

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 illustrated.

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'.¹ 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 paediatrician 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 cuts.

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 project)

| |
|--|
| 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 patients

| | Acute in-patients | Rehabilitation ward | Day hospital | Community care |
|-------------------------------|-------------------|---------------------|--------------|----------------|
| Number of patients | | | | |
| Priority goals | | | | |
| Assessment | | | | |
| Treatment activities | | | | |
| Location of treatment | | | | |
| Facilities/equipment required | | | | |
| Staff numbers and grade | | | | |
| Annual costs | | | | |

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British Journal of Occupational Therapy, January 1993, 56(1)

Occupational Therapy Group Protocol Examples

Patricia Crist, Gary Kielhofner



Occupational Therapy Group Protocol Examples:

Occupational Therapy and Mental Health Jennifer Creek, Lesley Lougher, 2008-01-01 Psychiatrie sant mentale

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 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

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

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

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 and educators

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

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

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

Service-Learning in 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

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

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

Early's Mental Health Concepts and Techniques in Occupational Therapy Cynthia Meyer,Courtney 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 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 Transition* to 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 resume writing interview skills negotiating a salary working within a team developing professional competencies and understanding the culture of an organization Each chapter includes learning objectives and

lists of practice activities that students can use to reinforce their skills Occupational Therapy Student to Clinician Making the Transition will benefit occupational therapy and occupational therapy assistant students preparing to graduate as well as employed clinicians dealing with specific employment related issues This text will also guide the employee who wants to move to the next job and reacquaint themselves with the job seeking process This comprehensive resource provides strategies and solutions for many employment challenges and will be an asset in any professional development curriculum

Clinical Research in Occupational Therapy, Sixth Edition Martin S. Rice, George Tomlin, Franklin Stein, 2024-06-01 In this new edition Dr George Tomlin joins Dr Martin S Rice and Dr Franklin Stein to add expertise and knowledge of the occupational therapy field With the combined knowledge and skills of the authors Clinical Research in Occupational Therapy Sixth Edition includes many valuable updates and enables the graduate student and clinical researcher to carry out a research study from the formulation of a research hypothesis to collecting analyzing and interpreting data in user friendly step by step procedures This Sixth Edition brings noteworthy changes improvements and enhancements including the following A thorough update of the published research in occupational therapy and health care Major revisions in all the chapters The addition of a new chapter on single case experimental research Updated research boxes and contemporary examples of both quantitative and qualitative research Updated compilation of tests and evaluations used by occupation therapists in research studies as outcome instruments and for clinical assessments Revision and additions to the glossary of terms and statistics Updated examples of the institutional review board application forms Updated landmarks in the history of occupational therapy Updated interfacing example with a popular statistical software including data organization analysis and interpretation Updated statistical tables Clinical Research in Occupational Therapy Sixth Edition is a valuable resource for students clinicians and researchers The text can be used as a complete self tutorial that provides the reader with the knowledge and skills to design and carry out a research project from hypothesis through data collection and analysis The text is written to help the reader evaluate the quality and rigor of research studies The Sixth Edition incorporates recent research in occupational therapy to help the reader design a feasible research project and understand and appreciate the literature of the field **The Entry Level Occupational Therapy Doctoral Capstone** Elizabeth D. DeJuliis, 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 mentors.

Cara and MacRae's Psychosocial Occupational Therapy Anne MacRae, 2024-06-01. Philosophical principles of recovery and justice are driving changing attitudes in the behavioral health arena, but the practical methods used to incorporate these principles need further clarity. To address this need, Cara and MacRae's *Psychosocial Occupational Therapy: An Evolving Practice*, Fourth Edition, is completely revised and reorganized. Relevant information from previous editions, including assessments, techniques, diagnoses, and specialized programs, are interwoven throughout the text with a new emphasis on social issues and lived experiences. Dr. Anne MacRae designed this Fourth Edition to meet practice challenges as the occupational therapy profession continues to evolve to meet the current needs of our communities. It includes specific examples of programs, groups, assessments, activities, techniques, approaches, and outcomes.

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Instructors in educational settings can visit www.efacultylounge.com for additional materials to be used in the classroom. While occupational therapists can certainly use this material for providing direct services and being part of a team, *Cara and MacRae's Psychosocial Occupational Therapy: An Evolving Practice*, Fourth Edition, is also an invaluable resource for defining and explaining psychosocial occupational therapy and in supporting our roles in consultation and program development.

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

Kielhofner's Research in Occupational Therapy Renee R Taylor, 2017-01-05 With an international team of expert contributors Renee Taylor carries on Gary Kielhofner's innovative work in the 2nd Edition of his comprehensive research methodologies text This guide bridges the gap between theorists and practitioners It focuses on the relevance and logic of research to provide a practical demystified approach to conducting applied research in the field for graduate students and clinicians You'll begin with an introduction to the nature 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

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

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