Our educational program is required to update the information included on this form annually for each of our fieldwork sites. For some of you this is a new version of the Fieldwork Data Form which I hope you will find user friendly and convenient to fill out and return. Let me know if you need any help or have any questions. Thanks, Jeanne

Introduction:

The purpose of the Fieldwork Data Form is to facilitate communication between occupational therapy (OT) and occupational therapy assistant (OTA) academic programs, OT/OTA students, and fieldwork educators. Fieldwork Educators and Academic Fieldwork Coordinators (AFWC) jointly complete the Fieldwork Data Form to describe the fieldwork setting where students may have placements. While much of the information may be completed by the Fieldwork Educator, there will be additional information best obtained through AFWC interview of the fieldwork education coordinator at the site. The AFWC will find opportunity to document fieldwork related Accreditation Council for Occupational Therapy (ACOTE) Standards that support the ACOTE on-site accreditation review process. In addition, OT/OTA students will find valuable information describing the characteristics of the fieldwork setting, the client population, commonly used assessments, interventions, and expectations and opportunities for students. The Fieldwork Data Form has been developed to reflect the Occupational Therapy Practice Framework (2008) terminology and best practice in occupational therapy to promote quality fieldwork experiences. It was developed through the joint efforts of the Commission on Education (COE) and Education Special Interest Section (EDSIS) Fieldwork Subsection with input from many dedicated AFWCs and fieldwork educators.
# AOTA FIELDWORK DATA FORM

## Date:
Name of Facility:

**Address:** Street  
City  
State  
Zip:

## FW Level II

<table>
<thead>
<tr>
<th>Contact Person:</th>
<th>Credentials:</th>
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<td>Phone:</td>
<td>E-mail:</td>
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## FW Level I (if different)

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<th>Contact Person:</th>
<th>Credentials:</th>
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<td>Phone:</td>
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## Director:

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<tr>
<th>Phone:</th>
<th>Fax:</th>
<th>Web site address:</th>
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## Corporate Status:

- For Profit
- Non-Profit
- State Gov't
- Federal

## Preferred Sequence of FW:

- ACOTE Standards B.10.6
- Any
- Second/Third only; 1st must be in:
  - Full-time only
  - Part-time option
  - Prefer Full-time

## OT Fieldwork Practice Settings (ACOTE Form A #s noted): (Double Click on boxes to check)

### Hospital-based settings
- **In-Patient**
  - Acute 1.1
- **In-Patient Rehab**
  - 1.2
- **SNF/ Sub-Acute/Acute Long-Term Care**
  - 1.3
- **General Rehab**
- **Outpatient**
  - 1.4
- **Outpatient Hands**
  - 1.5
- **Pediatric**
  - 1.6
- **Peds Hospital**
  - 1.7
- **In-Patient Psych**
  - 1.8

### Community-based settings

- **Peds Community 2.1**
- **Behavioral Health Community 2.2**
- **Older Adult Community Living 2.3**
- **Older Adult Day Program 2.4**
- **Outpatient/hand private practice 2.5**
- **Adult Day Program for DD 2.6**
- **Home Health 2.7**
- **Peds Outpatient Clinic 2.8**

### School-based settings

- **Early Intervention 3.1**
- **School 3.2**

### Age Groups:
- **0-5**
- **6-12**
- **13-21**
- **22-64**
- **65+**

### Number of Staff:
- **OTRs:** 3
- **COTAs:** 2
- **Aides:**
- **PT:**
- **Speech:**
- **Resource Teacher:**
- **Counselor/Psychologist:**
- **Other:**

## Student Requirements/Prerequisites (check all that apply)

**ACOTE B.10.6**

- **CPR**
- **First Aid**
- **Infection Control training**
- **HepB**
- **MMR**
- **Tetanus**
- **Chest x-ray**
- **Physical Check up**
- **Varicella**
- **Influenza**
- **Drug screening**
- **Physical Check up #_____ Panel**

## Health requirements:

- **HIPAA Training**
- **Prof. Liability Ins.**
- **Drug screening**

## Medicare / Medicaid Fraud Check:

- **Criminal Background**

---

WU rev 10/10 adapted from NEOTEC for GOTE 31

Page 2
Check
☐ Child Protection/abuse check
☐ Adult abuse check
☐ Fingerprinting
☐ Own transportation
☐ TB/Mantoux interview
Please list any other requirements:

### Aspects of Occupational Therapy’s Domain addressed in this setting (check all that apply)

#### Double Click on boxes to check

*Refer to the OT Practice Framework –II (2008) for descriptions and definitions…available through AOTA*

**Areas of Occupation**
- ☐ Activities of Daily Living (ADL)
- ☐ Instrumental ADL
- ☐ Rest and Sleep
- ☐ Education
- ☐ Work
- ☐ Play
- ☐ Leisure
- ☐ Social Participation

**Client Factors**
- ☐ Values, Beliefs and Spirituality
- ☐ Body Functions
- ☐ Body Structures

**Performance Skills**
- ☐ Sensory-Perceptual Skills
- ☐ Motor and Praxis Skills
- ☐ Emotional Regulation Skills
- ☐ Cognitive Skills
- ☐ Communication and Social Skills

**Performance Patterns**
- ☐ Habits
- ☐ Routines
- ☐ Roles
- ☐ Rituals

**Context and Environment**
- ☐ Cultural
- ☐ Personal
- ☐ Physical
- ☐ Social
- ☐ Temporal
- ☐ Virtual

**Activity Demands**
- ☐ Objects used and their properties
- ☐ Space Demands
- ☐ Social Demands
- ☐ Sequencing and Timing
- ☐ Required Actions
- ☐ Required Body Functions
- ☐ Required Body Structures

### Most common services priorities (check all that apply)

*Double Click on boxes to check*

- ☐ Direct service planning
- ☐ Discharge planning
- ☐ Evaluation
- ☐ Meetings (team, department, family)
- ☐ Client education
- ☐ Intervention
- ☐ Consultation
- ☐ In-service training
- ☐ Billing
- ☐ Documentation

### Types of OT Interventions addressed in this setting (check all that apply): *ACOTE Standards A.5.3, B.10.1, B.10.3, B.10.11, B.10.13, B.10.15, B.10.19, B.10.20*

### Areas of Occupation addressed in this setting - within client’s own environmental context (check all that apply): *Double Click on boxes to check*

**Activities of Daily Living (ADL)**
- ☐ Bathing/showering
- ☐ Bowel and bladder management
- ☐ Dressing
- ☐ Eating
- ☐ Feeding

**Instrumental Activities of Daily Living (IADL)**
- ☐ Care of others (selecting/supervising caregivers)
- ☐ Care of pets
- ☐ Child rearing
- ☐ Communication management

**Education**
- ☐ Formal education participation
- ☐ Informal personal educational needs or interests exploration
- ☐ Informal personal education participation
| □ Functional mobility       | □ Community mobility       | □ Work                          |
| □ Personal device care      | □ Financial management    | □ Employment interests & pursuits |
| □ Personal hygiene & grooming | □ Health management & maintenance | □ Employment seeking and acquisition |
| □ Toilet hygiene            | □ Home establishment & management | □ Job performance              |
|                            | □ Meal preparation & clean up | □ Retirement preparation & adjustment |
|                            | □ Religious observance     | □ Volunteer exploration / participation |
|                            | □ Safety procedures & emergency maintenance | |
|                            | □ Shopping                 |                                |

**Rest and Sleep**

- □ Rest
- □ Sleep
- □ Sleep preparation
- □ Sleep participation

**Play**

- □ Play exploration
- □ Play participation

**Types of Occupational Therapy Interventions:** *(Double Click on boxes to check)*

- **Occupation-based Intervention** – client engages in client-directed occupations that match identified goals
- **Purposeful Activity** – client engages in specifically selected activities that allow the client to develop skills that enhance occupational engagement

**Preparatory Methods** – practitioner selects directed methods and techniques that prepare the client for occupational performance. (PAM’s).

**Consultation Process** – using knowledge and expertise to collaborate with the client

**Leisure**

- □ Leisure exploration
- □ Leisure participation

**Work**

- □ Employment interests & pursuits
- □ Employment seeking and acquisition
- □ Job performance
- □ Retirement preparation & adjustment
- □ Volunteer exploration / participation

**Social Participation**

- □ Community
- □ Family
- □ Peer/friend

**Types of Occupational Therapy Interventions:** *(Double Click on boxes to check)*

- **Occupation-based Intervention** – client engages in client-directed occupations that match identified goals
- **Purposeful Activity** – client engages in specifically selected activities that allow the client to develop skills that enhance occupational engagement

**Preparatory Methods** – practitioner selects directed methods and techniques that prepare the client for occupational performance. (PAM’s).

**Consultation Process** – using knowledge and expertise to collaborate with the client

**Education Process** – imparting knowledge and information about occupation, health and participation that does not result in actual performance of the occupation/activity

**Advocacy** – efforts directed toward promoting occupational justice and empowering clients to seek and obtain resources to fully participate in their daily life occupations
### Method of Intervention

**Direct Services/case load for entry-level OT**
- One-to-one:
- Small group(s):
- Large group:

**Discharge Outcomes of clients**
- Home
- Another medical facility
- Home Health

### OT Intervention Approaches
- Create, promote (health promotion)
- Establish, restore, (remediation)
- Maintain
- Modify, (compensation, adaptation)
- Prevent, (disability prevention)

### Outcomes of Intervention
- Occupational performance
- Adaptation
- Health & Wellness
- Participation
- Prevention
- Quality of Life
- Role Competence
- Self-Advocacy
- Occupational Justice

### Theory/ Frames of Reference/ Models of Practice
- Biomechanical
- Cognitive - Behavioral
- Cognitive Disability
- Model of Human Occupation (MOHO)
- Occupational Adaptation
- Person/ Environment/ Occupation (P-E-O)
- Person-Environment-Occupational Performance
- Rehabilitation
- Sensory Integration
- Social Learning Theory
- Stages of change / Transtheoretical Model
- Other (please list):

### Please list most common screenings and evaluations used in your setting: Click or list
- COPM
- FIM
- 9 Hole Peg
- MMSE
- Bayley Scale
- Bruininks-Oseretsky
- Other, and list

### Identify safety precautions important at your FW site
- Medications
- Post-surgical (list procedures)
- Contact guard for ambulation
- Fall risk
- Other (describe):

- Swallowing/ choking risks
- Behavioral system/ privilege level (locked areas, grounds)
- Sharps count
- 1:1 safety/ suicide precautions

### Please list how students should prepare for a FW II placement such as doing readings, learn specific evaluations and interventions used in your setting:
**Target caseload/ productivity for fieldwork students:**

*(Double Click on boxes to check)*

- Productivity % per 40 hour work week:

- Caseload expectation at end of FW:

- Productivity % per 8 hour day:

- # Groups per day expectation at end of FW:

**Documentation: Frequency/ Format (briefly describe):**

*(Double Click on boxes to check)*

- Hand-written documentation:

- Computerized Medical Records:

- Time frame requirements to complete documentation:

**Administrative/ Management duties or responsibilities of the OTA student:**

- Schedule own clients
- Supervision of others (aides, volunteers)
- Budgeting
- Procuring supplies (shopping for cooking groups, client/ intervention related items)
- Participating in supply or environmental maintenance
- Other:

**Student Assignments. Students will be expected to successfully complete:**

- Research/ EBP/ Literature review
- In-service
- Case study
- Participate in in-services/ grand rounds
- Fieldwork Project (describe):
- Field visits/ rotations to other areas of service
- Observation of other units/ disciplines
- Other assignments (please list):

**Student work schedule & outside study expected:**

*(Double Click on boxes to check)*

- Schedule hrs/ week/ day:
  - Room provided
  - YES
  - NO

- Do students work weekends?
  - YES
  - NO

- Do students work evenings?
  - YES
  - NO

**Describe level of structure for student?**

- High

**Describe level of supervisory support for student?**

- High

- Moderate

**Stipend amount:**

- Low

**Describe public transportation available:**

**Acceptable Dress Code for the site:**

**Describe the FW environment/ atmosphere for student learning:**
Supervisory patterns—Description (respond to all that apply)

- 1:1 Supervision Model:
- Multiple students supervised by one supervisor:
- Collaborative Supervision Model:
- Multiple supervisors share supervision of one student, # supervisors per student:
- Non-OT supervisors:

ACOTE Standards Documentation for Fieldwork (may be completed by AFWC or FWII student interview of FW Educator)

Please answer as many of these as you can. When possible, the AFWC may interview you to answer questions.

1. Please complete the Occupational Therapy Staff Profile form. ACOTE Standards B.7.10, B10.12, B.10.17 (Double Click on boxes to check)

Occupational Therapy Staff Profile

✓ by those who currently supervise OT fieldwork students

<table>
<thead>
<tr>
<th>Name</th>
<th>Credential</th>
<th>Degree &amp; University</th>
<th>Years in OT</th>
<th>Specialty</th>
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Will the student(s) be supervised by a currently licensed or credentialed occupational therapist who has a minimum of 1 year of practice experience subsequent to initial certification, and is adequately prepared to serve as a fieldwork educator?  □ Yes  □ No
2. The fieldwork agency must be in compliance with standards by external review bodies. Please identify external review agencies involved with this fieldwork setting and year of accreditation:

(Double Click on boxes to check)

- JCAHO
- CARF

Dept of Health                             Year of most recent review: ______________
Dept of Mental Health                      Other (specify) _____

Summary of Outcomes of OT department review:

3. Describe the fieldwork site agency stated mission or purpose (can be attached). ACOTE Standards B.10.1, B.10.2, B.10.3, B.10.4, B.10.14, B.10.15

4.A. INTEGRATION OF CURRICULUM THEMES (ACADEMIC PREPARATION)

Please identify the extent of opportunities that students will have to incorporate the following themes in occupational therapy practice during the fieldwork experience:

<table>
<thead>
<tr>
<th>Theme</th>
<th>1 = No opportunity</th>
<th>2 = Limited opportunities</th>
<th>3 = Some opportunities</th>
<th>4 = Many opportunities (with most clients)</th>
<th>5 = Consistent opportunities (for all clients)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. CLIENT-CENTERED PRACTICE</td>
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<tr>
<td>B. OCCUPATION-BASED PRACTICE</td>
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<tr>
<td>C. EVIDENCE-BASED PRACTICE</td>
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<tr>
<td>D. LEADERSHIP &amp; ADVOCACY</td>
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<tr>
<td>E. CLINICAL REASONING</td>
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</table>

Please check all that apply (below) to identify “supports” to practicing curricular themes above:

(Double Click on boxes to check)

**Supports for client-centered practice:**
- [ ] Clients are routinely interviewed and goals documented
- [ ] Clients/family members/caregivers formally agree to the intervention plan
- [ ] Clients are provided with choices to direct the priorities of the intervention plan
- [ ] Other: (please describe)

**Supports for occupation-based practice:**
- [ ] The client is provided intervention in a natural environment [school-based, community outings (grocery shopping, using public transportation, entertainment, etc.), home care, home evaluation/visit, car transfers, etc.]
- [ ] The client is involved in active collaboration with practitioners to identify similarities and differences between the hospital/healthcare facility’s simulated environment and that of their residence/home
- [ ] The client and/or practitioner bring-in/provide authentic occupation-based activities as part of the intervention plan (cooking, playing games, musical instruments, arts & crafts, sports/fitness, etc.)
Other: (please describe)

Supports for evidence-based practice (EBP):
☐ Evidence-based practice is valued by the fieldwork facility and practitioners
☐ Clients/consumers inquire about research-proven options for interventions/OT services
☐ Time is allotted (each week) for staff development to address activities such as EBP
☐ In-services are offered on a regular basis to promote staff development and continued learning
☐ Internet access and access to online professional journals is available for searching and using EBP
☐ Other: (please describe)

Supports for leadership and advocacy:
☐ Leadership and advocacy is valued by the fieldwork facility and practitioners who serve as role models
☐ The facility’s environment promotes leadership and advocacy
☐ Time is allotted for activities that promote leadership and advocacy
☐ Other: (please describe)

Supports for Clinical Reasoning & Reflective Practice
☐ Students are provided opportunity to assess knowledge & practice skills in simulated contexts (e.g. role plays, problem based case scenarios)
☐ Students are given verbal prompts to probe reasoning in safe learning context (e.g., before, during, after sessions, in supervisory meetings)
☐ Students are given written assignments to challenge assumptions, build use of narrative, enhance reflection (e.g., interactive journal, case study)
☐ Students are given feedback re: growth in areas of clinical/professional reasoning (e.g., scientific/procedural, interactive, pragmatic, ethical, etc.)

4. B. Describe how psychosocial factors influence engagement in OT services? (Double Click on boxes to check)
☐ Discouraged or depressed may not want to participate. ☐ Encouragement/attention from therapist prompts greater participation
☐ Depressed may try to withdraw from activities/staff/treatment
☐ Positive feelings contribute to greater compliance.
☐ Other (please explain)
☐ Psychosocial factors are considered during assessment
☐ Psychosocial factors are considered during intervention planning: discouragement, depression, view of illness, etc..
☐ Psychosocial factors are considered during discharge planning

4. C. Describe how you address client’s community based needs in your setting? (Double Click on boxes to check)
☐ Refer to social worker/case manager when appropriate
☐ Provide resources/catalogs/written information for needed equipment, supplies as appropriate
☐ Provide names/written materials for community support groups as appropriate
☐ Refer to appropriate facility community groups when needed
☐ Instruct client in finding appropriate resources
☐ Provide referral to other community services as needed
☐ Other (please describe)

5. Please describe the FW Program & how students fit into the program. (Double Click on boxes to check) ACOTE Standards B10.2, B.10.3, B.10.5, B.10.7, B.10.13, B.10.19, B.10.20, b.10.21
Fieldwork Program has been in place many years with multiple schools and therapy levels (OT and OTA).

Fieldwork Program is relatively new and still evolving – currently takes students from OT or OTA schools. (Circle all that apply)

Fieldwork Program just took first fieldwork student from OT or OTA school. (Circle all that apply)

Students provide learning opportunity to staff therapists to implement supervisory relationships and skills.

Students provide a link to various educational institutions to keep up with changes/developments in the field.

Providing fieldwork experiences is an obligation and responsibility for current practitioners.

Providing fieldwork experiences assists OT/OTA practitioners with continuing education credits.

Fieldwork students can provide updates in the literature for evidence based practice that is helpful to the facility/practitioners.

Fieldwork students can provide more one-on-one time with clients due to lower caseloads and the learning environment.

Fieldwork students are generally helpful to the overall operation of the facility once oriented and adjusted to population.

Supervision of students is expected of practitioners.

Supervision of students is rotated among practitioners on a regular basis.

Students are not accepted unless a practitioner indicates interest/willingness to take a student.

Other (Please Explain)

6. Describe the training provided for OT staff for effective supervision of students (check all that apply). (Double Click on boxes to check) ACOTE Standards B.7.10, B.10.1, B.10.3, B.10.12, B.10.13, B.10.17, B.10.18, B.10.19, B.10.20, B.10.21

☐ Supervisory models

☐ Training on use of FW assessment tools (such as the AOTA Fieldwork Performance Evaluation - FWPE, Student Evaluation of Fieldwork Experience – SEFWE, and the Fieldwork Experience Assessment Tool – FEAT)

☐ Clinical reasoning Discussions and how to teach clinical reasoning to students

☐ Reflective practice

Comments:

7. Please check off any training or resources that fieldwork educators at your site have available to support their role in supervision of students (e.g., print resources, continuing ed. coursework, online materials, workshops, etc.) (Double Click on boxes to check)

☐ Site Specific Student objectives (please attach)

☐ Training in supervision process (agency in-services)

☐ AOTA Certificate in Fieldwork Education Program

☐ Training or in-service provided by GOTEC, Regional, State or individual Academic Programs

☐ Use of online resources such as: AOTA (http://www.aota.org/Educate/EdRes/Fieldwork/Supervisor.aspx)

☐ Facility’s Student manual

☐ Release time and/or reimbursement for continuing education

☐ Mentoring opportunities (e.g., in 1:1 or Group Format)

☐ Other: ________________________________

Supervision Process (Double Click on boxes to check)
What is the **nature** and frequency of supervision meetings:  
- [ ] Formal  
- [ ] Informal  
- [x] Formal  
- [ ] Informal  
- [ ] Frequency:  
- [ ] daily  
- [ ] weekly  
- [ ] other  

What is the model of supervision utilized at your site:  
- [ ] 1:1 Supervision Model  
- [ ] Several Students: 1Therapist (Collaborative model)  
- [ ] Several Therapists: 1 student

**Supervisory Methods to promote reflective practice:**  
- [ ] Journaling  
- [ ] Processing verbally  
- [x] Student Self  
- [ ] Assessment/Self Appraisal (log/form)  
- [ ] Written activity analysis  
- [ ] Probing questions  
- [ ] Written submission of intervention plans & rationale  
- [ ] Other: Interdisciplinary group supervision meetings

**Describe record keeping of supervision sessions:**  
- [ ] Co-signed documentation of daily/weekly supervision  
- [ ] All informal/formal notes maintained by FW Educator  
- [ ] Records kept when student not meeting expectations  
- [ ] Other:

---

8. **Please describe the process for record keeping supervisory sessions with a student, and the student orientation process to the agency, OT services and the fieldwork experience. (Double Click on boxes to check)**  

|-----------------|-----------------------------------------------------------------|
- [ ] Meet with student to review policies, procedures & forms during first week assigned to facility.  
- [ ] Introduce student to staff and give tour of facility.  
- [ ] Provide Student Fieldwork Manual of assignments, policies, procedures etc. for the facility.  
- [ ] Send student to employee orientation, all or parts depending on relevance or as required by facility.  
- [ ] Review Fieldwork Educator’s case load to help student understand populations and interventions being implemented.  
- [ ] Meet with student at designated time every week to review clients, therapeutic interventions and other questions or concerns.  
- [ ] Meet with student at various non-scheduled times to review clients, therapeutic interventions and other questions/concerns.  
- [ ] Wait for student to initiate request to meet with fieldwork educator.  
- [ ] Supervisory sessions have topic planned for each meeting with student.  
- [ ] Supervisory sessions do not have topic planned but depend on student’s questions/concerns.  
- [ ] Supervisory sessions address concerns about student performance with possible methods to change/enhance performance.  
- [ ] Sessions with student are documented by fieldwork educator.  
- [ ] Sessions with student are documented by student.  
- [ ] Sessions with students are not documented.  
- [ ] Sessions with student are documented if problems with performance arise.  
- [ ] Other. Please Explain

---

9. **Describe funding and reimbursement sources and their impact on student supervision. (Double Click on boxes to check)**  

|-----------------|-----------------------------------------------|
Facility receives funding through Medicare.
Facility receives funding through Medicaid.
Facility receives funding through private insurance/private pay.
Facility provides charity care.
Facility receives funding through other sources – grants, tax allocations, etc.

**Impact on Student Supervision:**

- Funding source does not affect OT/OTA student supervision.
- Funding source restricts some activities for OT/OTA students. (Circle which group of students affected)
- Funding source prohibits activities provided by OT/OTA students. (Circle which group of students affected)
- Funding source requires fieldwork educator to be on premises to provide supervision of OT/OTA students.
- Funding source requires fieldwork educator to have line-of-sight supervision of OT/OTA students.
- Other (Please Explain)

10. Please include a copy of the FW student objectives, weekly expectations for the Level II FW placement. Please attach to this form or mail to the Academic Fieldwork Coordinator.
Occupational Therapy Staff Profile

Date:

✓ by those who currently supervise OT fieldwork students

<table>
<thead>
<tr>
<th>Name</th>
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<th>Degree &amp; University</th>
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