



# ALL ABOUT SPEECH & LANGUAGE

## Occupational Therapist Procedure for Conducting a Daily Note

1. On your daily scheduler you will right click on the client appointment in the EMR system and hit check-in UNLESS they have already checked in at the kiosk/front desk. There will be a yellow box in the upper left-hand corner to indicate a client has been checked in to their appointment.

The screenshot displays the 'All About Speech & Language RPM' EMR system interface. The top section shows a scheduler for Wednesday, 03-10-21, with appointments listed for various providers including Jenna Graepel. A yellow box in the upper left corner of the appointment grid indicates a client has been checked in. The bottom section shows the patient record for Clayton Test, including personal information, insurance details, and contact information. A right-click context menu is open over the appointment, with the 'Check In' option highlighted.

**Appointment Scheduler (Wednesday, 03-10-21):**

Time	Dianna Rhoades (McGlamory)	Jenna Graepel	Martyna Boruta	Rosamaria Gigliotti	Melissa Dieguez
8 AM		Clayton Test			
9 AM		MEET w/ Brandi LR r/s			
10 AM		OTX30			
11 AM	MEET w/ Martyna	PAPER notes and cosings	MEET w/ Dianna	prep for EH re-eval tomorrow	

**Patient Record: Clayton Test**

PN: 0001839  
 DOB: 03-01-2010  
 Sex: M  
 Case FC: TRICA  
 Status: ACT  
 Balance: -35.00  
 Copay/Deductible: /0.00

Address: 1234 Happy Place, Valrico FL 33596  
 Pref Phone: (813) 616-4004  
 Home Phone: (813) 616-4004  
 Primary Cell: holly@aspeech.com  
 Email: holly@aspeech.com  
 Comment: AAC re-eval

**Right-click Context Menu:**

- Visit / Encounter
- Appointment History
- Edit
- Add
- Move To Waiting List
- Copy
- Cut
- Delete - no history
- Cancel - w/ history
- No Show
- Check In
- Check Out
- Clear Status
- Send Blast Alerts
- Confirm Appointment Manually
- Resend Appointment Reminder
- Send Welcome Letter



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- This will initiate the daily note for that visit. Double click the appointment to open the note. If you are using the web-based version of Raintree, you will have to open the chart and access the note under the Visit Info tab. Please consult management if needing a tutorial on this.
- You will work across the following tabs and fill out the respective information in each section

#### Daily Subjective

- Use boxes to fill in (i.e. tolerated, engaged and responsive, who was present for session etc.). Narrative comments/freeform descriptions are optional here, usually written in the Assessment portion. Please be mindful of your word choice when adding information to the subjective section. It needs to be factual while also being pragmatic. Terminology like “abnormal” or “atypical” is not appropriate for a daily note. Cause of behaviors cannot be assumed.

App Daily Note for Clayton Test - Visit: 1 Payor: TRICA 10002 Tricare East Region

Save Cancel

Yes/No Media Consent  
Fit for teletherapy

Patient Information: Patient Clayton Test, MR # 0001839, DOB 03-01-10, Age 11y, Case OT001

Record Information: Date 01-26-22, Time 11:00a, Therapist BASK, Assigned BASK, Loc STMPA, Ref 00011, Type Daily Note, OT Standard

History Subjective Goals Assessment Plan Progress Tracking

Response to Session: ☒ Tolerated, ☐ Inconsistently Tolerated, ☐ Could Not Tolerate

Behaviors: ☒ Engaged and Responsive, ☐ Slow to Engage, ☐ Limited Response

Present for session: ☒ Mom, ☐ Dad, ☐ Grandparent, ☐ Guardian, ☐ Day Care provider, ☐ School Aide, ☐ Other:

Comments (5)

Medical History:

Date	Description
10-05-21	Pediatric Medical History
09-07-21	Medical History Update

10:36 AM 1/26/2022



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## Occupational Therapist Procedure for Conducting a Daily Note

### Goals Addressed/Assessment Information

- Goal Selection: Select each long-term goal that is pertinent for each session (carrot arrow on the left side of each long-term goal). Double click a long-term goal to populate its corresponding short-term goals.

App Daily Note for Holly Speech - Visit: 2 Payor: SP 00003 + Patient Resp

Patient Information: Patient: Holly Speech, MR #: 0000722, DOB: 01-18-03, Age: 19y, Case: OT001

Record Information: Date: 01-26-22, Time: 11:00a, Therapist: BASK, Loc: 01, Type: Daily Note, Assigned: BASK, Ref: TEST

Load Template: Save

Goals Addressed / Assessment: Plan, Charges, Tracking

Goals	Revised	Start	End	Status	Progress	CPT	Duration
Client will improve feeding	12-14-21	12-14-21	New	0%			

Select Goals Addressed: Select All, Show met goals

Treatment Recap: Assessment (S)

Diagnosis 1-4: 5-B, 9-C

1 R13.11 Dysphagia, oral phase

- The short-term goals will initially be grayed out- select "Address Goal" button

App D Long Term Goals - DOB: 01-18-2003 Age: 19 yrs

Patient Information: Patient: Holly Speech, MR #: 0000722, Case #: OT001, Time: 01:00p, Revised: 12-14-21

Category / Progress: LT Goal #: OT001-002, Category: OT006 Activities of Daily Living

Address Goal

Long Term Goal (Alt L for List): Client will improve feeding

Effective Dates / Status: Start Date: 12-14-21, End Date: , Status: New

Daily Progress / Activity: Progress: 0%, CPT: , Duration:

Status	Short Term Goal	Comments	Start Date	End Date	Ad...
New	Child will demonstrate improved ADL ...		12/13/21		
New	To demonstrate improved self feedin...				



## ALL ABOUT SPEECH & LANGUAGE

### Occupational Therapist Procedure for Conducting a Daily Note

- Double click on the short term goal “status” to open the comment box.

The screenshot displays the software interface for 'All About Speech & Language'. The top bar shows the patient's name 'Speech, Holly' and various system information. The main window is divided into several sections:

- Patient Information:** Patient: Holly Speech, MR # 0000722, Case # OT001, Time 11:00a, Revised 01-26-22.
- Category / Progress:** LT Goal # OT001-002, Category OT006 Activities of Daily Living.
- Long Term Goal (Alt L for List):** Client will improve feeding.
- Effective Dates / Status:** Start Date 12-14-21, End Date, Status Ongoing.
- Daily Progress / Activity:** Progress 0%, CPT, Duration.
- Short Term Goals:** A table with columns: Status, Short Term Goal, Comments, Start Date, End Date, Ad...
 

Status	Short Term Goal	Comments	Start Date	End Date	Ad...
New	Child will demonstrate improved ADL ...		12/13/21		
New	To demonstrate improved self feedin...				

 A red arrow points to the 'Status' column in this table.

- Review all cells and select applicable options:
  - Status: Met, Ongoing, New
  - Comments: If you have already addressed this goal in the Assessment portion, you do not need to comment again. You can add commentary here if you feel it is necessary (i.e. “Goal met 1/3 sessions”). YOU WILL NEED TO COMMENT LEADING UP TO PROGRESS NOTES AND RE-EVALUATIONS.
  - Start Date – This should already be input from the date the goals were added (from the initial eval, re-eval, or progress note).
  - End Date – Add the date the goal was met or discontinued
  - Addressed – Select “Yes” (Note, when you select “yes” for addressing that goal, it will populate on the final draft. Ensure you are selecting all short term goals that apply to the activities/tasks you have addressed during that session). Of note, make sure if you are selecting a goal. That the “status” is ongoing.
  - Once the aforementioned cells are completed, select “Save” which is located at the top-left side. Repeat for each short term goal you addressed in the session.



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## Occupational Therapist Procedure for Conducting a Daily Note

All About Speech & Language - dat User: BSkjette Station: 14 allaboutspeechrainbowinc.com:10056

Speech, Holly

Save Cancel Add Edit Delete

Patient Information Patient Holly Speech MR # 000 Case # OT001 Time 11:00a Revised 01-26-22

Category / Progress LT Goal # OT001-002 Category OT006 Activities of Daily Living

Long Term Goal (Alt L for List) Client will improve feeding

Effective Dates / Status Start Date 12-14-21 End Date Status New

Short Term Goals

Status New

Short Term Goal To demonstrate improved self feeding skills

Comments

Start Date 1/16/22

End Date

Addressed

OK

All About Speech & Language - dat User: BSkjette Station: 14 allaboutspeechrainbowinc.com:10056

Speech, Holly

Save Cancel Add Edit Delete

Patient Information Patient Holly Speech MR # 000 Case # OT001 Time 11:00a Revised 01-26-22

Category / Progress LT Goal # OT001-002 Category OT006 Activities of Daily Living

Long Term Goal (Alt L for List) Client will improve feeding

Effective Dates / Status Start Date 12-14-21 End Date Status New

Daily Progress / Activity Progress 0% CPT

Short Term Goals

Status	Short Term Goal	Comments	Start Date	End Date	Ad...
Ongoing	Child will demonstrate improved ADL ...		12/13/21		Yes
Ongoing	To demonstrate improved self fe...				Yes





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- Assessment (S):
  - Right click the text box directly under the word “Assessments” and select the word “Edit”. This will open the text box. Here you will write your note in a narrative form.
  - When writing your narrative form please indicate all necessary items needed for someone to be able to read your note and replicate your session during coverage, for example: how they transitioned b/t tasks, use of visual aids, what type or writing paper did he/she used, inset puzzle with pegs or 4 pc interlocking puzzle with boarder, did they use smaller writing tools or standard number 2 pencil, etc, etc. See examples of notes below.

The screenshot shows the 'All About Speech & Language RPM' application. The top bar indicates the user is 'JGraepel' at 'Station: 9'. The main window displays a patient record for 'Test, Clayton' with various tabs like 'Histories', 'Daily Subjective', and 'Goals Addressed / Assessment'. The 'Goals' table lists a goal to 'Improve semantic skills by labeling a variety of age...' with a status of 'Ongoing' and '0%' progress. Below the table, there are sections for 'Treatment Recap' and 'Assessment (S)'. The 'Assessment (S)' section has a text box where a right-click context menu is open, showing options like 'Cut', 'Copy', 'Paste', and 'Edit...'. The 'Edit...' option is circled in red. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 12:01 PM on 3/10/2021.



## — ALL ABOUT — SPEECH & LANGUAGE

### Occupational Therapist Procedure for Conducting a Daily Note

Editor

File Edit Insert Format Paragraph View Tools Help

Pt worked to complete therapeutic tasks today focused on VMI, FMC, attention, regulation, and b|l coordination skills; he completed the following tasks:

- 1) Regulation: Linear and rotary swinging in hammock swing x5 min to promote regulation at start of session. Followed by GM activity (walking along uneven surface with min A, log rolling ~15' and crashing onto crash pad) x5 trials with mod cues for participation and sequencing.
- 2) VMI: visually scanning to find matching image and coloring following key with max cues; completing worksheet with 75% coverage skill with deviations up to 1/4" from margins. Presenting with maladaptive behaviors during task x2 (eloping from table, laying on the floor, loud voice volume and grabbing toys from shelf without permission). Able to be redirected to task within 3 min. Max VC and visual cues for task completion.
- 3) Core strength: In long sit across bolster, using BUE catching/throwing ball with therapist 2 set of 5 rpgs with LOB noted x3. Able to correct with min A.

Benefit from movement breaks with deep pressure input and heavy work activities between tasks to promote regulation and sustained attention.

Dad updated on session and POC.

4: 47

85°F Sunny

6:24 PM 6/6/2022

Editor

File Edit Insert Format Paragraph View Tools Help

Alexandria who [REDACTED] by "Alexa" transitioned with ease into OT session accompanied by her mother.

To improve FM, VMI, and attentional skills, Alexa completed [REDACTED] following tasks:

- 1) UE WB: Assumed prone position on platform swing, using BUE to propel self in circle to collect 25/25 small pom poms and place into container using mod resist tongs. Mod/max cues for following directions.
- 2) Graphomotor: Mod A to construct 3 simple sentences given topic. She then NPC onto trlined, highlighted paper using mechanical pencil and slant board to increase awareness of pencil pressure. Mod cues for writing speed and letter formation of "magic c" letters "a,d,g".

Mom updated throughout session on POC.

17: 1

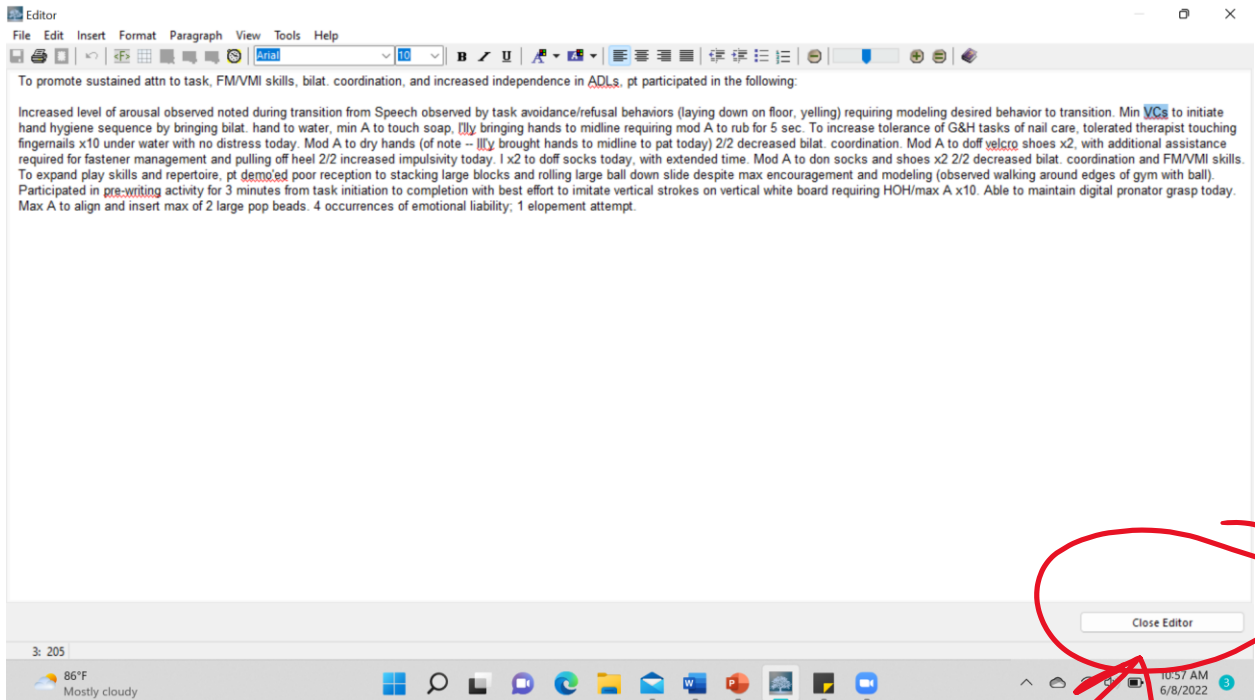
85°F Sunny

6:27 PM 6/6/2022



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### Occupational Therapist Procedure for Conducting a Daily Note



- Once you have completed your note, select “close editor”.





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#### AASL Approved Abbreviations for OT Department

Abbreviation	Meaning	Abbreviation	Meaning
A	Assistance	Min	minimal (less than 25%)
@	At	Mod	moderate (btw 25%-50%)
Ax	Activity	Max	maximum ( btw 5%-75%)
Attn.	Attention	N	normal
(B)	both, bilateral	NWB	non-weight bearing
BLE	bilateral lower extremity	Pt.	patient
BUE	bilateral upper extremity	POC	plan of care
Bilat.	bilateral	(R)	right
BM	bowel movement	RE	re-evaluation
BOS	base of support	Reps	repetitions
c/o	complaint of	RO	rule out
d/c	discharge	Rx	prescription
DOB	date of birth	Secs.	seconds
Dx	diagnosis	SOB	shortness of breath
EX	Exercise	STG	short term goal
Ex	example	Tx	treatment
Fa	Father	T or Txist	therapist
FH	family history	UE	upper extremity
Ft	foot/feet	Un	unable
HEP	home exercise Program	WFL	within functional limits
IE	Initial evaluation	WNL	within normal limits
(L)	left	X	times ( 3x=three times)
LE	lower extremity	Y/N	yes/no
LTG	long term goal	y/o	years old
Min	Minutes	Yrs.	years
Mo	Mother		
Mos.	Months		

- Please reference the attached document for the required/acceptable verbiage for specific therapeutic tasks completed in the session.

**In regard to USING SCISSORS & OTHER CLASSROOM TOOLS, the student will:**

DOMAIN	VARIABLES	CONDITIONS	CRITERIA
POSITION IN HAND/HOLD SCISSORS SNIP WITH SCISSORS CUT WITH SCISSORS STAPLE BIND WITH PAPER CLIP SHARPEN PENCIL FORM WITH STENCIL FORM WITH RULER MEASURE WITH RULER GLUE	On edge of paper Across regular sheet of paper On straight 1/4"-thick line On curved 1/4"-thick line A ____" Circle A ____" Square A complex shape A ____" line 2 or more pieces of paper together	With hand over hand assistance With assistance Independently Using assistive devices or adaptations Using consistent dominant hand Using a non-dominant hand as stabilizer Using appropriate pressure Using a functional grasp With fluent hand motion Producing a neat, clean end-product	____% of the time ____ trials out of ____ with ____% accuracy

**In regard to PLAY, the student will:**

DOMAIN	VARIABLES	CONDITIONS	CRITERIA
MODEL IMITATE GENERATE SHARE TAKE TURNS EXPLORE ACTIVATE PARTICIPATE IN	____ body postures or movements play schemes (simple) play schemes (complex) toy models of adult tools/objects assembly toys moving toys manipulatives/resistive materials human/animal figurines playground equipment a 1-person game a 2-person game a group game a switch-operated toy multi-sensory activities	With hand over hand assistance With assistance Given set-up Given demonstration With close supervision With distant supervision Independently In intended manner According to established rules Using assistive devices or adaptations Using assistive software With a partner In a group Within the designated play space With respect for others' play space Using 2 hands together Using consistent dominant hand Using appropriate force/speed of movement Using functional grasp/release patterns Showing interest in a variety of materials and people	____% of the time ____ trials out of ____ with ____% accuracy

**In regard to ORGANIZING & MANAGING PERSONAL BELONGINGS, the student will**

DOMAIN	VARIABLES	CONDITIONS	CRITERIA
ACCESS ITEMS STORE ITEMS RETRIEVE ITEMS PACK ITEMS RECORD LABEL ITEMS FILE ITEMS CLEAN/SORT ITEMS	In cubby In locker In bookbag In desk In notebook In agenda book In daily planner In "IN/TO DO" folder/file In "OUT/COMPLETED" folder/file personal data/date on ____	With hand over hand assistance With assistance Independently Using assistive devices or adaptations Given physical cues Given verbal cues Given visual cues In a timely manner	____% of the time ____ trials out of ____ with ____% accuracy within ____ seconds within ____ minutes

**In regard to WRITTEN COMMUNICATION, the student will:**

DOMAIN	VARIABLES	CONDITIONS	CRITERIA
GRASP TRACE COPY FROM NEAR MODEL COPY FROM FAR MODEL GENERATE IN MANUSCRIPT GENERATE IN CURSIVE TRANSCRIBE IN MANUSCRIPT TRANSCRIBE IN CURSIVE TYPE (COPY) TYPE (GENERATE) TYPE (TRANSCRIBE) EDIT FILL IN ON A FORM	Writing utensil Pre-writing shapes & forms ____ of 26 upper case letters ____ of 26 lower case letters Numbers zero through ____ ____ words ____ sentences ____ paragraphs	With hand over hand assistance With assistance Independently Using assistive devices or adaptations Using assistive software Using appropriate alignment Using appropriate spacing Using appropriate casing Using appropriate letter formation/directionality Within the designated space Using appropriate pencil pressure Using a functional pencil grasp Using home row hand placement	____% of the time ____ trials out of ____ with ____% accuracy

In regard to <b>STUDENT ROLE/INTERACTION SKILLS</b> , <i>the student will</i>			
DOMAIN	VARIABLES	CONDITIONS	CRITERIA
ATTEND TO VISUALLY ATTEND TO FOLLOW/ADHERE TO COMPLETE INITIATE DEMONSTRATE RESPECT FOR DEMONSTRATE COPING STRATEGIES WITH MANAGE INTERACT WITH TRANSITION TO/BETWEEN LOCATE INDICATE/IDENTIFY RESPOND TO REMAIN DEMONSTRATE USE OF	____ - step task ____ - part project ____ - step directions individual work task group instruction work/activity/daily schedule transportation schedule classroom/school environment tools & materials assignments peers staff self relevant/assigned activity areas within classroom relevant/assigned activity areas within school strengths/skills/interests areas of need/dislikes/deficits safety protocols needs/wishes arousal level	With hand over hand assistance With assistance Independently Using assistive devices, strategies, or adaptations Given environmental modifications Given set-up Given physical cues Given verbal cues Given visual cues With close supervision With distant supervision In a safe manner In proper sequence In a timely manner With regard to social conventions	____ % of the time ____ trials out of ____ with ____ % accuracy within ____ time
In regard to <b>TOILETING AND HYGIENE</b> , <i>the student will</i>			
DOMAIN	VARIABLES	CONDITIONS	CRITERIA
WIPE WASH DRY VOID IN COMMODE MANAGE CLOTHING CLEAN UP FLUSH COMMODE OPERATE FAUCET DISPOSE OF INDICATE NEED/DESIRE	Hands Face Peri area Self During toileting routine Refuse/trash During hand-washing routine During mealtime routine	With hand over hand assistance With assistance Independently Using assistive devices or adaptations Given physical cues Given verbal cues Given visual cues In proper sequence In a timely manner With minimal mess/spillage	____ % of the time ____ trials out of ____ with ____ % accuracy within ____ time
In regard to <b>FEEDING</b> , <i>the student will</i>			
DOMAIN	VARIABLES	CONDITIONS	CRITERIA
GRASP/HOLD RELEASE/PLACE SCOOP SPEAR CUT CARRY CHEW FORM BOLUS SWALLOW SIP/DRINK FROM SELECT WIPE/CLEAN OPEN	Spoon Fork Knife Appropriate utensil Sippie cup Straw cup Open cup Food/drink Food/drink packages/containers Mouth Face Eating area With appropriate chewing motion With appropriate lip closure With appropriate volume in mouth	With hand over hand assistance With assistance Independently Using assistive devices or adaptations Given physical cues Given verbal cues Given visual cues In a safe manner In proper sequence In a timely manner With minimal mess/spillage With regard to social conventions Using consistent dominant hand	____ % of the time ____ trials out of ____ with ____ % accuracy within ____ time
In regard to <b>DRESSING</b> , <i>the student will</i>			
DOMAIN	VARIABLES	CONDITIONS	CRITERIA
DON/PUT ON DOFF/TAKE OFF TIE FASTEN ZIP SNAP BUCKLE BUTTON MANAGE	Jacket Sweater Shoes Socks Shirt Apron Art Smock Lower body clothing for toileting Clothing Fasteners Buttons Belt Zipper Snaps	With hand over hand assistance With assistance Independently Using assistive devices or adaptations Using consistent dominant hand Using non dominant hand as a stabilizer Using appropriate pressure Using a functional grasp Given physical cues Given verbal cues Given visual cues	____ % of the time ____ trials out of ____ with ____ % accuracy within ____ time



**In regard to COLORING AND DRAWING, the student will:**

DOMAIN	VARIABLES	CONDITIONS	CRITERIA
HOLD/GRASP SCRIBBLE/MAKE MARKS COLOR (EXISTING PICTURE) DRAW (COPY) DRAW (GENERATE)	Crayon/marker/chalk/paintbrush Pencil Computer mouse Pre-writing shapes & forms Horizontal line Vertical line Diagonal line ___ " Circle ___ " Square ___ " Triangle Representational figures Face Person Simple landscape ___-part picture of a ___	With hand over hand assistance With assistance Independently Using assistive devices or adaptations Using assistive software In a variety of media Within the designated space With accurate proportion of parts With accurate placement of parts Using consistent dominant hand Using appropriate utensil pressure Using a functional utensil grasp	___ % of the time ___ trials out of ___ with ___ % accuracy within ___ time

**In regard to WORKING WITH DESIGNS & PATTERNS, the student will:**

DOMAIN	VARIABLES	CONDITIONS	CRITERIA
COPY ASSEMBLE LOCATE TRACK ARRANGE/SORT SEQUENCE FOLLOW	A ___ - block design A ___ - color pattern A ___ - piece inset puzzle A ___ - piece interlocking puzzle A ___ - part construction toy ___ objects within the visual field ___ steps of a construction project ___-step directions	With hand over hand assistance With assistance Independently Using assistive devices or adaptations Using assistive software Using consistent dominant hand Using a non-dominant hand as stabilizer Using a functional grasp Given demonstration Given spoken instruction Given written instruction Given illustrated instruction	___ % of the time ___ trials out of ___ with ___ % accuracy

**In regard to COMMUNITY INTEGRATION & PRE-VOCATIONAL ACTIVITY, the student will**

DOMAIN	VARIABLES	CONDITIONS	CRITERIA
INITIATE SEQUENCE COMPLETE ASSEMBLE FOLLOW NAVIGATE COLLECT SORT/MATCH/ARRANGE IDENTIFY	___ - step task ___ - part project work/activity schedule transportation schedule classroom/school environment work/community environment required tools & materials household items/objects work site items/objects strengths/skills/interests areas of need/dislikes/deficits	With hand over hand assistance With assistance Independently Using assistive devices or adaptations Given physical cues Given verbal cues Given visual cues In a safe manner In proper sequence In a timely manner With minimal mess/spillage With regard to social conventions	___ % of the time ___ trials out of ___ with ___ % accuracy within ___ time

**In regard to VERBAL/NON-VERBAL COMMUNICATION, the student will**

DOMAIN	VARIABLES	CONDITIONS	CRITERIA
ATTEND TO VISUALLY ATTEND TO FOLLOW/ADHERE TO COMPLETE INITIATE MANAGE INTERACT WITH TRANSITION TO/BETWEEN LOCATE INDICATE/IDENTIFY RESPOND TO DEMONSTRATE USE OF ACCESS OPERATE SELECT PLACE	Augmentative Communication Device Picture Schedule Picture Cards Choice Board Computer Switch Touch Screen Keyboard Mouse/Trackball	With hand over hand assistance With assistance Independently Using assistive devices, strategies, or adaptations  Given environmental modifications Given set-up Given physical cues Given verbal cues Given visual cues With close supervision With distant supervision In a safe manner In proper sequence In a timely manner With regard to social conventions	___ % of the time ___ trials out of ___ with ___ % accuracy within ___ time

In regard to <b>FUNCTIONAL MOBILITY &amp; POSITIONING</b> , <i>the student will</i>			
DOMAIN	VARIABLES	CONDITIONS	CRITERIA
MANEUVER ORIENT POSITION NAVIGATE STABILIZE SHIFT/CHANGE ALIGN ACCESS TRANSPORT PACE ENDURE	Classroom School campus Self at desk/table Self in chair/wheelchair Self for feeding Self at commode/sink Materials in class/cafeteria/media center/playground Sitting Standing	With hand over hand assistance With assistance Independently Using assistive devices, strategies, or adaptations Given environmental modifications Given set-up Given physical cues Given verbal cues Given visual cues With close supervision With distant supervision In a safe manner In proper sequence In a timely manner	___% of the time ___ trials out of ___ with ___% accuracy within ___time
In regard to <b>LEARNING ACADEMICS &amp; PROCESS SKILLS</b> , <i>the student will</i>			
DOMAIN	VARIABLES	CONDITIONS	CRITERIA
CHOOSE USE HANDLE/MANIPULATE SEEK INITIATE CONTINUE SEQUENCE TERMINATE LOCATE GATHER ORGANIZE/ARRANGE ADAPT/MODIFY/ADJUST RESPOND TO CHANGE	Appropriate tools/materials Steps of a task Clarification Actions Method/Manner Assistance Work space Demonstrated instructions Illustrated instructions Spoken instructions Written instructions Sensory or perceptual cues	With hand over hand assistance With assistance Independently For intended purpose In an appropriate manner Using assistive devices, strategies, or adaptations Using assistive software Using consistent dominant hand Using a non-dominant hand as stabilizer Using a functional grasp Given demonstration Given spoken instruction Given written instruction Given illustrated instruction In proper sequence In a timely manner With regard to social conventions Efficiently	___% of the time ___ trials out of ___ with ___% accuracy within ___time

[http://www.med.unc.edu/ahs/ocsc/bestpractice\\_000.htm](http://www.med.unc.edu/ahs/ocsc/bestpractice_000.htm)



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- **Plan**
  - Use boxes to fill in cells including the “Plan”, “Tolerance to Treatment” (including: excellent, fair, good, poor). Make sure to select the cell “Parent and caregiver consent to treatment plan....”. Once you make selections for “Tolerance to Treatment” and “Parent and caregiver” once, it will roll over to all the notes after. Please ensure this is accurate, it may need changing in future. Plan option must be selected upon every treatment note

Test, Clayton

Save Cancel

← Daily Note for Clayton Test - Visit: 1 Payor: TRICA 10002 Tricare East Region

**Patient Information**  
Patient Clayton Test MR # 0001839 DOB 03-01-10 Age 11y ... Case ST001

**Record Information**  
Date 03-10-21 Time 08:00a Therapist JEGR Loc VALFL Type Daily Note  
Assigned JEGR Ref 00011 SLT Standard

Load Template Save

Histories Daily Subjective Goals Addressed Assessment **Plan** Charges Tracking

**Plan**  
☒ Continue with present treatment plan  
☐ Review / revise treatment plan  
☐ Discontinue treatment plan

**Frequency/Duration**  
Frequency/ duration 2 visits per week for 52 weeks  
visits per visits per  
Total Visits 104 Used 1 Remaining 103  
RX 07-22-20 - 07-22-21 104 0 104

Tolerance to treatment is  
☒ excellent ☐ good ☐ fair ☐ poor

☒ Patient and/or caregiver consents to treatment plan and goals and gives verbal informed consent.

**Comments (5)**

**Family Education and Follow up**

**Discharge Planning**  
Criteria for discharge

**Discharge Planning Comments**

11:48 AM 3/10/2021





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## Occupational Therapist Procedure for Conducting a Daily Note

- **Charges**

- Apply all charges to notes before end of the same business day and complete the written note by the end of the next business day
- Under 97530 Therapeutic Activities enter the number of units for Tricare clients  
\*Follow 8-minute rule\* (1 unit=15 minutes of treatment; a 30 minute session would be 2 units)
- Therapeutic Activities 30/45/60-SP are for clients that are self-paying, PLSA or Gardiner Scholarship. Select the appropriate duration for each session

\*\*\*\*\*CHARGES FOR TRICARE INSURANCE\*\*\*\*\*

The screenshot displays the 'Charges' tab for a patient named Clayton Test. The interface includes a sidebar with navigation options like Dashboard, Scheduler, Patient Files, Daily Ledger, Reports / Forms, Connect, Tables, Utilities, What's Up, and Exit. The main area is divided into several sections:

- Evaluation Services:** Includes checkboxes for 97165 - Eval Low Complexity, 97166 - Eval Moderate Complexity, 97167 - Eval High Complexity, and 97168 - Re-Evaluation. There is also a checkbox for 'Evaluation Done Outside'.
- Miscellaneous Select Service:** Includes checkboxes for COVID-19 PPE Co..., Consultation, Family/Therapist Interview, Parent/Therapist Interview, Home Visit, Screening, and Late Fee (10 Min).
- Additional Services:** A table with columns for 'Services / Supplies', 'Unit', and 'Amount'.
- Insurance / Payor Information:** Shows 'A 10002 Tricare East Region' and 'TRICA' as the payor. It includes checkboxes for 'Returned Check Fee', 'Cancellation Fee', 'No Show Fee', 'No Visit', and 'No Service Ticket'.
- Posting Information:** Includes fields for 'Posted By', 'Billed', 'Expected', 'POS', 'Cosigner', 'Bill Doc', and 'Bill Loc'. There are buttons for 'Posting Review' and 'Show Charge Recap'.

A red arrow points to the '97530 Therapeutic Activity' checkbox under the 'Enter 15 Min increments' section.



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## Occupational Therapist Procedure for Conducting a Daily Note

\*\*\*\*\*CHARGES FOR SELF PAY/PLSA/GARDINER\*\*\*\*\*

The screenshot shows the 'Charges' tab in the software. The interface includes a sidebar with navigation options like 'Scheduler', 'Patient Files', 'Daily Ledger', 'Reports / Forms', 'Connect', 'Tables', 'Utilities', 'What's Up', and 'Exit'. The main area is divided into several sections:

- Evaluation Services:** Includes 'OT Evaluations' with radio buttons for 97165 (Low Complexity), 97166 (Moderate Complexity), 97167 (High Complexity), and 97168 (Re-Evaluation). There is also a checkbox for 'Evaluation Done Outside'.
- Miscellaneous Select Service:** Includes checkboxes for COVID-19 PPE Consultation, Family/Therapist Interview, Parent/Therapist Interview, Home Visit, Screening, and Late Fee (10 Min).
- Additional Services:** A table with columns for 'Services / Supplies', 'Unit', and 'Amount'.
- Insurance / Payor Information:** Includes fields for 'P' (00003), 'Patient Resp', 'Payor Set', and checkboxes for 'Returned Check Fee', 'Cancellation Fee', 'No Show Fee', 'No Visit', and 'No Service Ticket'.
- Diagnosis:** A section for entering diagnosis codes (e.g., R13.11 for Dysphagia, oral phase) and time-related fields (Time In, Time Out, Total Minutes, Timed, Untimed, Nonbillable).
- Collect Payment:** Includes fields for 'Amount', 'Type', 'Method', 'Check #', 'Copy', 'Ref #', and 'Type'.
- Posting Information:** Includes fields for 'Posted By', 'Billed', 'Expected', 'POS', 'Cosigner', 'Bill Doc', and 'Bill Loc'.

A red arrow points to the 'Therapy Procedures' section under 'Enter 15 Min increments', which includes checkboxes for various therapy codes like 97150 (Group), 97530 (Therapeutic Activity), and 92507 (Speech/Hear Therapy).

- Once you have completed all the tabs (Daily Subjective, Goals Addressed/Assessments, Plan, Charger) click “Save”, at the top left corner. Then select “Save and sign off” on the bottom R corner. This will then promote you to put in your Raintree password – Note if you are not done with your note and need to revise, you will select “Save and Exit”. You can then access the note from your scheduler again later.



## — ALL ABOUT — SPEECH & LANGUAGE

### **Occupational Therapist Procedure for Conducting a Daily Note**

#### OTHER TIPS FOR RAINTREE

- Reserve time: highlight the cell of time you want to reserve time for, right click, hit reserve and then type in what you need to for that time from the drop down. It will then appear on the scheduler in the designated color from the drop down list. OR you can just generally select the cell of time and write in the open box what you will be doing and it will then appear on the scheduler in Orange. This is convenient for inputting when you are working on documentation, planning/prepping, doing client related matters etc. You can also select the appropriate color-coded description to reserve time onto the scheduler as well and it will appear accordingly (yellow is for MTG, purple is Prep/Plan, Lunch is white etc.)
- Adding a new appointment – Highlight the cell of time you are wanting, right click, select add appointment, then select the following that applies for each cell.
  - 1. Patients name –Click on the cell to type in the patients last name, find the patient in accordance to correct first and last name, then double click the name. Make sure to do this step first, that way it will auto fill in “Referral”
  - 2. Location – Click the carrot arrow on the right side of the cell to generate the drop down list. Selecting the appropriate location for the clients session ( For example if you are treating out the south Tampa office, you will select South Tampa. Or if you are conducting a telehealth session in Valrico, you will select Telehealth Vist – Valrico
  - Type - Click the carrot arrow on the right side of the cell to generate the drop down list. Select the appropriate type for the session.
    - OTX30- 30 minutes OT session
    - OTX45 – 45 minute OT session
    - OTX60 – 60 minutes OT session
  - Case – This will auto populate if you input and select the patients name first
  - Length – This should auto populate when you entered in the “type”. The length of service time will match the “Type” of session, I.e. 30, 45, or 60 minute for treatment sessions.
- Once all the cells have been complete, select “Save” at the top left corner. You will then see this appointment added to your scheduler.



# ALL ABOUT SPEECH & LANGUAGE

## Occupational Therapist Procedure for Conducting a Daily Note

All About Speech & Language RPM - dat User: JGraepel Station: 9 allaboutspeech.raintreinc.com:10056

All Providers

View Add Edit Delete Cancel Find ± >

Appointments: AUTO

All Providers -- Friday -- 03-12-21

	Alicia Yimoyines	Baylee Skjette	Brandi Rodriguez
8 AM			Evaluations: 1 hr, 1 unit New Clients: 0 Cancellations: 2
15			
30			
45			
9 AM			
15			
30			
45			
10 AM			
15			
30			
45			
11 AM			
15			
30			

Context Menu (over Baylee Skjette):

- Add Appointment
- Add From Waiting List
- Paste Appointment Ctrl+V
- Make Available
- Make Unavailable
- Reserve Time** (highlighted with red circle)
- Clear Reserve Time
- Copy Schedule
- Paste Schedule

Calendar: Mar 2021

PN DOB Sex Case FC Status Balance Copay/Deductible

Address City Pref Phone Home Phone Work Phone Primary Cell Secondary Cell Email Comment

12:07 PM 3/10/2021

All About Speech & Language RPM - dat User: JGraepel Station: 9 allaboutspeech.raintreinc.com:10056

All Providers

Find Add Edit Deactivate Print Select Pending Code Update >

Appointments: AUTO

All Providers -- Friday -- 03-12-21

	Alicia Yimoyines	Baylee Skjette	Brandi Rodriguez
8 AM			Evaluations: 1 hr, 1 unit New Clients: 0 Cancellations: 2
15			
30			
45			
9 AM			
15			
30			
45			
10 AM			
15			
30			
45			
11 AM			
15			
30			

Reserve Time

Work Schedule Codes

Provider BASK

Location

Work Schedule Data

Date 03-12-21

Start Time 08:30a

End Time 09:00a

Length 30 minutes

Default Type MEET

Comment Jenna

Appointment / Recall Types

Code	Description
FEREV	Feeding Re-Evaluation
FEX30	Feeding Treatment
FEX45	Feeding Treatment
FEX60	Feeding Treatment
GROUP	Group Therapy
LUNCH	Lunch
MEET	Meeting
OTEL3	OT Teletherapy Tx
OTEL4	OT Teletherapy Tx
OTEL6	OT Teletherapy Tx
OTEVL	OT Evaluation
OTREV	OT Re-Evaluation

Work Phone Secondary Cell

12:08 PM 3/10/2021



## ALL ABOUT SPEECH & LANGUAGE

### Occupational Therapist Procedure for Conducting a Daily Note

The screenshot displays the 'All About Speech & Language' software interface. The top window shows the 'Appointments: AUTO' view for Friday, 03-12-21. The interface includes a menu bar with options: Find, Add, Edit, Deactivate, Print, Select, Pending Code Update. Below the menu, there's a section for 'Appointments: AUTO' with a list of providers: Alicia Yimoyines, Baylee Skjette, and Brandi Rodriguez. The appointments are listed in a grid format with time slots (8 AM, 15, 30, 45, 9 AM, 15, 30, 45, 10 AM, 15, 30, 45, 11 AM, 15, 30). The grid shows various activities like 'MEET Jenna', 'LUNCH', 'PAPER', 'Cleaning room and toys', and 'PREP'. The bottom section of the interface includes a calendar for March 2021 and a patient information form with fields for Patient, Insurance, Contacts, Address, City, Pref Phone, Home Phone, and Work Phone.

If a parent/caregiver requests to have a note sent to them or another professional, please inform the Front Desk. Please do so by providing client name, parent name, and specific request. They will send documentation to parents or other professionals as requested, ensuring necessary releases of information are on file.

### Cancelation & No Show Appointments

- If you have a no-show appointment, right click on the cell from the scheduler and click on “no show” then provide a reason and hit the “enable charges tab”. You will then go to the charges table and apply the no show fee charge, which will be in full for the associated length of the appointment.
- It is encouraged that notes be written during the session to ensure timeliness of completion per company policies. However, we understand that some clients are more hands on and require more from us and that is not always possible (i.e. if they are in the session and you are not able to write the note, if a client is more behavioral, if a client is lower functioning, if a client is highly distractible etc.)
- Use your downtime accordingly to complete notes to the best of your ability each day



Test, Clayton

Save Cancel

DOB 03-01-10 Age 11y ... Case ST001 Time 08:00a Assigned JEGR Ref 00011 SLT Standard

Histories Daily Subjective Goals Addressed / Assessment Plan Charges **Charge Recap** Tracking

Page 1 Page 2 Page 3

Code	CPT	Modifiers	Units	Dx	Auth /	X	Billed	Expected	BC	POS
ADCAN		GN	1	1		<input checked="" type="checkbox"/>	35	35.00	P	11
<					<	<input type="checkbox"/>			<	
<					<	<input type="checkbox"/>			<	
<					<	<input type="checkbox"/>			<	
<					<	<input type="checkbox"/>			<	
<					<	<input type="checkbox"/>			<	
<					<	<input type="checkbox"/>			<	
<					<	<input type="checkbox"/>			<	

**Case Information**

Date of Illness / Onset SOC 07-22-20

Total Billed/Expected 35.00 35.00  
Total Patient Billed/Expected 35.00 35.00

**Posting Information**

Posted By

Post Charges Create Task  
Refresh Charges Preview Post

**CCI Notes**

**Posting Errors**

11:53 AM 3/10/2021





## PROCEDURE AGREEMENT LOG

(Name)

(Date)