receive a passing score (minimum 33 points) allowed by the Level I Fieldwork Evaluation (FWE) form(s), and all other criteria as specified in the syllabi. The final grade will be assigned by the AFWC based on criteria as outlined in the syllabi for OCTD 614, OCTD 712, OCTD 714. In the event one or more of the syllabus criteria is not met the student will receive a "U" grade for the course.

Students may have additional assignments from the fieldwork site, in which case, the fieldwork educator will evaluate the assignment, which may influence the Level I fieldwork grade. Professional behavior and preparedness are also considered in the determination of the final course grade.

## **Credit for Level I Fieldwork**

Per ACOTE accreditation standards (C.1.11), it is the policy of the Department of Occupational Therapy that "...Level I fieldwork shall not be substituted for any part of Level II fieldwork" (ACOTE, 2023). This means that the student is not able to receive credit towards Level II fieldwork placement from the Level I fieldwork experience.

## **Attendance and Absences from Level I Fieldwork**

Students are expected to follow their supervisor's schedule, regardless of the University closing. If absences occur during scheduled fieldwork time, the student must call and email the site and fieldwork educator to inform the fieldwork educator of the absence before the expected time of arrival. Students must make arrangements to make up any missed fieldwork time at the convenience of the fieldwork educator/facility. If for any reason a student is unable to make up missed hours, he/she may be required to repeat the entire fieldwork experience at a later date, and scheduled by the AFWC according to site availability. If there is a snow emergency, the student should use his/her judgment as to whether or not one can safely travel during certain

emergency levels. If the student stays home he/she is expected to make the time up at the convenience of the fieldwork educator. If there is an announced level 3 snow emergency declared for the community, a student is not expected to go to fieldwork.

### **Failure from Level I**

The fieldwork educator will notify the AFWC in a timely manner of a potential problem that may lead to a student failing the fieldwork site. Likewise, the student will notify AFWC promptly if he/she is failing a Level I fieldwork placement. In either situation, a conference will be held between the student, AFWC, and fieldwork educator to discuss the situation before a decision is made to fail the student. Reasons for a student failing may include, but are not limited to:

- Student violation of facility policies (i.e. no call/no show as this may indicate client abandonment in many settings).
- Student performance (as assessed by fieldwork performance evaluation) is failing at midterm, a conference is held with the AFWC present, and the decision is made between the student, AFWC, and fieldwork educator that it is in the best interest of the student and/or fieldwork site to discontinue the current fieldwork assignment.
- Excessive absences that cannot be made up in a timely fashion.

### **Withdrawal from Level I Fieldwork**

The decision to withdraw from fieldwork placement may be initiated by the student or by the fieldwork educator. The fieldwork educator will notify the AFWC promptly of any potential problems that could lead to a student being withdrawn from the fieldwork site. A conference with the student, AFWC, and fieldwork educator will be held to discuss the situation before a decision is made to withdraw the student. A withdrawal may be noted as a “W” on a student’s transcript; while not impacting overall GPA it may impact program progression. Financial obligations of Level I fieldwork will follow Xavier’s refund policy. Potential failure at midterm is not necessarily legitimate grounds for withdrawal. The final decision for a withdrawal is at the discretion of the AFWC and is typically allowed only under circumstances of site-based inadequate supervision of the student and/or site-based ethical misconduct.

### **Reassignment of Level I Fieldwork**

Level I fieldwork placement will be reassigned only by the AFWC. AFWC will re-assign placement at an appropriate facility for withdrawal from Level I fieldwork placements. Reassignment will be at the availability of an appropriate fieldwork placement (and at the convenience of the fieldwork site and reasonable ability of AFWC). For an early withdrawal, reassignment of the same term will be attempted. For late withdrawal or unsatisfactory performance, reassignment may be made before or during the semester term or the next semester during which that course is offered. The AFWC and the student will collaborate to identify student strengths and areas of concern. The student is responsible for implementing strategies to facilitate success at the re-assigned placement.

## **Level II Fieldwork**

Level II fieldwork placements are designed to provide the student with opportunities for professional skill development and refinement in preparation for entry into the profession as an occupational therapist. Students are “. . . require(d) a minimum of the equivalent of 24 weeks full-time Level II fieldwork. This may be completed on a part-time basis, as defined by the fieldwork placement in accordance with the fieldwork placement’s usual and customary personnel policies, as long as it is at least 50% of an FTE at that site.” (Standard C.1.12, ACOTE, 2023). It is recommended that students are exposed to a variety of clients across the

lifespan and to a variety of settings. (ACOTE, 2023). It is possible a student can complete Level II fieldwork in a minimum of one setting if it is reflective of more than one practice area, or, in a maximum of four different settings (Standard C.1.12).

### **Definition and Purpose**

ACOTE (2023) states:

The goal of Level II fieldwork is to develop competent, entry-level, generalist occupational therapists. Level II fieldwork must be integral to the program's curriculum design and must include an in-depth experience in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation and research, administration, and management of occupational therapy services. It is recommended that the student be exposed to a variety of clients across the lifespan and to a variety of settings.

The Occupational Therapy program is guided by a philosophy statement, a copy of which can be found in the Student Handbook. Here, an abbreviated version is provided. The Occupational Therapy program's philosophy guides (or is aligned) not only all coursework but fieldwork as well.

### **Abbreviated Program Philosophy Statement**

We believe:

- Humans are biopsychosocial beings who are transformed by participation in occupation.
- Meaningful occupations shape human beings and provide a bridge to health and wellness.
- Occupational therapists form a dynamic relationship with service participants to realize their occupational potential.
- Best practice in occupational therapy is client-centered, occupation-based, evidence-based, and grounded in sound ethical principles.

Furthermore, our student-centered focus on learning is driven by our belief that students are self-directed, active learners who construct their knowledge in authentic contexts. The sequence of our curriculum is based upon a developmental model that builds knowledge and skills to form competent, caring & ethical practitioners.

### **Relationship to Curriculum Design**

Level II fieldwork serves as a culmination of the educational process and is situated after three academic on-campus semesters. Level II fieldwork focuses primarily on the role of the practitioner and provides students the opportunity to implement knowledge of theory into actual practice. It serves as the arena to further develop clinical reasoning and professional behavior skills and aligns with the didactic portion of the curriculum design for the educational preparation of students to work in a variety of occupational therapy practice areas.

### **Objectives of Level II Fieldwork**

Upon completion of Level I fieldwork, the student will:

1. Adhere to facility procedures, state laws, and ethical standards in accepting, responding to, and generating referrals as well as initiating OT services via educating others regarding the scope of OT practice.
2. Utilize client-centered, evidenced-based evaluation procedures and assessment tools to determine service recipients' occupational performance strengths and needs to screen, plan intervention, determine progression or regression, and prepare for transition and/or discontinuation.

3. Develop and implement a client-centered, occupation-based intervention plan according to current models of occupational therapy theory and practice, and supported by evidence in the literature.
4. Facilitate the process of transition services and discontinuation based on client's satisfaction, achievement of maximum benefit, and/or contextual influences.
5. Produce effective oral and written communication relevant to the roles and duties of an occupational therapist, including the ability to interact with consumers and staff professionally, as well as using context-based terminology.
6. Demonstrate appropriate professional and ethical behavior as evidenced by:
  - A. Establishing and maintaining therapeutic and supervisory relationships;
  - B. Incorporating sensitivity and respect for safety and confidentiality;
  - C. Understanding the roles and working collaboratively with other health professionals, including the OTA and other team members;
  - D. Assessing, improving, and maintaining self-competency and professional skills;
  - E. Accepting and applying feedback to promote self-directed learning and growth;
  - F. Developing a broad sense of professional responsibility to the facility and the community at large, and showing concern for social and health care issues based on efficient and effective intervention;
  - G. Developing a positive professional self-image.
7. Utilize critical thinking skills throughout daily practice to organize solutions that promote efficient, effective personal and professional performance.
8. Demonstrate ability to address psychosocial factors that influence engagement in occupation. (ACOTE, 2023, C.1.6)
9. Fieldwork sites will place a checkmark on this objective if the site addresses *practice* in behavioral health or psychological and social factors influencing engagement in occupation (ACOTE, 2023, Standard C.1.6. Fieldwork in Behavioral Health or Psychological and Social Factors)

### **Academic Eligibility for Level II Fieldwork Placement**

OTD students must have a status of Good Academic Standing to be eligible to begin Level II fieldwork. In the event a student is on Academic Notice, the student will be unable to begin Level II fieldwork and, therefore, ineligible to complete the Occupational Therapy Program requirements. A student placed on Academic Notice will be required to resume and maintain Good Academic Standing status before beginning Level II fieldwork.

All students must have a certified background check and an FBI check on record. If the results of a criminal background check include a felony charge and/or conviction, a letter of approval to sit for the certification exam from NBCOT must be on file before placement in either Level II fieldwork site. In the event of a felony charge/conviction on a criminal background check, the student assumes full responsibility for obtaining a letter of approval from NBCOT to sit for the exam. The Department Chairperson, the student's academic advisor, and/or the AFWC may be able to assist in preparing a letter of appeal to NBCOT, if appropriate.

### **State Authorization**

The National Council for State Authorization Reciprocity Agreements (NC-SARA) may restrict the states where students can complete fieldwork. This restriction makes it more difficult for Ohio facilities to accept students from states who do not have formal educational agreements with the State of Ohio; and, vice

versa, it makes it more difficult for students educated in the State of Ohio to complete their fieldwork in states who do not have a formal educational agreement with the State of Ohio.

According to NC-SARA, <http://nc-sara.org/>, “any degree-granting institution based in the United States, holding proper authorization from Congress...and holding accreditation from an accrediting association recognized by the U.S. Secretary of Education is eligible to apply to its home state to participate in SARA if that state is a SARA member”. The state of Ohio is considered an approved NC-SARA state and Xavier University is considered an approved NC-SARA institution in Ohio. However, this does not result in the student having access to Level II fieldwork in all other states. Each state, NC-SARA approved or not, has its guidelines regulating a student’s physical presence for education in that state. Ultimately, for Xavier occupational therapy students, this results in a restriction of the ability to complete their Level II fieldwork in a few states; however, the majority of the states in the United States remain open for completion by Xavier students of their Level II fieldwork placements.

### **Site Selection for Level II Fieldwork Assignments**

Assignments for Level II fieldwork placements will be made by the AFWC. The AFWC will consider student preference when assignment is made to fieldwork sites. Attempts to meet individual students' special circumstances will be made but cannot be guaranteed. Examples of special circumstances may include students who have dependent children or those who have responsibility for a dependent or elderly parent and are unable to relocate.

Xavier University will make every effort to accommodate qualified students with disabilities and not enter into a contractual agreement with any fieldwork agency that discriminates based on disability or is unable to make reasonable accommodations. Despite those commitments, the University cannot guarantee the availability of fieldwork to otherwise qualified applicants who may have a disability, as it is the fieldwork site that makes such a determination.

Students are placed in settings across the United States with the majority of students within the tri-state area of Ohio, Indiana, and Kentucky. The Department of Occupational Therapy cannot guarantee a Level II fieldwork placement in the local Cincinnati area or any specific area within the United States. At any given time, there may not be enough sites available locally, regionally, or nationally to accommodate all Xavier University students’ specific requests. Also, the Department of Occupational Therapy cannot guarantee that the student will be placed at a Level II fieldwork site immediately upon completion of the on-campus academic portion of the curriculum. Every attempt will be made to place the student into a Level II fieldwork site in a timely fashion, but due to the limited number of fieldwork sites available, the student might have to wait as much as three months to begin a fieldwork rotation. Students must be prepared to be flexible in planning for this phase of the Occupational Therapy program.

When students request specific cities, attempts by the AFWC will be made to establish a contractual agreement between Xavier University and a facility in the area requested. All requests for placements are made by the AFWC. Students will NOT contact facilities directly. After fieldwork placement assignments have been made, only under extenuating circumstances of a severe nature can a student request a change in a specific city, state, or location. However, the Department of Occupational Therapy is unable to guarantee placement of the student at a newly requested site during the same time as their original request.

Facility sites may cancel a student’s confirmed placement at any time, and for any reason, before or during the rotation. Possible reasons for the facility site canceling include but are not limited to staff turnover, unexpected lack of qualified supervisors, or changes in facility operations. The AFWC will make every effort to reassign the

student to a comparable facility during the same time period. However, circumstances may prevent this and the Department of Occupational Therapy cannot guarantee a comparable replacement during the same time period.

The following steps should be taken by the student in selecting preferred fieldwork sites.

1. Explore the site's online information files via Exxat. Students are invited to access Exxat via an email that is sent from the AFWC and Exxat. Typical information included in the site information file will be the fieldwork objectives, fieldwork data forms (AOTA Data Form), general information about the facility, and the student evaluation of the fieldwork site (SEFWE) if students have been placed in this facility in the past.
2. Students will receive the *Level II Fieldwork Preference Form* at the Level II fieldwork seminar in the Spring semester.
3. Develop a list of 5 cities and states in which the student is interested in completing Level II fieldwork.
4. Develop a list of up to five preferred sites that the student would like to complete Level II fieldwork.
5. Choose which population the student prefers (pediatric, adult, geriatric).
6. Students will be required to complete and turn in the *Level II Fieldwork Preference Form* to the AFWC.

### **Student Placement on Level II Fieldwork Assignments**

Students will typically be notified during the Spring semester of their final year in the Occupational Therapy program as to where they will be assigned for Level II fieldwork.

Successful completion of twelve credit hours of Level II fieldwork is necessary to graduate and meet the requirements to apply to take the NBCOT certification examination. Students are advised that they must complete 6 months of Level II fieldwork within 12 months of completing the academic or didactic portion of the Occupational Therapy Program on campus. Students must have the flexibility to relocate for Level II fieldwork placements.

Students are not currently offered the option of a Level II fieldwork site outside of the United States. Furthermore, since the beginning of the Program, no student has been scheduled to complete Level II fieldwork outside the United States. However, multiple students have been interested in an international experience related to occupational therapy which has served as the impetus for the AFWC to provide an international Level I experience for all students (TIDE).

### **Student Performance on Level II Fieldwork**

Level II student fieldwork performance will be evaluated on an ongoing basis including a formal evaluation, *AOTA Fieldwork Performance Evaluation (FWPE)* (AOTA, 2020), by the fieldwork educator at mid-term and at the end of each fieldwork placement.

A fieldwork educator routinely holds informal supervisory meetings with the student to give and receive feedback concerning student performance. Supervision begins directly and then decreases as appropriate throughout the Level II fieldwork placement, based on the setting, severity of the client's condition, and the ability of the student to support progression towards entry-level competency. If issues arise that require counseling and arbitration beyond routine supervision, the AFWC will be notified. AFWC will collaborate with the student and fieldwork educator to define issues and develop objectives and strategies to resolve the problem. This information will be documented and placed in the Department of Occupational Therapy student file. The AFWC will confer with the fieldwork educator at mid-term and be available via phone, zoom, and/or on-site visits for consultation on an "as needed" basis. The fieldwork educator will evaluate student performance using the FWPE, which will be electronically provided to the site via Formstack. Performance is formally reviewed at mid-term and final meetings with evaluation forms completed by the fieldwork educator before the meetings.

Both participants (student and fieldwork educator) will sign the final evaluation after the meeting. The FWPE is automatically sent to the AFWC once the student and fieldwork educator complete and submit it.

If the student is failing fieldwork at mid-term, the fieldwork educator will notify the AFWC. A meeting will be held with the student, AFWC, and fieldwork educator. A decision will be made collaboratively as to which of the following two options is in the best interest of all parties involved:

- Develop a remedial plan of action to include objectives, strategies, and timeline for meeting objectives with continued fieldwork placement;
- Student withdrawal or failure from and termination of fieldwork placement.

It is the policy of the Program to not assign any student to a Level II fieldwork site where there are no occupational therapy services established. All students will be placed in Level II where occupational therapy services exist. Accordingly, students are not currently, and will not be in the future, placed in a Level II site where occupational therapy services do not exist. The number of Level II fieldwork sites with established occupational therapy programs and available occupational therapists to serve as fieldwork educators has allowed placing all Level II fieldwork students accordingly. Since the development of the Program, all student placements have been at Level II fieldwork sites where occupational therapy services are offered and supervision by an occupational therapist has been provided. Since all students are placed with an occupational therapist for Level II, supervision has consistently been more than 8 hours of direct supervision each week.

### **Grades for Level II Fieldwork**

Grading of Level II fieldwork will be recorded on the academic record by "S" (satisfactory) or "U" (unsatisfactory). Students must achieve the minimum passing score of 3 or higher on items 1, 2, and 3 on the FWPE, as well as the minimum overall total score of the FWPE as outlined by AOTA, Inc. (AOTA, 2020).

The minimal requirements for a satisfactory (passing) grade consist of, but are not limited to: FWPE scored as stated in the policy above, meeting attendance requirements, completing assignments satisfactorily to meet the objectives and requirements (produced by a collaboration between Xavier University and fieldwork site), demonstrating appropriate professional behaviors, and demonstrating necessary skills and competencies. The final grade for fieldwork Level II will be assigned by the academic fieldwork coordinator based on criteria outlined in the syllabi for OTD 720 and 722.

A grade of In Progress ("IP") will be recorded for fieldwork placements that are not completed or final evaluations not returned by the University's deadline for submission of grades. AFWC will submit a *Grade Change* form to the Registrar upon receipt of the final FWPE form. Failure to turn in the final evaluation by the deadline may delay the typical graduation schedule.

### **Attendance and Absences from Level II Fieldwork**

Attendance requirements may vary from site to site. Students are considered full-time at the fieldwork site, which may vary with different settings and fieldwork sites. Students are expected to follow the fieldwork educator's schedule, regardless of the University academic calendar. If absences occur during a scheduled fieldwork rotation, the student must call and email the site to inform the fieldwork educator of the absence before the expected time of arrival. If there is a snow emergency, the student should use his/her judgment as to whether or not he/she can safely travel during certain emergency levels. If the student stays home he/she is expected to make the time up at the convenience of the fieldwork educator. If there is an announced level 3 snow emergency declared for the community, a student is not expected to go to fieldwork. The fieldwork educator will determine how many absences may occur before the student is required to make up missed time.

Regardless of site policy regarding making up missed time, it is strongly recommended that the student make every effort to make up all missed time in order to maximize learning opportunities.

### **Failure from Level II**

If a student receives unsatisfactory ratings in the areas of adherence to ethics, safety regulations, or judgment in the use of safety on the *Fieldwork Performance Evaluation*, the decision to offer the student an opportunity to enroll for a repeat of Level II fieldwork courses may be made by following the policy and procedure of the Occupational Therapy Department.

The fieldwork educator will notify the AFWC promptly of a potential problem that may lead to a student failing the fieldwork site. Likewise, the student will notify AFWC promptly if he/she is failing a Level II fieldwork placement. In either situation, a conference will be held between the student, AFWC, and fieldwork educator to discuss the situation before a decision is made to fail the student. Reasons for a student failing may include, but are not limited to:

- Student violation of facility policies (i.e. no show/no call as this may be considered client abandonment)
- Student performance (as assessed by fieldwork performance evaluation) is failing at midterm, a conference is held with the AFWC present, and the decision is made between the student, AFWC, and fieldwork educator that it is in the best interest of the student and/or fieldwork site to discontinue the current fieldwork assignment
- Excessive absences that cannot be made up in a timely fashion
- Violation of the AOTA Code of Ethics
- Violation of HIPAA
- Unprofessional or unsafe behavior

Failure from Level II fieldwork requires that the student repeat the rotation at another site to meet ACOTE standards regarding the length of time spent in fieldwork. Failure for any reason from coursework and/or Level II fieldwork may result in graduation delay, thereby postponing eligibility to take the NBCOT certification examination. A student must successfully complete "...a minimum of 24 weeks full-time Level II fieldwork." (AOTA, 2023) within 12 months of completing the academic portion of the occupational therapy program curriculum. Exemptions may be made for good cause.

Student failure from *two* Level II fieldwork assignments (for any reason) will result in the student being dismissed from the OTD program.

### **Withdrawal from Level II Fieldwork**

The decision to withdraw from fieldwork placement may be initiated by the student or by the fieldwork educator. The fieldwork educator will notify the AFWC promptly of any potential problems that could lead to a student being withdrawn from the fieldwork site. A conference with the student, AFWC, and fieldwork educator will be held to discuss the situation before a decision is made to withdraw the student. Any withdrawal will be noted as a "W" on a student's transcript; while not impacting overall GPA it may impact program progression. Financial obligations of Level II fieldwork will follow Xavier's refund policy. Potential failure at midterm is not necessarily legitimate grounds for withdrawal. The final decision for a withdrawal is at the discretion of the AFWC and is typically allowed only under circumstances of site-based inadequate supervision of the student and/or site-based ethical misconduct.

Withdrawal from Level II fieldwork requires that the student repeat the rotation at another site to meet ACOTE standards regarding the length of time spent in fieldwork. However, student withdrawal from *two* Level II fieldwork assignments (for any reason) will result in the student being dismissed from the OTD program.

Withdrawal for any reason from coursework and/or Level II fieldwork may result in graduation delay, thereby postponing eligibility to take the NBCOT certification examination. A student must complete "...a minimum of 24 weeks full-time Level II fieldwork." (AOTA, 2023) within 12 months of completing the academic portion of the occupational therapy program curriculum.

### **Reassignment of Level II Fieldwork Placement**

A student who has withdrawn/failed from Level II fieldwork will be reassigned by the AFWC only once. Reassignment to another facility will be made at the discretion of the AFWC and depends on site availability. A student who has withdrawn/failed for personal problems or unprofessional behavior may be asked to submit and complete a remediation plan of action to increase the chance of successful completion of the next rotation. AFWC may delay reassignment until the student demonstrates evidence of remediation of difficulties. If the withdrawal/failure occurs during the first fieldwork, the second fieldwork placement will proceed as scheduled. Every attempt will be made to reassign the fieldwork placement during the term following satisfactory completion of the second fieldwork. If student withdrawal/failure occurs during the second fieldwork, the AFWC will attempt to reassign a placement for the following rotation dates. However, this is dependent upon the availability of appropriate sites. A maximum of one withdrawal/failure from either Level II fieldwork placement will be reassigned by the AFWC. Upon a second withdrawal/failure from a Level II fieldwork placement, the student is automatically dismissed from the Xavier University Occupational Therapy program.

### **Limiting Additional Personal Activities**

Any student scheduled for Level II fieldwork will not be allowed to register for additional academic courses at Xavier University or any other educational institution during the six months that he/she is scheduled for fieldwork. If a student registers for courses in addition to Level II fieldwork, he/she will be notified in writing by the Department Chairperson and asked to withdraw from the course(s) immediately. Failure to withdraw after receiving this written notification may fail the Level II placement.

The responsibilities and duties of Level II fieldwork take precedence over additional activities (such as jobs or family responsibilities) in which the student may engage. It is understood that Level II fieldwork students should be prepared to accept flexible working hours and Level II fieldwork course-related assignments as deemed necessary by the fieldwork educator.

### **Certification and Licensure**

The National Board of Certification in Occupational Therapy (NBCOT) is the national certification body for occupational therapy professions in the United States. Its mission is to serve the public interest. NBCOT provides a world-class standard for the certification of occupational therapy practitioners. NBCOT develops, administers, and continually reviews its certification process based on current and valid standards that provide reliable indicators of competence in the practice of occupational therapy. See more at [nbcot.org](http://nbcot.org)

Following successful completion of the program, including all fieldwork requirements, the graduate is eligible to sit for the NBCOT examination.

Once a candidate has successfully applied for the national exam, he/she is eligible to apply for state licensure to practice occupational therapy. A list of state regulatory boards is available at [www.aota.org](http://www.aota.org). Each state must be contacted individually to obtain the regulation or licensure application process and requirements. A felony conviction may make a person ineligible for national certification and/or licensure for practice. Students with such a history should contact NBCOT before enrollment in the Occupational Therapy program.

## Essential Functions for Coursework and Fieldwork

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The following list reflects the performance abilities and characteristics that are necessary to successfully complete with or without reasonable accommodations the requirements of Xavier's Doctorate of Occupational Therapy Program, including fieldwork:

- Communicate effectively and proficiently in English both verbally and in writing utilizing accurate and appropriate terminology with classmates, faculty, clients, caregivers, families, members of the healthcare team and with individuals of all ages, races, genders, socioeconomic and cultural backgrounds. Communication must be conveyed and perceived in a professional, assertive, timely, and confident manner.
- Access information from books, reference manuals, screens on computers, paper and electronic medical records to accurately perform job functions and duties.
- Observe clients' response before, during and after intervention in close and distant proximity to maintain client safety and assess their performance.
- Perform or assist with and/or transfer, lift, move, position, and manipulate the client.
- Transport heavy, wheeled equipment and clients in wheelchairs and/or stretchers.
- Utilize creativity and therapeutic use of self to provide evidence-based evaluation and interventions.
- Demonstrate motor skills for safe and effective client-centered evaluation and intervention.
- Provide evaluation and intervention for clients with varied physical, social, emotional, cognitive, psychological disabilities including clients who may have experienced trauma, may be terminally ill, have transmittable diseases, psychiatric disorders, developmental disorders, and other conditions.
- Utilize technology for course work and client-centered evaluation and interventions.
- Perform continuous physical work to fulfill clinical education course requirements over an 8-12 hour period.
- Interact appropriately with others and demonstrate a high level of professional and procedural judgment decisions under typical, stressful, and/or emergency conditions, emergent demands, and a distracting environment.
- Recognize potentially hazardous materials, equipment, and situations and proceed safely in order to minimize risk of injury to patients, self, and nearby individuals by referencing, utilizing and adhering to OSHA requirements such as MSDS (Material Safety Data Sheets) and universal precautions.
- Respond professionally (mature, confident, calm, composed, respectful) and perform required duties, roles, and responsibilities in environments that involve exposure to the smells, sights and sounds within healthcare facilities (e.g., surgery, wound management, trauma, self-mutilation/cutting, infection control), and in situations requiring contact with bodily fluids (i.e.: blood, urine, feces, menstrual flow, semen, sputum, vomit) and a variety of adverse behaviors (e.g., cursing, yelling, sexual innuendos, violence real or perceived) as well as situations of intimacy/sex and end of life including death.
- Demonstrate critical thinking skills necessary to assess and re-assess the clients' occupational performance including adaptations and analysis of tasks based on best practices.
- Prioritize, organize, and utilize time-management skills to multi-task and fulfill clinical and course requirements.
- Present professional behavior and appearance and implement measures to maintain own physical and mental health, and emotional stability, while being flexible and able to work under stressful conditions and irregular hours.
- Complete productivity to facility standards and complete documentation in the time frame established by the facility.
- Adhere to safety procedures, react professionally in emergency situations and take appropriate actions as indicated.
- Show care and compassion for individuals, groups, and/or communities.
- Adhere to the Standards of the Occupational Therapy Code of Ethics and Ethics Standards (2020) (American Occupational Therapy Association, 2020).

Note: Specific fieldwork sites may have additional and unique essential functions beyond those listed above. Accommodations given during fieldwork rotations are determined by the fieldwork site.

Reference: American Occupational Therapy Association. (2025). AOTA 2025 occupational therapy code of ethics. *American Journal of Occupational Therapy*, 74.

Acknowledgments: Adapted from Department of Occupational Therapy, Baker College Center for Graduate Studies, Flint, MI; Trident Tech, Charleston, SC.  
10.13.2021

# Occupational Therapy Fieldwork Education: Value and Purpose

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The purpose of fieldwork education is to propel each generation of occupational therapy practitioners from the role of student to that of practitioner. Through the fieldwork experience, future practitioners achieve competence in applying the occupational therapy process and using evidence-based interventions to meet the occupational needs of a diverse client population.

Fieldwork experiences may occur in a variety of practice settings, including medical, educational, and community-based programs. Moreover, fieldwork placements also present the opportunity to introduce occupational therapy services to new and emerging practice environments. Fieldwork experiences constitute an integral part of the occupational therapy and occupational therapy assistant education curricula. Through fieldwork education, students learn to apply theoretical and scientific principles learned from their academic programs, to address actual client needs within the context of authentic practice environments. During fieldwork experiences, each student develops competency to ascertain client occupational performance needs to identify supports or barriers affecting health and participation, and to document interventions provided. Fieldwork education also provides opportunities for the student to develop advocacy, leadership, and managerial skills in a variety of practice settings, while incorporating principles of evidence-based practice and client-centered care. Finally, the student develops a professional identity as an occupational therapy practitioner, aligning his or her professional judgments and decisions with the American Occupational Therapy Association (AOTA) *Standards of Practice* (AOTA, 2021) and the *Occupational Therapy Code of Ethics* (AOTA, 2025).

As students proceed through their fieldwork experiences, performance expectations become progressively more challenging. *Level I fieldwork* experiences occur concurrently with academic coursework, and the goal “is to introduce students to the fieldwork experience, to apply knowledge to practice, and to develop understanding of the needs of clients” (Accreditation Council for Occupational Therapy Education® [ACOTE®], 2023). Furthermore, Level I is “designed to enrich didactic coursework through directed observation and participation in selected aspects of the occupational therapy process” (ACOTE, 2023). Level II fieldwork experiences occur at or near the conclusion of the didactic phase of occupational therapy curricula and are designed to “develop competent, entry-level, generalist practitioners” (ACOTE, 2023).

*Level II fieldwork* features “in-depth experience(s) in delivering occupational therapy services to clients, focusing on the application of purposeful and meaningful occupation” (ACOTE, 2023). For the occupational therapist student, there is an additional exposure to “research, administration, and management of occupational therapy services” (ACOTE, 2023). Students should be “exposed to a variety of clients across the lifespan and to a variety of settings” (ACOTE, 2023).

The value of fieldwork transcends the obvious benefits directed toward the student. Supervising students enhances fieldwork educators’ own professional development by providing exposure to current practice trends, evidence-based practice, and research. Moreover, the experience of fieldwork supervision is recognized by the National Board for Certification in Occupational Therapy and many state regulatory boards as a legitimate venue for achieving continuing competency requirements for occupational therapy practitioners.

Another benefit to the fieldwork site of sponsoring a fieldwork education program is the recruitment of qualified occupational therapy personnel. Through the responsibilities expected during Level II fieldwork,

occupational therapy staff and administration are given opportunity for an in-depth view of a student's potential as a future employee. In turn, an active fieldwork program allows the student, as a potential employee, to view firsthand the agency's commitment to the professional growth of its occupational therapy personnel and to determine the fit of his or her professional goals with agency goals. The fieldwork program also creates a progressive, state-of-the-art image to the professional community, consumers, and other external audiences through its partnership with the academic programs.

In summary, fieldwork education is an essential bridge between academic education and authentic occupational therapy practice. Through the collaboration between academic faculty and fieldwork educators, students are given the opportunity to achieve the competencies necessary to meet the present and future occupational needs of individuals, groups and, indeed, society as a whole.

#### References

Accreditation Council for Occupational Therapy Education. (2023). 2023 Accreditation Council for Occupational Therapy Education (ACOTE®) standards and interpretive guide. <https://acoteonline.org/accreditation-explained/>

American Occupational Therapy Association. (2025). Occupational therapy code of ethics (2025). *American Journal of Occupational Therapy*, Vol. 79 (Supplement 3), 7913060400. <http://dx.doi.org/10.5014/ajot.2015.696S03>

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*Adopted by the Representative Assembly 2016*

*Note.* This document replaces the 2009 document *Occupational Therapy Fieldwork Education: Value and Purpose*, previously published and copyrighted in 2009 by the American Occupational Therapy Association in the *American Journal of Occupational Therapy*, 63, 821–822. <http://dx.doi.org/10.5014/ajot.63.6.821>

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# HIPAA Guidelines for Fieldwork

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Per HIPAA guidelines, students cannot report the following information in fieldwork assignments such as case studies presentations:

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

For written reports, the following information **can** be shared:

- Age (age 90 and over must be aggregated to prevent the identification of older individuals)
- Race
- Ethnicity
- Marital Status
- Codes (a random code may be used to link cases, as long as the code does not contain, or be a derivative of, the person's social security number, date of birth, phone/fax numbers, etc.)

Students, as well as therapists, often keep "working files" in their desk. This is still allowed under HIPAA guidelines, however this information must be locked in a file cabinet when not in use, and must be shredded when no longer needed.

## Dress Code

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The student will be an active learner and participant in the fieldwork experience. As such, all students must dress with the safety of the client and themselves in mind at all times. Students will receive an Occupational Therapy polo. This polo must be worn to each Level I fieldwork site placement in all OTD 614, 712, and 714 Level I courses.

The student is responsible for making sure that the polo is clean and free from stains. The shirt must be long enough to be tucked in, without visible skin between the shirt and the top of the pants, even when the arms are raised or when assuming a squatting position. Students may elect to dress in layers to be compliant with the no visible skin policy (i.e. a tank top underneath the polo). The polo must be of appropriate length, fit, and coverage that does not allow for exposure of skin at the midriff or body parts showing cleavage when bending, squatting down, or leaning over.

Pants are to be khaki in color and full length. When bending down, as in a squat, visible skin should not be present, with the polo tucked into the pants. If a site specifically requires the student to wear scrubs, the site dress code supersedes the Occupational Therapy program dress code of polo and khakis. The wearing of yoga pants or leggings as pants are prohibited.

Students are to wear closed-toe shoes. In all healthcare settings, socks are required with shoes. Shoes must be clean. No athletic shoes unless occupational therapy staff are actively engaged in an athletic event, large gross motor exercises with clients or the setting requires/sanctions the wearing of such footwear.

Students may wear small earrings in their ears and a watch unless the site prohibits the wearing of jewelry of any kind. Nose, lip, or tongue jewelry must be removed while at the fieldwork site. Visible tattoos are to be covered. Students will have moderate make-up, fingernail length, and natural hair color. Hats cannot be worn inside the building. Specific fieldwork sites may also have a site-specific dress code which the student will also abide by.

Avoid the wearing of scented lotion, perfume/cologne, or cigarette smoke as these odors may be offensive to clients and staff. (Many sites are designated as no scent zones.)

Remember that appropriate attention to attire and demeanor can help inspire confidence in all clients including those who may be anxious, fearful, distrusting, or disengaged. The same attention to personal appearance can help the maintenance of relationships with other professionals in practice settings. Adherence to the dress code is included as a part of professional behavior and assessed by the fieldwork educator. Any breach in the dress code will result in the student being sent home from the fieldwork site.

## Student Acknowledgement Form

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A primary objective of fieldwork is to ensure that each student is exposed to a variety of clinical settings and environments during the course of Level I and Level II fieldwork. Different types of environments include, but are not limited to, acute hospital settings, home health care agencies, inpatient rehabilitation hospitals, nursing homes, outpatient clinics, and school systems. The experiences are designed to provide the student with directed learning in a variety of practice settings. These experiences are critical in providing the student a learning environment that provides students the opportunity to implement knowledge of theory into actual practice. Fieldwork serves as the arena to further develop clinical reasoning and professional behavior skills.

Students are assigned to clinical fieldwork sites by the AFWC with input from the student, fieldwork educator(s), and/or the fieldwork coordinator of the site. Students may not change their fieldwork site or trade with another student.

Coordination of placement for many students is a labor-intensive task. Negotiations and maintenance of fieldwork sites are highly competitive among the hundreds of Occupational Therapy and Occupational Therapy Assistant programs. Best efforts are made to locate sites within a reasonable commuting distance from Xavier University for Level I fieldwork and a place of lodging for Level II fieldwork. The student will be required to furnish his/her transportation and find his/her lodging.

To maintain the established mutual respect, relationships, and professional relationships between Xavier University and the fieldwork sites, each student is expected to abide by the Fieldwork Student Manual and the fieldwork site's policies, regulations, and procedures where they are assigned. The student's ability to be flexible and adjust to the varying environments within a variety of regulatory policies is extremely important.

By signing this form, the student acknowledges that he/she will abide by and uphold the Fieldwork Manual and the fieldwork site's policies and guidelines.

Name (printed): \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## Fieldwork Consent Form

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In accordance with the Citizen's Right to Privacy Act, it is necessary for us to have a signed consent in order to release any information to the fieldwork facility.

I, \_\_\_\_\_, give my consent to allow the Department of Occupational Therapy, Xavier University, Cincinnati, Ohio, to release the departmental Personal Data Sheet for Student Fieldwork Experience to all fieldwork facilities in which I will be assigned for affiliation purposes. Additionally, if the Department's Academic Fieldwork Coordinator is contacted to assist in mediating disputed issues between the student (me) and the fieldwork facility, I also give my consent to allow the Academic Fieldwork Coordinator to discuss information about my continuing development as a student in a professional program which is relevant to my success in the clinical faculty. I understand that no information may be released without my signed consent. This consent form is valid from the date below until withdrawal of this consent is received in writing from the person whose signature is indicated below.

\_\_\_\_\_  
Student signature

\_\_\_\_\_  
Date

Witnessed by:       Stacia Galey, OTD, OTR/L  
Academic Fieldwork Coordinator  
Department of Occupational therapy  
Xavier University  
Cincinnati, OH 45207

## Level I Fieldwork Preference Form

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Name: \_\_\_\_\_

|  |  |
|--|--|
|  | <b>Hospital based settings (t/o the lifespan)</b>  |
|  | Inpatient rehabilitation                           |
|  | Inpatient acute                                    |
|  | Skilled nursing/Assisted living/LTC                |
|  | Outpatient rehabilitation                          |
|  | Hand therapy                                       |
|  | NICU (peds)  |
|  | Burns  |
|  | Behavioral health                                  |
|  | <b>Community-based settings (t/o the lifespan)</b> |
|  | Pet-assisted therapy including hippotherapy        |
|  | Pediatric community                                |
|  | Behavioral health community                        |
|  | Older adult day program                            |
|  | Older adult community living                       |
|  | Outpatient private practice                        |
|  | Home health  |
|  | Pediatric outpatient clinic                        |
|  | <b>School-based setting (pediatric)</b>            |
|  | Early intervention                                 |
|  | School   |
|  | <b>Other</b>                                       |
|  | Respite camp                                       |
|  | Music therapy                                      |
|  | I am proficient in Sign-Language                   |
|  | I am Spanish-speaking                              |

**NOTE: You may have one weekend Level I fieldwork site throughout the two semesters.**

Where (facility and city/state) have you worked or did your volunteer/observation hours?

\_\_\_\_\_

What facilities (city/state) do you have an OT mentor and/or people that work in the healthcare setting (i.e. Is your mom a nurse at Mercy Fairfield, is your grandpa a PT at Lakota Schools)?

\_\_\_\_\_

Do you have any registered accommodations that will need to be in consideration during Level I?

## Level II Fieldwork Preference Form

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Name: \_\_\_\_\_

1. **Suggested Dates:** January-March 2027 and April-June 2027  
 \*You need to be available for Level II fieldwork from December 2026-August 2027\*

2. **Population (place a checkmark next to the ONE you would most prefer)**  
 Remember this is a preference, not a specific population that you will be with

\_\_\_\_\_Pediatric      \_\_\_\_\_Adult      \_\_\_\_\_Geriatric      \_\_\_\_\_Psychosocial

3. **List below any city/state and zip code in which you KNOW that you have the means to pursue living in that city/state while on Level II fieldwork.** Place them in order of PREFERENCE for either rotation. If you are unable to live in that city for either/both rotations, please do not write it.

Cincinnati and the surrounding area is always an option if the city/state you prefer will not accept a student. You will need to place Cincinnati in, at least, one of the 5 preferences below.

| City/State | Zip code | Specific facility |
|------------|----------|-------------------|
| 1.         |          |                   |
| 2.         |          |                   |
| 3.         |          |                   |
| 4.         |          |                   |
| 5.         |          |                   |

Will you have a different name during the time you are at fieldwork? If so, what name? \_\_\_\_\_

Where (facility and city/state) have you worked or did volunteer/observe in OT?

\_\_\_\_\_

What facilities (city/state) do you have an OT mentor and/or people that work in the healthcare setting (i.e. Is your mom a nurse at Mercy Fairfield, is your grandpa a PT at Lakota Schools)?

\_\_\_\_\_

Do you have any registered accommodations that will need to be in consideration during Level II?

\_\_\_\_\_