An Introduction to Protocols for Occupational Therapy

Inga Warren

The use of protocols for clarifying thinking and promoting occupational therapy is described, drawing on personal experience. Potential applications and methods of presentation are outlined and Blustrated.

Introduction

A protocol is a working document, a draft, formula or record, which can be used to clarify ideas, plans and processes. An appropriate definition of a protocol is 'a statement reporting an observation exactly and without attempting an interpretation'. A protocol describes but does not discuss. Occupational therapy protocols state what occupational therapy does or intends to do in given situations. They can be used for service planning and negotiating for resources, setting standards, research, education and training, and role definition.

Potential applications

Service planning

When planning services, intentions can be explained by drafting concise information about what will be done, to whom, by whom and how. This document can then be used to present proposals when seeking approval for service developments, or negotiating resources or contracts of service, it may later be used as a framework for planning individual treatments.

The author designed a protocol for occupational therapy with high risk infants admitted to a special care baby unit (SCBU). The project was new and without precedent. The protocol stated objectives, aims, criteria for referral, intended interventions, and skills needed (Table 1). References to appropriate research and publications were included. This was submitted to the psediatrician who discussed it with key members of staff and agreement that the project should go ahead was reached. The service was implemented in accordance with the protocol, which was updated to take into account increased skills, changes in unit structure and the results of evaluation.

In another example, a protocol was used as the foundation for planning a new elderly care service as part of a hospital complex. In this case, a protocol stating priority goals, preferred locations for interventions, staff numbers and grades was presented to help plan facilities and bids for continuing funds (Table 2). A concise, clearly laid out written statement of what the occupational therapy service intends is essential when bidding for space, funding or representation or when resisting service outs.

Setting standards

Protocols can be used to define what is acceptable practice in an occupational therapy department given available resources. Similarly, they can be used to illustrate the effect of changes in resources, structures or other services. They can also be used to compare practices. For example, two protocols for the rehabilitation of amputee patients were prepared. One described the existing service while the other proposed an improved service which would result from earlier referral. These were used to convince surgeons of the advantages of preoperative referral.

Table 1. Text format (widely used by the author and applied to SCBU

Objectives: State main purpose of programme.

Aims: State how you intend to meet the objectives.

Referral: State criteria for referring patients/clients to the programme and method of referral.

Assessment: State screening and assessment tools to be used.

interventions: State treatment techniques to be used and methods of delivery (for example, direct or indirect).

Discontinuation: State criteria for discontinuing intervention.

Locations: State where intervention will take place.

Liaison: State other disciplines or agencies who will collaborate.

Skills required: State specialised skills required by the therapist and related training needs.

References: List supporting research.

Table 2. An extract from a grid layout used to plan resources for a new elderly care unit serving hospital and community perfects.

	Accepte to	Rebabilita	-	Community
	petients	tion ward	hospital	Constants
Number of patients				
Priority goals				
Assessment				
Treatment activities				
Location of treatment		14		
Facilities/ equipment required				
Staff numbers and grade	1			
Annual costs				

Occupational Therapy Group Protocol Examples

Barbara Schell, Glenn Gillen

Occupational Therapy Group Protocol Examples:

Occupational Therapy and Mental Health Jennifer Creek, Lesley Lougher, 2008-01-01 Psychiatrie sant mentale Occupational Analysis and Group Process Jane Clifford O'Brien, Jean W. Solomon, 2014-04-14 Get the best instruction on occupational analysis group process and therapeutic media all from one book Using a matter of fact style to share their experiences successes and failures expert authors Jane Clifford O Brien and Jean W Solomon provide you with effective therapeutic media sample activity analyses useful in current health care contexts practical guidance in play leisure and social participation areas of occupation strategies for effective group management and processes and overviews of theories supporting best practice Comprehensive content covers the material taught in group process and occupational analysis courses thoroughly and completely for the OTA Logically organized content that s written in a matter of fact style helps you better understand and retain information Clinical pearls emphasize the practical application of the information Therapeutic Media are tried and true methods pulled from the author's extensive experience Group Dynamics in Occupational Therapy Marilyn B. Cole, 2025-02-25 This best selling textbook now in its Sixth Edition provides the essential strategies and tools that occupational therapists need to design and organize client groups for enhanced theory based therapeutic interventions for physical mental health and wellness populations Updated in line with AOTA's latest Occupational Therapy Practice Framework the book is split into three sections Section I introduces author Marilyn Cole s 7 step format for group leadership the cornerstone for the rest of the book This is followed by chapters on the fundamentals of group dynamics client centered groups and issues around diversity inclusion and cultural humility Section II provides an overview of a range of theoretical approaches to group work from psychodynamic biomechanical behavioral cognitive developmental sensory and occupation based models Section III focuses on design of group protocols synthesizing the theories activities or modalities leadership and membership selection guidelines Revisions include guidelines for using a client centered group approach with marginalized populations as well as designing occupational therapy groups with wellness and non traditional populations for student service learning in the community Thoroughly updated throughout and with new case studies drawn from a range of disciplines this is an essential resource for any student or practitioner in the field of occupational therapy **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 **Psychosocial** Conceptual Practice Models in Occupational Therapy Moses N. Ikiugu, Elizabeth A. Ciaravino, 2007-01-01 This book examines the occupational therapy paradigm its focal viewpoint core constructs and values as well as the role of complexity chaos theory as a scientific framework for occupational therapy research and practice Unlike other current OT texts this book uses clinical case examples to illustrate application of proposed changes to make procedures consistent with the latest Occupational Therapy Practice Framework The reader walks away with a clear grasp of the theoretical principles guiding his or her treatment interventions the explanations behind those principles and the applicable intervention for said techniques and procedures An emphasis on clinical reasoning skills including information on different types of reasoning skills as well as the MAPP model of teaching helps the student and clinician translate theoretical principles into practice The section on specific interventions addresses each of the conceptual practice models according to a consistent chapter template which enables the reader to apply conceptual practice models in real world contexts Preview questions at the beginning of each chapter alert the reader to important concepts in the upcoming text Critical analysis of the theoretical core provides suggested modifications to increase consistency with the new occupational therapy paradigm Routledge Companion to Occupational Therapy Moses N. Ikiugu, Steven D. Taff, Sarah Kantartzis, Nick Pollard, 2025-03-31 This comprehensive and groundbreaking text provides an indispensable guide to the application of key theories models and concepts informing occupational therapy s professional practice It includes contributions from a range of international scholars and addresses practice with individuals groups and communities This book also features theories underpinning professional education Each

chapter includes the theoretical core as well as evidence supporting the validity reliability and clinical effectiveness of the particular theoretical approach or model giving readers an insightful overview of the evidence available to determine the effect of interventions based on that theory Chapters also include case examples that illustrate application as well as sections offering constructive critique and possible future directions for further development of the theories This comprehensive wide ranging volume is the ideal resource for using theory as a tool for practice by occupational therapy practitioners students Willard and Spackman's Occupational Therapy Barbara A. Schell, Glen Gillen, Marjorie Scaffa, Ellen S. Cohn, 2013-03-08 Willard and Spackman's Occupational Therapy Twelfth Edition continues in the tradition of excellent coverage of critical concepts and practices that have long made this text the leading resource for Occupational Therapy students Students using this text will learn how to apply client centered occupational evidence based approach across the full spectrum of practice settings Peppered with first person narratives which offer a unique perspective on the lives of those living with disease this new edition has been fully updated with a visually enticing full color design and even more photos and illustrations Vital pedagogical features including case studies Practice Dilemmas and Provocative questions help position students in the real world of occupational therapy practice to help prepare them to react appropriately Spackman's Occupational Therapy Barbara Schell, Glenn Gillen, 2018-09-04 Celebrating 100 years of the Occupational Therapy profession this Centennial Edition of Willard Spackman's Occupational Therapy continues to live up to its well earned reputation as the foundational book that welcomes students into their newly chosen profession Now fully updated to reflect current practice the 13th Edition remains the must have resource that students that will use throughout their entire OT program from class to fieldwork and throughout their careers One of the top texts informing the NBCOT certification exam it is a must have for new practitioners Psychosocial Occupational Therapy - E-BOOK Nancy Carson, 2024-12-11 Develop the psychosocial skills to treat and address the mental health needs of clients in all practice settings Psychosocial Occupational Therapy Second Edition uses evidence based models to demonstrate effective occupational therapy for clients diagnosed with mental health conditions Clearly and logically organized the book begins with theories and concepts and follows with in depth coverage of OT interventions in both individual and group contexts Case studies and models show how to apply the fourth edition of the Occupational Therapy Practice Framework OTPF in selecting treatment strategies UPDATED AOTA's Occupational Therapy Practice Framework 4th Edition and current OT practice are reflected throughout the book to ensure alignment with the latest OT guidelines for education and practice NEW Complementary and Integrative Health chapter provides an overview of complementary approaches that have expanded in use within health care and includes examples of how to effectively incorporate them into OT treatment UNIQUE At least two cases studies in each clinical chapter show how to apply the Occupational Therapy Practice Framework OTPF in determining treatment options and one or more conceptual models address the psychosocial needs of clients NEW Feeding and Eating Disorders chapter

offers more in depth information on eating disorders included in the DSM 5 along with the OT s role in treatment NEW Enhanced ebook version included with every new print purchase allows access to all the text figures and references with the ability to search customize content make notes and highlights and have content read aloud Using the Occupational Therapy Practice Framework chapter describes how to apply the 4th edition of the OTPF to the practice of occupational therapy Balanced approach to psychosocial occupational therapy includes thorough coverage of primary diagnoses as well as occupational and psychosocial theories models and approaches Emphasis on clinical reasoning skills provides insights on how to select treatment strategies based on the conceptual theories and models presented in the earlier chapters the information on diagnoses also references the DSM 5 A focus on psychosocial skills makes it easier to adjust the method of approaching a client the nature of the therapeutic relationship and the direction and eventual outcomes of intervention regardless of the setting or the primary diagnosis Coverage of therapeutic interaction skills and group process skills shows how to provide treatment in both individual and group settings The Entry Level Occupational Therapy Doctoral **Capstone** Elizabeth D. DeIuliis, Julie A. Bednarski, 2025-10-24 The second edition of The Entry Level Occupational Therapy Doctoral Capstone is an essential resource to guide both students and educators through every phase of the doctoral capstone from development to dissemination Fully revised to align with the latest ACOTE accreditation standards and terminology each chapter of the book is divided into two sections one for students and one for educators This updated edition includes new chapters on mentorship and how to build collaborative skills conducting a literature review and performing a needs assessment and program evaluation Student learning activities are redesigned around design thinking principles such as empathy and identity mapping and personal mission statements to promote student self exploration and alignment with capstone sites and populations Mezirow's transformational learning theory is threaded throughout the content designed for the educator Additional guidance for faculty and capstone coordinators includes exemplar assignments rubrics and relevant topics such as artificial intelligence and intellectual property in relation to capstone deliverables A chapter on post professional capstones has also been added Well organized and full of practical examples of capstone experiences and projects this book is a vital tool for students in entry level or post professional OTD programs as well as their educators and Early's Mental Health Concepts and Techniques in Occupational Therapy Cynthia Meyer, Courtney mentors Sasse, 2024-03-13 Packed with up to date evidence based practice information and examples of contemporary interventions Early's Mental Health Concepts and Techniques for Occupational Therapy Practice 6th Edition equips occupational therapy occupational therapy assistant students and practitioners with an authoritative guide to working effectively with clients with mental health issues across all practice settings This practical bestselling text delivers a holistic approach to client care directly addressing the clinical needs of COTAs and OTs in assessing clients psychosocial status and providing interventions that improve their quality of life An ideal resource for OT students as well as those pursuing an Occupational Therapy

Doctorate the extensively updated 6th Edition expands coverage of the many assessments and interventions available in today s clinical practice empowering users with a sound foundation in occupational therapy processes and clearly demonstrating how to effectively intervene to meet the needs of clients with mental health issues Occupational Therapy Education Kathleen Flecky, Lynn Gitlow, 2009-11-13 Service Learning in Occupational Therapy Education Philosophy and Practice explores the use of service learning as a pedagogical tool for educators to enhance occupational therapy students knowledge and skills in the areas of critical thinking and problem solving diversity health promotion community issues social justice and citizenship These areas are representative of core competencies needed by occupational therapy professionals for occupation based practice in the 21st century This text describes philosophical and theoretical principles of service learning in relationship to occupational therapy philosophical and pedagogical traditions Effective service learning educational strategies and experiential applications of occupational therapy in the community are highlighted through the presentation of case studies of service learning initiatives in occupational therapy programs across the United States Examples of how to design implement and assess service learning projects and partnerships are provided along with insights and lessons learned from faculty engaging in service learning Description of the relevance and congruence of philosophical and theoretical traditions of service learning and occupational therapy Links service learning specifically to occupational therapy education faculty and student friendly exercises and reflective activities on practice Samples of how to initiate partnerships develop course objectives and syllabi aligned with Accreditation Council of Occupational Therapy Education ACOTE guidelines readings websites and course support materials as well as project and student assessment tools Description of lessons learned from faculty including the strengths and challenges of service learning based on qualitative and quantitative assessment results and community based research Primary Courses Community Service in Occupational Therapy Service Learning in Occupational Therapy Additional courses could include Occupational Therapy in the Community Community based Occupational Therapy Practice Emerging Areas of Practice in Occupational Therapy Experiential Community Practice in Health Professions 2011 310 pages 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 An Ethnographic Study of Mental Health Treatment and Outcomes Fran Babiss, 2002 Selected for inclusion in Doody s Core Titles in the Health Sciences 2005 edition DCT this book documents the treatment history of three women suffering

from affective and personality disorders The book guides you through the process of conducting qualitative ethnographic research providing examples of data collection techniques analysis and interpretation Interviews and observations provide you with a glimpse into the world of mental health treatment from each woman's perspective and offer suggestions on interventions and group activities designed to improve treatment outcomes **Evidence-Based Geriatric Nursing** Protocols for Best Practice Marie Boltz, Marie P. Boltz, Elizabeth Capezuti, Terry T. Fulmer, 2024-09-26 Praise for previous editions The evidence based protocols are designed as a primary reference and are useful substantive and timely The broader contributions of useful format and succinct review of the evidence make it likely that this text will continue to be the leading resource in nursing education and practice The Gerontologist As a gerontological clinical educator research nurse I will often use this as a reference The format and the content are good and the explanations of how to best use the evidence simplify the process of sifting through mountains of information to figure the best practice Score 97 Doodys The result of a collaboration between expert practitioners and educators in geriatric nursing the seventh edition of this acclaimed reference has been updated and revised with new information on chronic conditions and emerging models of care presented in 10 completely new chapters It provides the most current evidence based protocols for improving both quality of care and patient outcomes when caring for older adults in multiple disciplines and settings As in past editions the seventh edition is distinguished by its use of a rigorous systematic method AGREE Appraisal of Guidelines for Research and Evaluation to improve the validity of the book's evidence based content Chapters provide assessment and management principles clinical interventions and information on specialty practice and models of care Included in most chapters are protocols developed for each clinical condition by experts in that specific area Evidence is current and derived from all settings of care including community primary acute and long term care Protocols include an overview and evidence based assessment and intervention strategies Illustrative case studies with discussion are presented in most chapters along with chapter objectives and references with evidence ratings Instructor's resources include an AACN Mapping Grid Course Cartridge Transition Guide PowerPoints and Test Bank New to the Seventh Edition Updated to encompass the latest trends in older adult care chronic conditions and emerging models of care New chapters on care and management of diabetes and respiratory care New chapters on issues surrounding nutrition and dementia and mental illness New chapter on care and comfort at the end of life New chapters on adopting principles of diversity equity and inclusion and an age friendly health system into practice New chapters on models of care in long term community based and primary care Key Features Delivers easy to follow geriatric protocols for best practices Updates evidence regularly to reflect current practice standards Encompasses a broad scope of content including detailed information rarely covered in professional literature Offers case studies and discussions to illustrate application of protocol to practice Written by renowned leaders in geriatric nursing education and practice Use of AGREE Appraisal of Guidelines for Research and Evaluation to improve the validity of evidence throughout the text Mental Health Practice

for the Occupational Therapy Assistant Christine Manville, Jeremy Keough, 2024-06-01 Mental Health Practice for the Occupational Therapy Assistant is a comprehensive text that delineates the role of the occupational therapy assistant in the delivery of mental health services Christine Manville and Jeremy Keough provide information and learning activities that enable the student to build knowledge of mental health practice incorporating approaches used in the traditional medical model as well as the community The impact of mental illness on occupational performance across the lifespan is also examined Mental Health Practice for the Occupational Therapy Assistant guides the reader in how to analyze the service environment including cultural societal and political factors explore the client's participation in age appropriate meaningful occupations and under supervision of the occupational therapist provide treatment that includes 1 1 and group interventions Mental Health Practice for the Occupational Therapy Assistant structures each chapter to provide an enhanced approach to student learning by incorporating concepts from Bloom's Taxonomy Current and emerging trends in mental health practice are discussed as well as service provision in the traditional medical model. The appendices include a discussion of additional factors that impact the provision and efficacy of therapy services including pharmacology and ethical and legal issues Features Provides an overview of the DSM 5 and the World Health Organization's International Classification of Functioning Disability and Health These classification systems provide a common language for practitioners from a variety of disciplines to communicate about the impact of mental illness on occupational performance and participation Describes the use of general educational strategies to enhance the teaching learning process in the provision of occupational therapy services Terminology from the Occupational Therapy Practice Framework Third Edition is utilized to enhance the development of clinical reasoning and practice skills Provides information on how to communicate effectively with clients Mental health practice is viewed across the lifespan Instructor's materials include PowerPoint presentations student study sheets tests questions and application questions for each chapter Included with the text are online supplemental materials for faculty use in the classroom Mental Health Practice for the Occupational Therapy Assistant is an excellent side by side resource for the occupational therapy assistant occupational therapist or any practitioner working in a mental health setting **Occupational** Therapy Student to Clinician Lisa Davis, Marilyn Rosee, 2024-06-01 It is surprising that there is no go to resource for the occupational therapy or occupational therapy assistant student to have when they embark on their professional journey With this in mind Lisa Davis and Marilyn Rosee have written Occupational Therapy Student to Clinician Making the Transitionto help students hone the skills employers look for in new hires While many academic programs cover career oriented topics this is the first specific text to pull the pieces together with the purpose of showing readers how to become successful job candidates and employees Perfect for the student preparing for an occupational therapy career Occupational Therapy Student to Clinician covers all pragmatic issues that students face while securing their first job This text outlines a variety of topics including r sum writing interview skills negotiating a salary working within a team developing professional

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and scope of research and its place in OT and then explore research designs measurements and statistical analysis for qualitative quantitative and mixed studies You ll examine the steps and procedures required to conduct research and how research can be used to shape professional practice and improve patient care The Scholarship of Practice Patricia Crist, Gary Kielhofner, 2013-05-13 Integrate the freshest research with clinical practice Occupational therapy OT practitioners often lack the fundamental skills to conduct or effectively use research illustrating a disturbing gap between the advancement of theoretical concepts and the extent to which concepts are actually applied The Scholarship of Practice Academic Practice Collaborations for Promoting Occupational Therapy closes this gap by presenting a conceptual framework that integrates theory and research with clinical practice Leaders in the field provide insightful thought provoking ideas and strategies to promote research and facilitate effective new concepts and theories to hands on practitioners The Scholarship of Practice is a model that blends education with practice dynamically applying theoretical principles of occupational therapy learned in the classroom to their actual clinical practice. This framework is a planned focused practice relevant way to educate students build a tradition of independent scholarship consult with community based organizations and contribute to best occupational therapy practice Case studies show how partnerships and collaborative efforts can foster and apply important advances and rehabilitative strategies within communities Examples of faculty practitioner partnering at Duquesne University and the approach to scholarship at the University of Illinois are clearly discussed This cutting edge compilation of ideas and research is extensively referenced and filled with useful diagrams and tables The Scholarship of Practice Academic Practice Collaborations for Promoting Occupational Therapy discusses evidence based scholarship participatory action research single case study designs approaches that provide scientific evidence supporting OT services how theory models or frames of reference are modified as a result of practice demands or expectations best practices in education continuum of care services the New Doors Model that provides occupation based services while providing new opportunities for occupational therapists the Practice Scholar Program at Duquesne University the Concerns Report Method research on the outcomes of practice that support improved services creative fieldwork education that engages students in the scholarship of practice and more The Scholarship of Practice Academic Practice Collaborations for Promoting Occupational Therapy makes important enlightening reading for occupational therapists OT educators and scholars and graduate students preparing for advanced roles in OT

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