

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.

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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.

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Goals Addressed/Assessment Information

• Goal Selection: Select each long-term goals 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.

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

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17	New To demonstrate improved self feedin		
31			oral phase

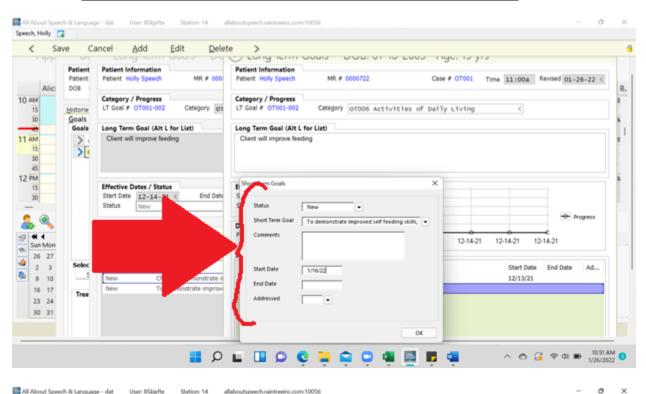


• Double click on the short term goal "status" to open the comment box.

29	ve Ci	ancel >	
pp	D	Long Term Goals - DO	🕞 Long Term Goals - DOB: 01-18-2003 Age: 19 yrs
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10	_5	New Child will demonstrate in	New Child will demonstrate improved ADL 12/13/21
17 24 31	Trea	New To demonstrate improv	New To demonstrate improved self feedin

- 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.

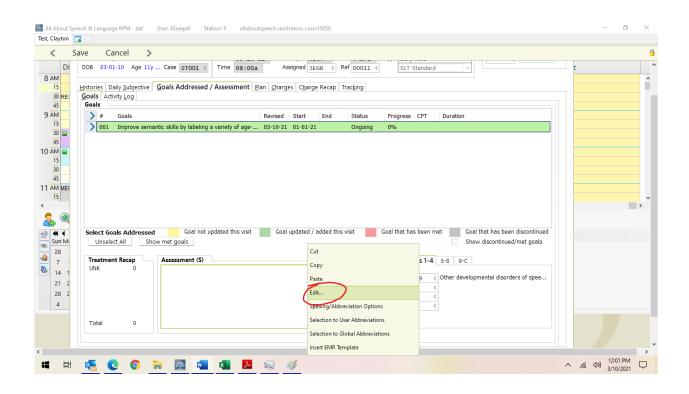




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- <u>Assessment (S):</u>
 - Right click the text box directly under the word "Assessments" and select the word "Edit". This will open the text box. Here you will write your note in a narrative form.
 - When writing your narrative form please indicate 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.





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· · · · · · · · · · · · · · · · · · ·			
Pt worked to complete therapeutic tasks today focused on VMI, FMC, attention, regulation, and bij 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 ~ 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 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			rs
3) Core strength: In long sit across bolster, using BUE catching/throwing ball with therapist 2 set of 5 regs 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.			
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To improve FM, VMI, and attentional skills, Alexa complete following tasks:			
to improve rwi, vwi, and attentional skills, Alexa completer bollowing 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	or following dire	ections.	
2) Graphomotor: Mod A to construct 3 simple sentences given topic. She then NPC onto trilined, highlighted paper using mechanical pencil and slant board to increase awareness of pencil speed and letter formation of "magic c" letters "a,d,g".	pressure. Mod	cues for wr	iting
Mom updated throughout session on POC.			
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To promote sustained attn to task. FM/VMI skills, bilat, coordination, and increased independence in ADLs, pt participated in the following:		
Increased level of arousal observed noted during transition from Speech observed by task avoidance/refusal behaviors (laying down on floor, yelling) requiring modeling desired behavior to transiti hand hygiene sequence by bringing bilat. hand to water, min A to touch soap, []]y bringing hands to midline requiring mod A to rub for 5 sec. To increase tolerance of G&H tasks of nail care, tol		
nano nygene sequence by bringing biat, nano to water, min A to touch soap, jug bringing nanos to micinie requiring mod A to rub for 5 sec. To increase toerando or GAn tasks on nai care, too fingenais x 10 under water with no distress today. Mod A to dry hands (of note – jilly brought hands to midline to pat today) 22 decreased bilat, coordination. Mod A to dry hands (of note – jilly brought hands to midline to pat today) 22 decreased bilat, coordination. Mod A to dry hands (of note – jilly brought hands to midline to pat today) 22 decreased bilat, coordination. Mod A to dry hands (of note – jilly brought hands to midline to pat today) 22 decreased bilat, coordination. Mod A to dry hands x 20 with		
required for fastener management and pulling off heel 2/2 increased impulsivity today. I x2 to doff socks today, with extended time. Mod A to don socks and shoes x2 2/2 decreased bilat. coord	lination and FM/VMI s	
To expand play skills and repertoire, pt demoind poor reception to stacking large blocks and rolling large ball down slide despite max encouragement and modeling (observed walking around ed Participated in pre-writing activity for 3 minutes from task initiation to completion with best effort to imitate vertical strokes on vertical white board requiring HOH/max A x10. Able to maintain dig		lau i
Participated in greating activity for 5 minutes non-task initiation to competion with best enor to finitiate ventical strokes on ventical white board requiring horizinax A x to. Able to maintain digit Max A to align and insert max of 2 large topo beads. 4 occurrences of emotional liability: 1 elopement attempt.	tal pronator grasp too	ay.
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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	Х	times (3x=three times)
LE	lower extremity	Y/N	yes/no
LTG	long term goal	y/o	years old
Min	Minutes	Yrs.	years
Мо	Mother		
Mos.	Months		

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

In record	to USING SCISSORS & OTHER CLAS	SSROOM TOOLS the student will	and the second sec
		CONDITIONS	ODITEDIA
DOMAIN	VARIABLES	CONDITIONS	CRITERIA
POSITION IN HAND/HOLD SCISSORS	On edge of paper		% of the time
NIP WITH SCISSORS	Across regular sheet of paper		trials out of
CUT WITH SCISSORS	On straight 1/4'-thick line	With hand over hand assistance	with% accuracy
STAPLE	On curved 1/4 - thick line	With assistance	
BIND WITH PAPER CLIP	A Circle	Independently	
	A Square	Using assistive devices or adaptations	
		Using consistent dominant hand	
ORM WITH STENCIL	A complex shape	Using a non-dominant hand as stabilizer	
ORM WITH RULER	A" line	Using appropriate pressure	
IEASURE WITH RULER	2 or more pieces of paper together	Using a functional grasp	
GLUE		With fluent hand motion	
		Producing a neat, clean end-product	
	In record to DLAV, the	tudont will	
DOMAIN	In regard to PLAY, the s VARIABLES		CRITERIA
NODEL	body postures or movements	With hand over hand assistance	_% of the time
	play schemes (simple)	With assistance	trials out of
MITATE			with% accuracy
GENERATE	play schemes (complex)	Given set-up	with_ % accuracy
SHARE	toy models of adult tools/objects	Given demonstration	
TAKE TURNS	assembly toys	With close supervision	
EXPLORE	moving toys	With distant supervision	
ACTIVATE	manipulatives/resistive materials	Independently	
PARTICIPATE IN	human/animal figurines	In intended manner	
	playground equipment	According to established rules	
	a 1-person game	Using assistive devices or adaptations	
	a 2-person game	Using assistive software	
	a group game	With a partner	
	a switch-operated toy	In a group	
	multi-sensory activities	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	
In regard to	ORGANIZING & MANAGING PERSO	NAL BELONGINGS, the student will	
DOMAIN	VARIABLES	CONDITIONS	CRITERIA
ACCESS ITEMS	In cubby	With hand over hand assistance	% of the time
STORE ITEMS	In locker	With assistance	trials out of
RETRIEVE ITEMS	In bookbag	Independently	with% accuracy
PACK ITEMS	In desk		within seconds
RECORD	In notebook	Using assistive devices or adaptations	within minutes
LABEL ITEMS	In agenda book	Given physical cues	
FILE ITEMS	In daily planner	Given verbal cues	
CLEAN/SORT ITEMS	In "IN/TO DO" folder/file	Given visual cues	
ULEAN/OURT ITEMO	In "OUT/COMPLETED" folder/file	In a timely manner	
	personal data/date on	· · · · · · · · · · · · · · · · · · ·	
DOMAIN	In regard to WRITTEN COMMUNIC. VARIABLES	ATION, the student will: CONDITIONS	CRITERIA
DOMAIN	Writing utensil	With hand over hand assistance	% of the time
GRASP	Pre-writing shapes & forms	With assistance	trials out of
TRACE	rie-willing shapes & toffits		with % accuracy
COPY FROM NEAR MODEL	of 26 upper case letters	Independently	with accuracy
COPY FROM FAR MODEL	of 26 lower case letters	Using assistive devices or adaptations	
GENERATE IN MANUSCRIPT	Numbers zero through	Using assistive software	
GENERATE IN CURSIVE	words	Using appropriate alignment	
TRANSCRIBE IN MANUSCRIPT	sentences	Using appropriate spacing	
TRANSCRIBE IN CURSIVE	paragraphs	Using appropriate casing	
TYPE (COPY)		Using appropriate letter formation/directionality	
TYPE (GENERATE)		Within the designated space	
		Using appropriate pencil pressure	
TYPE (TRANSCRIBE)			
EDIT		Using a functional pencil grasp	
FILL IN ON A FORM		Using home row hand placement	
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		to STUDENT ROLE/INTERACTION	SKILLS, the student will	
-	DOMAIN	VARIABLES	CONDITIONS	CRITERIA
ý	ATTEND TO VISUALLY ATTEND TO FOLLOW/ADHERE TO COMPLETE INITIATE DEMONSTRATE RESPECT FOR DEMONSTRATE COPING STRATEGIES WITH MANAGE	step task part project step directions individual work task group instruction work/activity/daily schedule transportation schedule classroom/school environment	With hand over hand assistance With assistance Independently Using assistive devices, strategies, or adaptations Given environmental modifications Given set-up Given physical cues	% of the time trials out of with% accuracy withintime
	INTERACT WITH TRANSITION TO/BETWEEN LOCATE INDICATE/IDENTIFY RESPOND TO REMAIN DEMONSTRATE USE OF	tools & materials assignments peers staff self relevant/assigned activity areas within classroom relevant/assigned activity areas within school	Given visual 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	
		strengths/skills/interests areas of need/dislikes/deficits safety protocols needs/wishes arousal level	IE the student will	
┟		regard to TOILETING AND HYGIEN		CDITEDIA
	DOMAIN	VARIABLES Hands	CONDITIONS With hand over hand assistance	CRITERIA % of the time
	WASH DRY VOID IN COMMODE MANAGE CLOTHING CLEAN UP FLUSH COMMODE OPERATE FAUCET DISPOSE OF INDICATE NEED/DESIRE	Face Peri area Self During toileting routine Refuse/trash During hand-washing routine During mealtime routine	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	trials out of^ with% accuracy withintime
		In regard to FEEDING, the s	and the second	
	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 withintime
	DOMAIN	in regard to DRESSING, the		COITCOIA
	DOMAIN DOFF/TAKE OFF TIE FASTEN ZIP SNAP BUCKLE BUTTON MANAGE	VARIABLES Jacket Sweater Shoes Socks Shirt Apron Art Smock Lower body clothing for toileting Clothing Fasteners Buttons Belt Zipper Snaps	CONDITIONS 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	CRITERIA % of the time trials out of with% accuracy withintime

DOMAIN	In regard to COLORING AND DRAM		
DOMAIN HOLD/GRASP	VARIABLES	CONDITIONS	CRITERIA
HOLD/GRASP SCRIBBLE/MAKE MARKS	Crayon/marker/chalk/paintbrush Pencil	With hand over hand assistance	% of the time
COLOR (EXISTING PICTURE)	Computer mouse	With assistance	trials out of
DRAW (COPY)		Independently	with% accuracy
DRAW (GENERATE)	Pre-writing shapes & forms	Using assistive devices or adaptations	withintime
BIGHT (BEHEIGTE)	Horizontal line	Using assistive software	
	Vertical line	In a variety of media	
	Diagonal line	Within the designated space	
	" Circle	With accurate proportion of parts	
	" Square	With accurate placement of parts	
	" Triangle	Using consistent dominant hand	
	Representational figures	Using appropriate utensil pressure	
	Face	Using a functional utensil grasp	
	Person	e en g a tanodonar atonor graop	
	Simple landscape		
	part picture of a		
In rega	rd to WORKING WITH DESIGNS &	PATTERNS the student will:	
DOMAIN	VARIABLES	CONDITIONS	CRITERIA
COPY	A block design	With hand over hand assistance	% of the time
ASSEMBLE	A color pattern	With assistance	
LOCATE	A piece inset puzzle	Independently	
TRACK	A piece interlocking puzzle	Using assistive devices or adaptations	with% accuracy
ARRANGE/SORT	A part construction toy	Using assistive software	
SEQUENCE	objects within the visual field	Using consistent dominant hand	
FOLLOW	steps of a construction project	Using a non-dominant hand as stabilizer	
	step directions	Using a functional grasp	
		Given demonstration	
		Given spoken instruction	
		Given written instruction	-
		Given illustrated instruction	
In regard to COM	MUNITY INTEGRATION & PRE-VOO	CATIONAL ACTIVITY, the student will	
NITIATE	VARIABLES	CONDITIONS	CRITERIA
SEQUENCE	step task	With hand over hand assistance	% of the time
COMPLETE	part project	With assistance	trials out of
	work/activity schedule	Independently	with% accuracy
ASSEMBLE	transportation schedule	Using assistive devices or adaptations	within time
FOLLOW	classroom/school environment	Given physical cues	
NAVIGATE	work/community environment	Given verbal cues	
COLLECT	required tools & materials	Given visual cues	
SORT/MATCH/ARRANGE	household items/objects	In a safe manner	
DENTIFY	work site items/objects	In proper sequence	
	strengths/skills/interests	In a timely manner	
	areas of need/dislikes/deficits	With minimal mess/spillage	
		With regard to social conventions	
In regard	to VERBAL/NON-VERBAL COMM	UNICATION, the student will	
DOMAIN	VARIABLES	CONDITIONS	CRITERIA
TTEND TO	Augmentative Communication Device	With hand over hand assistance	% of the time
ISUALLY ATTEND TO	Picture Schedule	With assistance	trials out of
OLLOW/ADHERE TO	Picture Cards	Independently	with% accuracy
OMPLETE	Choice Board	Using assistive devices, strategies, or	
NITIATE	Computer	adaptations	withintime
MANAGE	Switch	avaplations	
NTERACT WITH	Touch Screen	Given environmental modifications	
RANSITION TO/BETWEEN	Keyboard	Given set-up	
OCATE	Mouse/Trackball	Given physical cues	
NDICATE/IDENTIFY	wouse/ rackuall	Given verbal cues	
RESPOND TO		Given visual cues	
ESPOND TO EMONSTRATE USE OF		With close supervision	
CCESS		With distant supervision	
14.533		In a safe manner	
PERATE		In proper sequence	1
PERATE ELECT			1
PERATE		In a timely manner	
PERATE ELECT			

DOMAIN	regard to FUNCTIONAL MOBILITY & P	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 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 withintime
	egard to LEARNING ACADEMICS & PRO		CRITERIA
DOMAIN CHOOSE USE HANDLE/MANIPULATE SEEK INITIATE CONTINUE SEQUENCE TERMINATE LOCATE GATHER ORGANIZE/ARRANGE ADAPT/MODIFY/ADJUST RESPOND TO CHANGE	VARIABLES 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	CONDITIONS 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 withintime

http://www.med.unc.edu/ahs/ocsci/bestpractice_000.htm



- <u>Plan</u>
 - 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

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- <u>Charges</u>
 - 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

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03-01-10 Age 11y 7mCase 0TOO1 Time os ries Progress Note Treatment Plan Discharge Cha uation Services Evaluations Chg Exp 97165 - Eval Low Complexity	9:53a Assigned BASK < Ref 00011 < Eval 01 arges Tracking Miscellaneous Select Service Chg Exp	T Standard ← Required for Signoff →> Please enter discharge rease Diagnosis 1-4 5-8 9-C
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97167 - Eval High Complexity 97168 - Re-Evaluation	Family/Therapist Interview Parent/Therapist Interview Home Visit	3 < 4 <
	Screening Late Fee (10 Min)	Time In: Timed Time Out: Untimed
		Total Minutes: Nonbillable
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Daily Ledger Reports / Forms Co <u>n</u> nect Jables	Chg Exp 97165 - Eval Low Complexity 97166 - Eval Moderate Complexity 97167 - Eval High Complexity 97168 - Re-Evaluation	COVID-19 PFE Co Consultation Family/Therapist Interview Parent/Therapist Interview Home Visit Screening Late Fee (10 Min) Additional Services	1 R13.11 C 2 3 <
y Utilities) Wh <u>a</u> t's Up Exit	Evaluation Done Outside Transfer Charges Therapy Procedures Enter 15 Min increments Ohg Exp 97150 Group 97150 Toroucht 6 dridby	Services / Supplies Unit Amount	Location of Treatment
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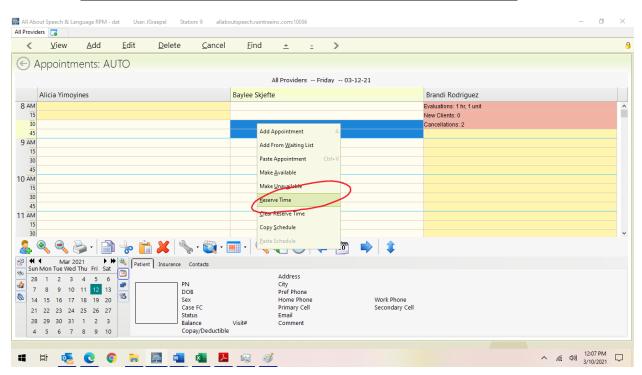
 Once you have completed all the tabs (Daily Subjective, Goals Addressed/Assessments, Plan, Charger) click "Save", at the top left corner. Then select "Save and sign off" on the bottom R corner. This will then promote you to put in your Raintree password – Note if you are not done with your note and need to revise, you will select "Save and Exit". You can than access the note from your scheduler again later.

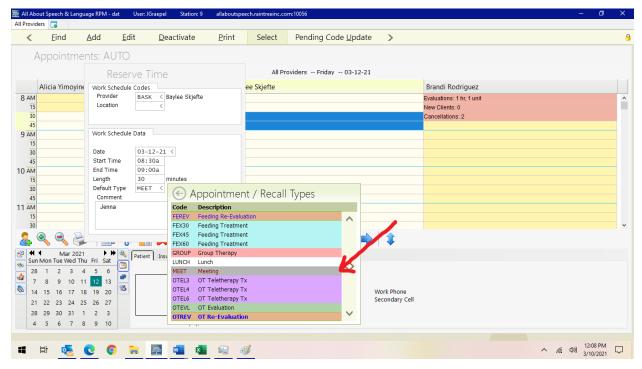


OTHER TIPS FOR RAINTREE

- 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 appreciate 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 imput 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.









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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



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0 RE:	Evaluation Services ST Evaluations 92521 Eval of Speech Fluency 92522 Eval ST Sound Production 92524 Eval Sound Prod w.Lang 92505 Speech/Hearing Evaluation 92610 Evaluate Swallowing Function 92527 Oral Speech Device Eval	Chg Exp	Miscellaneous Select Service COVID-19 PFE Co Consultation Faranily/Therapist Interview Parent/Therapist Interview Home Visit Screening Late Fee (10 Min)		Diagnosis 1-4	5-8 9-C Other developmental disorder Timed Untimed Nonbillable	
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PROCEDURE AGREEMENT LOG

Sign and date with your name if you are required to know this policy. By signing you are attesting that you have received, read, and understand the policy, and will apply it as required

(Name)	(Date)