

**Department of Occupational Therapy**  
Faculty of Rehabilitation Medicine  
University of Alberta

**OT FIELDWORK HANDBOOK**

*Revised: January 2018*

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## **FIELDWORK CONTACT INFORMATION**

### **Cori Schmitz, MEd, BScOT**

Academic Coordinator of Clinical Education (ACCE)  
Department of Occupational Therapy  
Corbett Hall 2-32  
Edmonton, Alberta T6G 2G4  
Phone: (780) 492-2777  
Fax: (780) 492-4628  
E-mail: [cori.schmitz@ualberta.ca](mailto:cori.schmitz@ualberta.ca)

---

### **Jutta Hinrichs, BScOT, FCAOT**

Calgary & Southern AB Clinical Education Coordinator (CCEC)  
Department of Occupational Therapy (Calgary Satellite Campus)  
Phone: (403) 561-6106  
E-mail: [jutta.hinrichs@ualberta.ca](mailto:jutta.hinrichs@ualberta.ca)

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### **Michele Derdall, MAOT, BScOT**

Saskatchewan Clinical Education Coordinator (SkCEC)  
Department of Occupational Therapy (Saskatchewan)  
Phone: (306) 867-7323  
E-mail: [derdall@ualberta.ca](mailto:derdall@ualberta.ca)

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### **Loraine Kolber, BScOT**

Clinical Education Coordinator for Independent Community Placements (CECICP)  
Department of Occupational Therapy  
Phone: (780) 492-2499  
Email: [lkolber@ualberta.ca](mailto:lkolber@ualberta.ca)

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### **Michelle Green, BA**

Clinical Education Administrator  
Department of Occupational Therapy  
Phone: (780) 492- 6968  
Fax: (780) 492- 4628  
Email: [michelle.green@ualberta.ca](mailto:michelle.green@ualberta.ca)

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[www.ot.ualberta.ca](http://www.ot.ualberta.ca)

## ***ABBREVIATIONS & TERMINOLOGY***

<b>ACCE</b>	Academic Coordinator of Clinical Education
<b>CAOT</b>	Canadian Association of Occupational Therapists
<b>CBFE</b>	Competency Based Fieldwork Evaluation for Occupational Therapists
<b>CCEC</b>	Calgary (& Southern Alberta) Clinical Education Coordinator
<b>CECICP</b>	Clinical Education Coordinator for Independent Community Placements
<b>CGFEOT</b>	Canadian Guidelines for Fieldwork Education in Occupational Therapy
<b>CR</b>	Credit (pass) in a course
<b>CSCE</b>	Centre for Studies in Clinical Education
<b>FS-Pro</b>	Fieldwork Site Profile
<b>HSPnet</b>	Health Sciences Placement Network
<b>ICP</b>	Independent Community Placement
<b>IN</b>	Incomplete in a course
<b>NFPS</b>	National Fieldwork Placement Service
<b>NC</b>	Non Credit (fail) in a course
<b>OCCTH</b>	Acronym used to refer to courses in the Occupational Therapy program
<b>OT</b>	Occupational Therapist
<b>PWR</b>	Pass With Reservation
<b>SCEC</b>	Saskatchewan Clinical Education Coordinator
<b>W</b>	Withdrawal from a course (for medical/personal reasons)

# OT FIELDWORK HANDBOOK

## **1. Introduction**

The content of the Fieldwork Handbook is organized in a chronological order as one would normally go through the fieldwork process. The list of policies in Section 10 is categorized alphabetically by topic for easy reference. The policies are also embedded in the rest of the content.

### **1.1 Fieldwork Philosophy**

These guidelines are intended to ensure that each fieldwork experience provides excellent learning opportunities and resources and an optimum environment for learning. Students are ‘professionals in training’ who acquire abilities and professional behaviors as well as new knowledge while engaged in fieldwork education. Students, 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 class. 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;
- ✓ Promote and develop behaviors required of a regulated health professional;
- ✓ Be accepted as an essential part of professional growth for both students and fieldwork educators;
- ✓ Occur in a positive learning environment;
- ✓ Consider the teaching methods and learning styles of both students and fieldwork educators;
- ✓ Consider students’ learning objectives in relation to their professional development within the context of the fieldwork environment;
- ✓ Develop inter-professional (IP) competencies;
- ✓ 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;
- ✓ Support fieldwork educators preferences for student level, timing and supervision model to facilitate an educational fit;
- ✓ Occur anywhere the roles and functions of an occupational therapist can be developed and integrated.

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Adapted from:  
Committee on University Fieldwork Education (CUFE), Association of Canadian Occupational Therapy University Programs (ACOTUP). (2011). Canadian Guidelines for Fieldwork Education Occupational Therapy (CGFEOT).

## 1.2 Fieldwork Requirements

Fieldwork is an academic requirement. Each fieldwork course has outlined goals and learning objectives. Each student defines individual learning objectives as part of the evaluation process for each placement. Individual learning objectives should reflect personal growth, and should be integrated with facility objectives and the achievement of course objectives (See course outlines).

CAOT requires students to complete a minimum of 1000 hours of fieldwork. At the U of A, students will complete a total of 29 weeks = 1087.5 hours (based on a 37.5 hour/week). For further information regarding how CAOT is involved with clinical education please refer to their website ([www.caot.ca](http://www.caot.ca)).

The University of Alberta requires students to complete fieldwork in the areas of:

- **Physical Health (P)** (minimum 262.5 hours = 7 weeks)
- **Mental Health (M)\*** (minimum 262.5 hours = 7 weeks)
- **Community (C)\*\*** (minimum 150 hours = 4 weeks)
- **Rural (R)\*\*\*** (minimum 150 hours = 4 weeks)

**1.2.1 Policy:** Students are required to graduate with fieldwork experience reflecting exposure to a diversity of areas of practice, and practice settings across the lifespan. At a minimum, students must have 150 hours (4 weeks full time) of experience in each of the community and rural practice settings. At a minimum, students must have 262.5 hours (7 weeks full time) of experience in each of the practice areas of mental health and physical health. Students are responsible for ensuring they graduate with this diversity. (OT Committee, September 23, 2011)

Please note that the first placement hours accrued in OCCTH 503 will contribute towards the total 1000 hours required, but not the placement content (P or M) or context (C or R) requirement.

### \*Mental Health Placement Definition:

Individuals with a psychiatric diagnosis (acute, chronic, or in recovery remission) that falls within DSM V with the exclusion of "Disorders Usually First Diagnosed in Infancy, Childhood, or Adolescence". Acquired brain injury, developmental delays and autism are not considered appropriate experiences for the mental health placement.

### \*\*Community Placement Definition

Placements that occur predominantly in client homes and/or communities (eg. school, Homecare/Home Living, community agencies, outreach programs, etc) and placements that occur in community-based clinics (eg. CAR, CRS/CRIS).

Please note that many community placements require that the student has access to a personal vehicle to be used during their placement. If a student does not have access to a vehicle then community placement selection will be somewhat limited and consultation with the ACCE is warranted. Students are responsible for arranging and funding their own personal vehicle insurance for the duration of the placement. (Policy 2.9.1)

\*\*\*Rural 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.

The above definition applies to sites in AB, SK, NWT, and all other national and international locations.

Sites that may be unclear, according to this definition, will be reviewed by the ACCE. (OT Committee, Aug. 13, 2009)

**1.2.2 Policy:** Students admitted into Saskatchewan-funded seats within the MScOT Program are eligible to complete only one 7 week placement in Alberta. Three of their placements must be completed in Saskatchewan, the NWT, in other Canadian catchments (via the Canadian Fieldwork Placement Sharing System [CFPSS]) or in an international setting. (OT Committee, April 2015)

### 1.3 Roles and Responsibilities

**Fieldwork educators are expected to...**

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



- ✓ Offer a positive and comprehensive learning environment to enable student development within the essential competencies (ACOTRO, 2003) required for occupational therapy practice;
- ✓ Clearly inform students of what is expected of them, appropriately grade responsibilities and expectations and be available to students to offer appropriate supervision;
- ✓ Offer regular and timely feedback based on student performance, including recommendations for improvement;
- ✓ Assist students to develop a good understanding of their “professional growth” and of the remaining learning objectives 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 if the student encounters any significant challenges or concerns;
- ✓ Provide to university fieldwork coordinators and students current information to complete and maintain a “Fieldwork Site Profile (FS-PRO)”.

**The ACCE and clinical education coordinators are expected to...**

- ✓ Assist students to develop a good understanding of their professional growth with respect to core competencies as described in the Profile of Occupational Therapy Practice in Canada (2007) by offering fieldwork preparation (e.g. orientation and resources) and debriefing sessions (e.g. integration of theory with practice) to students;
- ✓ Provide fieldwork educators with orientation and educational resources related to the university academic and fieldwork education programs and the supervision process;
- ✓ Coordinate offers and requests for placements and whenever possible match students and sites according to students’ academic and fieldwork profiles and interests;
- ✓ Ensure students make suitable choices with regard to establishing a varied fieldwork education profile (clienteles and fieldwork settings);
- ✓ Offer ongoing support and problem solving to students and fieldwork educators in dealing with student learning challenges;
- ✓ Recognize fieldwork partners who contribute time and expertise in supervising students;
- ✓ Provide sites with a fieldwork agreement, either temporary or long term, describing the liability and responsibilities of each party;
- ✓ 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 and provide recommendations to fieldwork sites.

**Students are expected to...**

- ✓ Take responsibility for their learning experience and the direction of that experience in partnership with fieldwork educators, onsite fieldwork coordinators, university professors and fieldwork coordinators;
- ✓ Consider personal and professional goals before the beginning of the fieldwork experience. Create and record formal learning objectives by the beginning of the second week of the placement. Review and adjust them throughout the placement;
- ✓ Do preparatory readings before and during the fieldwork experience;
- ✓ Uphold 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 the Standards of Practice (ACOT, 2003) and promote the roles and functions of occupational therapists in an inter-professional manner;
- ✓ Increase their understanding of and respect the roles and functions of other team members;
- ✓ Learn how occupational therapists contribute to the service delivery team;
- ✓ Increase their understanding of the systems in which occupational therapists practice;
- ✓ Develop competencies for the application of the occupational therapy process;
- ✓ Develop increased confidence and competence in their practice of occupational therapy;
- ✓ Develop an interest in one or several areas of occupational therapy to guide them in designing their learning plans and career path;
- ✓ Communicate with the university fieldwork coordinator if they encounter any fieldwork challenges or concerns;
- ✓ Provide feedback to supervisor based on their fieldwork learning experience.

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Adapted from:

Committee on University Fieldwork Education (CUFE), Association of Canadian Occupational Therapy University Programs (ACOTUP). (2011). Canadian Guidelines for Fieldwork Education Occupational Therapy (CGFEOT).

## ***2. Prior to Placement - Student Responsibilities***

### **2.1 Registration**

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.

### **2.2 Fieldwork Information Seminars**

**2.2.1 Policy:** "...Before undertaking fieldwork courses in each year of the program at each level of placement, students must attend all Fieldwork Information Seminars, and fulfill all fieldwork prerequisites..." (University of Alberta Calendar 164.1).

#### **Procedures:**

Fieldwork Information Seminars are organized to familiarize the student to the fieldwork system and processes, and to discuss issues relevant to fieldwork.

The date/time will be announced by the ACCE. These sessions **must be attended prior to placements** and are considered part of the fieldwork course. Non attendance will result in a mark of incomplete (IN) for the fieldwork course.

### **2.3 Selection Process**

**2.3.1 Policy:** A student is only guaranteed one placement in the city where they are receiving their classroom education: Edmonton or Calgary (OT Committee, July 20, 2004).

**2.3.2 Policy:** A student who has experienced difficulty in clinical education or academic course work will not be eligible to request an out-of-catchment (CFPSS), International, or Independent Community Placement for their subsequent placements (OT Committee, July 20, 2004).

**2.3.3 Policy:** A student will not be permitted to pursue a fieldwork placement at a site with explicit intentions to hire them as an occupational therapist upon completion of their OT program (OT Committee, July 20, 2004).

**2.3.4 Policy:** Normally, a student will not be permitted to pursue a fieldwork placement at a site where a close friend or relative works within or closely with the department or program where the student would be placed (OT Committee, Aug. 13, 2009).

Relationships that could cause a potential conflict of interest should be brought to the attention of the ACCE prior to the placement and, preferably, prior to the placement selection and matching process.

**2.3.5 Policy:** A student is not permitted to arrange or attempt to recruit a placement independently. A student must not contact individual occupational therapists, occupational therapy departments, or sites in the pursuit of a placement, except when given permission to do so by the ACCE for international placement opportunities.

All new or potential placement opportunities and new fieldwork sites must be discussed with the ACCE and submitted through a formal process (OT Committee, Sept. 16, 2009).

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 utilizes a web based automated placement processing system: Health Sciences Placement Network (HSPnet). Each student will “sign onto” the placement web site using the instructions provided. Students are required to make 10 placement selections from the offers provided on the web form.

For each placement the student will be given a deadline after which the placement selections can no longer be modified.

Students with special accommodation needs re: placement location (parents, primary care givers of persons with health issues, or students with significant health issues) are required to meet with the ACCE for individualized placement matching. To ensure that all students have equal opportunity to obtain diversity of areas of practice:

- Students are not to choose placements at a site (eg. UAH, FMC) where they have previously completed a 7-week placement. Students may return to the site of their 1-week Introductory Fieldwork Placement for a subsequent 7-week placement.
- Students are not to choose placements in the same specific practice area (eg. hand therapy, ABI, homecare, school-based, etc) as they completed in previous placements.
- Students are typically able to complete a maximum of one pediatric/youth placement within our catchment area (AB, SK, NWT). When extra capacity is occasionally available (eg: ICP or OCCTH 528), exceptions may be negotiated with the ACCE on a case by case basis. Students may complete a second pediatric placement in a national or international setting, as long as the practice context/area differs substantially from their previous pediatric placement.

## **2.4 Immunization/ CPR/Security Clearance/etc**

**2.4.1 Policy:** As part of the pre-requisites for clinical placements, occupational therapy students are required to undergo immunizations, fit-testing for masks, a security

clearance, and 'Health Care Provider' CPR as outlined in the University of Alberta Calendar, Faculty of Rehabilitation Medicine [Fieldwork / Clinical Practice Requirements](#). A student is responsible for all costs involved (OT committee, September 23, 2011).

#### **Procedures:**

Placements will not be assigned unless the Clinical Education Administrator has received proof of:

- 'Basic Life Support (BLS)' CPR certificate (annual recertification required)
  - Copy of verified immunization records
  - N - 95 Mask Fit testing
  - Criminal Records Check (CRC)

Any provider offering 'Basic Life Support (BLS)' CPR is acceptable so long as they follow the Heart and Stroke Foundation guidelines.

It will be the student's responsibility to ensure up-to-date immunizations on a yearly basis and to carry current immunization records to each placement. Failure to comply may result in cancellation of a placement. ([Public Health Agency of Canada - For Health Professionals](#))

All placements require that students complete a CRC/Security Clearance Check at the outset of enrolment in the MScOT Program. Note: Most placement sites accept the CRC/SCC completed at the outset of the program; however, **some placements (eg. pediatric sites) may require the student's CRC/SCC to be updated prior to their specific placement period.**

If a student anticipates that his/her Security Clearance Check will not be clear, an appointment with the ACCE is required.

If a student's Security Clearance is not clear, the site will ultimately determine the criteria for acceptance/denial of a particular placement.

## **2.5 Independent Community Placements (ICP)**

Independent Community Placements (ICP) have a long standing history at the University of Alberta and offer a unique opportunity for service learning, and provide a positive contribution to the community. ICPs occur at a variety of sites such as inner-city organizations, community agencies, etc (usually in Edmonton or Calgary).

As there are no direct formal OT services at these sites, the student will be matched with an on-site supervisor (e.g., social worker, nurse, etc) who will work with the student on a daily basis. The Clinical Education Coordinator for Independent Community Placements (CECICP) is an occupational therapist employed by the

University of Alberta who works with the student to provide timely, effective and on-site support in groups or on a 1:1 basis. The CECICP ensures that what the student is doing at the site is role-emerging OT and that the student is meeting the clinical education requirements. Typically two students are placed at each ICP site to provide support for each other and enrich the learning experience. For more information about ICPs, visit our [website](#).

ICPs are typically available as options for Level II and III students only.

Please note that a student is not eligible to do an ICP if he/she has had any previous fieldwork difficulties, including a PWR or NC in past placements. The student must be in good academic standing in order to qualify for this type of placement. (Refer to Policy 2.3.2).

## **2.6 National Placements - Canadian Fieldwork Placement Sharing System**

The Canadian Fieldwork Placement Sharing System (CFPSS) is currently being coordinated nationally by the Fieldwork Coordinators from each of the Canadian OT programs. Individual recruitment of placements for students is done separately from the U of A recruitment at a user cost paid by the student.

U of A places our students within catchment (AB, SK and NWT) using our own system. However, U of A also uses CFPSS to place U of A students in other catchment areas.

Note: There are very limited opportunities for students to complete a fieldwork placement outside of the UofA's catchment area (AB, SK, NWT). Only a limited number of students in each cohort (typically determined by lottery) may have the opportunity to complete a maximum of one fieldwork placement in a non-UofA catchment area (BC, ON, etc).

## **2.7 International Placements**

Students who are contemplating going out of country for any Level III placements are required to attend the annual International Fieldwork Seminar for their cohort. This yearly seminar will be scheduled by the ACCE.

Please note that a student is not eligible to do an international placement if he/she has had any previous fieldwork difficulties, including a PWR or NC in past placements. The student must be in good academic standing in order to qualify for this type of placement. (Refer to Policy 2.3.2).

## **2.8 Changes to and Cancellations of Placements**

All placements are assigned on the assumption of good health and good grades. However, illness, injury, or personal crises are matters that are handled individually in

consultation with both the student and the ACCE.

Students are **NOT** able to make any changes to their placements unless there are extenuating circumstances (i.e., medical reasons, caregiving, duplication in placements, death in the family etc). Getting married (student or friends), going on a holiday, traveling, family reunions, etc are NOT appropriate reasons. Students are not able to cancel or change placements because they are disappointed with where they are going, client issues, age group etc. Students are also not able to change placements because they misread or incorrectly filled out their placement forms.

There can be last minute cancellations of the placement by the site. Students must be prepared for quick adaptation to the situation. It is possible that some students may not receive a placement, requiring alterations in the curriculum placement plan. Every effort will be made, however, to acquire a suitable placement in a timely manner.

In the case of academic difficulty or failure, the student's circumstances will be reviewed by the ACCE and the Associate Chair, taking into consideration the content of the course(s) involved and the planned fieldwork. Unfortunately, final grades are not always available before placements begin. If there is a course failure, the student may be withdrawn from fieldwork (Refer to 6.3 Academic Challenges).

## 2.9 Expenses

**2.9.1 Policy:** A student requesting a fieldwork placement outside of Alberta, Saskatchewan or the North West Territories via CFPSS will be responsible for related application costs, whether they receive the requested placement or not (OT committee, July 20, 2004).

**Procedures:**

All costs related to CPR, immunizations and security clearance checks are the responsibility of the student (Refer to Policy 2.4.1). Also, all costs relating to clothing, accommodation, travel and meal expenses during fieldwork are the responsibility of the student.

## 2.10 Insurance

**2.10.1 Policy:** A student is responsible for ensuring they have appropriate vehicle insurance in the event that he/she uses his/her car during a fieldwork placement (OT Committee, Aug. 26, 2004).

**Procedures:**

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. (See

[UofA Human Resources website](#) re: WCB.) The University of Alberta does not cover any car insurance; therefore, each student must have his/her own.

## **2.11 Contact With the Site**

Each student must create and maintain an online ePortfolio (hosted on Mahara via UofA eClass) which includes an updated Resume and Letter of Introduction for each placement period.

Students must not make initial contact with the site or preceptor. The supervising therapist will be instructed to make contact with the student after they receive the placement confirmation email and the electronic Preceptor Information Package.

Once a student has been contacted, the student must provide their preceptor with a weblink (called a 'Secret URL') to their current ePortfolio.

If a student has not heard from the supervising therapist at least three weeks prior to the start of the placement, they should contact the Clinical Education Administrator for assistance.

## ***3. Prior to Placement - Preceptor Responsibilities***

### **3.1 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 preceptor please contact the ACCE.

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 has a system of [Clinical Appointments](#) to recognize individual's contribution to the education of our students.

The U of A sends out a 'Call for Offers' (CFO) (referred to in HSPnet as a Placement Request [PR]) to recruit placements three times each academic year via HSPnet and placement request forms via email. On these forms a clinician is asked if he/she can offer a certain level of placement for a certain time period.

Sites using HSPnet will receive the PR and can accept placement requests directly within the HSPnet database. Since each student's placement hours are determined by the schedule, policies and regulations of the fieldwork site (see policy 4.1.1), atypical



weekly or daily schedules, or any other significant placement-specific information, should be noted in the comment section of HSPnet to ensure students are pre-informed.

### **3.2 Fieldwork Site Profile**

The U of A promotes the use of the [Canadian Guidelines for Fieldwork Education in Occupational Therapy](#) (CGFEOT). The complete document can be found on the [ACOTUP website](#). A portion of 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.

Please note:

“The University Fieldwork Coordinators require information about fieldwork education sites regarding opportunities and resources for student learning. 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 FS-Pro will assist University Fieldwork Coordinators and students in making informed decisions about placement selection. They may achieve a balanced student fieldwork profile while meeting their learning needs.” (CGFEOT, 2011)

### **3.3 Canadian Fieldwork Placement Sharing System**

The Canadian Fieldwork Placement Sharing System (CFPSS) is currently being coordinated nationally by the Fieldwork Coordinators from each of the Canadian OT programs. Individual recruitment of placements for students is done separately from the U of A recruitment at a user cost paid by the student.

U of A places our students within catchment (AB, SK and NWT) using our own system. However, U of A also uses CFPSS to place U of A students in other catchment areas.

The ACCE may periodically approach certain sites/preceptors requesting a placement for a student from other Canadian universities.

### **3.4 Selection Process**

Students make their selection of an appropriate placement (AB, SK, NWT) to meet their needs, interests and fieldwork requirements based on the information provided to the university by the site. Students select their 10 top choices within HSPnet and the computer matches students to sites to maximize the number of students placed.

After the computer matching process is completed, the placements are approved by the ACCE and the students are notified by email that the results are available for viewing on HSPnet. The sites are then contacted via email and HSPnet to inform them that a student has been matched to their site. At that time, the site will also be sent a placement confirmation which contains the name and email address of the student.

### 3.5 Initial Communication

A U of A Preceptor Information Package will be emailed to the site/preceptor before the start of the placement and will include:

- Preceptor Information Letter
- Student's contact information
- Course outline
- Other relevant checklists, documents, and weblinks

**The site must reply to the student in as soon as possible**, confirming the start time, working hours, parking information, directions to the facility and other pertinent information. Please advise the student re: acronyms/abbreviations used by the site, appropriate textbook or journal readings, and an overview of the caseload to be worked with.

### 3.6 Changes to and Cancellations of Placements

Sometimes unavoidable situations result in a placement having to be changed or cancelled. 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.

## 4. *During a Placement – Student & Preceptor Responsibilities*

### 4.1 Attendance

**4.1.1 Policy:** A student's working hours (including lunch, coffee breaks, and daily schedule) will be determined according to the policies/regulations of the fieldwork site (OT Committee, Aug 26, 2004).

**Students are required to work the same hours and schedule as their preceptor.**

**4.1.2 Policy:** A student will attend fieldwork with no hours missed (OT Committee, Aug 26, 2004).

**4.1.3 Policy:** A student involved in academic or research endeavors at a recognized provincial, national, or international level, and is required to participate in an event during her/his 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 (OT Committee, Aug. 26, 2004).

**Procedure:**

Any 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 this time, including; project work/presentation, working extra hours through the week, extending the placement (if site/preceptor is available without inconvenience)), or adding hours to a subsequent placement.

**All students are encouraged to track their hours and overtime throughout their placements.** Most students tend to work overtime and making up missed time is not usually difficult. (Note: "Overtime" does not include lunch hour or skipped breaks.)

**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.

Missed hours that have not been legitimately made up by the end of the placement period, need to be recorded on the student's final placement evaluation.

**Students cannot 'bank' time to be used towards elective days off.**

**4.1.4 Policy:** 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 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 the fieldwork evaluation package for that placement. If requested by the ACCE, they must also provide evidence of registration and/or a Certificate of Attendance. (OT Committee, September 23, 2011)

## 4.2 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
- Orientation to the physical layout
- Review of universal precautions
- Discussion of facility objectives: philosophy, scope and limitations of service
- Relevant sections of any site policy manuals
- 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 learning objectives written by student
- The CBFЕ is reviewed by the student and the preceptor
- Take the opportunity to learn more about each other (preceptor/student work and life experiences)

### 4.3 First Week of Placement

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

- Development and completion of learning objectives. Orientation and observation.
- Preceptor delegates simple tasks. Student reports observations to preceptor/team. Safety issues/ techniques are reviewed. Client descriptions, diagnosis and needs, are reviewed.
- Preceptor assigns client tasks at the level of the student. Student initiates and implements these tasks. Preceptor provides feedback aimed at ensuring safety. Preceptor assigns a level of responsibility in maintaining client records.

### 4.4 Mid-Term of Placement

**4.4.1 Policy:** The mid-term evaluation will normally be given within 3 working days of the actual mid-date of the placement (or by end of 4th week of the placement) to allow the student the opportunity to make the necessary changes by the end of the placement. 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 (OT committee, July 20, 2004).

#### **Procedure**

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.

- Clinician evaluates student using CBFЕ.
- Student evaluates self using a copy of the CBFЕ.
- Clinician evaluates the student's professionalism using the **Professional Behavior Rubric** (© DalU).

- Preceptor evaluates the student's ability in areas of client care responsibilities and increases same as appropriate

If the student is failing or is perceived to be at risk of failing, both the student and the preceptor should contact the ACCE as soon as possible.

#### 4.5 Final Week of Placement

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

- Clinician evaluates student using **CBFE** and provides a grade recommendation (Refer to Policy 5.2.1)
- Student evaluates self using the **student copy of the CBFE**.
- Student evaluates their placement experience using the **Placement Evaluation** form and shares this information with their preceptor/ placement site.
- Student completes **Summary of Strengths & Challenge Areas** form which can be shared with the preceptor, upon request.
- Student makes copies of all evaluation documents for their own records
- Evaluation package is mailed or delivered to the University.

If the student is failing or is perceived to be at risk of failing **at any point during the placement**, both the student and the preceptor should contact the ACCE as soon as possible.

The student and the ACCE must be informed of a grade recommendation of NC/failure at the time of the final evaluation.

Following OCCTH 528, students are responsible for ensuring the final signed page of the main (preceptor's) CBFE document is faxed or hand-delivered to the Clinical Education Administrator **within one week** of the final day of their placement. The entire original evaluation package (containing all items on the checklist) must then be mailed or delivered to the University.

#### 4.6 Projects

**4.6.1 Policy:** A site may choose to assign an assignment or project to a student that will demand no more than 5% of the placement time (OT Committee, Aug. 26, 2004).

**Procedure:**

A facility may determine that an 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%).

Please note that during a student's one-week Introductory Fieldwork Placement (OCCTH 503), s/he should not be assigned a project.

#### 4.7 Academic Assignments

Certain academic courses will require the student to do an assignment related to their fieldwork experience. These assignments generally include collecting information to use in an assignment. Working on assignments is not to be done during the fieldwork hours unless it is directly related to the fieldwork expectations or caseload.

#### 4.8 Facilitating Self-Directed Learning

**4.8.1 Policy:** A student is expected to be self-directed in his/her learning and to adjust to the service specialty, focus, and environmental demands (OT Committee, Aug, 2004).

**Procedure:** To facilitate self-directed learning with students, a supervisor/preceptor may have to shift his/her 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 supervisor and student where feedback can be given and received comfortably.

Self-directedness can be evaluated with the learning objectives included in the Competency Based Fieldwork Evaluation and the role the student takes in completing these. Encourage students to evaluate themselves on the goals they set and on the learning process and to make changes as needed. The preceptor can also reflect on situations where students were required to demonstrate self-initiative to a degree determined by the situation at hand.

A preceptor 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.

**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.

#### 4.9 Closure

By the end of the placement, most preceptors 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.

### 5. Evaluation Process

#### 5.1 Competency Based Fieldwork Evaluation (CBFE)

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

Students are responsible for reviewing the evaluation forms thoroughly before the placement. The CBFE will be discussed in detail during the Fieldwork Information Seminar prior to each placement level.

The CBFE is an evaluation tool that consists of 7 major competency areas with descriptors of each area. The competencies are rated on a scale indicating the student's progress from entry-level student to entry-level clinician. Numbers assigned correspond to the expectations of a Level I, II, or III student's performance at a particular level. Comments are encouraged and may help to clarify specifics about a student's performance e.g., specific skills within a competency.

Varying degrees of supervision are required depending on the level of the student. The amount of supervision 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 and among all placements. (See Fieldwork Course Outlines for more information).

The following is a list of the seven competencies along with examples and definitions which should assist in developing and forming learning objectives.

**1. Practice knowledge** - theoretical and technical knowledge as well as knowledge of roles, parameters and values of the profession.

**Example:** able to provide the evidence or discuss the theory behind why they chose a particular approach or model to use with a particular client. Be able to discuss the anatomy and kinesiology concepts behind making a splint.

**2. Clinical Reasoning** - analytical and conceptual thinking, problem-solving and good judgment.

**Example:** able to analyze and think through what they are doing. Use common sense and good judgment in doing what is best and most reasonable given a certain situation.

**3. Facilitating Change** -able to carry out all components of the OT process in a client-centered manner.

**Example:** able to choose and use appropriate assessment tools, to plan and carry out appropriate interventions, to determine when intervention should cease and provide for discharge and follow-up.

**4. Professional Interactions** - fosters trust and respect while working collaboratively with others within ethical and legal standards.

**Example:** be able to develop a therapeutic relationship with clients. To understand professional boundaries and to work collaboratively in team settings.

**5. Communication** - open and appropriate written, verbal and non-verbal communication.

**Example:** appropriate charting, reporting in rounds or meetings, speaking assertively for client's interests.

**6. Professional Development** - identifies areas for future growth through self-directed learning.

**Example:** takes initiative to seek out learning experiences, especially during "down time", proactive in identifying areas of interest.

**7. Performance Management** - accountable, responsible, with ability to organize and set priorities.

**Example:** able to schedule self and clients, makes good use of time and prioritizes work appropriately. Organizes self and materials.

## **CBFE Learning Objectives**

A student's learning objectives are structured into each competency within the CBFE. The student must formulate learning objective(s) related to each competency 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. Learning objectives should be "SMART":

S - SPECIFIC

M - MEASURABLE

A - ACHIEVABLE

R - RELEVANT

T - TIME ORIENTED



For example, “demonstrate the ability to complete a kitchen assessment, with minimum supervision by midterm. “

As a rule of thumb, the student should have a minimum of one objective per competency that profiles/highlights an example of the specific learning that will occur during this particular placement. The learning objectives for each section can be referred to regularly and updated as needed. The number of learning objectives per competency will likely increase with the level of placement but the purpose of the learning objectives is to be illustrative of the student’s identified learning needs within the specific practice setting, not exhaustive. Refer to page 5 of the CBE manual.

Fieldwork preceptors 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.

### Definition of the Stages of Student Professional Competency Development

	Stage 1	Stage 2	Stage 3		
<b>Student Performance</b>	Knowledge Application	Transition – Reflection on Action	Consolidation – Reflection in Action		
<b>Educator Supervision Style</b>	Direct Teaching/ Evaluation/ Feedback	Coaching	Consulting/ Mentoring		
<b>Scoring</b>	<b>Scores 1-3</b> 1= low Stage 1 competencies 2= rudimentary Stage 1 competencies 3= mastery of Stage 1 competencies/transition to Stage 2	<b>Scores 3-6</b> 3= transition to Stage 2 4= rudimentary Stage 2 competencies 5= intermediate Stage 2 competencies 6= mastery of Stage 2 competencies/transition to Stage 3	<b>Scores 6-8</b> 6= transition to Stage 3 7= rudimentary Stage 3 8= mastery of Stage 3 competencies/ ready to enter clinical practice		
<i>General Guideline</i>					
<i>Placement #</i>	1	2	3	4	5

Adapted from: Bossers et al. (2008). Competency Based Fieldwork Evaluation for Occupational Therapists.

## 5.2 Grading Process

**5.2.1 Policy:** The clinical preceptor, using professional judgment, will provide a recommendation as to whether the student should receive a grade of CR (pass), CR/PWR (pass with reservation) or NC (failure). The ACCE (course instructor) will assign the grade based on the recommendation of the preceptor and the evidence recorded in the CBE. (OT Committee, January 26, 2018).

**5.2.2 Policy:** Students will be required to abide by the [Code of Student Behavior](#) in the U of A Calendar.

**Procedure:** The ONLY MARKS that are officially given for fieldwork courses by the University are the following:

**CR (Credit/Pass):** This designation will be assigned on the evaluation forms for the students who have successfully completed the placement.

**CR (Pass With Reservation/PWR):** Should a supervising therapist have concerns about a student's performance, this designation will be added on the student's evaluation form. (Refer to 6.4 – Difficulties in Fieldwork, for more information). Please note that a PWR can only be given during Level 1 and 2 placements. **If the preceptor makes a grade recommendation of PWR during a Level 3 placement, the student will be awarded an NC (failure).**

**W (Withdrawal):** Refer to 6.1 (Difficulties in Fieldwork).

**NC (Non-Credit/Fail):** Refer to 6.5 (Difficulties in Fieldwork).

**Please Note: The University has replaced the grade of F (Fail) with N/C.**

A mid-term and final evaluation are required with each placement. After evaluation at mid-term and final, ensure that both the **student and the preceptor sign the last sheet of the evaluation form.**

**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.

**If a NC/Failure or CR/Pass With Reservation is anticipated, the ACCE should be contacted as soon as possible prior to the evaluation.**

## ***6. Difficulties in Fieldwork***

### **6.1 Student Withdrawal**

**6.1.1 Policy:** Requests for withdrawal from a clinical course for compassionate, health or religious reasons must be made to and approved by the ACCE and the Department Chair. Note that a request for withdrawal for health reasons must be accompanied by a medical certificate.

Requests for withdrawal for other than compassionate, health or religious reasons must be made to and approved by the ACCE and Department Chair.

Withdrawals during days 1-5 of the placement will be assigned a grade of "W".  
Withdrawals on or after day 6 of the placement will be assigned a grade of "NC".

The circumstances of each approved withdrawal will be reviewed by the ACCE. Requirements to document readiness/fitness to complete fieldwork requirements will be determined by the ACCE and confirmed with the Student Academic Advisor. These conditions will be communicated to the student in writing two weeks following withdrawal. The requirements must be met prior to commencing a new placement.

If a student withdraws from a clinical course for any reason, such action will lengthen their program and may delay their graduation (OT Committee, March 28, 2003).

## **6.2 Site Withdrawal**

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

## **6.3 Academic Challenges**

**6.3.1 Policy:** Promotion: Students normally complete courses according to the curriculum sequence. If a student has deficient credit in a course or courses from a previous term, through failure or otherwise, that student must normally clear the deficiency the next time the course(s) is/are offered and is considered a repeating student (University of Alberta Calendar, section 164.1 (3)).

### **Procedure:**

If a student has failed one course during his/her year prior to a fieldwork placement, the student will, under normal circumstances, be allowed to attend a placement until the decision is made regarding a re-examination. The placement may be changed if the failed course is a necessary component for success. (If the reexamination is not approved, the student will be required to withdraw from the placement). If more than one course has been failed, fieldwork will be deferred until after the Academic Standing Committee has made a decision.

Students who have failed an academic course must meet with the Associate Chair, as this may affect not only other academic course, but also fieldwork placements. The Associate Chair will consult with the ACCE to discuss the impact of failing an academic course in relation to fieldwork and the need to withdraw from or change a placement.

## **6.4 Pass With Reservation – PWR**

If a student receives a PWR as a final grade in a Level 1 or 2 placement, he/she is required to meet with the ACCE to for extra support which will include reviewing their Summary of Strengths & Challenges and forwarding the learning objectives at the beginning of the next placement to the ACCE.

## 6.5 Non Credit – NC

### Criteria for Immediate Failure (NC)

**6.5.1 Policy:** 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 Behavior](#) and Professional Code of Ethics of their respective or relevant professional/licensing bodies (Eg: [ACOT Code of Ethics](#)) (OT Committee, July 20, 2004).

**Criteria for General Failure:** if a student fails to successfully complete any or all the course objectives (see course outlines).

**If recurring, the following are grounds for failure (NC):**

#### **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 care 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 CBE 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 incidences

**6.5.2 Policy** “Students who fail a fieldwork course must repeat the course ... [and] are required to re-register and pay the required course fees. Normally a student will be allowed to repeat only one fieldwork course. In the event that a student fails the repeated course or a second separate fieldwork course, the student will be required to withdraw from the program.” (University of Alberta Calendar, Section 163.3).

**6.5.3 Policy:** A student who has been assigned a grade of “W” or “NC” in a practicum placement is entitled to a second registration in this course, subject to satisfactory completion of such remedial work as may be assigned by the ACCE in consultation with the faculty (OT Council, April 2003).

**6.5.4 Policy:** A student who receives a “W” or “NC” in a fieldwork placement must repeat the course in a similar setting and type of service (OT Council, April 2003).

**6.5.5 Policy:** If a student receives a “W” or “NC” in the second attempt of a practicum placement, the student is required to withdraw from the Faculty of Rehabilitation Medicine (OT Council, April 2003).

## **6.6 Appeals and Grievances**

**6.6.1 Policy:** “Every student may have individual grades reviewed. Students should first approach the instructor concerned, then if necessary the Department Chair.” (University of Alberta Calendar, section 163.7).

### **Procedures:**

Fieldwork is an integral component of the curriculum. Fieldwork courses must be successfully completed to fulfill the requirements for a Master of Science Degree Course Based in Occupational Therapy: OCCTH 503 (Introductory Fieldwork Placement) OCCTH 525 (Level 1), OCCTH 526 (Level 2), OCCTH 527 (Level 3a), and OCCTH 528 (Level 3b).

A mid-term and final evaluation are required with each placement.

If the student is failing, or is perceived to be at risk of failing, at any point during placement, the preceptor and the student should be in contact with the ACCE as soon as possible.

The student and the ACCE must be informed of a grade recommendation of NC/failure at the time of the final evaluation.

**Due to ongoing changes in University policy regarding appealing a grade of NC in Clinical Education the student needs to first contact the Associate Chair.**

### **Grounds for Appeals:**

Appeals can be made only on the basis that there has been a miscarriage of justice in the case of the student.

### **Miscarriage of Justice may include:**

1. procedural errors on the part of the preceptor:
  - a. failure to orient the student to the philosophy, rules and regulations of the practicum setting leading to a misunderstanding of the role and responsibilities of the student
  - b. failure to inform the student of borderline or failing performance as a part of formal (summative) feed-back during the evaluation process
  - c. failure to work with the student in the development of the Learning Objectives
2. failure of the preceptor to consider all the factors and relevant information pertaining to the student performance within the environment and at the expected level of the student
3. failure of the preceptor to provide ongoing (formative) feed-back to the student
4. bias or discrimination against the student

## **6.7 Strikes**

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 preceptor, 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, cancelled, 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.

## **6.8 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 Assistant.

## **7. Student Records**

### **7.1 Fieldwork File at the U of A**

Each student will have a fieldwork file, kept in the office of the ACCE. A student may have access to his/her file at any time by directing the request to the ACCE. A fieldwork file contains all fieldwork evaluation forms, any correspondence that pertains to fieldwork courses and the information sheets which the student has completed. This information is kept to ensure that an up-to-date record of all communications relating to fieldwork is maintained.

When a student graduates, the file is purged and amalgamated with the academic file; only the evaluation forms and transcript remain on file. Six years after a student graduates, the academic file will be destroyed.

It is the student's responsibility to make or request a copy of the completed evaluation form from the preceptor. The OT Department will not provide copies.

**We strongly recommend that the student keeps their own copies of evaluations and documentation throughout the duration of the program and incorporates his/her fieldwork information/evaluations into his/her ePortfolio.**

## **7.2 Release of Information - Fieldwork Files**

**7.2.1 Policy:** Pursuant to section 23.9 (Student Records) of the University of Alberta Calendar:

1. Students must sign a release of information (ROI) form before any information can be divulged. ROI forms can be requested from the Clinical Education Assistant.
2. When requested, the faculty may summarize the student fieldwork record as it appears in the student file.

NOTE: Any disciplinary records are not to be referred to unless they pertain to the suspension or expulsion from the University.

3. Information can only be released to a faculty member or authorized officer of the University.
4. The fieldwork record is not part of the student's official record, therefore copies of fieldwork records may not be issued from this University.

**7.2.2 Policy:** Except as noted below, personal information will not be disclosed to others as provided by the *FOIPP Act* and without the written consent of the student or in accordance with an Information Sharing agreement or Research agreement as provided by the *FOIPP* legislation.

The following information is defined as the student's public record: name; Faculty of registration; dates of registration or convocation; and degree, diploma or certificate awarded. This information may be issued to third parties (such as other educational institutions, appropriate government agencies, or prospective employers) on a need to know basis (University of Alberta Calendar, section 23.9.4 (3)).

## **7.3 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 preceptor along with a copy of the student's CBFE at the end of each placement. Reference Authorization forms will be made available to the students prior to each placement period.

## 8. Disabilities & Accommodations

Although special 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, modifications required to function optimally in placements should be discussed with the ACCE (and in conjunction with SAS, when appropriate) as soon as possible and **in advance of the placement selection and matching process.**

Note: Depending on the extent of the placement accommodations required, students registered with SAS may not be eligible for national (CFPSS) or international placements.

### 8.1.1 Policy: [UofA Policy for Students with Disabilities](#) (GFC 26 SEP 1988).

*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.*

*Although the primary responsibility for the provision of services rests with [Student Accessibility Services](#) (SAS), the provision of a supportive physical, academic and social environment is the responsibility of the entire University.*

*To achieve its goal of attracting and retaining qualified students with disabilities, the University commits itself to the following objectives:*

- 1. The University of Alberta will ensure that persons with disabilities are considered for admission to any programs for which they are academically qualified within the quota restrictions of programs.*
- 2. Where warranted, and without compromising its academic standards, the University will modify program course load, examination procedures, and other academic requirements to permit students with disabilities to complete their programs. In determining any special circumstances which warrant the modification of a requirement, consultation will take place between Services for Students with Disabilities (SSDS) and the Deans of Faculties or their delegates. When arriving at appeal decisions, individuals and committees will take into account disability related factors. A student with a disability who is making an appeal may request advocacy from SSD.*
- 3. In consultation with appropriate University units, SSDS will provide the following: --  
orientation to the University  
- assessment of needs*



- *personal and academic advising*
- *referrals to additional services or agencies*
- *program planning*
- *registration assistance*
- *interpreting arrangements*
- *advocacy*
- *liaison with departments and faculties*
- *loan of available specialized equipment*
- *obtaining permission to tape lectures*
- *available volunteer assistance including: note taking, exam writing assistance, mobility assistance, taping of readings, library research help, study help, tutoring, special project help.*

*While support services will include the above, if future evidence supports the need for changes or additional services, these will be considered for implementation within the limits of the University's financial resources.*

*4. The University will continue its policy of:*

- *ensuring accessibility and safety by removing barriers which affect the wide range of students with disabilities,*
- *making special parking available to students with disabilities in keeping with city and provincial standards; and*
- *seeking ways to provide housing units adapted for use by students with disabilities.*

Steps will be taken to facilitate the registration procedure for students with disabilities. (EXEC 06 DEC 1967) (EXEC 27 APR 1998).

Students with disabilities who have difficulties in registration, attendance, etc should consult the Dean of their Faculty (EXEC 06 DEC 1967) (EXEC 27 APR 1998).

## **9. Fieldwork Course Outlines**

Varying degrees of supervision are required depending on the level of the student. The amount of supervision 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 and among all placements. For example, it is reasonable to expect every level of student to require maximal assistance within the first week of the placement, as they are being oriented and becoming familiar with the environment and population. The degree of supervision acceptable at the end of the placement, however, will depend on the level of student, with less supervision required by the end of each subsequent placement.

In this context, minimal supervision is the least amount of supervision. For example the supervising OT is not necessarily present when the task is being carried out, but is

available to the student by communication technology (telephone, fax, e-mail, etc.) or has provided an alternate plan in case of doubt or perceived risk.

Maximum supervision is when the supervising OT or designate is present within the environment when the task is being carried out.

Moderate supervision would be the continuum between these two extremes.

The [fieldwork course outlines](#) are available on our OT Department website.

- OCCTH 503 Introductory Fieldwork Placement
- OCCTH 525 Level 1 Fieldwork Placement
- OCCTH 526 Level 2 Fieldwork Placement
- OCCTH 527 Level 3a Fieldwork Placement
- OCCTH 528 Level 3b Fieldwork Placement

## **10. List of Fieldwork Policies**

### **Academic Challenges**

**2.3.2 Policy:** A student who has experienced difficulty in clinical education or academic course work will not be eligible to request an out-of-catchment (CFPSS), International, or Independent Community Placement for their subsequent placements (OT Committee, July 20, 2004).

**6.3.1. Policy:** Promotion: Students normally complete courses according to the Program sequence. If a student has deficient credit in a course or courses from a previous term, through failure or otherwise, that student must normally clear the deficiency the next time the course(s) is/are offered and is considered a repeating student (University of Alberta Calendar, section 164.1 (3)).

### **Appeals and Grievances**

**6.6.1 Policy:** “Every student may have individual grades reviewed. Students should first approach the instructor concerned, then if necessary the Department Chair.” (University of Alberta Calendar, section 163.7).

### **Attendance**

**4.1.1 Policy:** A student’s working hours (including lunch, coffee breaks, and daily schedule) will be determined according to the policies/regulations of the fieldwork site (OT Committee, Aug 26, 2004).

**4.1.2 Policy:** A student will attend fieldwork with no hours missed (OT Committee, Aug 26, 2004).

**4.1.3 Policy:** A student involved in endeavors at a recognized provincial, national, or international level, and is required to participate in an event during her/his 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 (OT Committee, Aug. 26, 2004).

**4.1.4 Policy:** 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 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 attach it to their fieldwork evaluation for that placement. If requested by the ACCE, they must also provide evidence of registration and/or a Certificate of Attendance. (OT Committee, September 23, 2011)

## Disabilities and Accommodations

**8.1 Policy:** 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 (GFC 26 SEP1988) (EXEC 27 APR 1998).

Although the primary responsibility for the provision of services rests with Services for Students with Disabilities (SSD), the provision of a supportive physical, academic and social environment is the responsibility of the entire University (GFC 26 SEP1988) (EXEC 27 APR 1998) (GFC Policy Manual 108.5).

To achieve its goal of attracting and retaining qualified students with disabilities, the University commits itself to the following objectives: (GFC 26 SEP1988) (EXEC 27 APR 1998)

1. The University of Alberta will ensure that persons with disabilities are considered for admission to any programs for which they are academically qualified within the quota restrictions of programs (GFC 26 SEP1988) (EXEC 27 APR 1998).

2. Where warranted, and without compromising its academic standards, the University will modify program course load, examination procedures, and other academic requirements to permit students with disabilities to complete their programs. In determining any special circumstances which warrant the modification of a requirement, consultation will take place between Services for Students with Disabilities (SSD) and the Deans of Faculties or their delegates. When arriving at appeal decisions, individuals and committees will take into account disability related factors. A student with a disability who is making an appeal may request advocacy from SSD (GFC 26 SEP1988) (EXEC 27 APR 1998).

3. In consultation with appropriate University units, SSD will provide the following:

- orientation to the University
- assessment of needs
- personal and academic advising
- referrals to additional services or agencies
- program planning
- registration assistance
- interpreting arrangements
- advocacy
- liaison with departments and faculties

- loan of available specialized equipment
- obtaining permission to tape lectures
- available volunteer assistance including: note taking, exam writing assistance, mobility assistance, taping of readings, library research help, study help, tutoring, special project help.

While support services will include the above, if future evidence supports the need for changes or additional services, these will be considered for implementation within the limits of the University's financial resources (GFC 26 SEP1988) (EXEC 27 APR 1998).

4. The University will continue its policy of:

- ensuring accessibility and safety by removing barriers which affect the wide range of students with disabilities,
- making special parking available to students with disabilities in keeping with city and provincial standards; and
- seeking ways to provide housing units adapted for use by students with disabilities (GFC 26 SEP 1988) (EXEC 27 APR 1998).

Steps will be taken to facilitate the registration procedure for students with disabilities (EXEC 06 DEC 1967) (EXEC 27 APR 1998).

In future, students with disabilities who have difficulties in registration, attendance, etc should consult the Dean of their Faculty (EXEC 06 DEC 1967) (EXEC 27 APR 1998).

## Evaluation

**4.4.1 Policy:** The mid-term evaluation will normally be given within 3 working days of the actual mid-date of the placement (or by end of 4th week of the placement) to allow the student the opportunity to make the necessary changes by the end of the placement. 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 (OT committee, July 20, 2004).

**5.2.1 Policy:** The clinical preceptor, using professional judgment, will provide a recommendation as to whether the student should receive a grade of CR (pass), CR/PWR (pass with reservation) or NC (failure). The ACCE (course instructor) will assign the grade based on the recommendation of the preceptor and the evidence recorded in the CBE. (OT Committee, January 26, 2018).

## Expenses

**2.4.1 Policy:** As part of the pre-requisites for clinical placements, occupational therapy students are required to undergo immunizations, fit-testing for masks, a security clearance, and 'Basic Life Support' (BLS) CPR as outlined in the University of Alberta

Calendar, Faculty of Rehabilitation Medicine [173.5 Fieldwork / Clinical Practice Requirements](#). A student is responsible for all costs involved (OT committee, September 23, 2011).

**2.8.1 Policy:** A student requesting a fieldwork placement outside of Alberta, Saskatchewan or the North West Territories will be responsible for related costs, whether they receive the requested placement or not (OT committee, July 20, 2004).

## Fieldwork Requirements

**1.2.1 Policy:** Students are required to graduate with fieldwork experience reflecting exposure to a diversity of areas of practice, and practice settings across the lifespan. At a minimum, students must have 150 hours (4 weeks full time) of experience in each of the community and rural practice settings. At a minimum, students must have 262.5 hours (7 weeks full time) of experience in each of the practice areas of mental health and physical health. Students are responsible for ensuring they graduate with this diversity. (OT Committee, September 23, 2011)

Please note that the first placement hours accrued in OCCTH 503 will contribute towards the total 1000 hours required, but not the placement content (P or M) or context (C or R) requirement.

## Grades

**5.2.1 Policy:** The clinical educator/preceptor, using professional judgement, will provide a recommendation as to whether the student should receive a grade of CR (pass), CR/PWR (pass with reservation) or NC (failure). The ACCE (course instructor) will assign the grade based on the recommendation of the preceptor and the evidence recorded in the CBE. (OT Committee, January 26, 2018).

**5.2.2 Policy:** Students will be required to abide by the [Code of Student Behavior](#) in the U of A Calendar.

**Procedure:** The ONLY MARKS that are officially given in fieldwork by the University are the following:

**CR (Pass Mark):** This designation will be assigned on the evaluation forms for the students who have successfully completed the placement.

**CR (Pass With Reservation/PWR):** Should a supervising therapist have concerns about a student's performance, this designation will be added on the student's evaluation form. (Refer to 6.4 – Difficulties in Fieldwork, for more information). Please note that a PWR can only be given during Level 1 and 2 placements.

If the preceptor makes a grade recommendation of PWR during a Level 3 placement, the student will be awarded an NC (failure).

**W (Withdrawal):** Refer to 6.1 (Difficulties in Fieldwork).

**NC (Non-Credit):** Refer to 6.5 (Difficulties in Fieldwork).

**Please Note: The University has replaced the grade of F (Fail) with NC.**

### **Immunization/CPR/Security Clearance/Etc.**

**2.4.1 Policy:** As part of the pre-requisites for clinical placements, occupational therapy students are required to undergo immunizations, fit-testing for masks, a security clearance, and 'Basic Life Support' (BLS) CPR as outlined in the University of Alberta Calendar, Faculty of Rehabilitation Medicine [173.5 Fieldwork / Clinical Practice Requirements](#). A student is responsible for all costs involved (OT committee, September 23, 2011).

### **Independent Community Placements**

**2.3.2 Policy:** A student who has experienced difficulty in clinical education or academic course work will not be eligible to request an out-of-catchment (NFPS), International, or Independent Community Placement for their subsequent placements (OT Committee, July 20, 2004).

### **Information Sessions**

**2.2.1 Policy:** "...Before undertaking fieldwork courses in each year of the program, students must attend an annual fieldwork seminar, and fulfill all fieldwork prerequisites..." (University of Alberta Calendar Section 164.1).

### **Insurance**

**2.9.1 Policy:** A student is responsible for ensuring they have appropriate vehicle insurance in the event that she/he uses his or her car during a fieldwork placement (OT Committee, Aug. 26, 2004).

### **International Placements**

**2.3.2 Policy:** A student who has experienced difficulty in clinical education or academic course work will not be eligible to request an out-of-catchment (NFPS), International, or Independent Community Placement for their subsequent placements (OT Committee, July 20, 2004).

### **Non Credit (NC)**

**6.5.1 Policy:** 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 Behavior](#) and Professional Code of Ethics of their respective or relevant professional/licensing bodies (Eg: [ACOT Code of Ethics](#)) (OT Committee, July 20, 2004).

**Criteria for Failure (General)** if a student fails to successfully complete any or all the course objectives (see course outlines).

**If Recurring, the following are grounds for failure (NC) (after incident)**

**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, ego.; give out personal phone number

**Instrumental Skills**

- negligent, improper, inadequate clinical care 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 signed in Learning Contract
- 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 incidences

**6.5.2 Policy:** "Students who fail a fieldwork course must repeat the course...(and) are required to reregister and pay the required course fees. Normally a student will be allowed to repeat only one fieldwork course. In the event that a student fails the



repeated course or a second separate fieldwork course, the student will be required to withdraw from the program” (University of Alberta Calendar, Section 163.3.3).

**6.5.3 Policy:** A student who has been assigned a grade of “W” or “NC” in a practicum placement is entitled to a second registration in this course, subject to satisfactory completion of such remedial work as may be assigned the Faculty (OT Council, April 2003).

**6.5.4 Policy:** A student who receives a “W” or “NC” in a fieldwork placement must repeat the course in a similar setting and type of service (OT Council, April 2003).

**6.5.5 Policy:** If a student receives a “W” or “NC” in the second attempt of a practicum placement, the student is required to withdraw from the Faculty of Rehabilitation Medicine (OT Council, April 2003).

## **Pass With Reservation**

**5.2.1 Policy:** The clinical educator/preceptor, using professional judgment, will provide a recommendation as to whether the student should receive a grade of CR (pass), CR/PWR (pass with reservation) or NC (failure). The ACCE (course instructor) will assign the grade based on the recommendation of the preceptor and the evidence recorded in the CBFE. (OT Committee, January 26, 2018)

## **Projects**

**4.6.1 Policy:** A site may assign an assignment or project to a student (first placement exempt) that will demand no more than 5% of the placement time (OT Committee, Aug. 26, 2004).

## **Selection Process**

**1.2.1 Policy:** Students are required to graduate with fieldwork experience reflecting exposure to a diversity of areas of practice, and practice settings across the lifespan. At a minimum, students must have 150 hours (4 weeks full time) of experience in each of the community and rural practice settings. At a minimum, students must have 262.5 hours (7 weeks full time) of experience in each of the practice areas of mental health and physical health. Students are responsible for ensuring they graduate with this diversity. (OT Committee, September 23, 2011)

Please note that the first placement hours accrued in OCCTH 503 will contribute towards the total 1000 hours required, but not the placement content (P or M) or context (C or R) requirement.

**2.3.1 Policy:** A student is only guaranteed one placement in the city where they are receiving their classroom education: Edmonton or Calgary (OT Committee, July 20, 2004).

**2.3.2 Policy:** A student who has experienced difficulty in clinical education or academic course work will not be eligible to request an out-of-catchment (NFPS), International, or Independent Community Placement for their subsequent placements (OT Committee, July 20, 2004).

**2.3.3 Policy:** A student will not be permitted to pursue a fieldwork placement at a site with explicit intentions to hire them as an occupational therapist upon completion of their OT program (OT Committee, July 20, 2004).

**2.3.4 Policy:** Normally, a student will not be permitted to pursue a fieldwork placement at a site where a close friend or relative works within or closely with the department or program where the student would be placed (OT committee, Aug. 13, 2009).

**2.3.5 Policy:** A student is not permitted to arrange a placement independently. A student must not contact individual occupational therapists, occupational therapy departments, or sites in the pursuit of a placement, except when given permission to do so for international placement opportunities.

All potential placement opportunities must be discussed with the ACCE and must be submitted through a formal process (OT Committee, Sept. 16, 2009).

## **Student Records**

**7.2.1 Policy:** Pursuant to section 23.9 (Student Records) of the University of Alberta Calendar:

1. Students must sign a release of information form before any information can be divulged (found in OT office).
2. When requested, the faculty may summarize the student fieldwork record as it appears in the student file.

NOTE: Any disciplinary records are not to be referred to unless they pertain to the suspension or expulsion from the University.

3. Information can only be released by a faculty member or authorized officer of the University.
4. The fieldwork record is not part of the student's official record, therefore copies of fieldwork records may not be issued from this University.

**7.2.2 Policy:** Except as noted below, personal information will not be disclosed to others as provided by the *FOIPP Act* and without the written consent of the student or in accordance with an Information Sharing agreement or Research agreement as provided by the *FOIPP* legislation.

The following information is defined as the student's public record: name; Faculty of registration; dates of registration or convocation; and degree, diploma or certificate awarded. This information may be issued to third parties (such as other educational

institutions, appropriate government agencies, or prospective employers) on a need to know basis (University of Alberta Calendar, section 23.9.(3)).

## **Student Responsibilities**

**4.8.1 Policy:** A student is expected to be self-directed in their learning and to adjust to the service specialty, focus, and environmental demands (OT Committee, Aug, 2004).

**5.2.2 Policy:** Students will be required to abide by the [Code of Student Behavior](#) in the U of A Calendar.

## **Student Withdrawal**

**6.1.1 Policy:** Requests for withdrawal from a clinical course for compassionate, health or religious reasons must be made to and approved by the ACCE and the Department Chair. Note that a request for withdrawal for health reasons must be covered by a medical certificate.

Requests for withdrawal for other than compassionate, health or religious reasons must be made to and approved by the ACCE and Department Chair.

Withdrawals during days 1-5 of the placement will be assigned a grade of "W".  
Withdrawals on or after day 6 of the placement will be assigned a grade of "NC".

The circumstances of each approved withdrawal will be reviewed by the ACCE. Requirements to document readiness/fitness to complete fieldwork requirements will be determined by the ACCE and confirmed with the Student Academic Advisor. These conditions will be communicated to the student in writing two weeks following withdrawal. The requirements must be met prior to commencing a new placement.

If a student withdraws from a clinical course for any reason, such action will lengthen their program and may delay their graduation. (OT Committee, March 28, 2003).

## **Withdrawal (W)**

**6.5.3 Policy:** A student who has been assigned a grade of "W" or "NC" in a practicum placement is entitled to a second registration in this course, subject to satisfactory completion of such remedial work as may be assigned by the ACCE in consultation with the faculty (OT Council, April 2003).

**6.5.4 Policy:** A student who receives a "W" or "NC" in a fieldwork placement must repeat the course in a similar setting and type of service (OT Council, April 2003).

**6.5.5 Policy:** If a student receives a “W” or “NC” in the second attempt of a practicum placement, the student is required to withdraw from the Faculty of Rehabilitation Medicine (OT Council, April 2003).