California Occupational Therapy Fieldwork Council

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 Progressive Objectives
Mental Health / Psychosocial Setting

Week I – Orientation & Observation

- Fieldwork educator or designated staff provides a guided tour of the facility, including group spaces, activity areas, quiet rooms, dining areas, and documentation stations.
- Review facility policies and procedures (e.g., confidentiality, safety procedures, crisis protocols, behavioral policies).
- Student is oriented to the location of activity supplies, group materials, coping tools, and documentation resources.
- Discuss the role of OT in supporting psychosocial function, routines, roles, and participation.
- Review daily schedules, group programming structure, documentation systems, and communication flow.
- Observe OT-led groups, individual sessions, and milieu-based interventions.
- Attend team meetings, case conferences, or treatment planning meetings as available.

Week II – Guided Participation

- Assist with preparation and set-up of group and individual interventions.
- Participate in portions of group sessions with direct supervision.
- Begin documentation with moderate guidance from the fieldwork educator.
- Observe interactions between OT and interdisciplinary team members (e.g., social work, nursing, psychology, psychiatry, case managers).
- Establish a consistent daily routine within the program structure.

Week III – Increasing Responsibility (¼ Caseload / Group Leadership)

- Co-lead portions of group sessions with supervision.
- Provide individual interventions with selected clients under supervision.
- Verbally report client participation, behaviors, and engagement during team discussions.
- Begin developing an independent daily schedule.
- Identify a topic for the student project that benefits the program.

Week IV – Expanding Clinical Reasoning (½ Caseload / Groups)

- Lead portions of group interventions with minimal prompting.
- Complete documentation with fewer corrections.
- Modify group activities based on client needs, behaviors, and engagement levels.
- Participate in informal feedback and self-assessment with the fieldwork educator.

Week V – Midterm Preparation and Independence

- Lead group sessions with increased confidence and therapeutic use of self.

- Provide individual sessions addressing coping skills, routines, and social participation.
- Complete midterm self-assessment.
- Present project outline to the fieldwork educator.
- Require minimal documentation corrections.

Week VI – Midterm Evaluation and Advanced Participation

- Demonstrate competency in planning, leading, and documenting groups and individual sessions.
- Participate in treatment planning or case review meetings.
- Demonstrate effective communication with clients experiencing varied psychosocial needs.
- Participate in the midterm evaluation using the FWPE.

Week VII – Near Full Caseload and Autonomy

- Lead full group sessions with distant supervision.
- Manage individual client interactions with consistent clinical reasoning.
- Complete documentation independently and efficiently.
- Refine project presentation for staff.

Week VIII – Full Caseload and Professional Transition

- Independently lead groups and individual sessions consistent with entry-level OTA performance.
- Demonstrate proficiency in documentation, communication, and therapeutic use of self.
- Deliver final project presentation to staff.
- Complete final self-evaluation and participate in final FWPE evaluation.
- Demonstrate professional termination of therapeutic relationships.