



UNIVERSITY
OF ALBERTA

OT FIELDWORK **Clinical Educator Handbook**

Department of Occupational Therapy
Faculty of Rehabilitation Medicine

REVISED September 2026

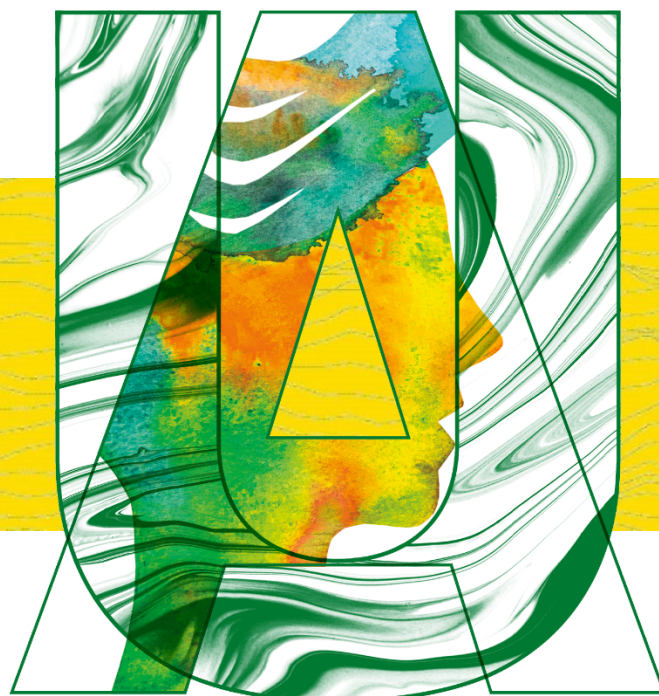


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1.0 University of Alberta Occupational Therapy Fieldwork

1.1 Contact Information

OT Clinical Education Website

Cherie Henderson

Academic Coordinator of Clinical Education
(ACCE)
Department of Occupational Therapy 2-64
Corbett Hall
Phone: (780) 492-9680
E-mail: cherie.henderson@ualberta.ca

Clinical Education Administrator

Department of Occupational Therapy 2-64
Corbett Hall
Phone: (780) 492- 2488
Fax: (780) 492- 4628
E-mail: otclined@ualberta.ca

Loraine Kolber

Associate Academic Coordinator of Clinical
Education (Associate ACCE)
Department of Occupational Therapy 2-64
Corbett Hall
E-mail: lkolber@ualberta.ca

Michele Moon

Calgary (& Southern AB) Clinical Education
Coordinators (CCEC)
Department of Occupational Therapy (Calgary
Satellite Campus)
Phone: (403) 803 4965
E-mail: mlmoon@ualberta.ca

Tami Turner

Saskatchewan Clinical Education
Coordinator (SkCEC)
Department of Occupational Therapy
(Saskatchewan)
Phone: (519) 280-5765
E-mail: tvturner@ualberta.ca

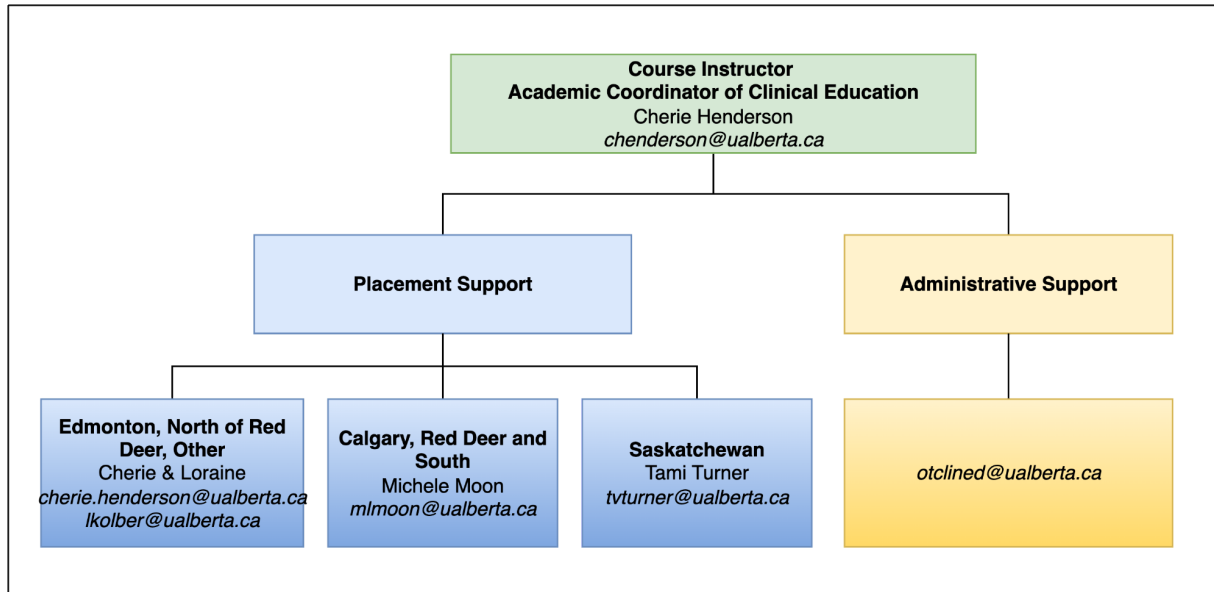
Leeanne Sadowsky

Augustana Satellite Coordinator
Department of Occupational Therapy
(Augustana Satellite Campus)
E-mail: lgsadows@ualberta.ca

1.2 Fieldwork Support

Who to Contact if you have a question(s) about:

- **Placement Support** e.g. student performance, evaluation, resources
- **Administrative Support** e.g. placement offers, dates, changes, requirements, HSPnet, Connect Care



1.3 Introduction to Fieldwork

The content of the University of Alberta (UofA) Occupational Therapy (OT) Clinical Educator Handbook contains important information to support a successful fieldwork experience.

Fieldwork Philosophy

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

Clinical Educators who supervise occupational therapy students contribute to crafting the future of the profession and uphold the Competencies of Occupational Therapists in Canada [Competency F: Engagement with the Profession, centers the competent occupational therapist as one who: F1. Contributes to the learning of occupational therapists and others (including students); F2. Shows leadership in the workplace; F3. Contribute to the development of occupational therapy.]¹

¹ ACOTRO, ACOTUP, & CAOT. (2021/2024). Competencies for Occupational Therapists in Canada/Référentiel de compétences pour les ergothérapeutes au Canada. Accessed at https://acotro-acore.org/sites/default/files/uploads/ot_competency_document_en_hires.pdf

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.
- Promote and develop behaviors required of a regulated health professional
- Consider the teaching methods and learning styles of both students and fieldwork educators
- Support students with developing inter-professional (IP) competencies
- Support fieldwork educators' preferences for student level, timing and supervision model to facilitate an educational fit

Adapted from: Committee on University Fieldwork Education (CUFE), Association of Canadian Occupational Therapy University Programs (ACOTUP). (2024). Canadian Guidelines for Fieldwork Education Occupational Therapy (CGFEOT).

1.4 Fieldwork Requirements

Students are required to graduate with fieldwork experience reflecting exposure to a range of practice areas, practice settings and clientele across the lifespan. At a minimum, students must have 150 hours of experience in a rural practice setting and one placement predominantly in a mental health setting. Students are responsible for ensuring they graduate with fieldwork experience in diverse practice settings.

Fieldwork is an academic requirement. Each fieldwork course outline/syllabus has standard learning objectives.

The Canadian Association of Occupational Therapists [CAOT] requires students to complete a minimum of 1000 hours of fieldwork. At the U of A, students will complete the equivalent of 29 weeks = 1087.5 hours (based on a 37.5 hour/week); however, any statutory holidays are deducted from this total.

The U of A requires students to complete fieldwork in the areas of:

- Mental Health (M)* (minimum 225 or 262.5 hours = 6 weeks)
- Rural (R)*** (minimum 150 hours = 4 weeks)

Please note that the first placement hours accrued in OCCTH 504 will contribute towards the total 1000 hours required, but not the placement context (M) or context (R) requirement.

***Mental Health Placement Definition:**

Occupational therapy provision that primarily supports psychosocial wellbeing, recovery-oriented services, and/or equity-deserving individuals and communities across the lifespan that may live with psychiatric conditions (acute, chronic) that fall within the DSM-V-TR.

*****Rural & Remote Placement Definition:**

A rural site is defined as a site located outside a major urban centre. In order for a site to be considered rural, it must fulfill the following requirements:

- The site cannot be in a major urban centre (Edmonton, Calgary, Saskatoon, or Regina).
- The city/town must be a minimum of 50 km from a major urban centre.
It cannot be a suburb of an urban centre (ie: Sherwood Park, St Albert, Airdrie, Cochrane, etc).

For example, in Alberta, Red Deer, Lethbridge, Medicine Hat, Fort McMurray, and Grand Prairie qualify for the rural site requirement. For example, in Saskatchewan, Prince Albert, Moose Jaw, North Battleford, Yorkton, and Swift Current qualify for the rural site requirement. In the Northwest Territories (NT), all sites including Yellowknife are considered rural/remote. The above definition applies to sites in AB, SK, NT, and all other national and international locations.

1.5 Roles and Responsibilities

1.5.1 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 student 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 process 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 the competencies needed to become an effective Occupational Therapist (CGFEOT, 2024) 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,...).

Adapted from: Committee on University Fieldwork Education (CUFE), Association of Canadian Occupational Therapy University Programs (ACOTUP). (2024). Canadian Guidelines for Fieldwork Education Occupational Therapy (CGFEOT).

1.5.2 University Fieldwork Coordinators and 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.

Adapted from: Committee on University Fieldwork Education (CUFE), Association of Canadian Occupational Therapy University Programs (ACOTUP). (2024). Canadian Guidelines for Fieldwork Education Occupational Therapy (CGFEOT).

1.5.3 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.

Adapted from: Committee on University Fieldwork Education (CUFE), Association of Canadian Occupational Therapy University Programs (ACOTUP). (2024). Canadian Guidelines for Fieldwork Education Occupational Therapy (CGFEOT).

2.0 Fieldwork Placements

Before the Placement Begins

2.1 Student Responsibilities

As in any other course, students must be correctly registered to receive credit. For fall, winter, spring and summer placements, students must register in the correct fieldwork course and section in Bear Tracks. Correct registration is the responsibility of the student and is not tied in any way to placement selection in HSPnet.

2.1.1 Immunization/CPR/Security Clearance/etc.

As part of the prerequisites for fieldwork, occupational therapy students are required to undergo immunizations, fit-testing for masks, a security clearance, and 'Health Care Provider' CPR as outlined in the UofA Calendar. A student is responsible for all costs involved.

Placements will not proceed unless the College of Health Science has received proof of:

- 'Basic Life Support (BLS)' CPR certificate (annual recertification required)
- Copy of verified immunization records
- N-95 Mask Fit testing
- Police Information Check (PIC) with Vulnerable Sector Search (VSS)

It is the student's responsibility to ensure requirements are up-to-date and to have records available if requested by the site. Current requirements are posted by the College of Health Sciences [HERE](#). Failure to comply may result in cancellation of a placement.

All students complete a PIC/Security Clearance Check at the outset of enrolment in the MScOT Program. Note: Most placement sites accept the PIC/VSS completed at the outset of the program to be valid for the duration of the program; however, **some placements (ie. pediatric sites) may require the student's PIC/VSS to be updated prior to their specific placement period. If this requirement applies to your site, please ensure that your HSPnet comments and description note this requirement and/or you inform otclined@ualberta.ca of this requirement when you make your placement offer.**

Security requirements are becoming increasingly difficult to complete in a timely manner and student placements proceeding as planned can be at risk.

2.1.2 Insurance

A student is responsible for ensuring they have appropriate vehicle insurance in the event that they use their car during a fieldwork placement.

A site/clinical educator has the choice to decide whether they will transport a student in their vehicles, or if the student will be expected to attend visits using their personal vehicle.

While fulfilling fieldwork requirements, either in-province or out-of-province, students are insured by the University of Alberta for both malpractice and general liability. In addition, students are covered under the Alberta Workers' Compensation Act. The University of Alberta does not cover any car insurance; therefore, each student must have their own.

2.2 Clinical Educator Responsibilities

2.2.1 Offering Placements

A clinician is eligible to supervise a student after 1 year of clinical practice. It is encouraged that clinicians with less than 1 year experience assist another therapist in student supervision.

If a clinician is interested in becoming a clinical educator, they should contact the fieldwork team and read the 'becoming an OT Clinical Educator' section.

- The U of A sends out requests for placements (referred to in HSPnet as a Placement Request [PR]) three times each academic year via HSPnet and placement request forms via email.
- Sites using HSPnet will receive the PR and can accept placement requests directly within the HSPnet database. Any significant placement-specific information (ie: requirement for Connect Care training and which role, requirement of a vehicle for the placement, description of specialized/focused services, atypical daily/weekly schedules, pertinent regulations of the fieldwork site) should be noted in the comment section of HSPnet to ensure students are pre-informed.

The Collaborative for Scholarship in Clinical Education (CSCE) and the ACCE offer Clinical Educator Workshops at various times during the year in topic areas related to fieldwork and working with students in rehabilitation. CSCE also offers clinical appointments to recognize extraordinary individual contributions to the education of our students which are reviewed/awarded on an annual basis.

Interested in becoming an OT Clinical Educator?

Why?

- Helps you stay current with your knowledge and best practice
- Contributes to the profession
- Energizes you in your own work
- Supports your continuing competency program

When?

- A clinician is eligible to supervise a student after completing 1 year of clinical practice.
- For clinicians with less than 1 year of experience, we recommend they assist another therapist in student supervision.

How?

- Check with your manager/employer to discuss the possibility of your site becoming an occupational therapy teaching site.
- Contact the [ACCE](#) to discuss your site, suitability and availability.
- OT fieldwork team will send interested clinicians a google form to complete re: site details and clinical educator availability.
- If you and/or your site have not hosted a student before, a student placement agreement with the University of Alberta will be established.

Clinical Educator Preparation

- Review Clinical Educator handbook and relevant clinical educator resources
- Collaborative for Scholarship in Clinical Education
- UA Microcredentialling [online course](#) for new clinical educators
- [Other Resources for Clinical Educators](#)

2.2.2 Fieldwork Site Profile (FSPro)

The U of A promotes the use of the [Canadian Guidelines for Fieldwork Education in Occupational Therapy \(CGFEOT\)](#). As outlined in this document, the Fieldwork Site Profile (FSPro), is to be completed for all new sites taking students and is to be updated every 5 years.

The main goal of this process is to promote excellence in fieldwork education among partners as well as to fulfill the CAOT requirements for Academic Accreditation. The information included in the FSPro will assist University Fieldwork Coordinators and students in making informed decisions about placement selection. (CGFEOT, 2024)

2.2.3 General Guidelines for Selection Process (HSPnet)

The yearly fieldwork schedule which outlines dates and activities with regards to the placement process will be set by the ACCE.

The Faculty of Rehabilitation Medicine utilizes a web based automated placement database: Health Sciences Placement Network (HSPnet). Students review the comment section of each offer in HSPnet for requirements such as a vehicle or need for Connect Care training then select their choices within HSPnet. The program, using a random lottery, then assigns students to their highest ranked available choice.

After the computer assignment process is completed, the placement assignments are approved by the ACCE and the students can view these on HSPnet. The sites are then contacted via email and HSPnet to inform them that a student has been assigned to their site.

2.2.4 Student Communication with Clinical Educator

After the matching process, a formal placement confirmation and clinical educator Information Package will be emailed to the site/clinical educator and will include:

- ☐ Clinical Educator Information Letter
- ☐ Student's contact information (U of A email address)
- ☐ Course outline
- ☐ Assessment tools
- ☐ Other relevant checklists, documents, and weblinks

Once assignments are completed, the fieldwork team will instruct the student to initiate email contact with their clinical educator. At this time, the student will introduce themselves, share their e-Portfolio and ask questions that they might have regarding their upcoming placement e.g. start time, working hours, parking information, resources, pre-readings.

The student's e-Portfolio will include:

- Description of occupational therapy competency development and an updated resume
- Relevant educational and professional experience
- U of A fieldwork team resources and contact information

2.2.5 Changes to and Cancellations of Placements

Sometimes unavoidable situations result in a placement having to be changed or canceled. If a situation arises at the facility that may affect the fieldwork experience for the student or alter it significantly, please contact the ACCE as soon as possible. Every attempt will be made to address the concerns of the fieldwork site while maintaining the best possible learning experience for the student. These situations are dealt with on a case by case basis.

During a Placement – Student & Clinical Educator Responsibilities

2.3 Attendance

A student's working hours (including lunch, coffee breaks, and daily schedule) will be determined according to the policies/regulations of the fieldwork site i.e. **students are required to work the same hours and schedule as their clinical educator including weekends, evenings or holidays.**

- **A student will attend fieldwork with no hours missed.**
- **Students must contact the ACCE to report and negotiate rescheduling of missed hours if more than 4 consecutive hours are missed.** It is recommended that students contact the ACCE regarding the plan for any missed hours.
 - ALL time missed from placement must be made up, regardless of reason (i.e., illness etc.). There are various strategies that can be used for students to make up time, including: project work/presentation, working extra hours through the week, extending the placement (if site/clinical educator is available without inconvenience), or adding hours to a subsequent placement.
 - Missed hours that have not been legitimately made up by the end of the placement period, must be recorded on the student's final placement evaluation form.
- **All students are encouraged to track their hours and overtime throughout their placements.**
- **Students cannot 'bank' time to be applied in future placements.**

A student involved in academic or research endeavors at a recognized provincial, national, or international level, who is required to participate in an event during their fieldwork placement, should inform the ACCE as soon as possible of the dates of the activities. The student is required to make up all missed time, and to complete the placement at a time that is arranged with the appropriate fieldwork site personnel.

Students may request to attend a conference during their placement that is pertinent to their occupational therapy education. This request must be negotiated with and approved by both the clinical educator/placement site and the ACCE. Given approval to attend, students may use up to 3 days of their placement to attend a conference without making up the time. Students must complete a Conference Record Form and submit it along with their final fieldwork evaluation package for that placement. If requested by the ACCE, they must also provide evidence of registration and/or a Certificate of Attendance.

2.4 Orientation

Before the student arrives onsite, an organized and thorough orientation to the facility should be planned. **Orientation to the site and service/practice area is mandatory as it structures the placement for a successful fieldwork experience.** The following is a list of what you might want to ensure is covered on or close to the first day:

- ☐ Introductions to team members
- ☐ Orientation to the physical layout
- ☐ Review of infection control precautions
- ☐ Discussion of facility objectives: philosophy, scope and limitations of service
- ☐ Relevant sections of any site policy/procedures manuals
- ☐ Review documents
- ☐ Communication etiquette of the facility
- ☐ Development of a schedule for the first week
- ☐ Scheduling a consistent time to meet for (daily/weekly) feedback
- ☐ Scheduling a time at the end of the first week to review the evaluation process and collaboratively review the evaluation process and the goals for the placement.
- ☐ The fieldwork evaluation tool reviewed by the student and the clinical educator
- ☐ Take the opportunity to learn more about each other (clinical educator/student work and life experiences)

2.5 First Week of Placement

The following is a checklist of what might typically be covered in the first week of the placement:

- ☐ Orientation and observation.
- ☐ Review student and placement learning goals
- ☐ Clinical educator may start to involve the student in interventions and have them report observations. Safety issues/techniques are reviewed. Client descriptions, diagnosis and needs, are reviewed. Documentation guidelines reviewed.
- ☐ Clinical educator assigns tasks at the level of the student. Student initiates and implements these tasks. Clinical educator provides formative feedback.

2.6 Student Projects

A site/program may determine that an assignment or project would augment the learning experience, and assist the student to develop their OT competencies. During a conventional placement, a site may choose to assign a presentation or project to a student that will require no more than 5% of the placement time. For example, on a 7 week placement = ~13 hours (7 weeks x 37.5 hours x 5%) and for a 6 week placement = ~11 hours. The student may be expected to work on the project/assignment outside of placement time but should align with the course expectation of 32-35 hours of independent study during the placement (including research, preparation or supplemental learning activities).

Non-clinical or leadership placements may have different expectations for projects.

Please note that projects should not be assigned during a student's one-week Introductory Fieldwork Placement (OCCTH 504).

2.7 Academic Assignments Related to Fieldwork

Certain academic courses may require the student to do an assignment related to their fieldwork experience. These assignments generally include collecting information to use in an assignment and must respect client confidentiality (ie. not identifying information). Working on assignments is not to be done during the fieldwork hours unless it is directly related to the fieldwork expectations or caseload.

2.8 Facilitating Student Self-Directed Learning

A student is expected to be self-directed in their learning and to adjust to the service specialty, focus, and environmental demands.

A clinical educator may provide a great deal of guidance and structured experience at the beginning of fieldwork, but it is expected that students will take more and eventually full responsibility for their own learning. It is important to discuss the student's current skill level and the expectations for this level. The skill level will vary with the fieldwork experience and with the degree of personal development.

To facilitate self-directed learning with students, a clinical educator may have to shift their thinking from being an instructor and information provider to a facilitator of learning for the students. Encourage students to share previous learning experiences and to build on these in determining learning needs and in setting goals and objectives. Encourage students to seek out and utilize available resources and to evaluate themselves according to their goals and learning. This model requires a collaborative relationship between the clinical educator and student where feedback can be given and received comfortably.

Self-directed learning is a motivating style of learning which builds upon past experiences and acknowledges the adult need to move from dependency to increasing independence

and self-directedness. It also takes into account that adults learn best when there is “a need to know” something and the learning experience is relevant and meaningful. The rewards are internal (personal and professional growth) versus external (exams). Self-directed learning skills are lifelong skills that a student will need in order to be a competent professional. These skills are required to allow students to continually seek out new knowledge and to adapt to new problems encountered.

Self-directedness can be evaluated with learning objectives and the role the student takes in completing these. Encourage students to evaluate themselves on the goals they set and on the learning process. The clinical educator can also reflect on situations where students were required to demonstrate self-initiative to a degree determined by the situation at hand.

2.9 Evaluation Process

2.9.1 Occupational Therapy Fieldwork Evaluation in Canada (OT-FAC)

The evaluation used in fieldwork education at the University of Alberta (and many other Universities across Canada) is currently the OT-FAC.

This tool consists essentially of two sections: 1) fieldwork experience and 2) assessment of competency levels in the six domains. The record of fieldwork experiences is intended to describe the student’s learning context, to better contextualise each fieldwork.

Competencies of each domain are global, complex, interactive, integrative and evolving, an overall rating is assigned to each of the six domains, along with comments justifying the rating.

Comments are encouraged and may help to clarify specifics about a student’s performance e.g., specific skills within a competency. Should clinical educators feel students are performing below expectation for a specific level (1/2/3/4) at midterm or final, they should contact the fieldwork team for discussion.

Varying degrees of supervision are required depending on the level of the student and may include direct, collaborative or indirect means. Clinical Educators are ultimately responsible for assessing the appropriate level of independence and amount/type of supervision required by the student. This may be dependent on the type of client population, the practice setting, the nature of the tasks carried out, the skills and knowledge of the student, and the physical environment. A student is expected to move along a continuum within each placement and among all placements. (See Fieldwork Course Outlines for more information).

Learning Objectives

To engage a student in active learning, students may create learning goals/objectives that profile/highlight specific learning related to the particular placement content/caseload. As students reach higher levels of fieldwork, learning objectives may become more refined, as particular areas are identified for further development.

Clinical educators will take into consideration the fieldwork course objectives (see Fieldwork Course Outlines for more information) and theory learned in academic courses covered to date in their evaluation of the student.

2.9.2 Mid-Term Evaluation

The mid-term evaluation will typically be given **within 3 working days of the actual mid-date of the placement**. This allows the student the opportunity to demonstrate progress. However, this does not preclude failure at any point during the placement given that competency has not been achieved or that there is an immediate failure

Procedures:

The mid-term evaluation is a vital component of the placement, allowing for formal adjustments of the learning objectives and providing the student with feedback to make the necessary changes to successfully complete the placement by final.

- ☐ Clinical educator evaluates student using the OT-FAC and discusses with student.
- ☐ Student evaluates self using a copy of the OT-FAC and discusses with clinical educator
- ☐ Clinical educator evaluates the student's ability in areas of client care responsibilities and progresses expectations as appropriate.

After evaluation at mid-term, ensure that both the **student and the clinical educator sign the OT-FAC evaluation forms**.

If the student is experiencing challenges, not progressing or meeting expectations, or is perceived to be at risk of failing, both the student and the clinical educator should contact the ACCE or CEC as soon as possible.

The time for the final evaluation should be scheduled at the mid-term meeting.

The final evaluation should be completed within the last 2 days of the placement whenever possible.

2.9.3 Final Evaluation

The clinical educator, using professional judgment, will provide a **recommendation** as to whether the student should receive a grade of Pass, Pass with reservation or Failure. **The ACCE (course instructor) will assign the grade** taking into consideration the recommendation of the clinical educator and the evidence recorded in the OT-FAC.

**** Please note that a PWR can only be given during Level 1 and 2 placements. If the clinical educator makes a grade recommendation of PWR during a Level 3 placement, the student will be awarded a failure. (see FAQ 7)**

The final evaluation is aimed at describing strengths and areas requiring further work. General goals for next placement are formulated through discussion.

- ☐ The clinical educator evaluates student using **OT-FAC** and provides a **grade recommendation**.
- ☐ Student evaluates self using the **student copy of the OT-FAC**.
- ☐ Student evaluates their placement experience using the **Placement Evaluation** form and shares this information with their clinical educator/placement site.
- ☐ Student completes **Summary of Strengths & Challenge Areas** form which can be shared with the clinical educator, upon request.
- ☐ Student makes copies of all evaluation documents for their own records
- ☐ Evaluation package, including all original, signed documents, is submitted to the University Clinical Education Administrator.

After evaluation at final, ensure that both the **student and the clinical educator sign the OT-FAC evaluation forms**.

Following each placement session, students are responsible for ensuring the OT-FAC and all evaluation documents are provided to the Clinical Education Administrator as directed.

2.10 Closure of Placement

By the end of the placement, most clinical educators are proud of the outcome of the student's performance. A relationship has developed that will require intentional closure. A suggestion is to join the student during farewells to clients and to be with the student at the end of the final day.

3.0 Difficulties in Fieldwork

3.1 Site Withdrawal

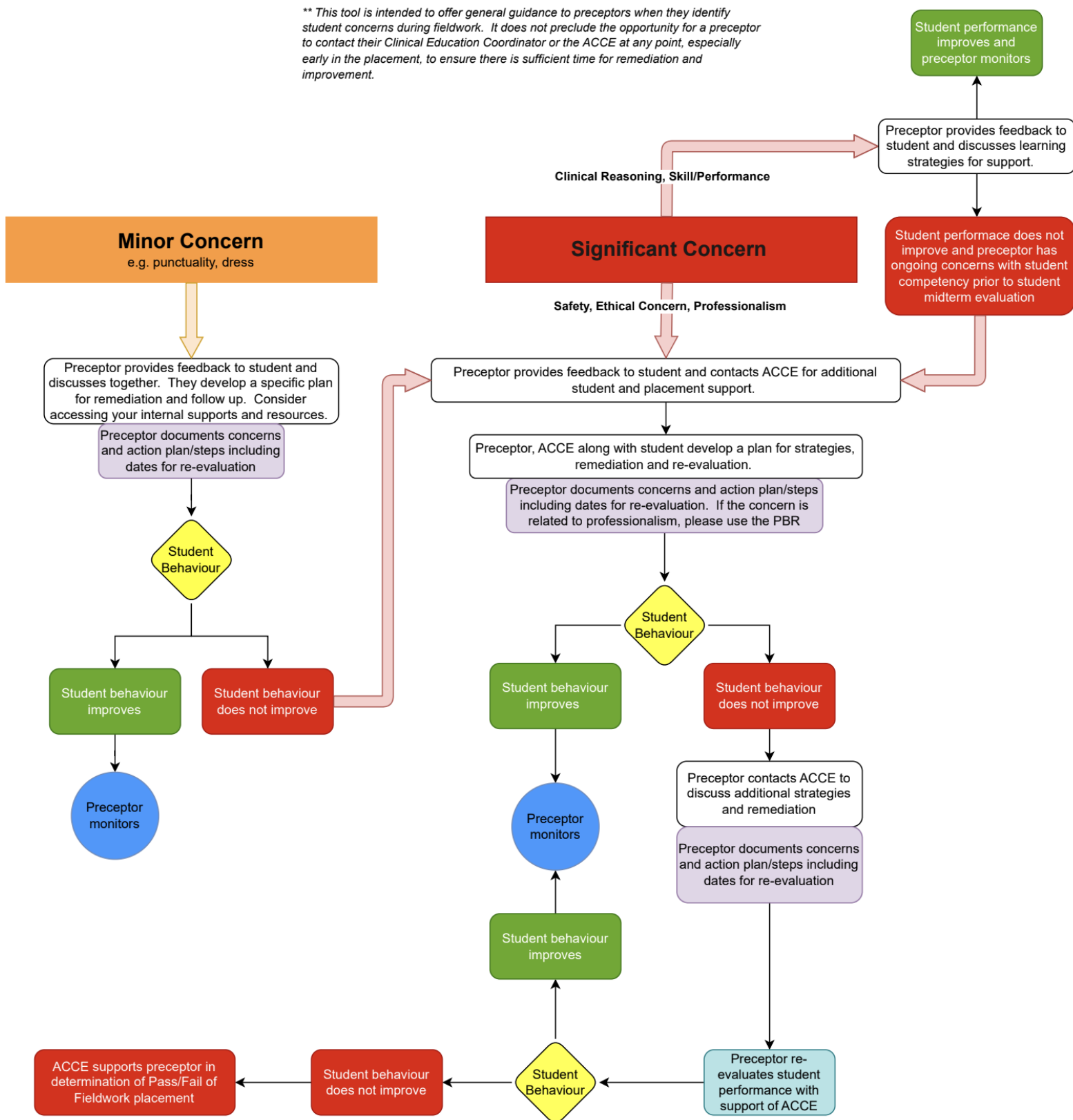
A site has the right to withdraw supervision or terminate the placement at any time assuming appropriate written rationale is given. Please contact the ACCE immediately to further discuss if this may be a possibility.

3.2 Student Concerns During Fieldwork

3.2.1 Flowchart

Student Concerns During Fieldwork

**** This tool is intended to offer general guidance to preceptors when they identify student concerns during fieldwork. It does not preclude the opportunity for a preceptor to contact their Clinical Education Coordinator or the ACCE at any point, especially early in the placement, to ensure there is sufficient time for remediation and improvement.**



3.2.2 Student Failure

A) Criteria for Immediate Failure

A student will be failed immediately when there is evidence of:

- Physical, verbal, emotional and/or sexual abuse of a client
- Any act that lacks good judgment and/or endangers a client's safety
- Breaches in confidentiality
- Taking financial advantage of a client or the facility
- Any other violations of the [U of A Code of Student Behaviour](#) and Accountability and Professional Code of Ethics of their respective or relevant professional/licensing bodies (Eg: [ACOT Code of Ethics](#)) (OT Committee, July 20, 2004).

B) Criteria for General Failure

If a student fails to successfully complete any or all the course objectives (see course outlines).

C) If Recurring, the following are grounds for failure:

General Communication Skills/Professional Relationships/Professional Competence

- Inappropriate or inadequate professional identity skills, i.e.; relationships with clients or peers that are unprofessional, inability to establish a therapeutic relationship with client
- Lack of respect for clients, co-workers or the institution; e.g.; arrogant, non empathetic, authoritarian manner, swearing, belligerence, condescending of other disciplines, supervisor and clients
- Overtly inappropriate/aggressive behavior
- Over-familiar behavior with clients, i.e.; give out personal phone number

Instrumental Skills

- Negligent, improper, inadequate clinical skills and documentation
- Consistent difficulty applying theory to practice at the expected skill level
- Inability to set priorities
- Inability to carry out aspects of the job. i.e.; clear lack of knowledge of diagnosis and symptoms, inability to do assessment, standardized or non-standardized
- Subjective, biased observation skills; unable to make observations of group process
- Must demonstrate control of groups
- Not completing assignments/projects i.e.; handing them in late or poorly done
- Not meeting goals outlined in Learning Objectives
- Not able to synthesize and prioritize client assets/problems, i.e.; drawing a complete picture of the client, identify issues to be dealt with and in what order
- Constantly needing excessive help with assessment, analysis and treatment skills
- Lack of clinical reasoning skills supported by documented incidents

3.3 Strikes During Placement

In the event of a strike the student/site is asked to contact the ACCE as soon as possible so strategies can be discussed. The student is asked to follow the lead of their clinical educator, unless this contravenes the direction of the union leader. It is understood that the student may not wish to cross the picket line for personal or political reasons. Due to the unpredictable nature of a strike, the placement may be delayed, canceled, or alternative work tasks engaged in and graduation may also be delayed. The student must keep a log of all missed hours related to strike action and attach the log to their final evaluation.

3.4 Injury of Student During Fieldwork

Students are covered under the Alberta Workers' Compensation Act (as per the [U of A Human Resources website re: WCB Reporting](#)). In the event of an accident or injury (including MVAs during placement hours), students must notify the ACCE immediately. The ACCE will direct them to complete and submit the appropriate forms to the Clinical Education Administrator.

4.0 Student Records

4.1 Fieldwork File at a Placement Site

Fieldwork sites will only keep a copy of a student evaluation if specifically and formally requested to do so. Students can elect to fill out a **Reference Authorization Form** to be left with the clinical educator along with a copy of the student's evaluation at the end of each placement. Reference Authorization forms will be made available to the students prior to each placement period.

4.2 Disabilities & Accommodations

Although services are available on campus to assist students who have disabilities, similar services may not be available for off-campus clinical placements, which are required for the degree in which the student is registered.

In order to enable the most support and flexibility possible, accommodations required to function optimally in placements should be discussed with the ACCE or their delegate (and in conjunction with an Accessibility Advisor, when appropriate) as soon as possible and **in advance of the placement selection and matching process**.

[Accommodation Procedure for Students](#)

The University of Alberta has a tradition of encouraging academically qualified persons with disabilities to seek admission to its programs. It has also demonstrated its commitment to provide support services to students with disabilities to enable complete access to university facilities and successful completion of programs. In assisting students with disabilities, the University's criteria for academic excellence will not be compromised.

4.3 Fieldwork Course Outlines

Please find the course outlines [linked here](#).

5.0 Frequently Asked Questions

1. How do I become a clinical educator?

We welcome you to express your interest in becoming a clinical educator. We value every clinical educator's contribution to the professional development of our students. Please read the ['becoming an OT Clinical Educator'](#) section for specific steps and details.

2. What do I do if a student is unexpectedly absent from placement?

The student must contact the OT admin team (otclined@ualberta.ca) for absences of greater than 4 hours. When the student returns to work/placement, they should negotiate with their clinical educator and the ACCE how to make up for their missed time. ALL missed time MUST be made up and tracked on the OT-FAC. If this is not possible, outstanding time at the end of placement must also be noted on the OT-FAC.

3. What do I do if a student is absent from placement and does not contact me?

Please attempt to reach out to the student to make sure that they are okay and determine the reason for the absence. Instruct them to contact the OT admin team at otclined@ualberta.ca and ACCE as soon as possible.

4. What happens if my unit/program is on outbreak due to flu or covid?

Students are expected to work alongside their clinical educator and follow their organization's policies and procedures. If a student is asked to leave placement, (e.g. because they do not have their flu shot and this is a requirement for their work) the student will have to make up this missed time. If you or your student has concerns, please [contact the ACCE](#).

5. What happens if my student has an incident/injury while on placement?

If the student requires urgent medical attention, please call 911 and then contact the ACCE as soon as possible. If the student requires medical attention, but it is not urgent, contact the ACCE and OT admin team at otclined@ualberta.ca as soon as possible for support and information.

If the student does not require medical attention, the student is still required to report the incident and complete placement site specific documents along with U of A WCB forms. WCB forms are time sensitive and require completion ASAP after the incident, so do not delay in reporting the occurrence. The ACCE will also follow up with the clinical educator and student to sufficiently debrief the incident and provide support when required.

6. If I have concerns about my student's performance on placement:

Who do I contact?

Do not hesitate to [contact the clinical education coordinator](#) for your area and/or the [ACCE](#) with any concerns. See 3.0 Difficulties in Fieldwork.

When should I contact the ACCE or CEC?

- If your concerns relate to professionalism, safety or professional ethics, please [contact the ACCE](#) as soon as possible with your concerns.
- If your concerns relate to a minor concern such as punctuality/dress, please address your concerns with your student and monitor for improvement. If the behaviour does NOT improve, please [contact the ACCE](#) or [CEC](#) for support.
- If your concern is related to clinical reasoning, skills and performance, provide feedback to your student as soon as you identify the area of concern. DO NOT wait until the midterm evaluation to provide this feedback to your student. If the behaviour does not show signs of improvement after discussion and opportunities for practice/remediation please [contact the ACCE](#) or [CEC](#) as soon as possible for support.

How soon should I talk to my student?

We encourage you to talk to your student as soon as possible once you identify an area of concern. It is important for the student to have adequate time to respond to strategies of support and remediation and demonstrate improvement. DO NOT wait until the midterm to provide this feedback to your student.

**** If you have any concerns or questions about student performance at any time, please [contact the ACCE](#) or [CEC](#) for advice and support. Please also see the student supervision resources linked [here](#) for additional guidance and support.**

7. What is a Pass with Reservation? How do I give my student a PWR?

In consultation with the ACCE , a student may be assigned a Pass with Reservation (PWR) during Level 1 and 2 placements For a level 3 or 4 placement, a designation of 'Pass with Reservation' would be considered a failure.

Please refer to 3.0 – Difficulties in Fieldwork, for more information if you have concerns about your student and are considering a PWR or placement failure.

8. Where do I find information about whether or not a student has taken a particular course in the program when they arrive on placement?

Information about courses completed and the curriculum will be sent out with placement confirmation documents. If you lose or cannot find these, please contact otclined@ualberta.ca

9. Can I ask students to complete work/preparation prior to the start of placement?

Yes, it is acceptable and reasonable for students to be asked to complete a small amount of preparatory work before they start placement. Please keep in mind that depending on the session, students may be completing a placement or academic coursework immediately prior to the start of your placement.

10. Can a student travel with me in my car to do home visits?

It is up to the site and/or clinical educator to determine whether they are comfortable having OT students travel in clinical educators' cars during placement. If this is not possible, please ensure that your site notes the requirement for a car in the site placement offer descriptions/requirements. Students using their own vehicles, are responsible for all costs including ensuring they have adequate vehicle insurance in place.

11. Can I ask my student to complete a presentation or project while on placement?

A site may choose to ask a student to complete a small project (e.g. presentation) that will demand no more than 5% of the placement time. It is important that the assignment would augment the learning experience, and assist the student to achieve the fieldwork objectives of the placement. For example, on a 7 week placement = ~13 hours (7 weeks x 37.5 hours x 5%).

Non-conventional or leadership placements may have different expectations for projects. Please discuss this with the ACCE.

Please note that during a student's one-week Introductory Fieldwork Placement (OCCTH 504), they should not be assigned a project.

12. Can my student be on placement if I am not (illness, part time schedule)?

Yes, as long as your student has a designated on-site supervisor to which they can reach out if required in your absence. Consideration should also be given to the length of absence, student's independence, and practice/caseload management. Please [contact the ACCE](#) if you have any concerns or questions.

13. Can my student see clients independently?

Yes. Please consider the level of your student, their level of competence, and organizational policies and procedures. Please ensure that appropriate safety measures are in place and communicated with the student. *Ultimately, the decision for students to see clients independently is a function of the clinical educator's judgement and experience.*

14. What happens if the student does not have the required security clearance for practice at our site? eg. vulnerable sector check.

Please [contact the ACCE](#) asap to determine next steps. Some placements allow for alternate ways for students to remain involved in the placement. Other placements do not have this flexibility and may require a student reassignment.

15. When will I hear if I have been assigned a student for an upcoming placement?

Typically we complete placement assignments 45 days in advance to ensure that required training such as connect care can be scheduled and completed. Unexpected changes sometimes occur, and in these instances, placement assignments can occur closer to the placement start date.

If you have submitted a placement request/offer and have not yet heard if you have been assigned a student, please contact otclined@ualberta.ca for an update.

16. What do I do if the context/practice setting for my student's placement needs to change unexpectedly?

We understand that sometimes unexpected and unavoidable circumstances occur (e.g. no longer able to supervise a student independently, change in practice setting/unit/schedule, leave/illness). If a situation arises that may affect the fieldwork experience for the student or alter it significantly, please [contact the ACCE](#) as soon as possible. Every attempt will be made to address the concerns of the fieldwork site while maintaining the best possible learning experience for the student. These situations are dealt with on a case by case basis.

17. My student asked me to act as their reference for a job offer? Am I able to keep a copy of their OT-FAC to do so?

Yes, if you sign a reference authorization form that the student will provide. The university does not need a copy of the reference authorization form, which students can find on their Canvas.

18. I have questions about how to use the OT-FAC?

If you have questions about how to use the OT-FAC, please see the OT-FAC [FAQs](#). If you still have questions, please contact cherie.henderson@ualberta.ca

19. Is it acceptable for me to offer a student an OT position at my fieldwork site?

If you decide to offer a student a job during their placement, the acceptance of that job should not affect their final clinical evaluation. For best practice, we recommend waiting until the student has completed their final evaluation before extending a job offer at your site and/or have the offer extended by someone other than the clinical educator.

It is important that a site does not offer a placement to a student with the explicit expectation or intention of hiring them once the placement is completed. While we understand that opportunities may arise and sites may choose to offer positions to students after graduation, placements should be provided without any pre-existing commitment or expectation of future employment.

20. Is it acceptable for a student who is on their final placement to complete job interviews while on placement?

Students are responsible for discussing interview requests with their clinical educator. The clinical educator can decide if the interview is disrupting the clinical day. To minimize disruptions, students should be encouraged to schedule interviews either at the beginning or end of their workday, during lunch breaks, or via Zoom whenever possible. Students will be responsible for making up this missed time.

6.0 Helpful Fieldwork Resources

Where can I find helpful Fieldwork Resources?

Please check out the following links or do not hesitate to reach out to any member of the fieldwork team for support.

[University of Alberta Clinical Educator Webpage](#)

[RESOURCES for Clinical Educators](#)