

PLEASE NOTE

If you choose to buy this document, it will be editable and comes with a 'how to guide'.

WEEKLY TASKS EXAMPLE

Day/Time	Client	Notes
Monday	10am Client 1 (telehealth)	☒ Planned
	3pm Client 2 (home session)	☐ Planned – prepare session plan
Tuesday	9:30 am FCA Client 3	☒ Planned
	1pm Client 4 school session	☒ Planned- email parent post session
Wednesday	10am Client 5 (telehealth)	☐ Planned- prepare sensory strategies
	11am Client 6 (telehealth)	☒ Planned
Thursday	ADMIN DAY	
	11am-12pm Client 7 - write up from observation. - Send assessments - Prepare next assessment - Write risk assessment	☒ Planned
	1:30-3:30pm Client 8 - Re-read FCA - Send via email - Complete notes OTHER: - Prep sessions for next week	☒ Planned
Friday	9:30 Client 9 home session	☒ Planned
	11am Client 10 home session	☒ Planned- pack items as per session plan

FCA REPORT CHECKLIST EXAMPLE

guidance
occupational therapy services

Client	Interview	Obs	Notes	Axs	Recomend	Collateral	Risk ax	Review	Due/sent
1	☒	☒	☒	☒	☒	☐ email support	☐	☐	☐ due 21/5
2	☒	☐ planned for 21/5	☐	☐ Send via email	☐	☐	☐ Burnout scale	☐	☐ due 13/6

SAMPLE

FCA REPORT CHECKLIST EXAMPLE

Client + due date	Interview	Vineland	CANS	LSP	WHODAS	Observation	Collateral	Recom	Risk Ax	Review	Case notes	Sent
1 5/6/26	Booked 21/5	Send 22/5	Send 22/5	Send 22/5	Send 22/5	Booked for 20/5	Email support					
2 30/5/26	Booked 1/5/26	Sent 2/5/26	Sent 2/5/26	Sent 2/5/26	Sent 2/5/26	Booked 15/5/26	Need to email support	Complete assessment analysis first	Conduct burnout scale	Booked with client on 30/5		
3 6/6/26	Booked 1/5/26	Complete analysis	Complete analysis	N/A	Complete analysis	Need to organise	Booked with ER	Review ax results	N/A	N/A		

SAMPLE