

Therapy Documentation Templates

Save 30 Minutes a Day

Assessment of Neuromuscular Re-education (Balance & Stability)

Assessment of Manual Therapy (Soft Tissue & Joint Mobilization)

Treatment Examples are Bolded

Treatment Examples are Bolded

SUBJECTIVE | INTAKE SUMMARY

Patient Overview	
Chief Complaint	
Cause or History	
Medical Treatment & Testing	
Current Limitations	

Sample Subjective

The patient is a 45-year-old female who presents with chronic low back pain (LBP) and right leg pain. She reports an acute exacerbation of her LBP and right leg pain that started 2 weeks ago.

OBJECTIVE PHRASE Examples

Postural Assessment & Symptom Location

- Patient stands with relatively depressed scapula and excessive scapular internal rotation on the right side.
- Dorsal and segmental rotation noted with unilateral shoulder flexion.
- Patient is tender to palpation along right supraspinatus tendon with active resistance.
- Unilateral hyperlordosis of thoracic spine present with forward head posture.
- Patient stands with legs shifted to avoid full weight bearing on left side.
- Excessive knee hyperextension present with standing.
- Right ankle observed to exhibit foot collapse with performance of partial squat.

Vital Signs

- Resting BP measured in sitting in right arm: 120/80
- Resting HR: 72 bpm
- Respiratory Rate: 20

Joint ROM

- Neck Flexion: L/R: 100°/120°
- Neck Extension: L/R: 75°/85°

Muscle Testing

	Left	Right
Neck Flexion	4/5	5/5
Neck Extension	4/5	5/5
Shoulder Flexion	4/5	5/5

Special Tests

- Straight Leg Test: +
- Strength (Leg Raise) Test: +
- Sit Test: +

Balance Testing

- FIM: 4 seconds
- BE: 10 seconds L/L: 5
- Timed Up and Go: 3 seconds on count

Gait & Functional Movement Tests

- Patient ambulates with an antalgic gait pattern, favoring right leg.
- Post this observation noted as right at normal gait.
- Decelerate gait with observed as right side prior to swing phase.
- Excessive hip relative flexion present during left swing phase.
- Poor posterior translation observed with performance of sit to stand.
- Forward abduction and medial rotation observed with repeating.
- Forward progression noted with performance of single leg stance.

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ASSESSMENT EXAMPLES

Sample Assessment Formula

The patient (action word) (identify location of problem) (task or movement) with (objective measurements or observations). During this (action instruction) resulted

in the patient demonstrated poor performance of partial squat noted for excessive anterior displacement of femur. Observations to note include were successful in decreasing pain while using these

The patient demonstrated lack of core muscle recruitment during a resistance, functional pattern in an extension of trunk to improve movement in order to achieve greater knee extension.

Action words:

- Demonstrated, performed, lifted, reached, pulled, carried, bent.

Quality of Performance

- Proper, improved, unimpaired, controlled, poor, unstable, coordinated, hesitant.

Task or Movement

- Upper limb, walking, stepping up, reaching, lifting, carrying, into flexion, with abduction, etc.

Specific Impairments or Improvements

- Excessive femur anterior displacement, poor recruitment of glute, lack of push off in last improved recruitment of glute, etc.

Skill Instruction

- Engage the lower abdominal, increase glute upon step up, relaxing the upper trapezius with reaching, etc.

Outcome

- Resulted in decreased pain, improved ROM, better position of the joint during motion, less shuffling/stepping, better ability to sit or overhead, etc.

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Documentation Manual for Occupational Therapy Crystal Gateley, 2024-06-01 The best selling newly updated occupational therapy textbook *Documentation Manual for Occupational Therapy Fifth Edition* is made for students and early career practitioners learning the critical skill of documentation. The workbook format offers students ample opportunities to practice writing occupation based problem statements and goals, intervention plans, SOAP notes, and other forms of documentation. The Fifth Edition has also been updated to reflect changes in the American Occupational Therapy Association's Occupational Therapy Practice Framework Domain and Process Fourth Edition. What's included in *Documentation Manual for Occupational Therapy*: Numerous worksheets for students to practice individual skills with suggested answers provided in the Appendix. Updated information on coding, billing, and reimbursement to reflect recent Medicare changes, particularly in post-acute care settings. Examples from a variety of contemporary occupational therapy practice settings. Included with the text are online supplemental materials for faculty use in the classroom. Instructors in educational settings can visit the site for an Instructor's Manual with resources to develop an entire course on professional documentation or to use the textbook across several courses. One of the most critical skills that occupational therapy practitioners must learn is effective documentation to guide client care, communicate with colleagues, and maximize reimbursement. The newly updated and expanded *Documentation Manual for Occupational Therapy Fifth Edition* will help students master their documentation skills before they ever step foot into practice.

The OTA's Guide to Documentation Marie Morreale, 2024-06-01 The bestselling newly updated occupational therapy assistant (OTA) textbook *The OTA's Guide to Documentation: Writing SOAP Notes Fifth Edition* explains the critical skill of documentation while offering multiple opportunities for OTA students to practice documentation through learning activities, worksheets, and bonus videos. The Fifth Edition contains step-by-step instruction on occupational therapy documentation and the legal, ethical, and professional documentation standards required for clinical practice and reimbursement of services. Students and professors alike can expect the same easy-to-read format from previous editions to aid OTAs in learning the purpose and standards of documentation throughout all stages of the occupational therapy process and different areas of clinical practice. Essentials of documentation, reimbursement, and best practice are reflected in the many examples presented throughout the text. Worksheets and learning activities provide the reader with multiple opportunities to practice observation skills and clinical reasoning, learn documentation methods, create occupation-based goals, and develop a repertoire of professional language. Templates are provided to assist beginning OTA students in formatting occupation-based SOAP notes, and the task of documentation is broken down into smaller units to make learning easier. Other formats and methods of recording client care are also explained, such as the use of electronic health records and narrative notes. This text also presents an overview of the initial evaluation process, delineating the roles of the OT and OTA, and guidelines for implementing appropriate interventions. New in the Fifth Edition: Incorporation of the Occupational

Therapy Practice Framework Domain and Process Fourth Edition and other updated American Occupational Therapy Association documents Updated information to meet Medicare Part B and other third party payer requirements Revised clinical terminology on par with current trends Added examples from emerging practice areas Expanded tables along with new worksheets and learning activities Included with the text are online supplemental materials for faculty use in the classroom this includes access to supplemental website worksheets learning activities and scenario based videos to practice the documentation process

Documentation Manual for Occupational Therapy Crystal A. Gateley, Sherry Borcharding, 2017 Documentation Manual for Occupational Therapy Writing SOAP Notes Fourth Edition presents a systematic approach to a standard form of health care documentation the SOAP note

The PTA Handbook Kathleen A. Curtis, Peggy DeCelle Newman, 2005 Are you tired of searching through multiple texts articles and other references to find the information you need The PTA Handbook Keys to Success in School and Career for the Physical Therapist Assistant contains extensive coverage of the most pertinent issues for the physical therapist assistant including the physical therapist physical therapist assistant preferred relationship evidence based practice and problem solving essentials of information competence and diversity This comprehensive text successfully guides the student from admission into a physical therapist assistant program to entering clinical practice The user friendly format allows easy navigation through topics including changes and key features of the health care environment guides to essential conduct and behavior and ethical and legal considerations Strategies are provided to successfully manage financial decisions and curriculum requirements as well as opportunities and obstacles that may emerge The physical therapist physical therapist assistant relationship often a source of confusion for health care and academic administrators academic and clinical faculty physical therapists and physical therapist assistants is specifically profiled and analyzed The authors clarify this relationship by utilizing an appropriate mixture of case studies multiple examples and current reference documents The physical therapist physical therapist assistant relationship often a source of confusion for health care and academic administrators academic and clinical faculty physical therapists and physical therapist assistants is specifically profiled and analyzed The authors clarify this relationship by utilizing an appropriate mixture of case studies multiple examples and current reference documents Each chapter is followed by a Putting It Into Practice exercise which gives the reader an opportunity to apply the information in their educational or clinical practice setting The information presented is current and represents the evolution of the physical therapy profession over the past 35 years since the inception of the physical therapist assistant role The PTA Handbook Keys to Success in School and Career for the Physical Therapist Assistant is an essential reference for students educators counselors and therapy managers who want to maximize the potential for success of the physical therapist assistant Dr Kathleen A Curtis is the winner of the President's Award of Excellence for 2005 at California State University Fresno Topics Include Evolving roles in physical therapy Interdisciplinary collaboration Legal and ethical considerations Cultural

competence Learning and skill acquisition Effective studying and test taking strategies Preparation for the licensure examination Clinical supervision direction and delegation Planning for career development

Elder Care in Occupational Therapy Sandra Cutler Lewis, 2003 Elder Care in Occupational Therapy has been extensively revised into a new and completely updated second edition This pragmatic text presents up to date information in a user friendly format that seamlessly flows from one subject to the next From wellness to hospice Elder Care in Occupational Therapy Second Edition offers a broad yet detailed discussion of occupational therapy practice that is devoted to older adults A wide variety of topics are covered in a concise format such as historical perspectives theoretical insights the aging process and current interventional strategies to name a few Twenty informative appendices are also included that clarify issues such as Medicare coverage community and clinical living arrangements client centered practice exercise programs evidence based practice and a summary of the newly adopted Occupational Therapy Practice Framework Domain and Process Additional features Contains information about the most advanced scientific achievements that can ultimately affect occupational therapy Lists new and updated resource materials Presents case studies that provide theoretical considerations and Intervention methods Clearly discusses exciting and new venues for occupational therapy programming Explains fundamentals of documentation and current reimbursement issues Perfect for the student or clinician Elder Care in Occupational Therapy Second Edition provides classic professional information on theory disease entities and intervention in a comprehensive format

The OTA's Guide to Writing SOAP Notes Sherry Borcharding, Marie J. Morreale, 2007 Written specifically for occupational therapy assistants The OTA's Guide to Writing SOAP Notes Second Edition is updated to include new features and information This valuable text contains the step by step instruction needed to learn the documentation required for reimbursement in occupational therapy With the current changes in healthcare proper documentation of client care is essential to meeting legal and ethical standards for reimbursement of services Written in an easy to read format this new edition by Sherry Borcharding and Marie J Morreale will continue to aid occupational therapy assistants in learning to write SOAP notes that will be reimbursable under Medicare Part B and managed care for different areas of clinical practice New Features in the Second Edition Incorporated throughout the text is the Occupational Therapy Practice Framework along with updated AOTA documents More examples of pediatrics hand therapy and mental health Updated and additional worksheets Review of grammar documentation mistakes Worksheets for deciphering physician orders as well as expanded worksheets for medical abbreviations Updated information on billing codes HIPAA management of health information medical records and electronic documentation Expanded information on the OT process for the OTA to fully understand documentation and the OTA's role in all stages of treatment including referral evaluation intervention plan and discharge Documentation of physical agent modalities With reorganized and shorter chapters The OTA's Guide to Writing SOAP Notes Second Edition is the essential text to providing instruction in writing SOAP notes specifically aimed at the OTA practitioner and student This

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Case-Smith's Occupational Therapy for Children and Adolescents - E-Book Jane Clifford O'Brien, Heather Kuhaneck, 2019-09-26. Selected for Doody's Core Titles 2024 with Essential Purchase designation in Occupational Therapy. The number one book in pediatric OT is back. Focusing on children from infancy to adolescence, Case-Smith's Occupational Therapy for Children and Adolescents, 8th Edition, provides comprehensive full color coverage of pediatric conditions and treatment techniques in all settings. Its emphasis on application of evidence based practice includes eight new chapters, a focus on clinical reasoning, updated references, research notes, and explanations of the evidentiary basis for specific interventions. Coverage of new research and theories, new techniques, and current trends with additional case studies keeps you in step with the latest advances in the field. Developmental milestone tables serve as a quick reference throughout the book. Full color contemporary design throughout. Text includes high quality photos and illustrations. Case based video clips on the Evolve website demonstrate important concepts and rehabilitation techniques. Research Notes boxes and evidence based summary tables help you learn to interpret evidence and strengthen clinical decision making skills. Coverage of OT for children from infancy through adolescence includes the latest research techniques and trends. Case studies help you apply concepts to actual situations you may encounter in practice. Learning objectives indicate what you will be learning in each chapter and serve as checkpoints when studying for examinations. A glossary makes it easy for you to look up key terms. NEW Eight completely new chapters cover Theory and Practice Models for Occupational Therapy With Children, Development of Occupations and Skills From Infancy Through Adolescence, Therapeutic Use of Self, Observational Assessment and Activity Analysis, Evaluation Interpretation and Goal Writing, Documenting Outcomes, Neonatal Intensive Care Unit and Vision Impairment. NEW A focus on theory and principles. Practice Models promote clinical reasoning. NEW Emphasis on application of theory and frames of reference in practice appear throughout chapters in book. NEW Developmental milestone tables serve as quick reference guides. NEW Online materials included to help facilitate your understanding of what's covered in the text. NEW Textbook is organized into six sections to fully describe the occupational therapy process and follow OTPF.

ChatGPT for Occupational Therapists Jade Summers, Discover how artificial intelligence is revolutionizing occupational therapy. Whether you're an experienced OT or a healthcare student or a tech curious practitioner, this guide is your blueprint for integrating ChatGPT into your practice.

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Pendleton, Winifred Schultz-Krohn, 2011-12-20 Chapter on polytrauma post traumatic stress disorder and injuries related to the War on Terror teaches you how to provide OT services to this unique population Content covers new advances in prosthetics and assistive technologies and provides more up to date assessment and interventions for TBI problems related to cognitive and visual perception Full color design visually clarifies important concepts Video clips on the companion Evolve website vividly demonstrate a variety of OT interventions **Preparing for the Occupational Therapy National Board**

Exam: 45 Days and Counting Rosanne DiZazzo-Miller, Fredrick D. Pociask, Tia Hughes, 2016-10-14 Preparing for the Occupational Therapy National Board Exam 45 Days and Counting Second Edition is a comprehensive overview for occupational therapist students preparing to take the National Board for Certification in Occupational Therapy NBCOT OTR exam It utilizes a well received health and wellness focus and includes tips and self assessment forms to develop effective study habits Unlike other OTR examination review guides this text chooses to provide a more structured and holistic approach including a detailed calendar and plan of study for the 45 days leading up to the exam

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