

**Below are goals that are currently being worked on.  
If you have questions or concerns please ask.**

Date

**Occupational Therapy  
Goals**

**Imma Brat  
Client**

Therapist:

**Goals Currently Working On**

Sit Still 4/5 times for 8 sessions

Don't be a brat for 2 seconds 3/5 times  
for 7 sessions

Use nice words when speaking to therapist 10  
times for 8 sessions

0

0

0

0

**Things to work on at home:**

Client days absent this month:

# Occupational Therapy Progress Note Template

**M Woodhall**



## **Occupational Therapy Progress Note Template:**

**Essential Forms for Therapists** Kate Brewer, 2008-03-24 Proper documentation is critical to your success. Clear the confusion, streamline processes and ensure accuracy with *Essential Forms for Therapists*. For a rehab facility, proper documentation is the most critical aspect of financial survival. But unfortunately, it is an area that causes confusion for clinical and non-clinical staff alike. If therapists do not document properly, they run the risk of improper reimbursement and denials. And even if done properly, documentation can be time-consuming and difficult. Simplify the process and ensure accuracy. This book and CD-ROM set features over 100 modifiable forms including: Therapy registration forms, Plan of treatment for outpatient rehabilitation forms, Plan of progress forms, Therapy daily notes forms and flow sheets. All are designed and tested by experts in the field to ensure that critical information is recorded accurately. Save time and streamline your processes. The book is divided into four sections for your convenience: Therapy documentation, Managed care, Personnel management and human resources, and Essential CMS. And the CD-ROM includes additional sections for job descriptions and performance reviews. These forms can easily be customized to fit individual or clinic needs and are geared toward all therapy staff. Take a look at some of the time-saving forms you'll receive: Inpatient rehab patient assessment instrument, Medical necessity documentation form, Occupational therapy flow sheet, Physical therapy and occupational therapy evaluation, Physical therapy daily notes, Physical therapy flow sheet, Plan of progress for outpatient rehabilitation, Plan of treatment for outpatient rehabilitation, Rehabilitation therapy registration form, Speech language pathology flow sheet, Speech therapy evaluation, Therapy checklist, Therapy discharge, Therapy progress report, Updated plan of progress for outpatient rehab, Advanced beneficiary notice, General Advanced beneficiary notice, Laboratory CORF facility request for certification to participate in Medicare program, CORF survey report, Fire safety report, Fire smoke zone evaluation worksheet, Medicare reconsideration request form, Medicare redetermination request form, Notice of denial of medical coverage, Notice of denial of payment, Who will benefit. Physical therapists, occupational therapists, speech language pathologists and managers in outpatient facilities, comprehensive outpatient rehabilitation facilities, private practice, hospitals and nursing homes. *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

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 exceptional edition offers both the necessary instruction and multiple opportunities to practice as skills are built on each other in a logical manner Templates are provided for beginning students to use in formatting SOAP notes and the task of documentation is broken down into small units to make learning easier A detachable summary sheet is included that can be pulled out and carried to clinical sites as a

reminder of the necessary contents for a SOAP note Updated information expanded discussions and reorganized learning tools make The OTA's Guide to Writing SOAP Notes Second Edition a must have for all occupational therapy assistant students This text is the essential resource needed to master professional documentation skills in today's healthcare environment

*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

*Therapeutic Reasoning in Occupational Therapy - E-Book* Jane Clifford O'Brien, Mary Beth Patnaude, Teresa Garcia Reidy, 2021-12-24 Build the clinical reasoning skills you need to make sound decisions in OT practice *Therapeutic Reasoning in Occupational Therapy How to Develop Critical Thinking for Practice* uses practical learning activities worksheets and realistic cases to help you master clinical reasoning and critical thinking concepts Video clips on the Evolve website demonstrate therapeutic reasoning and show the diverse perspectives of U.S. and international contributors Written by OT experts Jane Clifford O'Brien Mary Elizabeth Patnaude and Teresa Garcia Reidy this how to workbook makes it easier to apply clinical reasoning in a variety of practice settings Dynamic interactive approach reinforces your understanding with learning activities in each chapter Case studies and experiential learning activities flow from simple to complex and represent occupational therapy across the lifespan AOTA's Occupational Therapy Practice Framework 4th Edition and current OT practice are reflected throughout the book Practical learning activities and templates are clinically relevant and designed to support reasoning in a variety of practice settings Video clips on the Evolve website are contributed by practitioners educators and students reinforcing content and showing how therapeutic reasoning applies to real world cases Worksheets and or templates are included in

each chapter to enhance learning and for use in practice Assessments in each chapter measure therapeutic reasoning outcomes Student and practitioner resources on Evolve include printable PDFs of the in text worksheets video clips additional case examples templates for assignments exemplars and reflective activities

**Crafts and Creative Media in Therapy** Carol Tubbs, Margaret Drake, 2024-06-01 For more than 20 years Crafts and Creative Media in Therapy Fifth Edition has been an illuminating reference for the use of creative approaches in helping clients achieve their therapeutic goals Carol Crellin Tubbs has included a range of craft and creative activity categories from paper crafts to cooking to the use of recycled materials and everything in between Each chapter includes a brief history of the craft several projects along with suggestions for grading or adapting examples of related documentation and a short case study The text also features chapters on activity analysis general strategies for implementation of creative activities and documentation as well as a chapter describing the relevance of this media from both historical and current occupation based perspectives In this updated Fifth Edition the craft projects have been updated and numerous resources and links for more ideas have been added There are new chapters on making therapy tools and crafting with a purpose and the recycled and found materials chapter has been expanded in keeping with cultural trends A flow chart has been added to each case study to help students better understand the process and rationale for tailoring activities for individual client needs and project suggestions for working on specific performance skills or client factors are scattered throughout the chapters Other additions include a behavioral observation checklist as an aid in evaluation and documentation and several illustrations to help students distinguish between the use of occupation as means and occupation as end This Fifth Edition also includes an updated instructors manual with additional resources and suggestions for lesson planning Crafts and Creative Media in Therapy Fifth Edition not only provides a wide assortment of craft ideas and instructions but also provides multiple suggestions for therapeutic uses for activities in each category It includes ways to grade activities to best achieve therapy objectives and examples of documentation for reimbursement For each craft category there is discussion on precautions for use with certain populations contextual limitations and safety considerations Information is presented in several different formats such as examples tables illustrations and other formats to promote student understanding Included with the text are online supplemental materials for faculty use in the classroom Crafts and Creative Media in Therapy Fifth Edition is the foremost resource for using creative approaches in helping clients achieve their therapeutic goals and should be used by all occupational therapists occupational therapy assistants and recreational therapists

**Your IEP Playbook** Lisa Lightner, 2025-10-06 An easy to understand guide to navigating and implementing your child s individualized education plan IEP In Your IEP Playbook A Parent s Guide to Confident Advocacy disability parent and special education advocate Lisa Lightner delivers a practical guide for parents and caregivers of children with disabilities doing their best to navigate their individualized education plans IEPs This collection of realistic and implementable advice walks you through how to apply

federal and state law in your unique situation develop an advocacy strategy that works and collaborate with schools and the professionals involved in your child's education You'll learn about common mistakes made by people advocating for a child with special education needs and how to avoid them You'll also discover how to ensure that your child's needs and priorities aren't overlooked or under supported The book also contains Advice on how to break down and understand the different parts of an IEP including what they mean how to read one and what to document Guidance and reproducible exercises to determine reach and monitor progress of IEP goals Strategies for composing advocacy letters to your child's school and how to time them for maximum impact Perfect for the parents and guardians of pre K to grade 12 children with special needs Your IEP Playbook is also a must read for special education teachers case workers and people advocating for children in foster care

Theory in School-Based Occupational Therapy Practice Patricia Laverdure, Francine M. Seruya, 2024-06-05 Theory in School Based Occupational Therapy Practice A Practical Application addresses a critical need in the school based occupational therapy practice community for a model of integrating theory based decision making in school practice Drs Laverdure and Seruya provide pragmatic information to support the translation and application of theory in occupational therapy practice in school based settings The text provides an important blueprint for the advancement of occupational therapy practice in the context of educational reform and accountability What's included in Theory in School Based Occupational Therapy Practice Evidence based theoretical conceptual models theories and frames of reference used by occupational therapy practitioners in school practice Case examples to prepare occupational therapy students for practice in school settings Chapters written by theory and practice scholars and case exemplars illustrating the application of the content Perfect for future and current practitioners in school systems looking to improve student learning and postsecondary outcomes Theory in School Based Occupational Therapy Practice A Practical Application fills a gap that will improve the state of occupational therapy practice in educational settings across the country

*Mindful Crafts as Therapy* Cynthia Evetts, Suzanne Peloquin, 2017-04-28 Arts and crafts were one of the very first therapies employed by occupational therapists Today crafts are still employed as effective interventions for clients with mental health disorders physical dysfunctions cognitive issues and sensory concerns in hospitals outpatient clinics veterans centers schools skilled nursing facilities or community settings Step by step the authors show you how to use a wide range of novel and highly engaging crafts They explain how to connect the key tasks associated with an activity to functional outcomes and how to modify them to meet the specific needs of individual patients They also address the issues of documentation and reimbursement

Succeeding in Your Psychotherapy Practicum and Internship Michael D. Reiter, Kayleigh Sabo, 2024-06-28 Succeeding in Your Psychotherapy Practicum and Internship is a book about what students can often expect from their psychotherapy internship and how they can make the most of their experience The book is written from two perspectives one that of a seasoned therapist professor and supervisor of therapy and two the perspective of a registered intern therapist who just went through

the internship process Succeeding in Your Psychotherapy Practicum and Internship covers the basics of psychotherapy internships from the beginning stages of finding and starting at an internship site to navigating the common experiences at an internship to reflecting on therapeutic growth and the ending of an internship and much more Students will come away from this book with a deep understanding of each perspective one that will enhance their appreciation of the practicalities and possibilities of their practicum and internship experiences

**Pedretti's Occupational Therapy - E-Book** Heidi McHugh Pendleton, Winifred Schultz-Krohn, 2024-03-25 2025 Textbook and Academic Authors Association TAA McGuffey Longevity Award Winner Selected for 2025 Doody's Core Titles with Essential Purchase designation in Occupational Therapy Gain the knowledge and skills you need to treat clients/patients with physical disabilities Pedretti's Occupational Therapy Practice Skills for Physical Dysfunction 9th Edition uses a case-based approach threaded through each chapter to provide a solid foundation in evaluation, intervention, and clinical reasoning The text continues to support the entry-level occupational therapist and the experienced occupational therapist focused on expanding skills and knowledge With the OT practice framework as a guide you will focus on the core concepts and central goals of client care And by studying threaded case studies you will learn to apply theory to clinical practice Written by a team of expert OT educators and professionals led by Heidi McHugh Pendleton and Winifred Schultz-Krohn this edition includes an eBook free with each new print purchase featuring a fully searchable version of the entire text UNIQUE Threaded case studies begin and are woven through each chapter helping you develop clinical reasoning and decision-making skills and to apply concepts to real-life clinical practice UNIQUE Ethical Considerations boxes examine the obligation to collaborate with clients on their care using evidence to select treatment options UNIQUE OT Practice Notes convey important tips and insights into professional practice Illustrated evidence-based content provides a foundation for practice especially relating to evaluation and intervention Information on prevention rather than simply intervention or treatment shows how OTs can take a proactive role in client care Focus on health promotion and wellness addresses the role of the occupational therapist in what the AOTA has identified as a key practice area Content on cultural and ethnic diversity is included in every chapter reflecting occupational therapy's commitment to this important issue Key terms chapter outlines and chapter objectives highlight the information you can expect to learn from each chapter

**Implementing School-Based Occupational Therapy Services** Aimee Piller, 2025-09-03 This book focuses on providing occupational therapy sensory interventions through a tiered approach to help improve academic participation covering assessment of the sensory aspects of the environment and population as well as at the group level Chapters showcase how occupational therapy practitioners can effectively contribute to each tier of the multi-tiered system of supports MTSS framework with an emphasis on Tiers 1 and 2 The book also provides evidence-based methods to monitor outcomes of provided interventions and discuss how and when to modify the interventions and highlights innovative strategies to support a broad range of students especially those who may need additional assistance but do not



qualify for specialized services While there are many reasons students might require support this book zeroes in on sensory processing challenges and their impact on classroom participation and academic performance By addressing these needs occupational therapy practitioners can foster a more inclusive engaging and supportive learning environment for every student

Creek's Occupational Therapy and Mental Health Wendy Bryant,Jon Fieldhouse,Katrina Bannigan,2014-06-17

Now in its fifth edition this seminal textbook for occupational therapy students and practitioners has retained the comprehensive detail of previous editions with significant updates including the recovery approach informed by a social perspective Emerging settings for practice are explored and many more service users have been involved as authors writing commentaries on 14 chapters All chapters are revised and there are also new chapters such as mental health and wellbeing professional accountability intersectionality green care and working with marginalized populations Chapter 11 is written by two people who have received occupational therapy examining different perspectives on the experience of using services This edition is divided into clear sections exploring theory and practice issues in detail The first section covers the historical theoretical and philosophical basis for occupational therapy in the promotion of mental health and wellbeing The second section examines the occupational therapy process followed by a third section on ensuring quality in contemporary practice The fourth section offers insights into issues arising from the changing contexts for occupational therapy including an analysis of the implications for occupational therapy education The fifth section has eight chapters on specific occupations that can be applied across the varied settings which are covered in the sixth and final section Occupational Therapy and Mental Health is essential reading for students and practitioners across all areas of health and or social care in statutory private or third voluntary sectors and in institutional and community based settings Presents different theories and approaches Outlines the occupational therapy process Discusses the implications of a wide range of practice contexts Describes a broad range of techniques used by occupational therapists Provides many different perspectives through service user commentaries Coverage of trust as part of professional accountability leadership green care ethical practice using a principled approach Additional and extended service user commentaries An editorial team selected and mentored by the retired editors Jennifer Creek and Lesley Lougher

**Occupational Analysis and Group Process - E-Book** Jane Clifford O'Brien,Jean W. Solomon,2021-04-13 Learn how to analyze client needs and use group therapy for effective interventions Occupational Analysis and Group Process 2nd Edition provides practical information on two key components of occupational therapy practice helping you understand how to intervene with a variety of clients Using case scenarios and clinical examples this book provides strategies and guidelines for analyzing functional tasks for clients from children to adolescents to adults It guides you through every step of the group process including group leadership communication within the group and group interventions Written by noted OT educators Jane Clifford O'Brien and Jean W Solomon this book provides a solid foundation for intervention planning Comprehensive content covers the material taught in group process and occupational analysis

courses within Occupational Therapy and Occupational Therapy Assistant programs Clear matter of fact approach provides an understanding of the group process strategies for leading groups and guidelines for group interventions Case examples tables and boxes highlight the key content in each chapter Clinical Pearls emphasize practical application of the information providing tips gained in clinical practice Therapeutic Media are tried and true methods pulled from the author s extensive experience in occupational therapy NEW Updates and revisions to all chapters reflect the new Occupational Therapy Practice Framework and current OT practice NEW New chapter s include Guidelines and Best Practices for Setting and Developing Goals and Managing Difficult Behaviors During Group Interventions NEW Clinical Application Exercises and Worksheets chapter reinforces your understanding with learning exercises activities and forms for each chapter NEW Full color design provides a greater visual impact NEW Clinical Case begins each chapter and includes questions on key content NEW Case Application and Summary in each chapter address the Key Questions NEW Additional content on specific groups includes topics such as community trust building functioning civic rehab role playing and measuring outcomes NEW Expanded content on therapeutic interventions is added to the book NEW Emphasis on group work in a variety of practice settings prepares you to handle groups in multiple environments NEW Creative examples show groups and intervention activities

*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 *Occupational Therapy Assessment Tools* Ina Elfant Asher, 1996 Methodologic valuation test

Psychosocial Occupational Therapy Franklin Stein, Susan K. Cutler, 1998 This text defines occupational therapy as an applied science and rehabilitation profession concerned with enabling individuals with disabilities to reach their maximum potential in performing daily functions The authors both experts in the field bring together a holistic approach by using historical references current occupational therapy practice and research evidence They discuss and evaluate clearly the traditional and alternative treatment techniques and emphasize occupational therapy s link to its historical roots as well as the emerging trends in community mental health BOOK JACKET Title Summary field provided by Blackwell North America Inc All Rights Reserved **Structured Group Psychotherapy for Bipolar Disorder** Mark S. Bauer, MD, Linda McBride, MSN, 2003 This updated and substantially revised edition not only incorporates the expansion of the pharmacological armamentarium available for treatment but also integrates the explosion of evidence based data for psychosocial interventions The authors a psychiatrist nurse team have fine tuned their two phase treatment program and present a clear and concise approach to improving illness self management skills as well as social and occupational functioning **The Combined Volume COTA Second Edition and Practice Issues in Occupational Therapy**, 1995 *The Combined Volume* Sally E. Ryan, 1995 This volume incorporates Sally E Ryan s second edition of The Certified Occupational Therapy Assistant printed first followed by the popular Practice Issues in Occupational Therapy all in one book Both books are printed

verbatim in this combined edition

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