

# Occupational Therapy Documentation Cheat Sheet

## Process of occupational therapy service delivery

The occupational therapy process is facilitated by the distinct perspective of occupational therapy practitioners engaging in professional reasoning, analyzing occupations and activities, and collaborating with clients. Service delivery does not occur in a linear fashion. It is a dynamic and fluid process that allows occupational therapy practitioners to focus on identified outcomes while continually reflecting on and accommodating new developments and insights throughout the service delivery process.

## Evaluation

- **Occupational profile:** The occupational therapist summarizes information related to the client's occupational history, experiences, daily living patterns, interests, values, needs, contexts, and reasons for seeking services.
- **Analysis of occupational performance:** After obtaining a thorough occupational profile, the occupational therapist identifies the client's assets, limitations, and potential problems through observation and assessment of the client's performance.
- **Synthesis of the evaluation process:** The occupational therapist interprets the information gathered from the occupational profile and the analysis of occupational performance to determine priorities for intervention and outcomes, working collaboratively with the client to create goals.

## Intervention

- **Intervention plan:** The occupational therapy practitioner integrates information from the evaluation with theory, practice models, frames of reference, and research evidence to develop an action plan for addressing targeted goals and outcomes in collaboration with the client.
- **Intervention implementation:** The occupational therapy practitioner implements the action plan and continually monitors the client's response to interventions, which may include the therapeutic use of occupations and activities, interventions to support occupations, education, training, advocacy, self-advocacy, group intervention, or virtual intervention.
- **Intervention review:** The occupational therapy practitioner reviews the effectiveness of the intervention plan and the client's progress toward targeted goals and outcomes.

## Outcomes

- **Selecting outcome measures:** The occupational therapist selects valid, reliable methods to measure any of the following targeted outcomes: occupational performance, prevention, health and wellness, quality of life, participation, role competence, well-being, or occupational justice.
- **Measuring progress and adjusting goals and interventions:** Throughout the occupational therapy process, the practitioner uses the selected outcome measures to monitor progress, update goals, modify interventions, and plan for transition and/or discontinuation of occupational therapy services.

# Occupational Therapy Documentation

**Zhe Xu**



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