

**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; 4<sup>th</sup> 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 build upon and increase students' observational, assessment, intervention and clinical reasoning through application of accurate and concise documentation skills.

**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 in appropriately selecting, justifying, and documenting, 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. *Demonstrate competency in written communication by preparing thorough, accurate, logical, concise, timely, and legible documentation with understanding of abbreviations, jargon, and acceptable buzzwords.*
- D. Demonstrate 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. Demonstrate the understanding of the role of the OTA in care coordination, case management, and transition services in traditional and emerging practice environments.

#### Course Objectives:

1. Demonstrate an understanding of the use of technology to support performance, participation, health and well-being. **B.4.15 (A)**
2. Effectively document OT services to justify the need and rationale for OT services to ensure reimbursement of services. **B 4.29 (B)**
3. 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. **B.4.22 (C)**
4. Demonstrate skills of collaboration with occupational therapists on therapeutic interventions. **B4.22(A)**
5. Recommend to the OT the need for termination of OT services when stated outcomes have been achieved or it has been determined that they cannot be achieved. **B.4.28(B)**
6. Demonstrate knowledge of various reimbursement systems, electronic documentation and other specific documentation requirements that affect the practice of occupational therapy. **(D)**
7. Document interventions, outcomes, and discharge criteria in accordance with the framework document, federal and state guidelines, and 3<sup>rd</sup> party payers. **B.4.29 (D)**
8. Demonstrate use of commonly used abbreviations positive and negative buzzwords in documentation. **(E)**
9. 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)**
10. Demonstrate proper procedures to protect the rights and confidentiality of clients and patients. **(D)**
11. Demonstrate the role of the OTA in the evaluation, goal writing and intervention process. **(A,B)**
12. Complete documentation in proper SOAP format. **(A)**
13. Demonstrate the clinical reasoning process. **(B)**
14. Demonstrate effective documentation skills in recommending the need for termination of OT services, discharge summaries, recommendations and referrals. **(B 4.28) (B,D)**
15. Design intervention plans from case information, synthesize data from assessment results, and clinical observations. **(A,B)**
16. Demonstrate understanding of effective documentation of the ongoing processes for quality improvement and the implementation of appropriate changes when necessary. **(D)**
17. Demonstrate occupationally-based intervention goals, plans and strategies based on client needs and data gathered. **(A,B)**

#### 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 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.

**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

**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. Professional development is an integral part of becoming an Occupational Therapy Assistant. Students are expected to accept constructive criticism from faculty and peers and modify behavior accordingly.
- h. Advising appointment requests with faculty must be made in writing.

## **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.

*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.*

**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**

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**Reviewed by M. Allison 6/20**