

MSc Occupational Therapy Placement Checklist for Preceptors and Preceptor Insights OTP I – OTP IV

The checklist below is a guide to help you prepare for your upcoming placement. The checklist applies to all placement periods (OTP I – OTP IV).

PRE-PLACEMENT:

- Review placement match on InPlace
- Review the student's *Introductory Letter* when received via email which will outline relevant information (e.g., past work or educational experience)
- Correspond with the student by email to confirm:
 - Exact start and end dates of placement
 - Start and end times (e.g., 8:00 AM to 4:00 PM)
 - Where to go upon arrival on the first day
 - Any required activities that must be complete prior to placement if applicable (e.g., health and safety modules)
 - Resources/skills to be reviewed prior to placement
 - Parking information
 - Dress code
- Sign and return the *WSIB Agreement* and *Affiliation Agreement* if requested by the Clinical Education Assistant
- Ensure your InPlace Account is operational and connect with the Clinical Education Assistant at otclned@mcmaster.ca if an account or technical support is needed
- Bookmark the InPlace login page for ease of access <https://mcmaster-ca.inplacesoftware.com/>
- Review preceptor resources posted at <https://srs-ot.healthsci.mcmaster.ca/education/clinical-education/#tab-content-preceptor-resources>

FIRST WEEK:

- Review and sign the *Safety Orientation Checklist* (to be provided by student)

- Confirm access to InPlace
- Discuss placement expectations (e.g., communication channels, expected caseload targets, etc.)
- Review and provide input on student's learning objectives
- Discuss a communication plan to provide and receive feedback
- Discuss a plan and timing for mid-term and final CBFЕ-OT evaluations to take place

SECOND WEEK:

- Ensure student's learning objectives have been submitted on InPlace

ONGOING:

- Attend weekly preceptors' community-of-practice drop-in sessions
- Connect with the Director of Clinical Education as soon as *any* (even minor) concerns arise regarding student performance

DUE DATES FOR MID-TERM AND FINAL CBFЕ-OT:

N.B. Mid-term and final CBFЕ-OT are completed on InPlace (<https://mcmaster-ca.inplacesoftware.com/>)

- Mid-term CBFЕ-OT is due on Friday of mid-point week of placement (week #2 for OTP I and week #4 for OTP II to OTP IV)
- Final CBFЕ-OT is due on Friday of final week of placement
- Please remember that the CBFЕ-OT is a teaching tool meant to facilitate dialogue so please be concise (i.e., there is no length requirement)

The chart below includes additional insights from McMaster OT Preceptors on ways to prepare for students on clinical placement:

Preceptor Insights	
Area of Preparation	Consideration(s):
Caseload and Workload Management	<input type="checkbox"/> Review caseload and workload expectations prior to student arrival to plan a tentative schedule: Consider teaching moments, tailor learning experiences to student learning objectives, identify specific cases that offer unique educational insights or challenges, optimize time and resources during precepting sessions as well as throughout the placement period.
	<input type="checkbox"/> Obtain consent for student participation: Inform clients/patients of your decision to precept a student. Obtain appropriate consent(s) to gain permission for student participation in session(s).
	<input type="checkbox"/> Consider tasks that can be delegated to a student: Assigning a partial caseload (when appropriate) and/or clinical projects to the student under preceptor guidance can enhance student learning experiences and fulfillment of learning objectives. Some preceptors have kept a repertoire of ideas for clinical projects that they may not have had the opportunity to complete on their own (e.g., patient handouts, process guidelines).
	<input type="checkbox"/> Foster team awareness and intra/interprofessional learning opportunities: Inform colleagues of your decision to precept a student and request intra/interprofessional learning opportunities. Colleagues can provide valuable learning experiences to students and offer feedback and support to both preceptor and student during placement.

Orientation and
Administration

- Review preceptor support resources:** This can include but is not limited to the following:
 1. **Site-specific resources on preceptorship:** An employer may have their own resources to support preceptorship that may be beneficial to review.
 2. **Competency Based Fieldwork Evaluation for Occupational Therapists (CBFE-OT):** A copy of this evaluation for OT students can be emailed to preceptors in advance of placement for general reference to understand the student's evaluation criteria while on placement.
 3. **McMaster School of Occupational Therapy Program Handbook:** https://srs-ot.healthsci.mcmaster.ca/wp-content/uploads/2022/10/Occupational-Therapy-Program-Handbook-2023-2024_v1.0_08-21-23-2.pdf. This handbook contains information on all aspects of the MSc OT program.
 4. **Review College of Occupational Therapists of Ontario practice resources:** COTO Standards for the Supervision of Students (2023) <https://www.coto.org/standards-and-resources/resources/standard-for-the-supervision-of-students-and-occupational-therapy-assistants-2023>
 5. **Review resources posted on our McMaster OT program website:** <https://srs-ot.healthsci.mcmaster.ca/education/clinical-education/#tab-content-preceptor-resources>
- Scheduling important dates and organization orientation:** Keep apprised of important dates, including when student midterm and final CBFE-OT evaluations are due. Consider setting aside time for regular touch bases with the student for debriefing and reflection, as well as orientation time at the beginning of placement for the student to familiarize themselves with all the requirements of the clinical setting.
- Coordination of resources:**
 1. **Workspace:** Consider the physical workspace and where you will situate your student.
 2. **Technology:** Consider the technological requirements for the student and if additional preparations are required (e.g., determining whether the student will need login access to a database, separate work email, computer, etc.).
 3. **Collate clinical resources:** Consider gathering relevant clinical guidelines, protocols, and evidence-based resources to support student learning in the placement practice area to help guide their self-directed learning.
 4. **Collate site-specific resources:** Collaborate with site manager or human resource personnel to gather any relevant policies and procedures required by your organization.

**Student and
Preceptor
Support
Resources****❑ McMaster Clinical Education Support:**

1. Contact Sandra VanderKaay, Director of Clinical Education, to discuss any questions or concerns at any point during placement: vandes22@mcmaster.ca
2. Consider attending weekly preceptor community of practice sessions: This is a weekly platform offered to OT preceptors to foster collaboration and learning while actively precepting a student on clinical placement. The goal is to build, grow and support a well-rounded community of preceptors. For more information, please contact Sandra VanderKaay at vandes22@mcmaster.ca
3. Keep apprised of OT Clinical Education News and Events: Subscribe to the OT Program newsletter by completing this form: <http://eepurl.com/in6IS-/>
4. Preceptor Educational Modules: For additional resources and training in OT preceptorship, consider accessing the following:
 - Northern Ontario School of Medicine Health Sciences Preceptor Development Series: <https://www.nosm.ca/education/rehabilitation-studies/resources/self-directed-preceptor-development-series/>
 - Preceptor Education Modules: <https://preceptor.ca/>