

# SOAP Note for Occupational Therapy Template

## Client Information

John	Sample
First Name	Last Name
10/15/1965	11/22/2022
Date of Birth	Date

## Subjective

John is a 55-year-old farmer who lives rurally with his wife and sons.

John injured the palm of his left-hand four months ago operating farm machinery and underwent emergency surgery that night on the damaged tendons in his hand.

He no longer uses a brace and is seeking occupational therapy to assist with driving, preparing food and dexterity.

## Objective

Mild tenderness upon palpation of left palm.

Grip strength 44 lbs.

Scar appears well healed with callouses around surgical site.

## Assessment

John is ready to begin targeted exercises to aid in his driving ability, particularly handling a steering wheel, and dexterity.

## Plan

Provided resistive grip and pinch exercises x3 with visual guide for completion.

Weekly sessions and review of frequency in one month.

\_\_\_\_\_  
Signature

# Occupational Therapy Notes Documentation

**Diane Powers Durette, Sharon A.  
Gutman**



## **Occupational Therapy Notes Documentation:**

**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

**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 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

The OTA's Guide to Documentation Marie Morreale, 2022-08 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 Instructors in educational settings can visit [www.efacultyounge.com](http://www.efacultyounge.com) for an Instructor's Manual and bonus videos to be used in the classroom Also included with the book is access to a supplemental website for students with to be used in the classroom Also included with the book is access to a supplemental website

worksheets learning activities and scenario based videos to practice the documentation process      **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      **Occupational Therapy for Physical Dysfunction** Mary Vining Radomski, Catherine A. Trombly Latham, 2008 The definitive work on occupational therapy for physical dysfunction returns in its Sixth Edition with reputable co editors and clinical academic and consumer contributors This text provides a current and well rounded view of the field from theoretical rationale to evaluation treatment and follow up Through the Occupational Functioning Model OFM the Sixth Edition continues to emphasize the conceptual foundation and scientific basis for practice including evidence to support the selection of appropriate assessments and interventions NEW TO THIS EDITION Student DVD with video clips demonstrating range of motion manual muscle testing construction of hand splints and transferring patients Evidence Tables summarize the evidence behind key topics and cover Intervention Participants Dosage Type of Best Evidence Level of Evidence Benefit Statistical Probability and Reference Assessment Tables summarize key assessment tools and cover Instrument and Reference Description Time to Administer Validity Reliability

Sensitivity and Strengths and Weaknesses      *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.

**Willard and Spackman's Occupational Therapy** Glen Gillen, Catana Brown, 2023-07-20 A foundational book for use from the classroom to fieldwork and throughout practice, Willard Spackman's Occupational Therapy 14th Edition remains the must-have resource for the Occupational Therapy profession. This cornerstone of OT and OTA education offers students a practical, comprehensive overview of the many theories and facets of OT care, while its status as one of the top texts informing the NBCOT certification exam makes it an essential volume for new practitioners. The updated 14th edition presents a more realistic and inclusive focus of occupational therapy as a world-wide approach to enhancing occupational performance, participation, and quality of life. It aims to help today's students and clinicians around the world focus on the pursuit of fair treatment, access, opportunity, and advancement for all while striving to identify and eliminate barriers that prevent full participation.      Occupational Therapy Essentials for Clinical Competence Karen Jacobs, Nancy MacRae, 2024-06-01 Occupation theory-driven, evidence-based, and client-centered practice continue to be the core of the profession and are the central focus of Occupational Therapy Essentials for Clinical Competence Third Edition. The Third

Edition contains updated and enriched chapters that incorporate new perspectives and evidence based information important to entry level practitioners The Third Edition continues to relate each chapter to the newest ACOTE Standards and is evidence based while also addressing the guidelines of practice and terms from the AOTA s Occupational Therapy Practice Framework Third Edition Dr Karen Jacobs and Nancy MacRae along with their 61 contributors introduce every topic necessary for competence as an entry level practitioner Varied perspectives are provided in each chapter with consistent references made to the relevance of certified occupational therapy assistant roles and responsibilities Additionally chapters on the Dark Side of Occupation and Primary Care have been added to broaden the foundational scope of knowledge Each chapter also contains a clinical case used to exemplify relevant content New in the Third Edition All chapters have been updated to reflect the AOTA s Occupational Therapy Practice Framework Third Edition Updated references and evidence based practice chart for each chapter Updated case studies to match the current standards of practice References to the Occupational Therapy Code of Ethics 2015 Faculty will benefit from the multiple choice questions and PowerPoint presentations that coincide with each chapter Included with the text are online supplemental materials for faculty use in the classroom Occupational Therapy Essentials for Clinical Competence Third Edition is the perfect multi use resource to be used as an introduction to the material while also serving as a review prior to sitting for the certification exam for occupational therapists and occupational therapy assistants Ryan's Occupational Therapy Assistant Karen Sladyk, 2024-06-01 A renowned and cornerstone text for the occupational therapy assistant for more than 30 years is now available in an updated Fifth Edition Continuing with a student friendly format the classic Ryan s Occupational Therapy Assistant Principles Practice Issues and Techniques continues to keep pace with the latest developments in occupational therapy including the integration of key concepts from key documents for the occupational therapy profession such as AOTA s Occupational Therapy Practice Framework Third Edition ACOTE Standards Code of Ethics and Ethics Standards Guidelines for Supervision Roles and Responsibilities During the Delivery of Occupational Therapy Services Diagnostic and Statistical Manual of Mental Disorders Fifth Edition DSM 5 Building on the legacy work of Sally E Ryan Dr Karen Sladyk presents more than 45 chapters in the Fifth Edition of Ryan s Occupational Therapy Assistant Using actual client examples occupational therapy assistant OTA students are guided throughout the process of learning various principles and disabilities to applying that knowledge in a clinical setting What is new inside the Fifth Edition Two new chapters included in the Occupations and Disabilities section on Downs syndrome and diabetes and bipolar disorder Updates of each chapter throughout New evidence based practice and supportive research throughout New color interior design throughout Updated references throughout Included with the text are online supplemental materials for faculty use in the classroom Ryan s Occupational Therapy Assistant Fifth Edition includes a variety of treatment techniques that help students understand how to choose and when to implement certain procedures Group intervention assistive technology and adaptive equipment basic splinting wellness and

health promotion and work injury activities are examples of the techniques presented This Fifth Edition also includes specific chapters about evidence based practice and understanding research Chapters on supervision functional ethics and professional development are examples geared toward educating OTA students on how to manage different aspects of their early career A core text for students aspiring to become successful OTAs for more than 30 years Ryan s Occupational Therapy Assistant Principles Practice Issues and Techniques Fifth Edition is the leading textbook to have throughout one s education and early career Preparing for The Occupational Therapy Assistant National Board Exam: 45 Days and Counting Dizazzo-Miller,2017-08-30 Preparing for the Occupational Therapy Assistant Board Exam 45 Days and Counting provides a comprehensive overview for occupational therapy assistant students preparing to take the Certified Occupational Therapy Assistant COTA exam Each new print copy includes Navigate 2 Preferred Access that unlocks a complete eBook Study Center Homework and Assessment Center Navigate 2 TestPrep with over 500 practice questions Occupational Therapy for Physical Dysfunction Diane Powers Dirette, Sharon A. Gutman,2020-01-30 Designed to help students become effective reflective practitioners this fully updated edition of the most widely used occupational therapy text for the course continues to emphasize the whys as well as the how tos of holistic assessment and treatment Now in striking full color and co edited by renowned educators and authors Diane Powers Dirette and Sharon Gutman Occupational Therapy for Physical Dysfunction Eighth Edition features expert coverage of the latest assessment techniques and most recent trends in clinical practice In addition the book now explicitly integrates Frames of Reference to help students connect theories to practice and features a new six part organization thirteen all new chapters new pedagogy and more **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

*Mosby's Q & A Review for the Occupational Therapy Board Examination - E-Book* Patricia Bowyer,Dorothy P. Bethea,2007-03-27 This book CD ROM review package gives you the necessary tools you need to successfully prepare for the National Board for Occupational Therapy Certification Examination With this overall package you can study for the NBCOT certification exam and feel more confident you are prepared to take the test The text includes 800 multiple choice review questions written to parallel the content and format of the exam The accompanying CD with all 800 questions enables you to generate an unlimited number of practice tests to simulate the actual testing situation Questions focus on the Occupational Therapy Practice Framework OTPF as well as the results from the practice analysis completed by NBCOT Questions cross the spectrum of occupational therapy process evaluation intervention planning intervention service management and outcomes of a variety of populations including pediatric mental health and adult physical and neurological conditions Practice environments such as the community school based and hospital based care are covered throughout Specific references for every question and a comprehensive list of resources are provided at the end of the book for further study Rationales for answer options are provided to explain why the correct answer is right and the other choices are wrong Provides information on the format of the NBCOT exam and tips for studying and answering test questions

**Occupational Therapy with Aging Adults - E-Book** Karen Frank Barney,Margaret Perkinson,2024-06-21 Get all the information you need to work holistically creatively and collaboratively when providing services for older adults with Karen Frank Barney Margaret A Perkinson and Debbie Laliberte Rudman s Occupational Therapy with Aging Adults 2nd Edition Emphasizing evidence based occupation based practice and a collaborative interdisciplinary approach this text walks students and practitioners through the full range of gerontological occupational therapy practice inclusive of working with individual clients to working at systems and societal levels Over 80 leaders in their respective topical areas contributed to the book s 33 chapters including the conceptual foundations and

principles of gerontological occupational therapy bio psychosocial age related changes environmental forces shaping occupational participation for older adults the continuum of health care as well as implications for communities and the attributes ethical responsibilities and roles involved in gerontological occupational therapy This edition also covers topical OT issues that are crucially important to an aging population such as diversity and inclusion disability and aging sexuality technology telehealth and virtual environments intergenerational connections updates on dementia research and caring for someone with dementia occupational justice and aging age inclusive communities and an expanded section on hearing to ensure your students are well versed in every aspect of this key practice area UNIQUE Intraprofessional and interprofessional approach to intervention emphasizes working holistically and collaboratively in serving older adults UNIQUE Chapter on the wide range of physiological musculoskeletal and neurological changes among the aging patient population highlights related occupational performance issues Case examples help you learn to apply new information to actual client and community situations Chapter on evidence based practice discusses how to incorporate evidence into clinical or community settings Questions at the end of each chapter can be used for discussion or other learning applications UNIQUE Chapters on nutrition food insecurity and oral health explore related challenges faced by older adults Chapter on ethics provides a deeper understanding of how to address challenging ethical dilemmas

**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

Early's Physical Dysfunction Practice Skills for the Occupational Therapy Assistant E-Book Mary Beth Patnaude, 2021-01-15 NEW Intervention Principles for Feeding and Eating chapter is added to this edition NEW Reorganization of all chapters aligns content more closely with the Occupational Therapy Practice Framework NEW Combined chapters make the material more concise and easier to navigate

**Writing Patient/Client Notes** Ginge Kettenbach, Sarah Lynn Schlomer, Jill Fitzgerald, 2016-05-11 Develop all of the skills you need to write clear concise and defensible patient client care notes using a variety of tools including SOAP notes This is the ideal resource for any health care professional needing to learn or improve their skills with simple straight forward explanations of the hows and whys of documentation It also keeps pace with the changes in Physical Therapy practice today emphasizing the Patient Client Management and WHO s ICF model

Documenting Occupational Therapy Practice Karen M. Sames, 2010 Taking a global look at documentation in occupational therapy this book examines both the technical how to aspect of all forms of clinical

school based and administrative documentation and the ethical legal and language issues related to documentation Soap notes as well as other forms of documentation are discussed throughout Sections in this book include Use of Language Ethical and Legal Considerations Clinical Documentation School System Documentation and Administrative Documentation There are also extensive appendices on AOTA Standards of Practice AOTA Guidelines to Occupational Therapy Documentation and AOTA Code of Ethics This book can be used by students to learn about documentation and by clinicians to improve the quality of documentation in the field

*Best Practice Occupational Therapy for Children and Families in Community Settings* Winnie Dunn, 2024-06-01 As the occupational therapy profession concerns itself with how people occupy their time during daily life it is critical for occupational therapists who serve children to understand how to apply their knowledge and skills within the complex and varied environments of the community A core text for over 10 years *Best Practice Occupational Therapy for Children and Families in Community Settings* Second Edition by Dr Winnie Dunn provides a clear insight into how to conceive design implement and evaluate services that reflect core principles *Best Practice Occupational Therapy for Children and Families in Community Settings* Second Edition provides the most current information about providing services within community settings with material addressing early intervention early childhood school age services and transitions The context of this text is rooted in best practice principles from interdisciplinary literature and illustrates how occupational therapy professionals implement those principles in their everyday practices

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### Occupational Therapy Notes Documentation :

A Dog's Purpose (2017) A dog looks to discover his purpose in life over the course of several lifetimes and owners. A Dog's Purpose (film) A Dog's Purpose is a 2017 American family comedy-drama adventure film directed by Lasse Hallström and written by W. Bruce Cameron, Cathryn Michon, ... A Novel for Humans (A Dog's Purpose, 1) This moving and beautifully



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