



Occupational Performance Coaching (OPC):

Case Note Audit Tool

Audit Date _____ Therapist ID _____ Client ID _____ Session # _____

Quality Rating			Item Descriptor
NR	Un-clear	Clear	Scoring Notes: (0) if item is not reported; (1) if item is reported but meaning is unclear; (2) if item is clearly reported.
0	1	2	
			1. The person who will engage in the goal activity is clearly stated. (e.g., client, child, dependent). 2. Activity (task or routine) at the focus of the goal is stated. 3. Context of the goal is stated e.g., home, school, work, specific community location. 4. Indication of the importance/ value of the goal to the client. Revisited each session. 5. A specific score or descriptor related to client-valued gain in activity performance (e.g., quality/level of involvement, engagement, satisfaction). May be measured as frequency, duration, percent, or descriptively. 6. Specific date for anticipated goal achievement. 7. Brief description of current situation in relation to goal. 8. Additional descriptors beyond goal statement of client vision. Highly valued and motivating aspects highlighted. 9. Evidence of Collaborative Performance Analysis: client-led observations, reflections, analysis related to achieving goal. 10. In client words, statement of planned action in subsequent sessions.
			TOTAL SCORE if first session (Items 1-9): ___ / 20; = ___%
			11. Evidence that goal progress discussed. Specific reporting in relation to goal 'extent' documented at first session needed. 12. Planned action specifically recorded. Success of strategies and /or rejection of earlier plans is noted. 13. Evidence that opportunities to generalise successful plans noted.
			TOTAL SCORE if subsequent session (Items 1-13): ___ / 26; = ___%

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