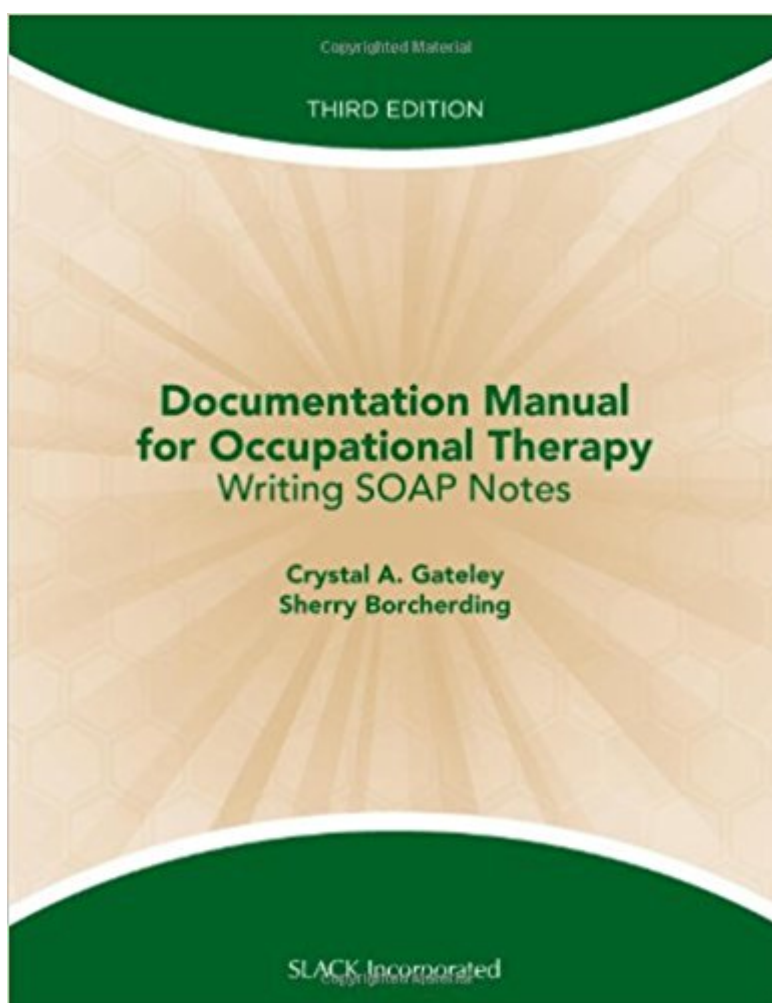


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# Documentation Manual For Occupational Therapy: Writing SOAP Notes



## Synopsis

As the practice of occupational therapy evolves, so too should the resources that aid clinicians, faculty, and students in learning and achieving the skill of effective documentation. Documentation Manual for Occupational Therapy: Writing SOAP Notes, Third Edition is designed to provide each part of the documentation process, while the worksheets are designed to let you practice each step as you learn it. Crystal A. Gateley and Sherry Borcharding take the Third Edition and broaden the scope of the text to include SOAP notes relevant to pediatric practice, driving assessment, balance, assistive technology, positioning and mobility, and other practice settings. Additionally, the authors have introduced in this updated edition, the COAST method of goal writing that emphasizes client-centered and occupation-based intervention and documentation. Also included in the Third Edition, new online instructor's material that includes videos, scenarios, corresponding documentation, sample grading rubrics, and assignments. As in the previous editions, Documentation Manual for Occupational Therapy: Writing SOAP Notes, Third Edition focuses specifically on documentation of client performance in occupational therapy practice. The proven "how to" strategy of this workbook translates the SOAP note process into a step-by-step sequence. Features of the Third Edition Include:

- Worksheets designed to practice individual skills as well as the entire SOAP note process
- New chapter on reimbursement, legal, and ethical consideration
- New chapter on general guidelines for documentation
- Instructor's material that includes videos, scenarios, corresponding documentation, sample grading rubrics, and assignments
- Additional on-line resources available with new book purchase
- Current information including AOTA's Centennial Vision, the Occupational Therapy Practice Framework: Domain & Process, 2nd Edition, and other AOTA Official Documents.

Instructors in educational settings can visit [www.efacultylounge.com](http://www.efacultylounge.com) for additional material to be used for teaching in the classroom. Documentation Manual for Occupational Therapy, Third Edition presents essential documentation skills that all occupational therapy clinicians, faculty, and students will find critical for when assessing, treating, and offering the best evidence available for their clients.

## Book Information

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## Customer Reviews

“In this new edition, there is an additional focus on all areas of documentation, not just SOAP notes, including chapter 4’s general guidelines for documentation. This book was primarily designed to help with one important aspect of clinical instruction: teaching documentation. Thus, it is mostly for educators and students but can be a valuable addition to a department receiving students on placement or for therapists wanting to improve their documentation skills.”  
- Paulette Guitard, Canadian Journal of Occupational Therapy

Crystal A. Gateley, MA, OTR/L currently serves as a faculty member at University of Missouri in Columbia where she has taught since 2009. She teaches Foundations of Occupation, Developmental Framework, Pediatric Fieldwork, Clinical Documentation, and Health & Wellness. She has also taught Advanced Strategies and Problem-Based Cases. Crystal also assists with supervising occupational therapy students at the program’s on-site pediatric clinic. Crystal graduated Summa Cum Laude from University of Missouri with a BHS in occupational therapy and went on to complete her master’s in educational leadership and policy analysis (ELPA), also from the University of Missouri. She is currently pursuing a doctoral degree in ELPA from the University of Missouri. Crystal has worked in a variety of OT practice settings, including inpatient and outpatient rehabilitation, long-term care, home health, outpatient pediatrics, public schools, and sheltered workshops. Besides teaching, Crystal enjoys attending her daughters’ extracurricular events, including soccer, basketball, and band. She also loves camping, fishing, and boating with family and friends.

Sherry Borcharding, MA, OTR/L recently retired from the faculty of University of Missouri where she taught for 15 years. During the time she was on faculty, she taught disability awareness; complementary therapy; clinical

ethics; frames of reference; psychopathology; loss and disability; long-term care; wellness; and a three-semester fieldwork sequence designed to develop critical thinking, clinical reasoning, and documentation skills. Two of her courses were designated as campus writing courses and one was credentialed for computer and information proficiency. As a part of the fieldwork and documentation courses, she filmed simulated occupational therapy interventions for student use in class. Three of those "movies" are available on [www.efacultyounge.com](http://www.efacultyounge.com) with this edition of the book. Sherry graduated with honors from Texas Woman's University, Denton with a BS in occupational therapy and went on to complete her master's in special education with special faculty commendation at George Peabody College, Nashville, Tennessee. Following her staff positions in rehabilitation, home health, and pediatrics, she assumed a number of management roles including Chief Occupational Therapist at East Texas Treatment Center, Kilgore; Director of Occupational Therapy at Mid-Missouri Mental Health Center, Columbia; and Director of Rehabilitation Services at Transitional Housing Agency, Columbia, Missouri. She has also planned, designed and directed occupational therapy programs at Capital Regional Medical Center, Jefferson City, Missouri and at Charter Behavioral Health Center, Columbia, Missouri. Sherry is a lifelong learner. Since her retirement, she has further expanded her private practice devoted to complementary and alternative therapies. She is certified in CranioSacral Therapy at the techniques level through Upledger Institute, Palm Beach Gardens, Florida and is attuned as a Reiki master. For leisure, Sherry enjoys music, dance, and all kinds of three-dimensional art. Her pottery has appeared in several local shows over the past few years.

Like this book better than the other I purchased simply because it is more in depth. I am revisiting information I learned but in a way that is clicking with my brain. Since I am on clinicals and documentation is not making sense to me- this is vital to my passing the class.

overpriced and would be nice to have soap notes for different settings such as acute. The answers are in the back of the book and I find that helpful. The book shows examples of poor, average, better, and much better documentations. I have to highlight the better examples so I can quickly read them for review instead of accidentally using a poor example and to save time.

This documentation book is extremely helpful and I highly recommend it! I feel that this is a great book for new documenters. It provides multiple ways to learn, using worksheets and cheat sheets for you to use on daily basis.

This book uses the COAST method for writing goals and also goes over SOAP notes. It also goes over some medical abbreviations and terminology. There are activity worksheets to help give you practice so you can get down to doing what you need to learn. It also comes with two cardboard cheat sheets that help you remember how to write goals, soap notes, and problem statements for your clients. I would recommend this book to anyone starting OT school. I wish I had gone through it before I had even started.

As an Occupational Therapy student, I have found this book to be extremely helpful in writing efficient, informative SOAP notes.

It's not a required text book for my program, but I'm glad I bought for my personal use. Highly recommended for people who are not confident for writing goals.

An excellent book for a new OT student. Each chapter builds on the one before it in a logical fashion, with worksheets to practice the new skills (and copies of the worksheets are downloadable from the website using the enclosed code. Definitely worth the price I paid.

Very thorough

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