

Yoga-Informed Regulation in Adult OT

Documentation Cheat Sheet (Scope-Safe & Audit-Ready)

How to document breath, grounding, and movement strategies in occupational therapy — without crossing scope

Yoga-informed strategies are documented by FUNCTION, not FORM.

You are documenting:

- Why the strategy was used
- How it supported participation
- What changed functionally

This approach aligns with occupational therapy scope and professional standards commonly referenced by the American Occupational Therapy Association.

WHERE REGULATION STRATEGIES FIT IN OT

Use yoga-informed tools as:

- ✓ Preparatory methods
- ✓ Embedded supports during activity
- ✓ Carryover strategies for routines

They are never the intervention goal.

SAFE PHRASES YOU CAN USE (COPY/PASTE)

Breathing

- Paced breathing used as a preparatory method prior to task participation
- Breathing strategy implemented to support emotional regulation

Grounding

- Grounding strategy used to support task engagement
- Sensory orientation provided to improve readiness for activity

Movement

- Graded movement used to improve tolerance for functional activity
- Supported movement implemented to reduce avoidance and increase participation

SOAP NOTE MINI-TEMPLATES

Objective

Client engaged in paced breathing and grounding strategies for 3–5 minutes to support emotional regulation prior to ADL participation.

Assessment

Regulation strategies supported improved readiness and tolerance for occupational engagement.

Plan

Continue integrating regulatory strategies as preparatory methods to support participation in daily activities.

EMBEDDED USE (DURING ACTIVITY)

Client utilized paced breathing during task performance to sustain participation in IADL task.

HOME PROGRAM LANGUAGE

Client educated on use of regulation strategies to support participation in daily routines.

DISCHARGE LANGUAGE

Client demonstrates ability to independently utilize regulation strategies to support occupational participation.

LANGUAGE TO AVOID (DO NOT DOCUMENT)

- ✗ Yoga poses
- ✗ Flow or sequences
- ✗ Vagal nerve work
- ✗ Nervous system “healing”
- ✗ Spiritual or philosophical terms

QUICK SELF-CHECK BEFORE YOU CHART

Ask yourself:

1. Did I tie this to function?
2. Did I avoid yoga or medical claims?
3. Could I defend this in an audit?

If yes — you’re good.

Bottom Line

You are not documenting yoga.

You are documenting occupation-centered regulation support.

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