

OCTA 218
Bossier Parish Community College
Master Syllabus

Course Prefix and Number: OCTA 218

Credit Hours: 1

Course Title: Clinical Documentation II

Course Prerequisite: Enrollment in the OCTA program courses is limited to those students who have been selected and admitted to the professional phase of the program. Program courses are sequenced by semester and must be taken as a group each semester per program requirements and policies.

Textbooks/ Learning Resources:

Required textbook:

Morreale and Borchering; The OTA's Guide to Documentation; 4th edition

Course Description:

This course will provide opportunities to increase documentation skills throughout the OT process and expand upon clinical reasoning skills. Topics will include documenting skilled services for reimbursement, goal writing, intervention plans, SOAP notes and other forms of documentation, electronic documentation, and the introduction of telehealth as an emerging delivery model.

Relationship to Curriculum Design:

Clinical documentation II is designed to further develop students' **professional and personal development** by providing knowledge about the scope, theory, and approaches to practice of OT documentation to ensure accountability of service. Clinical documentation II is designed to build upon and increase students' observational, assessment, intervention and **clinical reasoning** through application of accurate and concise documentation skills which will in turn, justify the need for skilled intervention to third party payors and stakeholders. Students build upon previously learned documentations skills and observation skills which advance in complexity as the program progresses. Students are better able to identify and report relevant changes in patient's status in order to produce timely, accurate, and logically sequenced written documentation. Students further their knowledge on data gathering and the roles of the OTA are examined throughout the OT process with emphasis on documenting **evidence-based** and **occupational-based** activities for intervention in practice. Students will expand upon and further integrate information with demonstration in a case-based learning practicum that encourages the utilization of **occupation-based** driven goals.

Teaching/Learning Method and Instructional Delivery:

Course content will be delivered through on-campus lectures and labs with supplemental coursework through Canvas and fieldtrips.

Instructional methods include power point lectures including voice over presentations, case studies, online discussion board activities and assignments, quizzes, group activities, video analysis, lecture, fieldtrips, skills training and demonstration, and role-play.

Students will demonstrate learning through:

1. Assigned readings
2. Student participation through completion of:
 - a. Pre-class activities and prep work
 - b. Learning through group discussion and class activities
 - c. Independent assignments
 - d. Discussion board activities
 - e. Simucase and Ice Learning Videos with SOAP writing
 - f. Exams

Learning Outcomes:

At the end of this course the student will be able to:

- A. develop occupation-based intervention plans and strategies, including goals and methods to achieve them, based on stated needs of the client in simulated role play in collaboration with occupational therapists in various note writing formats;
- B. demonstrate effective clinical reasoning to appropriately select, justify and document progress, interventions, as well as discharge plans for an occupational therapy patient or client based upon a written OT evaluation and plan of care;
- C. *prepare well-written communication by preparing thorough, accurate, logical, concise, timely, and legible documentation with understanding of abbreviations, jargon, and acceptable buzzwords;*
- D. synthesize knowledge of documentation, outcomes, discharge criteria, and privacy standards in relation to reimbursement systems, electronic documentation and other specific documentation requirements that affect the practice of occupational therapy;
- E. develop the role of the OTA in care coordination, case management, and transition services in traditional and emerging practice environments.

Course Objectives:

1. Demonstrate knowledge of the use of technology in practice, which must include:
 - Electronic documentation systems
 - Virtual environments
 - Telehealth technology. **B.4.15 (A,E)**
2. Effectively interact through written, oral, and nonverbal communication with the client, family, significant others, colleagues, other health providers, and the public in a professionally acceptable manner. **(C, E)**
3. Under the direction of an occupational therapist, collect, organize, and report on data for evaluation of client outcomes. **(B.4.6) (C,D)**

4. Monitor and reassess, in collaboration with the client, caregiver, family, and significant others, the effect of occupational therapy intervention and the need for continued or modified intervention, and communicate the identified needs to the occupational therapist. **(B.4.22) (A,B)**
5. Explain the importance of using psychometrically sound assessment tools when considering client needs, and cultural and contextual factors to deliver evidence-based intervention plans and strategies. Intervention plans and strategies must be client centered, culturally relevant, reflective of current occupational therapy practice, and based on available evidence. **(B.4.4) (B,D)**
6. Provide direct interventions and procedures to persons, groups, and populations to enhance safety, health and wellness, and performance in occupations. This must include the ability to select and deliver occupations and activities, preparatory methods and tasks (including therapeutic exercise), education and training, and advocacy. **(B.4.10) (A,B)**
7. Monitor and reassess, in collaboration with the client, caregiver, family, and significant others, the effect of occupational therapy intervention and the need for continued or modified intervention, and communicate the identified needs to the occupational therapist. **(B.4.22) (D,E)**
8. Implement a discharge plan from occupational therapy services that was developed by the occupational therapist in collaboration with the client and members of the interprofessional team by reviewing the needs of the client, caregiver, family, and significant others; available resources; and discharge environment. **B.4.28 (B)**
9. Demonstrate knowledge of various reimbursement systems, electronic documentation and other specific documentation requirements that affect the practice of occupational therapy. **(D)**
10. Demonstrate knowledge of various reimbursement systems and funding mechanisms (e.g., federal, state, third party, private payer), treatment/diagnosis codes (e.g., CPT®, ICD, DSM® codes), and coding and documentation requirements that affect consumers and the practice of occupational therapy.
Documentation must effectively communicate the need and rationale for occupational therapy services. **B.4.29 (B, D)**
11. Demonstrate use of commonly used abbreviations positive and negative buzzwords in documentation. **(E)**
12. Describe and document the OT process within the OT practice framework including the collection, organizing and reporting on patient/client data as well as psychosocial factors influencing occupational performance. **(B.4.9) (A,B)**
13. Explain an understanding of the business aspects of practice including, but not limited to, financial management, billing, and coding. **(B.5.3) (B,D,E)**
14. Demonstrate proper procedures to protect the rights and confidentiality of clients and patients. **(C,D)**
15. Demonstrate the role of the OTA in the evaluation, goal writing and intervention process. **(A,B)**
16. Complete documentation in proper SOAP format. **(A)**
17. Demonstrate the clinical reasoning process. **(B)**
18. Demonstrate effective documentation skills in recommending the need for termination of OT services, discharge summaries, recommendations and referrals. **(B 4.28) (B,D)**

19. Design intervention plans from case information, synthesize data from assessment results, and clinical observations. **(A,B)**
20. Demonstrate understanding of effective documentation of the ongoing processes for quality improvement and the implementation of appropriate changes when necessary. **(C,D)**
21. Demonstrate occupationally-based intervention goals, plans and strategies based on client needs and data gathered. **(A, B)**
22. Participate in the documentation of ongoing processes for quality management and improvement (e.g., outcome studies analysis and client engagement surveys) and implement program changes as needed to demonstrate quality of services. **(B.5.7) (B,D)**

Topical Outline

- I. Documenting the OT Process
 - A. OTPF
 - B. Occupation
 - C. ADLs
 - D. IADLs
- II. The Health Record
 - A. Definition and purpose
 - B. Reimbursement
 - C. Billing Codes
 - D. Quality Improvement
 - E. Electronic documentation
 - F. Telehealth
 - G. Research and Evidenced Based Practice
- III. Review
 - A. Medical Terminology
 - B. Avoiding common mistakes
- IV. SOAP Analysis
 - A. S- subjective
 - B. O- objective
 - C. A- assessment
 - D. P- plan
- V. Goals and Interventions
 - A. Short term
 - B. Long term
 - C. Functional and measurable
- VI. Evaluation and Intervention Planning
 - A. Initial evaluation
 - B. Intervention planning
- VII. Documenting different stages of treatment
 - A. Contact notes
 - B. Progress notes
 - C. Reevaluation

- D. Transition plans
- E. Discharge
- VIII. Documentation in different practice settings
 - A. Mental health
 - B. School
 - C. Skilled nursing and long term care
 - D. Outpatient
 - E. Acute
 - F. Home care
- IX. Making Good Notes even Better
 - A. SOAP
 - B. Checklist
- X. Examples of Different kinds of notes
 - A. Acute
 - B. Outpatient
 - C. Hand therapy
 - D. Mental health
 - E. Cognition
 - F. Safety
 - G. Pediatric
 - H. Wheelchair mobility

Course Grading: The student’s grade for this course will be based on:

- Written Exams which comprise 60% of final grade (average of all written exams) and
- Case Studies, documentation, assignments , which comprise Active participation, professional behavior and attendance (assessed by rubric) 35 % of final grade
- Case based learning 5% of final grade

Instructional methods include lecture, presentation, case studies, role play, small group activities, and video observation and analysis.

Canvas Modules contain:

- Prep Work
- Presentation (power point)
- Presentation supplements (if applicable) such as handouts, videos, or links to information that are part of the presentation – also “testable” material
- Discussion Board assignments and Assignments to be uploaded (if applicable)
- Lecture Activities

Assignments

If an assignment instructs you to submit through MyBPCC Canvas, then you will be expected to submit the assignment through MyBPCC Canvas (don’t email assignments to instructor).

Course Requirements: In order to earn a grade of “C” or higher, the student must earn 70% of the total possible points for the courses and achieve all of the course requirements listed below:

- satisfactory completion of all course assignments (minimum score of 75%)

Course Requirements: In order to earn a grade of “C” or higher, the student must earn 70% of the total possible points for the course and achieve all of the course requirements listed below.

- Minimum score of 75% average on Program assignments

Course Grading:

- A- 90% or more of total possible points; and minimum of 75% on program assignments; passing score on Fieldwork Student Evaluation Form
- B- 80-89% or more of total possible points; and minimum of 75% on program assignments; passing score on Fieldwork Student Evaluation Form
- C- 70-79% or more of total possible points; and minimum of 75% on program assignments; passing score on Fieldwork Student Evaluation Form
- D- 60-69% or more of total possible points; and minimum of 75% on program assignments; passing score on Fieldwork Student Evaluation Form
- F - Less than 60% of total possible points; or less than 75% on program assignments; below passing score on Fieldwork Student Evaluation Form

Students must have a “C” or better and a semester GPA average of 2.5 or better to receive credit toward the OTA program requirements and to move to the next level of coursework.

Student Expectations:

- a. Course faculty will determine if class absence is excused. Unexcused absences will result in a zero (0) for the exam, assignment, or class participation due on the date of absence.
- b. **One** tardy will be excused per semester. All other tardies will constitute a decrease of one percentage point each in final grade.
- c. Make-up work or exams for excused absences will be given at the discretion and convenience of the instructor.
- d. Satisfactory completion of ALL assignments is required. Late assignments will receive a 10% deduction per day. Instructor has discretion to give a grade of zero for late assignments and is determined on a case by case basis.
- e. All written work will be typed and produced according to the *APA Publication Manual, 7th edition* unless otherwise indicated in assignment directions.

- f. *Active* participation during class time, community outings, fieldwork experiences, and other professional experiences is mandatory. Passive note taking and silent observation is not considered active participation.
- g. Preparation is required to engage in class activities.
- h. Professional behaviors and development are integral parts of becoming an Occupational Therapy Assistant. Students are expected to accept constructive criticism from faculty and peers and modify behavior accordingly.
- i. Advising appointment requests with faculty must be made in writing.

More detailed information available in the OTA Program Student Handbook.

Professional Behavior:

In addition to requirements related to technical skill development during class/lab and fieldwork practice experiences, the Program additionally expects students to demonstrate affective behaviors consistent with a “professional.” Students are expected to conduct themselves in a professional manner at all times, including written and verbal communication. The policies and procedures of the Program and of the Fieldwork Facility must be adhered to and additionally the student should conform to the principles outlined in the AOTA Guide for Professional Conduct and the AOTA Code of Ethics.

Netiquette

This term is used to describe accepted, proper behavior on the Internet. Remember the following when communicating online (messages, discussions, etc.):

- A good rule of thumb: If you would not say it to the recipient face-to-face, do not type it and send it electronically.
- Never post profanity, racist, or sexist messages
- Be respectful of fellow students and instructors
- Never insult any person or their message content
- Never plagiarize or publish intellectual property
- Do not use text messaging abbreviations or street slang
- Do not type in all CAPS (this is considered online yelling)

Attendance Policy: The college attendance policy, which is available at <http://catalog.bpcc.edu/content.php?catoid=4&navoid=231&hl=attendance&returnto=search#class-attendance>, allows that “more restrictive attendance requirements may apply to some specialized classes such as laboratory, activity, and clinical courses because of the nature of those courses.” The attendance policy of the OTA program is described in the OTA Program Student Handbook.

Nondiscrimination Statement

Bossier Parish Community College does not discriminate on the basis of race, color, national origin, gender, age, religion, qualified disability, marital status, veteran's status, or sexual orientation in admission to its programs, services, or activities, in access to them, in treatment of individuals, or in any aspect of its operations. Bossier Parish Community College does not discriminate in its hiring or employment practices.

COORDINATOR FOR SECTION 504 AND ADA

Angie Cao, Student and Disability Services Specialist

Disability Services, F254, 6220 East Texas Street, Bossier City, LA 71111

318-678-6511

acao@bpcc.edu

Hours: 8:00 a.m.-4:30 p.m. Monday - Friday, excluding holidays and weekends.

Equity/Compliance Coordinator

Teri Bashara, Director of Human Resources

Human Resources Office, A-105

6220 East Texas Street

Bossier City, LA 71111

Phone: 318-678-6056

Hours: 8:00 a.m.-4:30 p.m. Monday - Friday, excluding holidays and weekends.

The syllabus is comprehensive and covers a lot of detail. Read it carefully and ask questions about anything you do not understand. The syllabus is subject to change, but all changes will be announced as far in advance as possible.

Reviewed by M. Allison 5/22