

## WRITING SOAP NOTES

### Initial Assessment

#### **Definitions:**

**Initial Assessment:** Usually done post-operatively, it is the first thorough assessment of the injury that involves taking of measurements and setting baselines; *it is not to be confused with the injury report itself.*

- I. **S (Subjective):** includes any of the following information given to the athletic trainer by the athlete or a designated family member:
  - A. The athlete's:
    1. History
    2. Lifestyle or home situation
    3. Emotions or attitudes
    4. Goals
    5. Complaints
    6. Response to treatment
  - B. Any other information that is relevant to the athlete's case or present condition, home situation, whether the athlete feels the goals set were achieved and whether the athlete feels ready to function at home.
- II. **O (Objective):** includes any of the following information (depending upon the individual clinical facility):
  - A. Part of the athlete's history taken from the medical record and relevant to the current problem [NOTE: Only certain facilities include information from the medical record under O].
  - B. Information that is a result of objective measurements or observations (must be measurable and reproducible data (like goniometer measurements, ft/lbs of torque, etc.); may use database, flow sheets, or charts and summarize data under O.
  - C. Part of the treatment already given to an athlete (particularly specific exercises taught to the athlete, the level of independence in performing the exercises, number of repetitions tolerated, positions used, modifications necessary, etc).
- III. **A (Assessment):** includes four sections that together provide the reader with the athletic trainer's reasoning for goals and treatment set.
  - A. The Problem List provides a summary of the athlete's major problems as written in the subjective and objective parts of the note. The steps to formulating the problem list are as follows:
    1. Write the S and O portions of the note. (*Prerequisite step*)
    2. Review the S and O portions of the note, jotting down or highlighting findings that are not WNL and that can be influenced or changed by rehabilitation in the athletic training room. (Medical or psychiatric problems do not belong in the rehabilitation problem list.)
    3. Set priorities as to which problem is the most important, the next important, and so forth.
    4. List the problems to be addressed during rehabilitation in order of priority.

# Sample Occupational Therapy Progress Note

**Jessica J Manson**



## **Sample Occupational Therapy Progress Note:**

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

The OTA's Guide to Writing SOAP Notes Sherry Borcharding, Marie J. Morreale, 2007 Written specifically for occupational therapy assistants The OTA's Guide to Writing SOAP Notes Second Edition is updated to include new features and information This valuable text contains the step by step instruction needed to learn the documentation required for reimbursement in occupational therapy With the current changes in healthcare proper documentation of client care is essential to meeting legal and ethical standards for reimbursement of services Written in an easy to read format this new edition by Sherry Borcharding and Marie J Morreale will continue to aid occupational therapy assistants in learning to write SOAP notes that will be reimbursable under Medicare Part B and managed care for different areas of clinical practice New Features in the Second Edition Incorporated throughout the text is the Occupational Therapy Practice Framework along with updated AOTA documents More examples of pediatrics hand therapy and mental health Updated and additional worksheets Review of grammar documentation mistakes Worksheets for deciphering physician orders as well as expanded worksheets for medical abbreviations Updated information on billing codes HIPAA management of health information medical records and electronic documentation Expanded information on the OT process for the OTA to fully understand documentation and the OTA's role in all stages of treatment including referral evaluation intervention plan and discharge Documentation of physical agent modalities With reorganized and shorter chapters The OTA's Guide to Writing SOAP Notes Second Edition is the essential text to providing instruction in writing SOAP notes specifically aimed at the OTA practitioner and student This 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, 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 Evaluation for Children : a Pocket Guide** Shelley Mulligan, 2014 In pediatrics occupational therapy practitioners are concerned most with positively impacting the extent to which children and their families are able to successfully and meaningfully go about their daily lives whether it be playing learning working caring for oneself or others or socializing Clinical decisions made throughout the evaluation process ultimately shape what and how occupational therapy practitioners deliver interventions perhaps making

the evaluation process the most important and interesting part of the service delivery process It is the context where we first come know and appreciate our clients their specific situations and discover what it is that we as occupational therapy practitioners can do to be of most help Provided by publisher 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 **OT Student Primer** Karen Sladyk,1997 The OT Student Primer A Guide to College Success focuses on advice and tutorials to make a student s journey through OT school more successful and enjoyable This book is designed to help both OTA and OT students make the best of their education by providing the basic information needed to succeed and build their knowledge of OT The process of learning OT theories techniques terminology and concepts is challenging and this book addresses the core understanding of the profession that all students should know as they embark on their OT careers The primer is filled with tutorials practical skills advice helpful hints and professional skills The text provides the most up to date fieldwork issues complete coverage of documentation skills and therapeutic communication plus essential OT concepts Tables and worksheets are included to gain a better self understanding and exercises allow students to check what they have learned

Introduction to Occupational Therapy- E-Book Jane Clifford O'Brien,2011-11-01 A complete overview of the profession and the practice of occupational therapy Introduction to Occupational Therapy 4th Edition prepares you for the roles responsibilities and relationships of the OT practitioner This edition incorporates the latest revisions of the Occupational Therapy Practice Framework which defines the OT process and areas of concern Discussions also include treatment settings occupational therapy across the lifespan and evaluation intervention and outcomes within the OT process Written by OT expert Jane Clifford O Brien this edition also keeps you current with emerging topics such as working with culturally diverse patients evidence based practice and new practice areas such as driving and obesity Coverage of different OT practice areas e g adult geriatric pediatric and mental health prepares you for the variety of clients you will encounter in clinical practice An emphasis on evidence based practice helps you think logically and use the literature to form a basis for diagnoses and treatment plans Case studies and activities in each chapter promote problem solving skills and demonstrate concepts The OT Practice Framework and reimbursement mechanisms are addressed in terms of the occupational therapy process providing a sound basis for decision making A broad perspective on OT practice fits the needs of both occupational therapy and occupational therapy assistant students Chapter objectives key terms chapter summaries and review questions highlight important content in each chapter A companion Evolve website includes video clips review questions with answers crossword puzzles and additional case studies NEW The latest revisions to the Occupational Therapy Practice Framework are incorporated throughout the book keeping you current with today s OT theories and practice NEW cultural content prepares

you to meet the needs of diverse clients NEW discussions of the Centennial Vision provide a big picture view of occupational therapy and its changes as the profession reaches the age of 100      **Willard and Spackman's Occupational Therapy** Gillen, Glen, Catana Brown, 2023-07-13 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      *Preparing for The Occupational Therapy Assistant National Board Exam: 45 Days and Counting* Rosanne DiZazzo-Miller, Fredrick D. Pociask, 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      *Pedretti's Occupational Therapy - E-Book* Heidi McHugh Pendleton, Winifred Schultz-Krohn, 2017-03-10 NEW Coverage of the Occupational Therapy Practice Framework OTPF 3 increases your understanding of the OTPF 3 and its relationship to the practice of occupational therapy with adults who have physical disabilities NEW All new section on the therapeutic use of self which the OTPF lists as the single most important line of intervention occupational therapists can provide NEW Chapter on hospice and palliative care presents the evidence base for hospice and palliative care occupational therapy describes the role of the occupational therapist with this population within the parameters of the third edition of the Occupational Therapy Practice Framework OTPF 3 and recommends clinician self care strategies to support ongoing quality care UPDATED Completely revised Spinal Cord Injury chapter addresses restoration of available musculature self care independent living skills short and long term equipment needs environmental accessibility and educational work and leisure activities It looks at how the occupational therapist offers emotional support and intervention during every phase of the rehabilitation program UPDATED Completely revised chapter on low back pain discusses topics that are critical for the occupational therapist including anatomy client evaluation interventions areas client centered occupational therapy analysis and intervention strategies for frequently impacted occupations UPDATED Revised Special Needs of the Older Adult chapter now utilizes a top down approach starting with wellness and productive aging then moving to occupation and participation in meaningful activity and finally highlighting body functions and structures which have the potential to physiologically decline as a person ages NEW and EXPANDED

Additional section in the Orthotics chapter looks at the increasing array of orthotic devices available in today's marketplace such as robot assisted therapy to support the weak upper extremity UPDATED Revised chapters on joint range of motion and evaluation of muscle strength include new full color photos to better illustrate how to perform these key procedures EXPANDED New information in the Burns and Burn Rehabilitation chapter including expanded discussions on keloid scars silver infused dressings biosynthetic products the reconstructive phase of rehabilitation and patient education UPDATED and EXPANDED Significantly updated chapter on amputations and prosthetics includes the addition of a new threaded case study on Daniel a 19 year old combat engineer in the United States Army who suffered the traumatic amputation of his non dominant left upper extremity below the elbow

**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      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      *Management and Administration for the OTA* Karen Jacobs,2024-06-01 Comprehensive skills in management administration and leadership are essential for occupational therapy assistants OTA in their daily interactions with their clients in various health care environments Inside Management and Administration for the OTA Leadership and Application Skills Dr Karen Jacobs has gathered an expert team of 11 contributors of clinicians academicians administrators managers and graduate students to address each of the ACOTE Standards with a focus on evidence based literature and examples of the leadership and management skills needed as an OTA What you will learn from Management and Administration for the OTA Contexts and Health Care the potential impact of policy issues as they relate to the practice of occupational therapy Leadership and Advocacy two important roles that OTAs need to assume to be agents of change Credentialing introduces the national requirements for credentialing and for licensure certification or registration under state laws Reimbursement the various reimbursement systems requirements that affect the practice of occupational therapy Marketing and Promoting The role of the OTA to promote the distinct value of occupational therapy to the public as well as other professionals service providers consumers third party payers and regulatory bodies Documentation and Quality Improvement to ensure the OTA provides the highest quality of occupational therapy services Supervision to understand the important relationship between the OTA the OT and nonprofessional personnel Fieldwork to understand the role criteria and components of the OTA in fieldwork education Communication Skills define health literacy

and discuss how to use this concept to better understand the client the client s health environment and the client s occupations and health activities Ethics explore the components of ethics that impact the delivery of occupational therapy and the foundational skills and knowledge needed by the OTA to maintain high standards of responsible ethical practice Scholarship and Scholarly Practice assists the OTA with how to articulate the importance of how scholarly activities and the evidence based literature contribute to the distinct value and advancement of occupational therapy The chapters of Management and Administration for the OTA Leadership and Application Skills also includes 5 key vocabulary terms and their definitions case examples relevant to the content website resources and multiple choice review questions Included with the text are online supplemental materials for faculty use in the classroom Straightforward comprehensive and user friendly Management and Administration for the OTA Leadership and Application Skills will provide OTA students and clinicians with an essential resource for their future success

**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

*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 Examination Review Guide](#) Caryn R Johnson, Tina DeAngelis, Mary Muhlenhaupt, 2015-05-27 Rely on the guide that has helped thousands of students pass their exams with exactly the practice they need The 4th Edition mirrors the latest NBCOT exam blueprint and the question formats multiple choice and simulation at the difficulty level and in the decision making style of the actual exam More than 1 000 questions in five practice exams help you identify your strengths and weaknesses while you improve your test taking performance

*Occupational Therapy in East Asia* Hector Wing Hong Tsang, Stella Wai Chee Cheng, David Wai Kwong Man, 2025-10-21 This is the first major textbook on occupational therapy OT aimed at students and practitioners based in Asia Written by a team of authors mainly based in Hong Kong the book is divided into four sections Section I presents the history of OT in the region as well as those key theories which underpin it Section II introduces the essentials of OT practice From assessment through to evaluation and intervention these chapters cover five key therapeutic areas in which occupational therapists work providing support for sensory and motor functions providing support for cognitive and

perceptual issues providing support for psychosocial issues providing support for returning to home and the community including the use of assistive technology and providing support for returning to the workplace Section III then details a range of case studies to show occupational therapists in action while Section IV looks at how the field is developing including the increasing use of AI and other technologies Throughout the book cultural factors specific to the region are highlighted An ideal resource for any student in Hong Kong mainland China Taiwan or Singapore this outstanding text is also a key reference work for practitioners in the region

**Health System Management and Leadership - E-Book** William R. VanWye, Dianna Lunsford, 2023-10-05 Prepare to be a more effective physical or occupational therapy professional by learning skills in healthcare leadership management and policy Health System Management and Leadership for Physical and Occupational Therapists provides a guide to essential topics such as health legislation current issues in health care professionalism proposal and grant writing business administration quality assurance insurance and billing and managing a therapy practice in a variety of care settings Written by a team of expert contributors led by physical and occupational therapy educators William R VanWye and Dianna Lunsford this resource helps readers become well informed and knowledgeable physical and occupational therapy professionals Objectives and Key Terms at the beginning of each chapter guide your study and ensure that you understand important concepts and terminology Chapter Summaries review the key content in each chapter Figures with discussion prompts and key points are provided throughout the text An eBook version is included with print purchase The eBook allows you to access all of the text figures and references with the ability to search customize your content make notes and highlights and have content read aloud

**The Successful Occupational Therapy Fieldwork Student** Karen Sladyk, 2024-06-01 The Successful Occupational Therapy Fieldwork Student is a stimulating new book that paves the way to the profession of occupational therapy This book fulfills the needs of all OT and OTA students throughout their entire education by fully preparing them for their fieldwork assignments This is an imperative learning tool for all students since all curricula include Level I and II fieldwork requirements ranging from the associate s level to a master s program This complete fieldwork book contains a wide array of topics that guide the reader from the initial planning steps to the completion of successful fieldwork including how to design fieldwork as a supervisor It provides students with the opportunity to not only assess various situations but also utilize their knowledge to demonstrate clinical reasoning A multitude of activities are included from the first page to the last designed to groom students for their fieldwork The Successful Occupational Therapy Fieldwork Student is the ultimate resource for OT OTA students and the clinicians who educate them providing a wealth of information while allowing for clinical reasoning to occur This one of a kind book contains unique features that will prove beneficial to students at varying degrees of education Features Each chapter includes activities and assignments for students to complete as they prepare for fieldwork The text is filled with real life fieldwork student cases The text teaches how to prevent problems that can occur as well as how to fix them when they do

**Willard and 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

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web the pediatric balance scale was designed to require minimal use of specialized equipment the following is a complete list of items required for administration of this

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web the early clinical assessment of balance ecab mccoey et al 2014 was developed to monitor postural stability in children with cerebral palsy cp items were adopted from

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web the pediatric balance scale pbs a modification of berg's balance scale was developed as a balance measure for school age children with mild to moderate motor impairments

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