I. FUNDAMENTALS OF PRACTICE

1. Adheres to ethics: Adheres consistently to the American Occupational Therapy Association Code of Ethics and site's policies and procedures including when relevant, those related to human subject research.
   - Maintains strict patient confidentiality
   - Interacts professionally and respectfully with patients, families, and staff.
   - Establishes and maintains a therapeutic relationship with the patient
   - Maintains quality patient care and patient satisfaction as guidelines for professional behavior

2. Adheres to safety regulations: Anticipates potentially hazardous situations and takes steps to prevent accidents.
   - Utilizes infection control precautions and procedures
   - Maintains clear and orderly work area by returning equipment and supplies
   - Follows facility policies in response to emergency code or drill situations

3. Uses judgment in safety: Uses sound judgment in regard to safety of self and others during all fieldwork-related activities.
   - Provides safe supervision of patients during high-risk activities
   - Refrains from use of equipment or procedures unless trained
   - Seeks and is receptive to supervision to ensure patient safety
   - Demonstrates willingness to function within constraints of center policies and procedures

II. BASIC TENETS

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

5. Clearly, confidently, and accurately articulates the value of occupation as a method and desired outcome of occupational therapy to clients, families, significant others, colleagues, service providers, and the public.
   - Explains how and why occupation is used as a means to an end
   - Explains how and why occupational therapy practitioners are client-centered
   - Thoroughly instructs other disciplines in carrying out treatment procedures initiated by OT
6. Clearly, confidently, and accurately communicates the roles of the occupational therapist and occupational therapy assistant to clients, families, significant others, colleagues, service providers, and the public.
   • Verbalizes the differences in role delineation for an OT, OTA, and Rehab Technician within the practice setting.

7. Collaborates with client, family, and significant others throughout the occupational therapy process.
   • Establishes treatment priorities after discussing goals with all concerned parties
   • Reviews progress with client, family, and significant others at regular intervals

III. EVALUATION AND SCREENING
8. Articulates a clear and logical rationale for the evaluation process.
   • States how and why a specific approach to the evaluation process is being used

9. Selects relevant screening and assessment methods while considering such factors as the client’s priorities, context(s), theories, and evidence-based practice.
   • Identifies conditions and precautions associated with apparent deficits of assigned patients.
   • Selects appropriate component areas to assess, based on the center's practices and the patient’s level of apparent deficits and secondary diagnoses and complications

10. Determines client’s occupational profile and performance through appropriate assessment methods.
    • Reads the client's clinical evaluation prior to initiating evaluation, and verbalizes an understanding of the client’s premorbid occupational performance.

11. Assesses client factors and context(s) that support or hinder occupational performance.
    • Utilizes correct procedures for assessing individual performance areas
    • Selects appropriate areas for further assessment

12. Obtains sufficient and necessary information from relevant resources such as client, families, significant others, service providers, and records prior to and during the evaluation process.
    • Interviews patient or caregiver to obtain relevant information
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Fieldwork Objectives

- Listens to input from other team members

13. **Administers assessments** in a uniform manner to ensure findings are valid and reliable.
   - Maintains objectivity in observing and assessing areas where standardization is not an option
   - Demonstrates an understanding of FIM language and terminology to assess areas of self-care

14. **Adjusts/modifies the assessment procedures** based on client’s needs, behaviors, and culture.
   - Alters methods of instructing the patient to accommodate limitations in cognition/communication as needed
   - Alters methods of assessing performance areas where medical complications or restrictions exist

15. **Interprets evaluation results** to determine client’s occupational performance strengths and challenges
   - Determines correct neurological and functional levels based on evaluation results
   - Determines correct FIM levels for self-care levels of functioning
   - Determines correct DRS levels of functioning at admission and discharge (ABI only)
   - Determines correct ASIA levels on the initial assessment

16. **Establishes an accurate and appropriate plan** based on the evaluation results, through integrating multiple factors such as client’s priorities, context(s), theories, and evidence-based practice.
   - Identifies functional limitations affecting self-care performance
   - Sets long-term goals that are attainable for the patient, based on diagnosis and realistic assessment of the client’s strengths and limitations
   - Sets short-term goals in specific, objective, and measurable terms
   - Is able to prioritize interdisciplinary team goals
   - Incorporates patient goals and priorities into the plan of care.

17. **Documents the results of the evaluation** process that demonstrates objective measurement of client’s occupational performance.
   - Follows correct procedures for documenting evaluations accurately
   - Thoroughly addresses all problem areas
   - Summarizes evaluations clearly and concisely in note
   - Follows correct processes for recording goniometry, manual muscle testing, and ASIA results
IV. **INTERVENTION**

18. **Articulates a clear and logical rationale** for the intervention process.
   - Completes thorough treatment plans for clients
   - Prioritizes problem areas and addresses foundation skills needed for treatment progressions

19. **Utilizes evidence** from published research and relevant resources to make informed intervention decisions.

20. **Chooses occupations** that motivate and challenge clients.
    - Facilitates self-care activities for eating, grooming, bathing, dressing, and toileting skills
    - Directs patient performance in areas of IADLs as the functional level allows

21. **Selects relevant occupations** to facilitate clients meeting established goals.
    - Demonstrates functional-based interventions for self-care performance components
    - Directs patient performance in areas of IADLs as functional level allows
    - Participates in community re-entry outings
    - Refers and implements group-based participation to address problem areas

22. **Implements intervention plans that are client-centered.**
    - Incorporates patient priorities into established goals
    - Schedules and performs ADLs/AM programs appropriate to the patient’s level of participation
    - Considers age level when directing all patient care activities

23. **Implements intervention plans that are occupation-based.**
    - Directs self-care remediation
    - Utilizes purposeful activities during treatment sessions
    - Demonstrates awareness of the patient’s various life roles in selecting activities
    - Selects activities that are meaningful and relevant to the patient

24. **Modifies task approach, occupations, and the environment** to maximize client performance.
    - Identifies and addresses underlying problems and prerequisite skills to promote gains in higher-level functional skills
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Fieldwork Objectives

- Grades and modifies treatment activities to provide effective treatment for the patient’s current status
- Selects activities considering patient abilities to promote progress without undue frustration
- Selects activities by taking into account patient preferences, values, and age

25. **Updates, modifies, or terminates the intervention plan** based upon careful monitoring of the client’s status.
   - Identifies appropriate goals to address underlying factors that impede functional progress
   - Recognizes changes in the patient’s physical, emotional, or cognitive status and adjusts the program to promote optimal progress

26. **Documents client’s response** to services in a manner that demonstrates the efficacy of interventions.
   - Accurately documents patient FIM scores and outcomes for self-care
   - Updates status of goals; short term goals do not continue for more than two reporting periods if not met
   - Problem-solves with patient and team members to establish goals that are realistic and incorporate the potential discharge situation
   - Uses correct terminology to describe treatments and interventions

V. **MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES**

27. **Demonstrates through practice or discussion the ability to assign appropriate responsibilities to the occupational therapy assistant and occupational therapy aide.**
   - Directs therapy technicians in performing patient care activities within the scope of SC practice standards

28. **Demonstrates through practice or discussion the ability to actively collaborate** with the occupational therapy assistant.
   - Verbalizes process for collaboration with the OTA within the specific practice setting

29. **Demonstrates understanding of the costs and funding** related to occupational therapy services at this site.
   - Ensures that patient care time is used productively
   - Notifies supervisor of charges for supplies, equipment, and time
   - Verbalizes an understanding of costs for purchasing adaptive equipment or devices, or DME within the practice setting
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Fieldwork Objectives

30. **Accomplishes organizational goals** by establishing priorities, developing strategies, and meeting deadlines.
   - Arrives promptly to scheduled meetings and treatment sessions.
   - Completes assignments by scheduled deadlines.
   - Schedules patient treatments to make optimal use of treatment time given current assignment and caseload.
   - Utilizes unscheduled time to increase learning.
   - Maintains personal schedules and lists to ensure timely completion of responsibilities.
   - Prepares in advance for meetings and treatments.
   - Notifies supervisor and OT educator when problems arise.

31. **Produces the volume of work** required in the expected time frame.
   - Adjusts work pace to accommodate increased workload.
   - Provides assistance to other staff members when able.
   - Recognizes when current workload prohibits helping others.

VI. **COMMUNICATION**

32. **Clearly and effectively communicates verbally and nonverbally** with clients, families, significant others, colleagues, service providers, and the public.

33. **Produces clear and accurate documentation** according to site requirements.
   - Completes written treatment or care plans as assigned by supervisor for review.
   - Complies with SC policy for approved abbreviations.
   - Follows SC policies and procedures for documentation.

34. **All written communication is legible**, using proper spelling, punctuation, and grammar.
   - Complies with SC policy for approved abbreviations.

35. **Uses language appropriate to the recipient** of the information, including, but not limited to funding agencies and regulatory agencies.

VII. **PROFESSIONAL BEHAVIORS**

36. **Collaborates with supervisor(s)** to maximize the learning experience.
   - Asks questions when uncertain.
   - Notifies supervisor of unusual occurrences or circumstances.
   - Identifies, communicates, and uses own optimal learning methods and styles.
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Fieldwork Objectives

- Recognizes communication styles of self and supervisor; adjusts style as needed to promote optimal communication with supervisor
- Uses discretion in wording and timing of questions asked of supervisor
- Demonstrates receptiveness to feedback and input from supervisors
- Actively seeks feedback on performance

37. Takes responsibility for attaining professional competence by seeking out learning opportunities and interactions with supervisor(s) and others.
   - Attends regularly scheduled staff meetings and in-service opportunities in practice area
   - Collaborates with OT educator to participate in additional learning opportunities and observations center-wide

38. Responds constructively to feedback.

39. Demonstrates consistent work behaviors including initiative, preparedness, dependability, and work site maintenance.

40. Demonstrates effective time management.

41. Demonstrates positive interpersonal skills including but not limited to cooperation, flexibility, tact, and empathy.

42. Demonstrates respect for diversity factors of others including but not limited to socio-cultural, socioeconomic, spiritual, and lifestyle choices.