



Disclaimer:

This document is a sample progression guide for OTA Level II fieldwork and is not intended to replace site-specific training, policies, or expectations. Facilities should edit and adapt this template to accurately reflect their clinical environment, patient population, and supervisory practices.

OTA Level II Fieldwork: 8-Week Objectives

SNF / Physical Disability Setting

Week 1 – Orientation, Observation, and Foundations

- Fieldwork educator or designated staff provides a guided tour of the facility, including therapy gym, patient rooms, nursing stations, dining areas, and ADL spaces.
- Review facility policies and procedures (e.g., HIPAA, infection control, fall precautions, documentation flow).
- Student is oriented to the location of therapy equipment, adaptive devices, transfer equipment, and safety supplies within the facility.
- Discuss the role of OT within the interdisciplinary team, including collaboration with nursing, PT, ST, social services, and case management.
- Review therapy schedules, documentation systems, and billing procedures.
- Observe OT treatment sessions, ADL retraining, and functional mobility interventions.
- Attend team meetings, care conferences, or discharge planning meetings as available.

Week 2 – Guided Participation with 1–2 Clients

- Assist with treatment planning and implementation for 1–2 assigned clients under direct supervision.
- Accurately document daily notes with moderate guidance from the fieldwork educator.
- Participate in interdisciplinary rounds and summarize client status verbally.
- Observe other disciplines and describe how collaboration supports client outcomes.
- Establish a consistent daily routine and schedule.

Week 3 – Increasing Responsibility (¼ Caseload)

- Provide treatment to a small caseload (approximately 25%) with supervision.
- Develop treatment plans aligned with established goals and OTA scope of practice.
- Demonstrate effective verbal reporting during rounds or team communication.
- Begin developing an independent daily treatment schedule.
- Identify a topic for the student project that benefits the site.

Week 4 – Expanding Clinical Reasoning (½ Caseload)

- Manage approximately 50% of a typical OTA caseload with review by the fieldwork educator.
- Complete documentation with minimal corrections.
- Demonstrate clinical reasoning when modifying interventions based on client response.
- Participate in group treatment or class planning if available.
- Engage in informal self-assessment and feedback discussion.

Week 5 – Midterm Preparation and Independence

- Deliver treatment, reevaluations, and documentation with minimal guidance.
- Demonstrate improved efficiency and time management across the day.

- Complete midterm self-assessment in preparation for formal evaluation.
- Present a project outline to the fieldwork educator.
- Require little to no documentation corrections.

Week 6 – Midterm Evaluation and Advanced Participation

- Demonstrate competency across treatment planning, implementation, and documentation.
- Participate in group/class interventions independently when appropriate.
- Present clients during medical or care conferences.
- Complete all interdisciplinary observations.
- Participate in the midterm evaluation using the FWPE.

Week 7 – Near Full Caseload and Autonomy

- Manage 75–100% of a typical OTA caseload with distant supervision.
- Demonstrate consistent clinical reasoning and adaptability during sessions.
- Complete documentation independently and efficiently.
- Provide caregiver or family education when appropriate.
- Refine project presentation for staff.

Week 8 – Full Caseload and Professional Transition

- Independently manage a full OTA caseload consistent with entry-level performance.
- Demonstrate proficiency in all aspects of documentation, treatment, and communication.
- Deliver final project presentation to staff.
- Complete final self-evaluation and participate in final FWPE evaluation.
- Demonstrate professional termination of client relationships and transition of care.

Weekly Supervisory Session Objectives

- Review effectiveness of treatment plans from the previous week.
- Discuss challenges, stress management, and professional behaviors.
- Establish measurable learning goals for the upcoming week.
- Review documentation quality and efficiency.
- Monitor progression toward entry-level OTA performance expectations.