



MONASH University
Medicine, Nursing and Health Sciences

Occupational Therapy Program

Student Placement Evaluation Form Second Year

This evaluation tool was made possible by a grant received from the 1997 Action Learning Program of the University of Queensland

The project team consisted of occupational therapists representing both university and clinical settings. The team members were as follows:

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This team gratefully acknowledges the timely feedback and suggestions from students and professionals in the field during the development of the evaluation tool.

The University of Queensland
Division of Occupational Therapy

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Introduction

The Student Placement Evaluation Form (SPEF) has been introduced in 2007 as a common assessment tool by the four Victorian Occupational Therapy Programs (Charles Sturt University, Deakin University, Monash University and La Trobe University). Most Australian programs at undergraduate and master's level now use the SPEF to assess students' fieldwork performance across all years of the program.

The introduction of a common fieldwork assessment tool means there is only one form and assessment procedure students' supervisors need to be familiar with. It is hoped that this will simplify the assessment process for supervisors and improve the reliability and validity of fieldwork assessment for students from different universities. In addition, the use of a common tool across Australia will broaden the scope for research on its properties, and lead to further refinements in the future.

The SPEF was originally developed by the University of Queensland, following extensive communication and piloting with the occupational therapy profession. It was initially developed for third and fourth year students. In conjunction with the University of Queensland, the Victorian Universities have developed a simplified form of this tool for use with first and second year students. (Implementation of simplified tool for first and second year approved by Katie Ward, Fieldwork Manager, University of Queensland, during Victorian SPEF Forum on Friday 13th October, 2006, Monash University).

The second year SPEF manual provides:

- The Victorian University Contact details
- Section One: Overview of the Evaluation (Users instructions)
- Section Two: Original Copy of Student Placement Evaluation
- Section Three: Student Review of Placement
- Appendix A: Examples of allocating pass or fail for learning objectives
- Appendix B: Checklist for determining overall grade

Supervisors can obtain copies of the assessment form in a number of ways. Firstly, an original form may be sent out from the student's university of origin, secondly, supervisors can email university contact staff (as listed in this manual) for a copy to be sent by email or finally, the manual can be downloaded at the following addresses:

<http://www.latrobe.edu.au/occtherapy/Fieldwork/Fieldwork.html>

<http://www.csu.edu.au/faculty/health/cmhealth/>

<http://www.med.monash.edu.au/occupationaltherapy/fieldwork.html>
(using educator password allocated)

Instructions on how to use the tool are outlined in detail in Section One of the manual, but universities will also organise information session (or include information in scheduled fieldwork tutorials) on how to use the tool. Students will also be familiar with the tool, and will use it to self-evaluate their fieldwork performance.

Any further information on this assessment tool or the administrative process can be directed to any of the listed university contact staff.

University Contact Details

School of Occupational Therapy
Faculty of Health Sciences
La Trobe University
Victoria 3086
Phone: 03 9479 5854
Fax: 03 9479 5737
Contact: Lieve De Clercq
Email: l.declercq@latrobe.edu.au

Occupational Therapy
School of Community Health
Faculty of Science
Charles Sturt University
PO Box 789, Albury NSW 2640
Phone: 02 6051 6758
Fax: 02 6051 6989
Contact: Michael Curtin
Email: mcurtin@csu.edu.au

Department of Occupational Therapy
School of Primary Health Care
Faculty of Medicine, Nursing and Health Sciences
Monash University – Peninsula Campus
PO Box 527, Frankston Vic 3199
Phone: 99044822
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Contact: Pamela Kirke
Email: pamela.kirke@med.monash.edu.au

Department of Occupational Therapy
Faculty Health, Medicine, Nursing & Behavioural Sciences
Deakin University – Waterfront Campus - Geelong
1 Gheringhap Street
Geelong Vic 3217
Phone: 52278370
Contact: Lynne Adamson
Email: Lynne.adamson@deakin.edu.au

Content

Section One – Handbook

Overview of the evaluation	1
Learning objectives	2
Component behaviours (items)	3
Rating scale	4
Additional comments	5
Summary feedback	6
◆ Determining a pass or fail grade	6
➤ Determining a grade for learning objectives	6
➤ Table of minimum requirements re learning objectives	7
➤ Determining overall grade	7
Half way evaluation	8
If problems arise	8
Final evaluation	9
Student review of placement	9

Section Two – Student Placement Evaluation

Form for completion	1-14
---------------------	------

Section Three – Student Review of Placement

Form for completion	1-8
---------------------	-----

Appendix A

Examples of allocating pass or fail for a learning objective.

Appendix B

Checklist for allocating an overall grade of pass or fail.

Section One – Handbook

Overview of the evaluation

The Student Placement Evaluation is designed to be graded **pass / fail** with the emphasis on providing students with feedback that is helpful, objective and specific.

The second year tool is comprised of six **learning objectives** covering the following areas

- ◆ Professional Practice
- ◆ Self Management Skills
- ◆ Communication Skills
- ◆ Documentation
- ◆ Assessment / Information Gathering
- ◆ Group Skills (*optional – according to workplace*)

These objectives are made up of **component behaviours (items)**, each of which is rated on a **five point scale**. Different objectives have different numbers of items however this does not reflect the importance of the area per se. It instead reflects the differing nature of the objectives and the key behaviours considered necessary to fulfil them.

Within this basic framework, **core** learning objectives and **core** behaviours have been identified. These objectives and behaviours are considered foundational in the practice of Occupational Therapy. The core objectives are professional practice, self management skills and communication skills. These core objectives are considered to be very important indicators of a student's performance. The rating of the core objectives and behaviours will have a large bearing on the overall outcome of the evaluation.

After rating each item in a learning objective, supervisors also have the opportunity to provide more specific written feedback in relation to that objective in the **additional comments** space provided.

Finally, a **summary statement** regarding the student's overall performance is completed with a grade of **pass or fail**. Students must achieve the stated minimum requirements of the evaluation in order to be awarded a passing grade. (See page 6 for specific details of minimum requirements.)

Learning objectives

The six learning objectives broadly describe the knowledge; behaviours and skills students will need to develop if they are to provide effective services as occupational therapists. As previously mentioned, these objectives cover the following areas.

1. **Professional Practice**
2. **Self Management Skills**
3. **Communication Skills**
4. **Documentation**
5. **Assessment / Information Gathering**
6. **Group Skills (*Optional- according to workplace*)**

Each learning objective is stated in full at the beginning of each table of items. The first three learning objectives have been identified as core objectives and students must pass each of these by their final assessment to achieve an overall pass.

To provide for the broad scope of services an occupational therapist may now provide, some learning objectives have been “customised”, giving the supervisor a choice of items to best reflect the nature of their role.

In objectives 3 and 5, i.e. those addressing **communication skills and assessment / information gathering**, items have been developed under two broad categories designed to describe the primary role therapists fulfil in their workplace. These roles are:

A

♦ **Direct Client Care** – Therapy services are provided directly to clients and their families / significant others.

B

♦ **Case Management** – The therapist primarily co-ordinates and supports client care without necessarily providing clinical intervention.

Options are labelled **A or B**. Supervisors are provided with cues on the evaluation form when a choice of category has to be made.

The supervisor is only required to complete **one** option for each learning objective. Where there is some overlap, the supervisor is asked to pick the option that **best** describes the skills, knowledge and behaviours needed in their work role. In some settings, both options may seem highly relevant and the supervisor may complete additional categories if they wish. **At the commencement of the placement, students should be informed of the option chosen by their supervisor.**

Objective six, **group skills**, is optional according to whether the student participates in activities related to this area. Again, students should be informed whether or not this category is to be included in their evaluation.

Component behaviours (items)

The learning objectives are divided into **component behaviours** (items) which together more fully describe the knowledge, skills, and behaviours required to fulfil the objective.

These behaviours are numbered and written in bold type on the evaluation form. In many instances more information is provided immediately following the item in the form of examples. The purpose of these examples is to provide clarification and to facilitate the supervisor's recall of the student's experiences and performance. They are **not** intended to be an exclusive list of the behaviours or contexts the item is addressing, but provide **some examples only**. Additional space has been provided in the table to allow the supervisor to note their own workplace specific examples.

Each behaviour is given a score according to the five point rating scale. More detailed feedback can be provided in the **Additional Comments** section.

Core behaviours can be easily identified on the assessment form by the ▲ symbol. Students are required to achieve a minimum score of 3 on each of these items in the final assessment to achieve an overall pass. Mostly, core behaviours fall within the three core learning objectives:

Professional Practice, Self Management Skills and Communication Skills.

Rating scale

Each behaviour is allocated a score in accordance with the following five point scale.

1. **Unacceptable performance:** very limited knowledge and skills; consistently poor performance; substantial improvement required to pass item.
2. **Concerns exist:** concerns regarding extent of instruction and/or assistance required; marked inconsistency of performance.
3. **Developing competence:** adequate application of knowledge and skills; some inconsistent performance may exist; emerging competence.
4. **Competent performance:** effective application of knowledge; consistently sound performance with appropriate level of supervision.
5. **Exceptional performance:** Consistently exceeds expected level of competence at student level; requires minimal supervision; demonstrates exceptional initiative and creativity.

Where appropriate, items may be marked with the following two categories:

N/A – Not Applicable: the behaviour has not been required as part of the student's learning experience. (The behaviour may or may not be relevant to the setting)

I/O – Insufficient Observation: The behaviour or skill has not been observed often enough for the supervisor to make a judgement. A score of I/O on the halfway evaluation may be useful in determining performance goals for the second part of the fieldwork affiliation.

Using this rating scale, a score of 3 indicates an adequate level of performance. Naturally, students are encouraged to seek to develop their knowledge and skills to a higher level. In a score of 4, the term 'competent' should be understood in its **most positive light**, indicating capability and accomplishment. It should be noted that scores of 5 indicate exceptional performance, and individual student profiles dominated by 5s would be uncommon.

Students are to be graded **as students**, as opposed to being evaluated as newly graduating therapists. As the student undertakes various placements, supervisors are likely to see improved skills in more generalised areas of practice eg. interpersonal skills, level of confidence etc. However due to the diverse nature of placements available, performance of specific technical skills, eg. standardised assessments, are likely to be at a 'first placement' level.

Halfway assessment standards should be the same as for the final assessment.

Space is provided on the evaluation form to complete both the halfway and final assessment. Supervisors who prefer to grade the final evaluation without reference to halfway scores can do so but will need to photocopy extra forms.

Additional comments

As the primary emphasis of this evaluation is to provide constructive and detailed feedback, supervisors are asked to provide further comment for each objective in **Additional Comments**. Students are more likely to be able to modify behaviours if the feedback is objective and identifies clearly what behaviour change is necessary for improvement. For example, instead of a student being told they have "poor communication skills", he/she could be specifically encouraged to

- maintain eye contact
- speak more slowly and clearly

Hence, supervisors are encouraged to write comments in terms of **current behaviours** and/or **desired behaviours**.

When writing comments, supervisors are asked to specify which item they are referring to by noting its corresponding number. Not all items may need additional comment. If supervisors require more space they may wish to insert additional pages.

Summary feedback

In the summary feedback section, the supervisor records the final grade of pass or fail and provides more general feedback about the student's performance.

Determining a pass or fail grade

The student's overall grade of pass or fail is determined by specific criteria outlined below. These criteria relate to each learning objective and to the evaluation as a whole. Supervisors should work systematically through the following steps to determine the overall grade.

Step One: Determining a grade for each learning objective.

After scoring all items in a learning objective, the supervisor determines if the student has passed that objective. To pass a learning objective, the student must achieve **all** of the following:-

- ◆ Pass **all** core items
- ◆ Receive **no more than a single score of 1** per learning objective.
- ◆ Achieve the **minimum number of scores of at least 3** allocated to the category.

Students must score **at least 3** on **all core items** within the learning objective (items marked with a ▲). Not all objectives contain core items. Scores of **N/A** or **I/O** are to be **counted as a pass** for that item. Because the learning objectives contain different numbers of items, different minimum requirements have been developed for each one. These are summarised in **Table 1**.

NB. The requirement that students may receive no more than a single score of 1 per objective **applies to all learning objectives**. For simplicity this has not been included at each level of the table.

An abbreviation of the minimum requirements for each learning objective is noted below the Additional Comments section at the end of the objective. Once the supervisor has determined if the student has met these requirements, he/she may tick the adjacent pass or fail box for that particular category. For examples of scoring, please turn to **Appendix A**.

Table 1.

Name of Objective	Minimum Requirement (NB: no more than a single 1 per objective)
Professional Practice	2 ▲ passed, at least one other score of 3 or above
Self management Skills	2 ▲ passed, at least two other scores of 3 or above
Co-worker Communication	3 ▲
Communication A	5 ▲
Communication B	4 ▲
Documentation	at least two scores of 3 or above
Assessment A	at least five scores of 3 or above
Assessment B	at least four scores of 3 or above
Group Skills	at least four scores of 3 or above

Step Two: Determining overall grade

After determining if the student has passed or failed each learning objective, the supervisor can then allocate an overall grade. To achieve an overall pass the student:-

- ◆ must pass **all** core items.
- ◆ must pass **each** of the core learning objectives, ie. Professional Practice, Self Management Skills, and Communication Skills.
- ◆ may fail **no more than one** non-core learning objective. The choice to include, or not include, the optional group skills objective **does not** alter this criteria.

If further assistance is required to determine the overall grade, please refer to **Appendix B**.

Halfway evaluation

Supervisors are asked to complete a Summary Feedback at halfway, indicating if the student is passing or failing according to the minimum requirements just described. Comments may address the student's strengths and areas for improvement, outcomes which need to be achieved by the final assessment and

suggestions for further learning experiences. The use of learning contracts is a valuable method for formalising any plans made at this stage.

The halfway evaluation is also an excellent opportunity for supervisors to seek feedback from students. You may ask questions about the adequacy of time which has been available for supervision; whether expectations are perceived as being clear and realistic; whether the workload could be increased or reduced; if there are additional experiences the student feels may be beneficial and finally, whether the student is satisfied with the level of independence expected of him/her. Many students are reluctant to offer this type of feedback unless it is sought. Information of this kind may highlight the need for changes to maximise the learning opportunities in the remaining weeks of placement. Supervisors may find Section A of the Student Review of Placement to be a useful tool for facilitating such feedback.

If problems arise

If, at halfway, the student is identified as having problems that place him / her at risk of failing the placement, the **Concerns Exist Form** should be completed and immediately forwarded to the Fieldwork Manager. (If concerns are evident prior to the halfway evaluation, contact should be made at the earliest possible stage.) If preferred, initial contact regarding difficulties may be made by phone or email.

Once alerted, the Fieldwork Manager will contact the relevant staff and the student as required to develop a plan of action to overcome difficulties.

The action plan may involve site visits or phone support, interviewing the supervisor(s) and student (either individually or together), and linking the student with appropriate University staff.

Additional support may then be offered to encourage improvement of underdeveloped knowledge and skills. At times referral for counselling support may also be appropriate. While not all of these options are available in non-metropolitan areas, the best possible support will be provided.

University fieldwork staff will remain closely involved with the placement in the event of continuing difficulties.

Final evaluation

The final grade is determined in the final week of placement by the clinical supervisor/s, and university staff as required.

After allocating a grade of pass or fail according to the minimum requirements, the supervisor is also asked to complete a general summary of the student's performance. This statement may address some of the following

- ◆ student's strengths
- ◆ areas for improvement
- ◆ brief summary of opportunities and experiences completed by the student during the placement

Once the document is discussed by the supervisor(s) with the student, the student should receive a copy and the ***original copy, section 2 only*** (signed by both supervisor and student) should be dated and then returned as quickly as possible to

**The Clinical Service Officer, School of Occupational Therapy,
Faculty of Health Sciences, La Trobe University, Victoria 3086**

In the case that a student fails a final assessment, the student will usually be required to repeat the placement. The choice of option is determined by the Fieldwork Manager.

If a student has a grievance with the final result awarded by the supervisor, he/she may request a reassessment with the supervising therapist. Any further difficulties should be referred to the Fieldwork Manager. The University is responsible for determining the final grade in any disputed cases.

Student review of placement

At the completion of a placement the student is also asked to provide formal feedback in a professional manner to their supervisor using the Student Review of Placement Form. (See **Section Three** of this handbook.)

Section A of the student review of placement is primarily to provide useful feedback to the supervisor/s.

Section B promotes personal reflection by the student. Students are not required to present Section B for perusal.

Once Section A has been discussed by the student with the supervisor it should be signed by the supervisor and returned to the Fieldwork Manager with the completed Student Placement Evaluation.

If the supervisor wishes they may add an additional cover note to the Review with any comments.

Section Two – Student Placement Evaluation

Supervisors will select the pages to match the appropriate stream, ie



♦ **Direct Client Care** – Therapy services are provided directly to clients and their families / significant others.



♦ **Case Management** – The therapist primarily co-ordinates and supports client care without necessarily providing clinical intervention.

Student Placement Evaluation

Student's name _____

Supervisor/s _____

Student Co-ordinator _____

Facility or Service _____

Address _____

Date of Placement _____ to _____

Date of Halfway Assessment _____

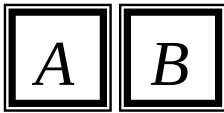
Date of Final Assessment _____

Rating Scale

1. **Unacceptable performance:** has very limited knowledge and skills; consistently poor performance; substantial improvement required to pass item.
2. **Concerns exist:** concerns regarding extent of instruction and/or assistance required; marked inconsistency of performance.
3. **Developing competence:** adequate application of knowledge and skills; some inconsistent performance may exist; emerging competence.
4. **Competent performance:** effective application of knowledge; consistently sound performance with appropriate level of supervision.
5. **Exceptional performance:** consistently exceeds expected level of competence at student level; demonstrates exceptional initiative and creativity.

N/A - not applicable

I/O - insufficient observation to make an evaluation



1. Professional Practice

Learning Objective: Behaves in a manner appropriate to professional practice.

1. ▲ Respects values, beliefs and needs of clients and staff eg. Non-discriminatory, non-judgemental, accepts others points of view, does not impose own values, able to identify client needs as they arise in the context of treatment (client sitting comfortably, client able to access toilet etc.)...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
2. ▲ Maintains confidentiality of information pertaining to clients, staff and workplace eg. Files handled appropriately, discussions held in private as necessary ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
3. Demonstrates respect for workplace and procedures eg. administrative procedures, safety procedures, workplace structure and hierarchy, attendance at meetings, carries out routine tasks willingly, returns resources, uses work resources appropriately, does not use personal mobile phone in work time...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
4. Represents Occupational Therapy in an appropriate manner eg. Explains O.T to others, able to explain at a beginning level the purpose of an OT intervention to an OT after an observation of therapist and client...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
5. Shows awareness of the broad impact of political, legal and industrial issues on the profession, workplace and client group eg. legislation, policy, funding, quality assurance, code of ethics ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final

Additional Comments (current behaviours / desired behaviours)

Halfway Comments

Final Comments

(minimum requirement: 2 ▲, 1 other item)

P **F**



2. Self Management Skills

Learning Objective: Demonstrates appropriate self management skills.

1. Demonstrates time management skills eg. punctuality, work completed within appropriate timeframes, able to plan work schedule, sensible use of time (i.e. use of workbook or other resources when having down time), completion of self-evaluation in timely manner (before evaluation session) ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
2. Personal presentation and behaviour is appropriate to workplace eg. appearance, attire, confident manner, organisation of workspace, well developed telephone skills, interacts with courtesy ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
3. ▲ Assumes responsibility for own learning eg. evaluates own practice (eg. use of diary), develops objectives and plans for improvement (eg. learning contract), seeks help / information appropriately, shows interest in roles other than O.T ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
4. Demonstrates use of initiative and responsibility in workplace eg. problem solving skills, does not require unnecessary prompting, offers assistance where appropriate ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
5. Demonstrates stress management skills eg. Recognises own limits re workload / stressful situations, appropriate ventilation skills, seeks appropriate and timely support, appropriate separation of work and personal issues...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
6. ▲ Accepts supervision and constructive criticism appropriately, modifying practice as necessary eg. Accepts responsibility for actions, prepares for and contributes to supervision sessions (eg. self-evaluates), obtains clarification of feedback from supervisor if necessary...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final

Additional Comments (current behaviours / desired behaviours)

Halfway Comments

Final Comments

(minimum requirement: 2 ▲, 2 other items)

P

F



3. Communication skills

Co-Worker Communication

Learning Objective: Communicates effectively within the workplace.

1. ▲ Maintains acceptable co-worker relationship with all members of staff eg. pleasant informal communication style, respectful, adapts level of formality as needed ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
2. ▲ Works in effective collaboration with all co-workers eg. scheduling, listening skills, use of questions, negotiation ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
3. ▲ Works as an effective member of a team if appropriate to setting eg. understands and values own and others' role, effective collaboration ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
4. Effective presentation of information / training to co-workers/ client groups/ service providers if applicable eg. in-service, lectures to community groups etc., appropriate preparation, content, format ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final

Additional Comments (current behaviours / desired behaviours)

Halfway Comments

Final Comments

(minimum requirement: 3 ▲)





3. Communication Skills

Communication with clients and significant others

A: Direct Client Care & B: Case management

Learning Objective: Communicates effectively within the workplace.

1. ▲ Develops and maintains a therapeutic relationship with clients eg. verbal and nonverbal skills are appropriate and non-contradictory, comfortable in asking clients appropriate questions, physical contact or handling is respectful and caring, appropriate limit setting ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
2. ▲ Communicates effectively with client's family / significant others eg. verbal and nonverbal skills are appropriate and non-contradictory, appropriate limit setting ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
3. ▲ Demonstrates effective listening and questioning skills eg. empathy, flexibility to modify plans in response to client wishes / concerns, responsive to others' emotional status ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
4. ▲ Expresses intentions clearly, ascertains level of comprehension, and modifies communication as necessary eg. modifies language to client's / significant others' understanding, avoids use of jargon, clarifies information, provides opportunity for questions, use of interpreter as needed ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
5. ▲ Enacts closure of therapeutic relationship eg. effective, timely, awareness of dependency issues ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final

Additional Comments (current behaviours / desired behaviours)

Halfway Comments

Final Comments

(minimum requirement: 5 ▲)





4. Documentation

Learning Objective: Develops and maintains appropriate records.

1. Documentation written with needs of audience in mind eg. appropriate language, content, format ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
2. Documentation written in an objective manner with interpretations and recommendations supported by relevant information eg Home visit reports, progress reports, equipment orders...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
3. Formal workplace requirements observed eg. on time, appropriate format, frequency and distribution ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
4. Understands and follows procedure to complete specialised documents if appropriate to setting eg. submissions, tenders, medico – legal reports, technical drawing / specifications, home visit reports ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final

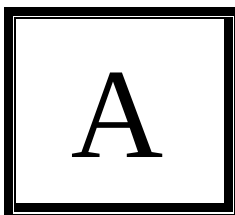
Additional Comments (current behaviours / desired behaviours)

Halfway Comments

Final Comments

(minimum requirement: 2 items)

P F



5. Assessment / Information Gathering

A: Direct Client Care

Choose A or B

(Choose both only if relevant)

Learning Objective: Demonstrates effective assessment skills.

1. Selects appropriate methods of assessment eg. knowledge of range of formal / informal assessments appropriate to client group ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
2. Gathers and analyses information from appropriate sources eg. Client, significant others, previous assessments / reports, client files, other service providers ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
3. Selects and arranges environment to facilitate optimal performance eg. time, physical setting / location, adaptations made as necessary ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
4. Administers formal assessments / standardised tests if applicable, according to guidelines eg. administration and scoring ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final

(Items 5-8 continued over page)

Additional Comments (current behaviours / desired behaviours)

Halfway Comments

Final Comments

5A: Direct client care cont. (Assessment and Information Gathering)

5. Adapts standardised technique to gather data when formal testing is not possible eg. ...	N/A 1 2 3 4 5 I/O Halfway
	N/A 1 2 3 4 5 I/O Final
6. Makes astute observations regarding the qualitative nature of client's performance / behaviour during formal and informal assessments eg. fatigue, impulsiveness / concentration, quality of movement / posture, mood ...	N/A 1 2 3 4 5 I/O Halfway
	N/A 1 2 3 4 5 I/O Final
7. Analyses and interprets findings appropriately eg. strengths, liabilities, relates results to client's functional performance – formulates hypotheses to explain any apparent contradictions in results ...	N/A 1 2 3 4 5 I/O Halfway
	N/A 1 2 3 4 5 I/O Final
8. Explains and details findings and recommendations clearly and appropriately eg. to clients, significant others, other service providers as necessary ...	N/A 1 2 3 4 5 I/O Halfway
	N/A 1 2 3 4 5 I/O Final

Additional Comments (current behaviours / desired behaviours)

Halfway Comments

Final Comments

(minimum requirement: 5 items)

P

F

B

5. Assessment / Information Gathering

B: Case Management

Choose A or B

(Choose both only if relevant)

Learning Objective: Develops and manages effective assessment process.

1. Collaborates with client / significant others to determine assessment needs eg. understanding of client's life roles, goals, priorities, resources ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
2. Conducts effective interviews with major stakeholders as appropriate eg. client, significant others, employer, treating practitioner; notes verbal and nonverbal communication ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
3. Gathers and analyses additional information to further understand client's needs eg. accesses reports and other sources of background information ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
4. Makes appropriate referrals for formal assessments eg. ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
5. Collates and analyses assessment findings appropriately eg. strengths, liabilities, relates results to clients functional performance –develops hypotheses to explain any apparent contradictions ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
6. Explains and substantiates recommendations clearly to client and all other relevant stakeholders eg. ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final

Additional Comments (current behaviours / desired behaviours)

Halfway Comments

Final Comments

(minimum requirement: 4 items)

P

F

6. Group skills

(*OPTIONAL – according to workplace*)

Learning Objective: Demonstrates effective group skills.

1. Identifies factors which suggest inclusion in a group is an optimal / appropriate intervention strategy eg. ...	N/A 1 2 3 4 5 I/O Halfway
	N/A 1 2 3 4 5 I/O Final
2. Effectively adopts designated role within a group eg. participant, co-leader, leader, facilitator ...	N/A 1 2 3 4 5 I/O Halfway
	N/A 1 2 3 4 5 I/O Final
3. Shows an awareness of and manages group dynamics within individual sessions and over time, as appropriate eg. inclusion , power, dependency, closure ...	N/A 1 2 3 4 5 I/O Halfway
	N/A 1 2 3 4 5 I/O Final
4. Develops and explains short and long term goals for the group, in collaboration with group members as appropriate eg. ...	N/A 1 2 3 4 5 I/O Halfway
	N/A 1 2 3 4 5 I/O Final

(Items 5-7 continued over)

Additional Comments (current behaviours / desired behaviours)

Halfway Comments

Final Comments

6. Group Skills cont.

5. Plans and carries out intervention strategies that are goal directed and are beneficial for the needs of individuals within the group and the group as a whole eg. ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
6. Completes appropriate documentation of group process eg. planning, summaries, evaluation of individual sessions / group process as a whole ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final
7. Effectively evaluates individual and group status and modifies intervention as necessary eg. use of observation, feedback from members, consideration of stated desired outcomes ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 4 5 I/O Final

Additional Comments (current behaviours / desired behaviours)

Halfway Comments

Final Comments

(minimum requirement: 4 items)

P

F

Summary Feedback at Halfway

Passing / Failing

Comments may include specific feedback regarding:-

- ◆ strengths
- ◆ areas for improvement; outcomes required / desired by final assessment
- ◆ suggestions for further learning experiences

Signature of
Supervisor/s_____

Signature of
Student_____

Date_____

Date_____

Only supervisors who have identified the student as having difficulties that place him / her at risk of failing should now complete the Concerns Exist Form on page 25.

Summary Feedback at Final Evaluation

Passing / Failing
(Please circle)

Comments may include:

- ◆ brief summary of opportunities and experiences available to the student during the placement
- ◆ strengths
- ◆ areas for improvement
- ◆ perceived suitability for future work in the field

Signature of
Supervisor/s _____

Signature of
Student _____

Date _____

Date _____

Return completed form to: The Clinical Service Officer, School of Occupational Therapy, Faculty of Health Sciences, La Trobe University, Victoria 3086, Australia

Student Placement Evaluation Form
CONFIDENTIAL - Concerns Exist Form

*Supervisors should contact University fieldwork staff using this form
if a student is identified at the Halfway assessment as having difficulties that place him / her at risk of failing
(or at any time if assistance is required) .*

Student's Name: _____

Supervisor Name/s: _____ **Phone No.** _____

EMAIL _____

Name of Facility / Service: _____

Stage of the placement: eg Week 3 or 6 or ?? _____

Please provide a brief outline of your concerns at this point in the placement:

Please indicate which specific items in the SPEF the student is at risk of failing: _____

Briefly describe any strategies to deal with the issues implemented so far:

Please indicate the support you would like from University Staff: _____

Is the student aware you have contacted the University? Yes / No

Urgent / Not Urgent (circle one)

Best time of day to phone? _____

Supervisor's Signature: _____ Date: _____

Student's Signature: _____ Date: _____

Please fax this form to: Fax: 07 3365 1622

Marked attention to -

**The Clinical Service Officer, School of Occupational Therapy, Faculty of
Health Sciences, La Trobe University, Victoria 3086, Australia**

**Or call directly to discuss your concerns - Phone: 03 9479 5854 - The Clinical Service
Officer will connect you with the relevant fieldwork coordinator**

Section Three – Student Review of Placement

Student Review Of Placement

Name of student: _____

Name of supervisor/s: _____

Name of workplace: _____

Dates of placement: _____ to _____

Signature of student: _____ Date: _____

Signature of supervisor/s: _____ Date: _____

_____ Date: _____

Instructions: Students are required to complete this document prior to leaving the placement. The contents of **Section A** are primarily for the supervisor/s and may form the basis of a discussion regarding the placement.

Section A is to be returned to the University.

Section B is for the student's personal reflection and its contents need not be shown to the supervisor or university staff.

Student Review of Placement

The goals of completing this review are twofold. It is designed to *provide feedback* to your supervisor about different aspects of your placement. You may like to offer specific suggestions for change as well as highlighting experiences you found particularly worthwhile. It also encourages *personal reflection* on your accomplishments and areas for improvement. These insights perhaps are most useful if they then lead to the formulation of learning goals for future placements (or the workplace.)

A

Placement Feedback

Statements highlighting crucial aspects of fieldwork placement follow. Use the continuum to indicate your response to these statements. Please use the comment section to provide more specific feedback as necessary. (Remember that by giving specific feedback, you will assist your supervisor/s with future placements.)

- *The orientation process was well planned and comprehensive.*

|_____|_____|_____|_____|
Strongly Disagree Strongly Agree

Comments: (eg. information / experiences that were particularly helpful; balance of time between opportunities to review resources and prescribed activities; changes you would suggest.)

- *Expectations throughout the placement were clearly defined and reasonable*

|_____|_____|_____|_____|
Strongly Disagree Strongly Agree

Comments: (eg. flexibility of expectations according to need; rate at which responsibility was increased; level and variability of workload.)

I felt a welcome member of the workgroup.

|_____|_____|_____|_____|
Strongly Strongly
Disagree Agree

Comments:(eg. positive experiences; suggestions for changes; contact with non OT staff you found helpful; student facilities)

- *The time my supervisor allocated to me was satisfactory.*

|_____|_____|_____|_____|
Strongly Strongly
Disagree Agree

Comments:

- *I was encouraged to evaluate my performance and develop strategies for improvement.*

Strongly Disagree | | | Strongly Agree

Comments: (eg. use of formal strategies eg. learning contracts and diaries; sense of value placed on your opinion.)

- *Feedback provided to me was timely, specific and balanced positive and negative reflections on my performance.*

Strongly Disagree | | | Strongly Agree

Comments: (eg. quantity / clarity of feedback; did feedback provide encouragement or provoke anxiety etc)

- *After the halfway assessment I was clear about my strengths and weaknesses and what I had to do to improve.*

Strongly Disagree | | | Strongly Agree

Comments: (eg. supervisor used current behaviour / desired behaviour format in formal assessment; plans developed to encourage improvement; fieldwork manager contacted as necessary.)

- *My supervisor/s facilitated my learning by providing a supportive environment.*

 Strongly Disagree Strongly Agree

Comments: (eg. student participation valued; supervisor approachable; questions welcomed, flexibility in response to individual learning style.)

- *The balance of autonomy and supervision reflected my level of skill and preferred learning style.*

_____|_____|_____|_____|
 Strongly Disagree Strongly Agree

Comments: (eg. creativity and freedom to develop individual work style encouraged; appropriate level of responsibility.)

- Which experiences do you feel future students would particularly benefit from?

- Please add any additional comments you would like to make.

Personal Reflection

This section is for your personal use and need NOT be shown to your supervisor. The contents of this section may be useful in completing selection criteria in job applications and so should be retained for future reference.

Name of Facility_____

- [illegible]

- [illegible]

Goals

Plan

Appendix A

Examples of allocating pass or fail for a learning objective

The following pages contain four examples which highlight the correct use of the scoring guidelines.

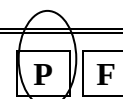
Example One

1. Professional Practice

Learning Objective: Behaves in a manner appropriate to professional practice.

1. ▲ Respects values, beliefs and needs of clients and staff eg. Nondiscriminatory, nonjudgemental, accepts others points of view, does not impose own values ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 (3) 4 5 I/O Final
2. ▲ Maintains confidentiality of information pertaining to clients, staff and workplace eg. files handled appropriately, discussions held in private as necessary ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 (3) 4 5 I/O Final
3. Demonstrates respect for workplace and procedures eg. administrative procedures, safety procedures, workplace structure and hierarchy, attendance at meetings, carries out routine tasks willingly, returns resources ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 (3) 4 5 I/O Final
4. Represents Occupational Therapy in an appropriate manner eg. explains O.T to others, assumes O.T role appropriate to setting ...	N/A 1 2 3 4 5 I/O Halfway N/A (1) 2 3 4 5 I/O Final
5. Shows awareness of the broad impact of political, legal and industrial issues on the profession, workplace and client group eg. legislation, policy, funding, quality assurance, code of ethics ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 (2) 3 4 5 I/O Final

(minimum requirement: 2 ▲, 1 other item)



Student **has passed** this learning objective because he /she:

- Scored a 3 for each core item. (those marked with▲)
- Received only a single score of 1
- Received a score of 3 on another non-core item, thereby attaining the minimum number of scores of at least 3 allocated to this objective.

Example Two

1. Professional Practice

Learning Objective: Behaves in a manner appropriate to professional practice.

1. ▲ Respects values, beliefs and needs of clients and staff eg. Nondiscriminatory, nonjudgemental, accepts others points of view, does not impose own values ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 (3) 4 5 I/O Final
2. ▲ Maintains confidentiality of information pertaining to clients, staff and workplace eg. files handled appropriately, discussions held in private as necessary ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 (2) 3 4 5 I/O Final
3. Demonstrates respect for workplace and procedures eg. administrative procedures, safety procedures, workplace structure and hierarchy, attendance at meetings, carries out routine tasks willingly, returns resources ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 3 (4) 5 I/O Final
4. Represents Occupational Therapy in an appropriate manner eg. explains O.T to others, assumes O.T role appropriate to setting ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 (3) 4 5 I/O Final
5. Shows awareness of the broad impact of political, legal and industrial issues on the profession, workplace and client group eg. legislation, policy, funding, quality assurance, code of ethics ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 (3) 4 5 I/O Final

6. (minimum requirement: 2 ▲, 1 other item)

P F

Student **has failed** this learning objective because he /she:

- Received a score of 2 for a core item. (those marked with σ)
(Professional practice is a core learning objective which has to be passed to secure an overall pass. Consequently, this student has also failed overall.)

Example Three

4. Documentation

Learning Objective: Develops and maintains appropriate records.

1. Documentation written with needs of audience in mind eg. Appropriate language, content, format ...	N/A 1 2 3 4 5 I/O Halfway N/A (1) 2 3 4 5 I/O Final
2. Documentation written in an objective manner with interpretations and recommendations supported by relevant information eg ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 (3) 4 5 I/O Final
3. Formal workplace requirements observed eg. on time, appropriate format, frequency and distribution ...	N/A 1 2 3 4 5 I/O Halfway N/A (1) 2 3 4 5 I/O Final
4. Understands and follows procedure to complete specialised documents if appropriate to setting eg. submissions, tenders, medico – legal reports, technical drawing / specifications, home visit reports ...	N/A 1 2 3 4 5 I/O Halfway (N/A) 1 2 3 4 5 I/O Final

(minimum requirement: 2 items)

P F

Student **has failed** this **learning objective** because he / she:

- Received more than a single score of 1

(As this is a non-core learning objective the student may pass overall if he /she passes **all** other learning objectives)

Example Four

6. Group skills

(OPTIONAL – according to workplace)

Learning Objective: Demonstrates effective group skills.

1. Identifies factors which suggest inclusion in a group is an optimal / appropriate intervention strategy eg. ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 (3) 4 5 I/O Final
2. Effectively adopts designated role within a group eg. participant, co-leader, leader, facilitator ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 2 (3) 4 5 I/O Final
3. Shows an awareness of and manages group dynamics within individual sessions and over time, as appropriate eg. inclusion , power, dependency, closure ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 (2) 3 4 5 I/O Final
4. Develops and explains short and long term goals for the group, in collaboration with group members as appropriate eg. ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 (2) 3 4 5 I/O Final
5. Plans and carries out intervention strategies that are goal directed and are beneficial for the needs of individuals within the group and the group as a whole eg. ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 (2) 3 4 5 I/O Final
6. Completes appropriate documentation of group process eg. planning, summaries, evaluation of individual sessions / group process as a whole ...	N/A 1 2 3 4 5 I/O Halfway (N/A) 1 2 3 4 5 I/O Final
7. Effectively evaluates individual and group status and modifies intervention as necessary eg. use of observation, feedback from members, consideration of stated desired outcomes ...	N/A 1 2 3 4 5 I/O Halfway N/A 1 (2) 3 4 5 I/O Final

(minimum requirement: 4 items)

P **F**

Student **has failed** this learning objective because he / she:

- has not received at least four scores of 3 or more.

NB The score of N/A **was counted** as a 3.

(As this is a non-core learning objective the student may pass overall if he /she passes **all** other learning objectives)

Appendix B

Checklist for determining overall grade

Once a grade has been determined for each of the learning objectives, the following process may be used to allocate overall grade of pass or fail.

1. Has the student passed all the learning objectives?

- ☐ **YES** – the student has **passed** overall.
- ☐ **NO** – go to 2.

2. Has the student failed any of the following **core** learning objectives?

- ◆ professional practice,
- ◆ self management skills
- ◆ communication skills.

- ☐ **YES** – the student has **failed** overall.
- ☐ **NO** – go to 3.

3. Has the student failed **only one** of the non-core learning objectives? ie. documentation, assessment / information gathering, and group skills.

- ☐ **YES** – the student has **passed** overall.
(Students may fail one non-core learning objective.)
- ☐ **NO** – the student has **failed** overall.
(Students may fail only one non-core learning objective.)