



OTA & PTA Program Pre-Placement Requirements

Program	Field Placement Semester	Electronic Records Verification (ERV) Due Date
Occupational Therapy Assistant & Physiotherapist Assistant Program	2	November 25
	3	August 15
	4	March 1

Ensuring you meet your school's health and safety documentation requirements is mandatory for to attend placement. **Failure to meet the requirements by the deadlines provided will prevent you from taking field placement courses and will extend the length of your program considerably with applicable fees applied.**

Some of these items below take several weeks to complete, so be sure to **start this process now** to avoid implications to your participation in clinic practice.

IMPORTANT INFORMATION:

- Read all requirements carefully as there are some time sensitive items.
- Always keep your original documents. This is your personal information and as such is considered confidential.
- There are costs associated with ERV, immunizations, lab tests and certifications.

Requirements Checklist

Once you complete all items on the list, you upload all documents to **Verified by Synergy Gateway** (a secure third-party document verification webpage). Information about Synergy and this process can be found at the end of this document. Review this checklist to ensure you have everything you need before booking your online verification appointment. Your Synergy status must be a ***pass by the deadline above and remain at a pass for the entire duration of the program (including placement).***

Please use this [link](#) to access these forms. **You are only required to complete these checklist items – not all the forms you may find in the link.**



Requirements Checklist for Field Placement One (Due Nov 25)

☐ **Entry Immunization Form (EIF)**

Book an appointment with your health care provider now as this process requires multiple visits to your doctor and can take over a month to complete. If you do not have a doctor, you can book an appointment at the Campus Health and Wellness Centre by calling 905-721-3037. Please view the form carefully. Supplying your yellow immunization tracking card is not sufficient documentation.

☐ **Criminal Reference Check (CRC) with Vulnerable Sector Check (VSC)**

VSC is valid for 6 months only and must remain valid for the entire duration of your placement. Allow for approximately 4-6 weeks for your VSC to arrive. Do not apply too soon as you need your VSC to be valid through to the beginning of April 2026.

☐ **Standard First Aid (SFA) & CPR Level C Course**

Courses will only be accepted if the provider is [WSIB approved](#), which mandates an in-person or blended version. Exclusively online training will not be accepted. CPR remains valid for **one year from date of issue, regardless of expiry date on a card issued by the provider** and must be re-certified annually. Standard First Aid remains valid for three years.

☐ **Mask Fit Testing**

The program will arrange for Mask Fit testing opportunity in the early Fall – you can also complete this independently if you prefer. Mask Fit is valid for 2 years from date of issue.

☐ **Online Training Modules**

Access via DC Connect in ADVI Health Sciences course after you have completed course registrations for your program. Save or print each completion certificate and upload each to Synergy.

- ☐ Workplace Hazardous Materials Information (WHMIS) Module Completion certificate
- ☐ Accessibility for Ontarians with Disabilities (AODA) Module Completion certificate
- ☐ Workplace Violence and Harassment Prevention Module Completion Certificate
- ☐ Worker Health & Safety Awareness in 4 Steps Module Completion Certificate
- ☐ Diversity Module Completion Certificate

☐ **Student Forms**

Access forms from DC Connect in ADVI Health Sciences course or via links below:

- ☐ [HS Informed Consent for the Release of Personal Information](#)
- ☐ [HS Student Declaration of Understanding Form \(WSIB\)](#)

☐ **IPAC for Health Care Workers (HCWs) interactive course**

Access via [Public Health Ontario website](#). You must create a MyPHO account.

Print and save each completion certificate and upload to Synergy. You can view your list of completed certificates under the My Portfolio tab. Scroll down to the Completed Certificates section and select the printer icon next to the certificate name. Follow your browser prompts to view and save the image to print. [More FAQs here](#).

There are 3 core + 1 additional module to complete as listed below:

- ☐ Module 1: Introduction to IPAC and Routine Practices
- ☐ Module 2: Foundational Elements in Routine Practices
- ☐ Module 3: Additional Precautions in IPAC
- ☐ Module 4E: Applying IPAC Principles in Primary Care Settings



Requirements Checklist for Field Placement Two (Year 2 Students - Due Aug 15)

- ☐ [Re-Entry Immunization Form](#) – One Step TB test will be required
- ☐ **Updated Criminal Reference Check with Vulnerable Sector Screening** (valid for six months)
- ☐ **Standard First Aid & Level C CPR – CPR Recertification required** (valid one year only in health care)

Requirements Checklist for Final Block Field Placement (Year 2 Students - Due March 1)

- ☐ **Updated Criminal Reference Check with Vulnerable Sector Screening** (valid for six months)
- ☐ **Ensure all other documents are valid for duration of placement** (this information is available on your Synergy account)

Important Information & Helpful Tips

- Always keep your original documents. This is your personal information and as such is considered confidential. Some clinical sites may be required to check original documents for their own accreditation purposes.
- There are costs associated with ERV, immunizations, lab tests and certifications. **Be sure to keep all of your receipts for income tax purposes.**
- Criminal Reference Check and Vulnerable Sector Check (CRC/VSC)
 - Obtain through your local policing website (for example, if you live in Durham Region, visit the Durham Regional Police webpage). International students must wait until they are in their Canadian residence to order their CRC/VSC
 - If your police service has separate applications for the CRC and VSC, you only need to apply for the VSC.
 - The student letter required for this is emailed to you upon paying your deposit. They will also be in your ADVI course on DC Connect once you register for courses.
 - If you live in Toronto, you need to use an agency code to apply for your VSC. This will also be included in the email to you upon paying your deposit.

Synergy Gateway

What is Synergy?

Synergy Gateway (Synergy) is a third-party system which eliminates the need for you to attend an in-person appointment to have your health and safety documentation reviewed. You submit all of your clinic/field placement required documentation from the comfort of your home to their website and book an Electronic Requirements Verification (ERV) appointment. Always keep your original documents. You may be asked to present the original documentation at any time. Some field placement hosts like to have copies of these documents in their files.

Required Documents For My Program

- Most of these documents are a requirement of the Occupational Health and Safety Act of Ontario to not only be able to participate in placement/clinic, but also for your future employment in the industry.
- Ensuring you meet your requirements is mandatory for you to proceed in your chosen program. Further information about each requirement can be found on the ADVI Health Sciences course page on DC Connect once you register for courses.
- You **MUST** adhere strictly to your program deadline to avoid delays with program progression and extension with additional fees.

Accessing Synergy

- Synergy is available through a secure username and password.
- **Login instructions are emailed to your DC Mail account within 48 hours (2 business days) from the time you register for your courses.**
- If you cannot locate this information in your general inbox, then please check your junk/spam folder. If you still can't find your login credentials, please open a Help Desk ticket by visiting www.synergyhelps.com
- To log into Synergy go to: <https://verified.sgappserver.com/>

Booking Your Virtual Appointment:

- Once you have ensured that all requirements have been uploaded to your Synergy profile, you may book your virtual appointment (ERV) in Synergy.
- Synergy will send you an email 48-72 hours (2 to 3 business days) after your appointment with a status update. Be sure to book your appointment prior to the due date, to ensure you obtain a pass status PRIOR to the due date.
- **To avoid paying additional appointment fees, ensure all of your documentation has been uploaded prior to your appointment date. Each appointment incurs a fee.**
- If you are notified by Synergy via email your documents were not approved, please correct the issue and upload the correction to Synergy. You need to either create a help ticket, or book another ERV in order for Synergy to know there is a document there for review. Follow the steps issued in the Synergy email to ensure this is done correctly.

Synergy Fees

- The fee schedule can be found at Synergy Gateway, <https://verified.sgappserver.com/> under Notes and Fees on the left-hand panel.
- To avoid booking multiple appointments and paying for each one throughout the year we strongly suggest that you check each semester for upcoming documentation expirations.

- You can update expiring Vulnerable Sector Checks (VSC) documents free of charge, after your initial appointment, throughout that calendar year. The free update will only be honored if you upload the documentation into Synergy before they expire and only applies to the VSC.
- Once you have uploaded your new VSC, ***you need to place a helpdesk ticket to have it processed***. If you are renewing other documents at the same time, you will need to book an appointment.

FAQs

1. **What if I'm waiting for my VSC in the mail but have everything else complete?**

Upload all documents to Synergy and your VSC receipt and complete an Offence Declaration Form (found on Synergy under Important Forms). Assuming everything was completed correctly, you should be issued a conditional pass. Then you'll have 30 days to upload your actual VSC for free by creating a ticket in Synergy for review.

2. **What if I need booster doses for vaccines, but have everything else complete?**

Upload all documents for review and book an ERV. Assuming everything is completed correctly, you should be issued a conditional pass. You will need to upload your booster proof PRIOR to the conditional pass date they provide you. You create a ticket and have it reviewed for free, as long as you create your ticket prior to the date Synergy provided you with.

3. **What if I have a conditional pass?**

That means something else is still required for you to obtain a full PASS status. You need to log in to your account and review what is outstanding. Then upload that document PRIOR to the date outlined in your conditional pass note. You create a ticket for review for free, PRIOR to the conditional pass date outlined. If you upload after the conditional pass date, you have to pay a full ERV rate again. Please be aware that your conditional pass date and your overall status expiry date are different, so please be sure to reference the correct information.

4. **I don't have a pass status. How do I know what is missing?**

Log into your Synergy home page to see what has expired or will be expiring. You can also review the email Synergy sent you after your last review.