

# **Canadian Guidelines for Fieldwork Education in Occupational Therapy (CGFEOT)**

Guiding Principles, Responsibilities and  
Continuous Quality Improvement Process

Presented by the

Committee on University Fieldwork Education  
(CUFE)  
Association of Canadian Occupational Therapy University Programs  
(ACOTUP)

Approved by CUFE and ACOTUP  
Summer 2003, Revised 2005, 2011, 2024

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## Introduction

The Canadian Guidelines for Fieldwork Education in Occupational Therapy (CGFEOT) was developed by the Committee of University Fieldwork Educators (CUFE) of the Association of Canadian Occupational Therapy University Programs (ACOTUP) and continues to be monitored and reviewed by the committee.

The purpose of the CGFEOT is to provide a national resource to guide both university programs and fieldwork partners in developing appropriate and effective fieldwork learning experiences for students. This shared vision for fieldwork education is critical to promote quality and accountability, and reflect current best practice in fieldwork education across Canada.

CUFE has reviewed and updated the CGFEOT to reflect the core competencies of occupational therapy in Canada, changes in health care environments and the evolution of occupational therapy practice. The review has incorporated input from ongoing communications with fieldwork partners, reviews of national and international documents and most recently, from the CUFE subcommittee that formed to clarify the definition of fieldwork in Canadian Occupational Therapy Education. (See Appendix A )

Foundational to the CGFEOT are the WFOT Minimum Standards for the Education of Occupational Therapists (WFOT 2016) which states that the purpose of fieldwork (or practice education) "is for students to integrate knowledge, professional reasoning and professional behaviour within practice, and to develop knowledge, skills and attitudes to the level of competence required of qualifying occupational therapists."

CUFE acknowledges and values the commitment of all its fieldwork partners in continuing to support high quality fieldwork education in Canada.

Section 1 of the guidelines includes principles to promote optimum fieldwork education.

Section 2 presents the responsibilities of the main fieldwork education partners: students, preceptors and university programs.

Section 3 proposes tools and processes for supporting quality in fieldwork education.

## **Section 1: Principles Guiding the Canadian Occupational Therapy**

### **Fieldwork Experience**

These guidelines are intended to ensure that each Canadian occupational therapy fieldwork experience provides excellent learning opportunities and resources, and an optimum environment for learning. Students acquire abilities and professional behaviors as well as new knowledge while engaged in fieldwork education. Students, preceptors (fieldwork educators), onsite fieldwork coordinators, university professors and university fieldwork coordinators are expected to collaborate in linking fieldwork experiences to what students have learned in the university setting. Therefore, it is important to share a common vision for fieldwork education.

#### **The fieldwork experience should:**

- Be a collaborative learning experience among students, clients, fieldwork educators, onsite fieldwork coordinators and university programs;
- Be mutually beneficial to students and fieldwork educators;
- Be accepted as an essential part of professional growth for both students and fieldwork educators and fieldwork site;
- Occur in a positive learning environment;
- Consider students' learning objectives in relation to their professional development within the context of the fieldwork environment;
- Support students to account for their learning;
- Enable students to link theory with practice;
- Enable students to take an active role within the site;
- Promote satisfaction for both students and fieldwork educators regarding the fieldwork experience;
- Occur anywhere the roles and functions of an occupational therapist can be developed and integrated.

## Section 2: Responsibilities of Fieldwork Education Partners

### ***Students are expected to:***

- Develop competencies for the application of the occupational therapy process;
- Take responsibility for their learning experience and the direction of that experience in partnership with fieldwork educators, onsite fieldwork coordinators, university professors and university fieldwork coordinators;
- Uphold legal standards and the Codes of Ethics at all times (CAOT, professional regulatory body, fieldwork site, university program);
- Comply with site and university policies and procedures;
- Increase their understanding of and promote the roles and functions of occupational therapists;
- Learn how occupational therapists contribute to the service delivery team;
- Increase their understanding of the systems in which occupational therapists practice;
- Increase their understanding of and respect the roles and functions of other team members;
- Develop confidence and competence in their practice of occupational therapy;
- Set personal and professional goals before the beginning of the fieldwork experience. Review and adjust them throughout the placement;
- Complete all necessary required learning before and during the fieldwork experience including readings and other forms of learning activities (e.g., online modules, trainings, reviewing lectures...);
- Uphold the workplace readiness standards required of a healthcare professional before and during their fieldwork experience (e.g., respect the site dress code, use of professional communication in person, with the use of a cell phone and online/via email);
- Communicate with the university fieldwork coordinator/professor any time during their fieldwork experience if they encounter challenges in developing their competency profile;
- Provide feedback to their fieldwork educator based on their fieldwork learning experience.
- Provide feedback and submit an evaluation of their fieldwork experience to their university fieldwork professor/ coordinator following each placement.

### ***Fieldwork educators are expected to:***

- Act as role models for students;
- Become familiar with the university fieldwork education program (learning objectives, educational tools, fieldwork evaluation tool, expected student performance in accordance with learner's placement level) and with the supervision process;
- Offer a welcoming environment, a comprehensive orientation and provide space for student use, as available within the site's resources;

- Clearly inform students of what is expected of them, appropriately scaffold responsibilities and expectations and be available to students to offer appropriate supervision;
- Model a processes of critical self-reflection and clinical reasoning, while making a space for students to do the same;
- Offer regular and timely feedback based on student performance, including recommendations for improvement;
- Offer a positive and comprehensive learning environment to enable student development within the core competencies required for occupational therapy practice;
- Assist students to develop a good understanding of their professional growth with respect to core competencies as described in the *Competencies for Occupational Therapists in Canada 2021* (CAOT, 2021) by allowing and promoting time for guided reflection;
- Meet with students to discuss and evaluate their performance at the mid-term and end of the fieldwork education experience;
- Communicate with the university fieldwork coordinator/professor at any time during the placement if the student encounters significant challenges;
- Provide to university fieldwork coordinator/professor a current fieldwork site profile describing learning opportunities and resources;
- Provide feedback with respect to their experience as fieldwork educator (student preparedness, impact of the supervisory experience, administrative support availability, evaluation of pedagogical needs, etc.) according to the university programs' process (e.g. questionnaire, program evaluation focus group, webinar,...).

***University fieldwork coordinators/faculty are expected to:***

- Support students to develop a good understanding of their professional growth with respect to core competencies as described in the *Competencies for Occupational Therapists in Canada 2021* (CAOT, 2021) by providing fieldwork preparation (e.g. orientation and resources) and debriefing sessions (e.g. integration of theory with practice) to students;
- Support fieldwork educators with orientation and educational resources related to the university academic and fieldwork education programs and the supervision process;
- Recruit and coordinate fieldwork opportunities, while striving to assign students to teaching sites according to students' university and fieldwork profiles and personal interests and requests;
- Support students to make suitable choices with regard to establishing a varied fieldwork education profile (clienteles and fieldwork settings) to be eligible for licensure;
- Offer ongoing support and problem solving to students and fieldwork educators in dealing with teaching-learning challenges;
- Complete data management related to student fieldwork experiences, fieldwork educators and teaching sites to assist in analysis of quality fieldwork opportunities and experiences;

- Recognize fieldwork partners who contribute time and expertise in educating students;
- Work with teaching sites to negotiate a fieldwork agreement, either temporary or long term, describing the liability and responsibilities of each party, as well as any pre-fieldwork requirements;
- Ensure students are provided with appropriate liability coverage and work site insurance;
- Regularly assess the content and quality of supervision given and provide recommendations to fieldwork sites and feedback to fieldwork educators.
- Regularly assess the content and quality of the environment in which the placement occurs to ensure appropriate resources are available to support a positive learning environment and provide recommendations to fieldwork sites.

### **Section 3: Tools and Processes to Support Quality in Canadian University Occupational Therapy Fieldwork Education**

To support the quality of Canadian occupational therapy fieldwork education, the following tools and processes are **recommended**:

1. The university fieldwork coordinator is recommended to provide each site with a fieldwork site profile form to complete. The aim of this profile is to provide important information to the university which enables an understanding of the student learning experience within the site. It also helps to ensure quality teaching sites and gives students information prior to their placement with the intention to improve the learning experience. The following list describes suggested information to be provided:

- Site name and contact information
- Characteristics of occupational therapy services provided (area of practice, patient characteristics such as age/diagnosis, specialized programs, interdisciplinary team members, non-conventional or community setting...)
- Site requirements (e.g. car...) and specific prerequisites (e.g. CRC)
- Learning opportunities and resources (IT/library access, specialized training...)
- Amenities (e.g. parking on site)
- Approval by a Site Representative

University programs can use their own personalized method of collecting this information that meets their needs and their institutions' needs. A fillable pdf is recommended and can be filled out by the site contact or facilitated by the university fieldwork coordinator. The form can also be filled out by the site's first student and verified by site contact. Or an e-survey can also be used. Two examples of Fieldwork Site Profile forms are outlined in appendix B and may be used for this purpose if the university so chooses.

2. Following each fieldwork placement, it is recommended that students be given the opportunity to provide feedback. University programs can use their own personalized method of collecting this feedback that meets their needs and their institutions' needs. One example is the use of a fieldwork site feedback evaluation form. The aim of this evaluation process is to gain an understanding of how the student's learning experience at the site contributed to

his or her professional development. An example of a student fieldwork site evaluation forms is outlined in appendix C and may be used for this purpose if the university so chooses.

3. Considering the important formative role assumed by preceptors, universities must support preceptor professional development as related to fieldwork education. It is strongly recommended that the university fieldwork coordinator/professor collect and analyze preceptor feedback. How this feedback is collected is up to the University (e.g. feedback form, advisory committee, individual meetings...)

4. On a regular basis (to be determined by the university), the university fieldwork coordinator should review the documents pertaining to particular fieldwork sites: the fieldwork site profile, the relevant student fieldwork site evaluation forms, and the relevant preceptor feedback. It is recommended that the university fieldwork coordinator shares a summary with their fieldwork sites at minimum every 5 years.

5. If issues related to teaching and learning with a fieldwork site arise, the university fieldwork coordinator, in conjunction with the fieldwork site, will propose a plan with measurable outputs and timelines for improving or optimizing the student learning opportunities.

6. Depending upon specific needs and programs developed, it is anticipated that each university will be responsible for designing and implementing additional quality improvement measures that are deemed appropriate for their region and context (e.g. ensuring sites are inclusive and can adapt to different student needs and accommodations).

# Appendix A: Clarifying the Definition of Fieldwork in Canadian Occupational Therapy Education

CUFE Sub-Committee on Clarifying the Definition of Fieldwork

July 2021; Updated May 2022; Finalized November 2022

## Executive Summary:

Starting in March 2020, the COVID-19 pandemic began to affect health care, education and social services across Canada, thereby impacting fieldwork opportunities (clinical education, practice placements) for occupational therapy (OT) students. The ACOTUP Board of Directors encouraged CUFE to examine whether fieldwork placements being used in the new pandemic reality were still reflective of the existing definition of fieldwork. A subcommittee of CUFE reviewed accreditation, WFOT documents and other fieldwork literature. They concluded that these foundational documents continue to support the creative and innovation strategies currently being used by Canadian OT education programs for fieldwork placements.

## Background & Introduction:

When the COVID-19 pandemic began in March 2020, many health care and social services across Canada were immediately refocused and restricted and, as a result, fieldwork opportunities for occupational therapy students were significantly impacted. In many situations/regions, fieldwork placements that were planned or in progress were immediately interrupted, cancelled or postponed. In order to ensure students were able to meet fieldwork requirements for graduation, fieldwork coordinators at the various Canadian programs had to necessarily look broadly and creatively at (re)new(ed) fieldwork opportunities that would continue to meet the definition and purpose of practice education but be flexible enough to occur within, and accommodate the realities of, pandemic practice circumstances. This caused an increase in the use of legitimate but 'non-conventional' fieldwork placements during the remainder of 2020 and during 2021 to date.

Notably:

- The number of placements using virtual supervision increased significantly. That reality has been associated with many conventional and non-conventional placements during the pandemic time period but is not the primary focus of this statement.
- The number of placement services/settings engaging in virtual service provision (aka: tele-rehabilitation) also increased dramatically which mirrored a similar increase in the use of tele-rehabilitation in the profession in general. Many of the OT services which were typically in-person transitioned to online delivery during this period.

In order to ensure that all involved in fieldwork placements nationally are fully informed of the definition of occupational therapy fieldwork, ACOTUP encouraged CUFE to strike a sub-committee (established January 2021). The sub-committee's purpose was to review and clarify if the pandemic-impacted placements being used adhered to and aligned with the existing, evidence-based definition of fieldwork for Canadian occupational therapy education..

The CUFE sub-committee met between January-July 2021. International and national documents, including minimum accreditation standards, as well as publications related to 'non-conventional' fieldwork placements were thoroughly reviewed and referenced to create the following summary regarding the definition of fieldwork in Canadian occupational therapy education.

The World Federation of Occupational Therapy (WFOT, 2016) explicitly sets the minimum standard for practice education (aka: practice placements, fieldwork, clinical education). The COVID-19 and WFOT Minimum Education Standards Statement published in March 2020, in response to the emergence of the pandemic, also clearly stated:

*A dynamic and flexible approach to how the 1000 hours is achieved has always been the intent of the Minimum Standards (WFOT 2020, p. 2).*

### **Definition & Purpose of Fieldwork:**

'Practice placements' are defined by the WFOT (2016) as:

*... the time students spend interpreting specific person-occupation-environment relationships and their relationship to health and well-being, establishing and evaluating therapeutic and professional relationships, implementing an occupational therapy process (or some aspect of it), demonstrating professional reasoning and behaviours, and generating or using knowledge of the contexts of professional practice with and for\* real live people\*\*. (p. 71)*

*The purpose of practice education is for students to integrate knowledge, professional reasoning and professional behaviour within practice, and to develop knowledge, skills and attitudes to the level of competence required of qualifying occupational therapists. Students experience a range of practice education that requires them to integrate knowledge, skills and attitudes to practice with a range of different people\*\*\* who have different needs, and in different contexts. (WFOT, 2016, p. 48)*

\*The 'and for' includes occupational therapy service and consultation provided to organizations and communities.

\*\*Simulated practice activities used within fieldwork are completed with 'real live people' represented by actors portraying standardized patient scenarios. As per WFOT (2020): *"Many education programmes use role play and simulation as a form of practice education. Other teaching strategies include problem-based case study work, video assessments and in-depth, evidence informed reflective practice."*

\*\*\*Fieldwork placements are a part of the occupational therapy services provided to clients including individuals, families, groups, communities, organisations and populations (WFOT, 2010).

## **Standards for Fieldwork Placements:**

The WFOT (2016) requires that all occupational therapy students complete a minimum of 1000 practice placement hours which position the student to be actively involved in *"implementing an occupational therapy process, or an aspect of an occupational therapy process involving human interaction with person or persons as client (individual, family, group or community to business, institution, agency or government)"* (p. 49).

The WFOT (2016) further provides direction that any one OT student's experience during their 1000 hours of practice education must contain a range of experiences (p. 46):

- *People of different age groups*
- *People who have recently acquired and/or long-standing health needs*
- *Interventions that focus on the person, the occupation, and the environment.*

And that the breadth of experience obtained by a single student during 1000 hours of fieldwork should normally include at least three of the following parameters (p. 46):

- *A range of personal factors such as gender and ethnicity that is reflective of the [Canadian] population that will be recipients of occupational therapy*
- *Individual, community/group and population approaches*
- *Health conditions that affect different aspects of body structure and function and that cause different kinds of activity limitations*
- *Different delivery systems such as hospital and community, public and private, health and educational, urban and rural, local and international*
- *Pre-work assessment, work re-entry, career change*
- *Existing and emerging services, such as services being developing for and with people who are under-employed, disempowered, dispossessed or socially challenging; organisations and industries that may benefit from occupational therapy expertise; or arts and cultural services*
- *Settings where there are currently no occupational therapists employed.*

Within our Canadian jurisdiction, the Canadian Association of Occupational Therapist (CAOT, 2019) Academic Accreditation Standards and Self-Study Guide are derived from *“the Minimum Standards for the Education of Occupational Therapists (WFOT, 2016) and a review of current best-practice in accreditation as well as current and future trends in education and professional practice (p. 3)”*. These CAOT standards very simply and broadly note the following necessities:

- *Fieldwork education includes a minimum of 1000 supervised hours.(Standard 2.74 p. 17)*
- *The fieldwork component demonstrates that students acquire a range of experiences. (Standard 2.76 p. 18)*
- *Each student’s fieldwork hours are supervised by an occupational therapist. (Standard 2.712 p. 19).*

The Canadian Guidelines for Fieldwork Education in Occupational Therapy (ACOTUP, 2011) further note that *“the fieldwork experience should occur anywhere the roles and functions of an occupational therapist can be developed and integrated”* (p. 4). Until November 2021, those roles were defined by the Profile of Practice of Occupational Therapy in Canada (CAOT, 2016): *The role of Expert in Enabling Occupation draws on the competencies included in the roles of Communicator, Collaborator, Practice Manager, Change Agent, Scholarly Practitioner, and Professional* (p. 2). In December 2021, the newly released Competencies for Occupational Therapists in Canada (ACOTRO, ACOTUP, & CAOT, 2021) replaced the Profile and merged with the previous national essential competencies document to outline six domains of occupational therapy competencies: A) Occupational Therapy Expertise, B) Communication and Collaboration, C) Culture, Equity and Justice, D) Excellence in Practice, E) Professional Responsibility, and F) Engagement with the Profession (p. 9).

Specifically in relation to pandemic circumstances, the WFOT (2020) acknowledged that *“the pandemic has required occupational therapists to develop new and innovative mechanisms for the delivery of services”* (p. 1). By extension, this ‘reality’ permits fieldwork placements to follow suit and similarly occur using new and innovative mechanisms of service delivery.

The WFOT (2016; 2020) also provides additional detailed information and standards re:

- Placement duration and distribution within the overall curriculum (p 49):
  - *Practice placements are of sufficient duration to allow integration of theory to practice. The range of placement length will depend on the specific program and its context.*
  - *Practice placements can be distributed throughout every year of the curriculum as suitable for the culture and context.*

- Supervision of practice placements by regulated occupational therapists (p 50):
  - *Practice placements are guided by learning objectives and supervised and assessed by an occupational therapist. There is no requirement for the supervisor to be on site ... supervision refers to the process of overseeing the student's implementation of an occupational therapy process, where the [OT] supervisor is responsible for the quality of the student's practice and for the safety of the recipient of occupational therapy.*
  - *It is expected that supervision will include:*
    - *Discussion*
    - *Collaborative development of learning objectives*
    - *Review of the student's intervention plans and documentation*
    - *On-going monitoring and evaluation of student/students' performance*
    - *Completion of final assessment including identification of future learning needs.*
  - *The amount and frequency of supervision will progress from close, on-site supervision to independent practice as student's progress through the programme. The level of supervision will also vary with students' knowledge base, familiarity with the practice setting and their learning needs; the contexts of practice - including the presence or absence of other health professionals; the complexity of the occupational therapy intervention to be provided and the level of proficiency required for it to be effective; and the safety risks for both students and recipients of occupational therapy.*

### **Non-Conventional Placements:**

To meet these standards, fieldwork can take many forms. Historically, in our Canadian context, conventional\*\*\*\* placements are those placements occurring where OTs are commonly and currently employed part-time or full-time, including but not limited to front-line 'clinical' health and social service, industry and educational milieus. By contrast, 'non-conventional' placements typically occur outside, or as an expansion of, the established front-line OT practice in a given region. For several decades, we had already seen an increase in these types of placements in the Canadian context (Bossers, Clark, Polatajko & Laine, 1997).

In our Canadian context, non-conventional placements have begun to be categorized/grouped by some programs as LEAP placements (Barker & Duncan, 2020) because many are focused on Leadership, Emerging practice (or expanding scope of practice), Advocacy (or administration) and Program planning (or projects). However, the names/types and the extent of use of these non-conventional placements vary between programs and can include but are not necessary limited to:

- Leadership/administrative/managerial roles, program planning, projects and initiatives, including policy development and advocacy
- Role-emerging/role-enhancing/role-expanding OT service provision
- Alternative models of supervision, including on-site interprofessional supervision as long as a sufficient amount of OT supervision occurs for the given context and

nature/scope of practice and individualized evaluation of student applied OT practice competencies occurs

- Student-led, site-facing, occupation-focused projects involving knowledge application & translation and/or program development & evaluation in partnership and alignment with the needs of clinical sites/services and/or community organizations and/or industry, as long as individualized evaluation of student applied practice competencies occurs by a registered occupational therapist (ie: not an evaluation of the project outcome itself).
- Simulation, as long as it is “*delivered with immediacy to interaction with a real client (who may be portrayed by a standardized patient) and to occupational therapy practice education/fieldwork placements*” (OTCA 2020) and includes an individualized evaluation of student applied practice competencies by a registered occupational therapist

There is clear direction provided by the WFOT (2016) regarding the need for and use of non-conventional placements and, amidst fluctuating and evolving pandemic practice circumstances, the WFOT (2020) statement re-emphasized:

*Educators, students and graduates should be encouraged to use these extraordinary circumstances to enhance unique and creative learning opportunities congruent with the client’s unique context just as all occupational therapists are currently doing (p. 2).*

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\*\*\*\*This nomenclature is being used by CUFE for the purpose of this document to categorize placements since 'conventional' is defined as what is based on or in accordance with what is generally done or believed.

The current occupational therapy practice environment is complex and graduates require a variety of skills to successfully navigate within such an environment (Fortune et al, 2013). “*Today’s graduates need skills to enable occupation at clinical (micro) and macro levels*” (Fortune and McKinstry, 2012 p. 274) as well as opportunities that demand they perform within authentic environments which require innovation and the ability to function within change and uncertainty. Fieldwork opportunities beyond conventional environments provide opportunities for development of these required skills (Fortune and McKinstry, 2012) while still drawing on and developing the core set of OT competencies.

LEAP and other non-conventional placements provide a significant number of these diverse fieldwork opportunities within the Canadian context. For example, leadership placements provide students exposure to “... *career paths in many areas beyond that of the front-line occupational therapy clinician [which] require graduate and post-graduate degree credentials including research, administration and management positions in the health and social sectors* (WFOT, 2016, p. 7). Furthermore, role-emerging/role-enhancing placements enable students to be involved in “*existing and emerging services, such as services being developed for and with people who are under-employed, disempowered, dispossessed or socially challenging; organizations and industries that may benefit from occupational therapy expertise*” (WFOT, 2016, p. 49).

Placements focused on projects are seen as opportunities for “*learners to draw together a range of attributes that support the ability to manage complex issues that have occupational relevance at a macro level. In addition, such experiences help learners to develop agency and political acumen both increasingly important capabilities for the contemporary workplace*” (Fortune & McKinstry, 2012, p. 265).

### **Justice, Equity, Diversity & Inclusion (JEDI) Within Fieldwork:**

As noted previously, a broad range of fieldwork experiences, which include addressing the occupational needs of populations, communities and societies, is necessary to enable future occupational therapists “*to engage in community capacity building and societal change beyond the individual*” (WFOT 2016, p. 5).

A ‘societal purpose’ is called for by the WFOT (2016, p. 11) and fieldwork placements serving communities and populations are encouraged in order to “*... advance social participation, health, wellness and social inclusion globally with knowledge and practices that address the social determinants of health and occupational justice, beyond bodily dysfunction*” (p.6). Furthermore, as noted in the placement parameters above, a diversity of personal and sociocultural characteristics, such as gender, ethnicity, age, and language, that is reflective of the Canadian population and our current political-socio-cultural context is a necessary component of the fieldwork experience (p.46).

Often non-conventional practice settings serve individuals and communities not typically served in conventional ‘mainstream’ health and social services. During fieldwork placements, these settings enable students to critically examine their experiences through a JEDI ‘lens’ and address broad societal needs including disparities in health care access, provision of equitable service delivery, and occupational injustice (Wilson et al, 2020).

### **Conclusion:**

With the encouragement of ACOTUP, a subcommittee of CUFÉ was struck to review the existing evidence-based definition of fieldwork for Canadian occupational therapy education and clarify if fieldwork practices and contexts used since the outset of the pandemic were aligned and adhering to the existing definition and standards. The subcommittee reviewed international and national documents, including accreditation standards, and publications related to ‘non-conventional’ fieldwork.

The Minimum Standards for the Education of Occupational Therapists (WFOT, 2016) and the COVID-19 and WFOT Minimum Education Standards Statement (2020) were seen as foundational to our national accreditation standards and subsequently to the subcommittee’s understanding of how fieldwork is defined. Furthermore, the WFOT definition and accompanying standards were considered to provide sufficient structure as well as scope to both support and be reflective of fieldwork practice in our current national context.

## **Acknowledgement & Authorship:**

The national collaboration reflected in this document was possible due to the cooperation and contribution of the entire CUFE membership.

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## Appendix B: Examples of Fieldwork Site Profile Form

### Example 1: Fieldwork Site Profile (FS-PRO): Learning Opportunities and Resources

*Please fill in and return to your affiliated university occupational therapy program.*

#### Site and Contact Information

Name of site: _____
Address: _____ _____
Web site: _____
Name and title of contact: _____
E-mail address*: _____
<input type="checkbox"/> Supporting material about the site and occupational therapy services attached (e.g. pamphlet, brochure, fact sheet)
<i>*of contact person</i>

#### Declaration of Site Representative

<input type="checkbox"/> I have read and am in agreement with Section 1 and 2 of the <i>Canadian Guidelines for Fieldwork Education in Occupational Therapy (CGFEOT)</i>
<input type="checkbox"/> I understand that occupational therapists at this site acting as preceptors for occupational therapy students will have at least one year of experience as a practicing occupational therapist, as per the Canadian Association of Occupational Therapy recommendations.

## Characteristics of Occupational Therapy Services:

1. Occupational therapy services are organized on:  an O.T. department basis  a program basis  
 No O.T. on site  other: \_\_\_\_\_

2. System(s) / services in which you practice:  Public sector  Private practice

<input type="checkbox"/> Rehabilitation centre	<input type="checkbox"/> Outpatient clinic	<input type="checkbox"/> Hospital
<input type="checkbox"/> Long term care centre	<input type="checkbox"/> Home care	<input type="checkbox"/> Day hospital
<input type="checkbox"/> Insurance industry	<input type="checkbox"/> Community setting	<input type="checkbox"/> School

Other: \_\_\_\_\_

3. Occupational therapy roles:  Direct care  Indirect care  Consultation  Research  
 Administration  Other: \_\_\_\_\_

4. Client life span:  Children  Adolescents  Adults  Older adults

## Characteristics of Occupational Therapy Services (continued):

5. Client conditions:  Mental health  Physical health  Combined  Other

*Please list common client issues:*

6. Occupational therapy focus:

7. Hours of operations: \_\_\_\_\_

8. Total number of occupational therapists working at/for your site:

Full Time: \_\_\_\_\_  Part Time: \_\_\_\_\_

9. Support personnel (e.g. OTAide, rehab assistant)?  yes  no If yes, how many: \_\_\_\_\_

## Learning Opportunities and Resources for Students:

1. Access to a library (either on or off-site) :  yes  no

2. Other learning opportunities and resources for students (*please list*):

(*e.g. interprofessional contacts, field trips, resource binders*):

3. Please state your general learning and performance expectations of students (other than the ones from the University) to assist them in preparing for fieldwork education at your site.

## Administrative Resources:

1. Orientation session offered upon students arrival:  
 yes  no, it will be available on (*specify date*): \_\_\_\_\_
  
2. Space and resources available to students (phone, desk, workstation, etc.):
  
  
  
  
  
  
  
  
  
  
3. Policies and procedures information available:  
 yes, location: \_\_\_\_\_  
  
 no, it will be available on (*specify date*): \_\_\_\_\_
  
4. Health and safety policy in place:  
 yes  no, it will be available on (*specify date*): \_\_\_\_\_
  
5. Emergency procedures information available:  
 yes, location: \_\_\_\_\_  
  
 no, it will be available on (*specify date*): \_\_\_\_\_
  
6. Contingency plan available (for absent fieldwork educator during placement):  
 no, it will be available on (*specify date*): \_\_\_\_\_  
  
 yes. Please outline its major characteristics:

## Administrative Resources (continued):

7. Continuing education plan in place for occupational therapists on site:

no, it will be available on (*specify date*): \_\_\_\_\_

yes. Please outline its major characteristics:

*Please outline your site's continuing education policy or describe how occupational therapists remain current in issues that impact their professional practice. Also, describe use of evidence based practice:*

## Amenities Available to Students:

1. Cafeteria:  yes  no
2. Kitchen facilities:  microwave oven  refrigerator  other: \_\_\_\_\_
3. Locker:  yes  no
4. Bicycle rack:  yes  no
5. Parking:  yes, cost: \_\_\_\_\_  no
6. Public transportation available:  yes  no
7. Other (*please list*): (e.g. accommodations for students)

## Site Requirements for Students:

1. Immunization:  yes  no If yes, specify in box below.
  2. Criminal / police record check:  yes  no If yes, specify in box below.
  3. Dress code:  yes  no If yes, specify in box below.
  4. A car is required during placement hours:  yes  no
- If yes, describe the site "gas reimbursement" policy for OT students, in the box below.

Please specify additional information and/or requirements (e.g. mask fit testing):

## Message to Students:

Please add anything else you would like students to know or prepare for prior to starting a placement at your site.

Pre-placement information package sent to student (e.g. reading list or material, schedule):  yes   
no

## Signatures:

Profile completed by: \_\_\_\_\_ date: \_\_\_\_\_  
(Name and title)

My organization wishes to offer placements to occupational therapy students from:

my affiliated University       Canadian universities       International O.T. programs

For fieldwork education purposes, I hereby authorize my affiliated university occupational therapy program to forward the information included in the FS-PRO to students and fieldwork coordinators from other occupational therapy programs.

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

If you have any questions or comments, please contact your university representative:

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

E-mail address\*: \_\_\_\_\_

# Example 2: Fieldwork Site Profile (FS-PRO):

Adapted with permission from NACEP

## SECTION ONE – FACILITY

1. Facility Name: \_\_\_\_\_
2. Facility Address: \_\_\_\_\_
3. Contact Name and title:  
\_\_\_\_\_
4. Contact email: \_\_\_\_\_
5. Is the facility accredited?    \_\_\_ Yes \_\_\_ No
6. Does your facility carry liability insurance?    \_\_\_ Yes \_\_\_ No
7. Does your facility endorse the *Canadian Guidelines for Fieldwork Education in Occupational Therapy (CGFEOT)*?    \_\_\_ Yes \_\_\_ No
8. What charting methods are used by your facility? (e.g. Paper, electronic...)
9. Is student parking available on-site? \_\_\_ Yes \_\_\_ No

If yes, please specify: \_\_\_\_\_

10. Does your facility have a specific dress code? \_\_\_ Yes \_\_\_ No

If yes, please specify: \_\_\_\_\_

## SECTION TWO – STAFFING

Describe your staffing complement for Occupational Therapist(s)?

	Total FTE	# full-time	# part-time
OTs			

## SECTION THREE – FACILITY HEALTH AND ADMINISTRATION REQUIREMENTS

1. Is a **criminal reference check** required?    \_\_\_ Yes \_\_\_ No

How recent must the record check be?

\_\_\_\_\_

2. Is **mask fit testing** required?    \_\_\_ Yes \_\_\_ No

3. Does your facility require any immunization beyond the requirements prescribed by the Quebec Department of Public Health (Protocole d'Immunisation du Québec (PIQ))? \_\_\_\_\_

Yes \_\_\_ No

If yes, please specify: \_\_\_\_\_

4. Is travel required as part of the student's clinical placement? \_\_\_ Yes \_\_\_ No

If yes, does the student require a vehicle? \_\_\_ Yes \_\_\_ No

#### **SECTION FOUR – STUDENT EXPERIENCE**

*Please select all opportunities below that may be available to a student while on clinical placement at your facility:*

1. Practice Settings (please check all that apply):

- |   |  |
|---|--|
| <ul style="list-style-type: none"><li>● Acute care hospital</li><li>● Rehabilitation hospital/facility</li><li>● School/School Board</li><li>● Private Practice</li><li>● Home care</li><li>● Long term care facility</li></ul> | <ul style="list-style-type: none"><li>● Community</li><li>● Administration/ Research</li><li>● Non conventional/Role-emerging/Role-enhancing</li><li>● Other (please specify):<br/>_____</li></ul> |
|---|--|

2. Areas of practice (please check all that apply):

- |  |  |
|--|--|
| <ul style="list-style-type: none"><li>● Mental Health</li><li>● Amputees</li><li>● Assistive Technology</li><li>● Burns</li><li>● Cardiac/Cardiac surgery</li><li>● Neurology/CVA/TBI</li><li>● Driving</li><li>● ER</li><li>● Ergonomics</li><li>● Hand therapy</li><li>● ICU</li><li>● Medicine</li><li>● NICU</li></ul> | <ul style="list-style-type: none"><li>● Oncology</li><li>● Orthopedics</li><li>● Palliative Care</li><li>● Spinal Cord Injury</li><li>● Surgery</li><li>● Developmental Delay</li><li>● Low vision</li><li>● Musculoskeletal</li><li>● Chronic Pain</li><li>● Wellness / Health Promotion</li><li>● Geriatrics</li><li>● Other (please specify):<br/>_____</li></ul> |
|--|--|

3. Patient age groups (please check all that apply):

- Preschool age (<4 years)
- School age (4-17 years)
- Mixed children (0-17 years)
- Adults (18 to 64 years)
- Older adults (65 years and up)
- Mixed adults (18+)
- All ages

4. Categories of common conditions (please check all that apply):

- Autism/Neurodiversity
- Musculoskeletal
- Neurological
- Cancer
- Cardio-vascular and respiratory
- Dementia & other aspects of cognitive decline
- Developmental disability
- Surgery
- Other (please specify): \_\_\_\_\_

5. Special programs / activities / learning opportunities (please check all that apply):

- |                                     |   |
|-------------------------------------|---|
| ● Advocacy                          | ● Palliative/End of Life care                   |
| ● Caregiver/family education        | ● Pelvic floor rehab                            |
| ● Case-management                   | ● Policy development                            |
| ● Chronic disease management        | ● Polytrauma                                    |
| ● Classroom consultation            | ● Poverty/homelessness                          |
| ● Community care/Crisis/Development | ● Psychotherapy                                 |
| ● Dysphagia                         | ● Research                                      |
| ● Equity and Justice                | ● Non-conventional/role-emerging/role-enhancing |
| ● Global health                     | ● Sensory integration and processing            |
| ● Group programs                    | ● Sexuality and gender                          |
| ● Home assessments and modification | ● Service/business administration               |
| ● Independent living and housing    | ● Substance use/Addictions                      |
| ● Indigenous health                 | ● Telehealth                                    |
| ● Insurance assessment              | ● Universal and inclusive design                |
| ● ICU/ER                            | ● Veterans affairs or Armed forces              |
| ● Leadership and change agency      | ● Other (please specify): _____                 |
| ● Medical-legal services            |   |
| ● Orthotic/Prosthetic fabrication   |   |

6. Inter-professional collaborations, interactions and/or observation (please check all that apply):

- |  |                                 |
|--|---------------------------------|
| ● Administrator                        | ● Respiratory Therapist         |
| ● Community support worker             | ● Social worker                 |
| ● Dietician/Nutritionist               | ● Speech Language Pathologist   |
| ● Kinesiologist                        | ● Orderly (PAB)                 |
| ● Nurse / Nurse Practitioner           | ● Teacher/principal             |
| ● Physiotherapist                      | ● Special educator              |
| ● Osteopath                            | ● Neuropsychologist             |
| ● Physician/Specialist                 | ● Psychologist                  |
| ● Physiotherapy Technologist/Assistant | ● Patient partner               |
| ● Prosthetist                          | ● Other (please specify): _____ |
| ● Recreational Therapist               |                                 |

7. During a typical student clinical placement, students are expected to complete approximately 35 hours per week. What is a typical weekly schedule that a student can expect at your facility?

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8. A fieldwork site is expected to offer a structured clinical learning experience for students. The clinical educator is expected to set learning objectives and discuss expectations with the student, and to provide them with regular, constructive, and actionable feedback. Please indicate what types of tools your site uses to accomplish these requirements:

- A structured orientation session
- Use of a learning contract and clinical learning objectives
- Structured practical sessions with the student
- Regular reserved time for feedback
- Education sessions
- Other (please specify): \_\_\_\_\_

9. Please provide any additional information you feel may be useful:

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10. Please provide any useful web links that students should consult in preparation for a clinical placement at your facility:

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This form was completed by:

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

Position: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email address: \_\_\_\_\_

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

## Appendix C: Example of a student site evaluation form

### STUDENT REPORT ON FIELDWORK PLACEMENT

Facility:

Program/Service:

Fieldwork preceptor(s):

Date of Placement:

Student:

Students are to complete this form at the midterm and final evaluation periods of the placement and then review and discuss it with the preceptor(s). Student and preceptor signatures are required after discussing the form at both midterm and final. The form must be returned to the University of Toronto fieldwork administrative assistant after the completion of the placement.

#### INSTRUCTIONS:

- Students are encouraged to provide comments as they are extremely valuable and assist in clarifying ratings. Comments are especially helpful if there is student dissatisfaction.
- Spaces for ratings are indicated at the end of each line. Please mark the appropriate rating box according to the following scale:

**Fully Agree:** Meaning that the statement completely reflects your experience and this area does not require improvement

**Agree in Part:** Meaning that the statement only partially reflects your experience and this area requires some improvement

**Disagree:** Meaning that the statement does not reflect your experience at all and requires much improvement

**N/A:** Meaning that the statement is not applicable for the setting, placement level, or situation

ORIENTATION	Midterm			
	Fully Agree	Agree in Part	Disagree	N/A
I was adequately oriented to the facility/organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was adequately oriented to the program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was adequately oriented to staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was adequately oriented to the materials, supplies and equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was adequately oriented to emergency and safety procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was adequately oriented to workload measurement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was adequately oriented to charting/documentation procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments:				

ORGANIZATIONAL CLIMATE/LEARNING ENVIRONMENT	Midterm				Final			
	Fully Agree	Agree in Part	Disagree	N/A	Fully Agree	Agree in Part	Disagree	N/A
Interaction with other health professionals was available during the placement	<input type="checkbox"/>							

Participation as part of the program/department/health care team was encouraged	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Library and other learning resources (including staff expertise) was available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The site fieldwork coordinator was helpful in dealing with clinical fieldwork issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall this placement provided the learning experience required to develop basic competency in this area of practice appropriate to my clinical level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments at midterm:									
Comments at final:									

RAPPORT WITH PRECEPTOR	Midterm					Final			
	Fully Agree	Agree in Part	Disagree	N/A		Fully Agree	Agree in Part	Disagree	N/A
My preceptor communicated with me in an effective manner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

My preceptor was sensitive to my learning style and adjusted his/her teaching style appropriately	<input type="checkbox"/>							
Expectations, roles and responsibilities of a student at my level were discussed with my preceptor as required.	<input type="checkbox"/>							
My personal learning objectives were taken into account throughout the placement	<input type="checkbox"/>							
My preceptor was available and easily accessible	<input type="checkbox"/>							
I felt comfortable asking my preceptor questions	<input type="checkbox"/>							
Overall, I feel that I developed good rapport with my preceptor	<input type="checkbox"/>							
Comments at midterm:								
Comments at final:								

FACILITATION OF DEVELOPMENT OF CLINICAL REASONING SKILLS	Midterm				Final			
	Fully Agree	Agree in Part	Disagree	N/A	Fully Agree	Agree in Part	Disagree	N/A
My preceptor served as a good role model in the development of my clinical reasoning skills	<input type="checkbox"/>							
My preceptor was a good resource for development of my clinical reasoning skills	<input type="checkbox"/>							

Appropriate time was scheduled for discussions regarding clinical reasoning and the management of clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My preceptor provided appropriate opportunities for the progression of my independence and responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My preceptor encouraged me to critically think through problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My preceptor encouraged me to develop self-directed learning skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments at midterm:									
Comments at final:									

LEARNING OPPORTUNITIES	Midterm					Final			
	Fully Agree	Agree in Part	Disagree	N/A		Fully Agree	Agree in Part	Disagree	N/A
My preceptor facilitated the meeting of my learning objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The variety of conditions provided a valuable learning experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My caseload was appropriate (in numbers and complexity) for my level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

There was adequate opportunity to develop and practice interview skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There was adequate opportunity to develop and practice the administration of assessments and outcome measurements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There was adequate opportunity to develop and practice the identification of occupational performance issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There was adequate opportunity to develop and practice the implementation of treatment plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There was adequate opportunity to develop and practice evaluation of treatment plan progression	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There was adequate opportunity to develop and practice documentation skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There was adequate opportunity to develop and practice skills in discharge planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There was adequate opportunity to develop and practice appropriate communication with other members of the health care team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunities to attend in-services and or relevant meetings were provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments at midterm:									

Comments at final:

FEEDBACK	Midterm				Final			
	Fully Agree	Agree in Part	Disagree	N/A	Fully Agree	Agree in Part	Disagree	N/A
I was provided with timely and appropriate positive feedback and reinforcement	<input type="checkbox"/>							
I was provided with timely and appropriate constructive feedback and suggestions for improvement	<input type="checkbox"/>							
Appropriate time was scheduled for discussion regarding my progress	<input type="checkbox"/>							
My preceptor created an open environment and encouraged me to provide feedback on his/her performance	<input type="checkbox"/>							
My preceptor was responsive to my feedback on his/her performance	<input type="checkbox"/>							
Comments at midterm:								
Comments at final:								

EVALUATION	Midterm				Final			
	Fully Agree	Agree in Part	Disagree	N/A	Fully Agree	Agree in Part	Disagree	N/A

I feel I was adequately supervised which allowed my preceptor to record a true reflection of my performance on the CBFEE-OT evaluation	<input type="checkbox"/>							
Evaluations were completed by the pre-determined period	<input type="checkbox"/>							
Discussions with my preceptor regarding the evaluations included collaborative plans to improve performance and/or learning opportunities	<input type="checkbox"/>							
Comments at midterm:								
Comments at final:								

<p><b>The most positive aspects of this placement were:</b></p>
<p><b>Some suggestions for enhancing the learning experience are:</b></p>

FINAL ONLY

Evaluation	Excellent	Very Good	Good	Fair	Poor
Upon completion of this placement, how would you rate this clinical experience?	<input type="checkbox"/>				
<b>Overall Comments:</b>					

Midterm Review	Final Signatures
This form was reviewed by and discussed with the following individuals at mid-term:	Student Signature: _____ Preceptor(s) Signature: _____ Preceptor(s) Signature: _____
Date:	Date:

