



# **Conversion Note AASL Procedure for Speech Language Pathologists**

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## Conversion Note AASL Procedure for Speech Language Pathologists

### Completing a Conversion Note

1. This occurs when you have a client starting treatment at our office, but they have a current evaluation within 6 months from the initial evaluation to the time they want to start services at AASL
2. In this case, you just have to add in LTG and STG via the pick lists (see Treatment Plan portion of Evaluation Template for more info on pick list goals)
3. Once logged into the EMR, go to Patient Files, search via the client's last name, and then click on their name when you find it from the drop down list. Then click on the patient chart

All About Speech & Language RPM - dat User: JGraepel Station: 9A allaboutspeech.raintreeinc.com:10096

Patient

Find Add Edit Delete Print Select Show Inactive Hide Inactive

Main Menu

- Dashboard
- Scheduler
- Patient Files**
- Daily Ledger
- Reports / Forms
- Engagement Center
- Tables
- Utilities
- What's Up
- Exit

Patient Files

Account #	Name	Status	DOB
0001982	[REDACTED]	ACT	[REDACTED]
0001983	[REDACTED]	ACT	[REDACTED]
0201551	[REDACTED]	ACT	[REDACTED]
BBFCH	Beyond Basics for Chil, Group	GROUP	
BOYSS	Beyond Basics for Boys, Group	GROUP	
ELEM	Elementary - Winthrop, Group	GROUP	
ELEMS	Elementary - S. Tampa, Group	GROUP	
PEER	PEERS - S. Tampa, Group	GROUP	
PEERS	PEERS - Winthrop, Group	GROUP	
TINY	Tiny Socialights (W), Group	GROUP	
<b>TINY</b>	<b>Tiny Socialights (ST), Group</b>	<b>GROUP</b>	



# ALL ABOUT SPEECH & LANGUAGE

## Conversion Note AASL Procedure for Speech Language Pathologists

Browser window: All About Speech & Language RPM - dat User: JGraepel Station: 9A allaboutspeech.raintreeinc.com:10056

Find Cancel

Main Menu

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- Exit

**FIND**

Press TAB to see search history or UP/DOWN arrow keys to switch search option

TEST [max 75 characters]

- ☒ Smart Find
- ☐ Number
- ☐ Name
- ☐ SS#
- ☐ DL#
- ☐ Zip Code
- ☐ Status Code
- ☐ Date
- ☐ DOB
- ☐ Find by subscriber...
- ☐ Document Search (Full Text Search)...
- ☐ Document Search (Full Text Search)...
- ☐ Family Contacts
- ☐ Search By Phone From Patient, Contacts, Payors

Browser window: All About Speech & Language RPM - dat User: JGraepel Station: 9A allaboutspeech.raintreeinc.com:10056

Patient All Providers

Find Add Edit Delete Print Select Show Inactive Hide Inactive

Main Menu

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- Reports / Forms
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- Tables
- Utilities
- What's Up
- Exit

**Patient Files**

Name	Status	Account #	DOB
	INACT		
	INACT		
	INACT		
	INACT		
	Alias		
	ACT		
	INACT		
	INACT		
	ACT		
	INACT		
	INACT		
	ACT		
Test, Clayton	ACT	0001839	03-01-2010
	INACT		
	INACT		
	ACT		
	INACT		
	INACT		
	INACT		
	INACT		
	INACT		
	INACT		



# ALL ABOUT SPEECH & LANGUAGE

## Conversion Note AASL Procedure for Speech Language Pathologists

- Once in their patient chart hit A to add under Visit History, then select Long-Term Therapy Note. Select your respective discipline case (ST001 or OT001). When it populates, the note you will then need to change the Note Type to a conversion note on the drop down. Then under that make sure you add from the other dropdown SLT Standard. This is located on the upper right hand side of the note.



# ALL ABOUT SPEECH & LANGUAGE

## Conversion Note AASL Procedure for Speech Language Pathologists

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Test, Clayton All Providers

Patient Chart - 0001839 Clayton Test DOB: 03-01-2010 Age: 11 yrs 0 mos

Case  Menu  Picture  Waiting List

Visit Info | Therapy Tracking | Documents/Tasks | Communication | Admin | All Records

Case Information

#	Type	Case Name	Start	End	DOI	Primary Diagnosis	Primary Payor
ST001	LTERM	Speech Therapy	07-22-20			Other developmental disor...	A Tricare East Region - TRICA

☐ Hide Closed / Discharged Cases

Visit History

Date Range	Time	Te	Provider Name	Loc	Case	Signed	Posted	Post Rev	Amended
07-22-20	03:00p	INC		VALFL	00000	NV			
07-22-20	02:59p	INC		VALFL	00000	NV			

Select Type of Note

- Agent based service ticket
- Group Attendance
- Group Attendance Ticket
- Group Member Visit
- Group Periodical Posting Ticket
- Group Visit
- Interim Note
- Long Term Therapy Note
- Service Ticket

Print Notes Fax/Email Notes

Not Signed Signed Off Amended / Cosigned Canceled / No Show

Visit Report Role Records

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Test, Clayton All Providers

Save Cancel

Conversion Note for Clayton Test - Visit: NV Payor: TRICA 10002 Tricare East Region

Patient Information MR # 0001839 Record Information Date 03-02-21 Time 01:34p Therapist JEGR Loc VALFL Type Conversion Note Eval

DOB 03-01-10 Age 11y 1d Case ST001 Assigned JEGR Ref 00011

Load Template

Initial Evaluation  
Initial Eval/Discharge  
Daily Note  
Re-Evaluation  
Progress Note  
Discharge Note  
Conversion Note  
Service Ticket

Plan

Initiate Therapy ☐ PT ☐ OT ☒ SLT

Continue Therapy ☒

No Services Needed ☐

Recheck ☐

Home Program ☐

In Order To

Comments (S)

Frequency/ Duration

Frequency/ duration 2 visits per

visits per

Treatment Duration

Total Visits 104 Used 0 Remaining 104

POC From 07-22-20 POC To 07-22-21

RX 07-22-20 - 07-22-21 104 0 104

Discharge Planning

Criteria for discharge

Discharge Planning Comments



## ALL ABOUT SPEECH & LANGUAGE

### Conversion Note AASL Procedure for Speech Language Pathologists

The screenshot shows a web-based form titled "Conversion Note for Clayton Test - Visit: NV Payor: TRICA 10002 Tricare East Region". The form is divided into several sections:

- Patient Information:** Patient: Clayton Test, MR #: 0001839, DOB: 03-01-10, Age: 11y 1d, Case: ST001.
- Record Information:** Date: 03-02-21, Time: 01:34p, Therapist: JEGR, Loc: VALFL, Ref: 00011.
- Plan:** Includes radio buttons for "Initiate Therapy", "Continue Therapy" (selected), "No Services Needed", "Recheck", and "Home Program".
- Frequency/Duration:** Includes a dropdown for "Frequency/ duration" (set to 2 visits per week) and a dropdown for "Treatment D" (set to SLT Standard, highlighted with a red arrow).
- Discharge Planning:** Includes a section for "Criteria for discharge" and "Discharge Planning Comments".

The form also includes a "Load Template" button and a "Save" button. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 1:40 PM on 3/2/2021.

5. You do not need to fill out all portions of this note template!
6. Under the "Treatment Plan" tab you will add goals. Please do so the same way you would for an initial or re evaluation (See Procedure for "Completing an Evaluation"). We do our best to add the goals as they parallel our pick lists, but sometimes we just add them as they were written from the previous place of service; the ultimate goal is to have the goals as closely related to one another between the previous facility and ours



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All About Speech & Language RPM - dat User: JGraepel Station: 8 allaboutspeech.rainforestinc.com:10056

Test, Clayton All Providers

Save Cancel Add Edit Delete Find Print

Conversion Note for Clayton Test - Visit: NV Payor: TRICA 10002 Tricare East Region

**Patient Information** Patient: Clayton Test MR #: 0001839 DOB: 03-01-10 Age: 11y 1d Case: ST001

**Record Information** Date: 03-02-21 Time: 01:34p Therapist: JEGR Assigned: JEGR Loc: VALFL Ref: 00011 Type: Conversion Note Eval: SLT Standard

Load Template Save

Histories Subjective Objective Findings Assessment **Treatment Plan** Recommendations

Goals Activity Log

**Goals**

#	Goals	Revised	Start	End	Status	Progress	CPT	Duration
<div>Add</div> <div>Find</div> <div>Print</div>								

Select Goals to Include Goal not updated this visit Goal updated / added this visit Goal that has been met Goal that has been discontinued

Unselect All Show met goals Show discontinued/met goals

**Treatment Recap**

**Treatment Plan Summary**

Prognosis for Achieving Goals

☐ Good ☐ Fair ☐ Poor

Short term goals are anticipated to be achieved in Long term goals are anticipated to be achieved in

Date Certification dates

1:41 PM 3/2/2021

7. Under the Recommendations, you just have to add in the following:
- Frequency/Duration: 2 visits per week for 52 weeks (DEPENDING ON CLIENT, may be 1x/week, may be 3x/week)
  - Treatment Duration is 30 minutes USUALLY (rarely is it longer)
  - Total number of visits will be 104 (simple math)
  - POC From and POC To Dates are in line with the initial date of the evaluation; so you input the initial date of the evaluation and then put that same date but a year later denoting when it “expires” and that will warrant us to do a re-evaluation





## ALL ABOUT SPEECH & LANGUAGE

### Conversion Note AASL Procedure for Speech Language Pathologists

Test, Clayton | All Providers | Save | Cancel

Conversion Note for Clayton Test - Visit: NV Payor: TRICA 10002 Tricare East Region

**Patient Information**  
Patient: Clayton Test | MR #: 0001839 | DOB: 03-01-10 | Age: 11y 1d | Case: ST001

**Record Information**  
Date: 03-02-21 | Time: 01:34p | Therapist: JEGR | Assigned: JEGR | Loc: VAL.FL | Ref: 00011 | Type: Conversion Note | Eval: SLT Standard

**Plan**  
☐ Initiate Therapy ☐ PT ☐ OT ☒ SLT  
☒ Continue Therapy  
☐ No Services Needed  
☐ Recheck  
☐ Home Program

**Frequency/ Duration**  
Frequency/ duration: 2 visits per Week for 52 Week  
Treatment Duration: [ ]

**Discharge Planning**  
Criteria for discharge: [ ]  
Discharge Planning Comments: [ ]

**Recommendations For Further Assessments**  
Recommendations for Further Assessments: [ ]  
Comment: [ ]

**Comments (S)**  
[ ]

**Discharge Planning**  
Criteria for discharge: [ ]  
Discharge Planning Comments: [ ]

**Frequency/ Duration**  
Frequency/ duration: 2 visits per Week for 52 Week  
Treatment Duration: [ ]

**Discharge Planning**  
Criteria for discharge: [ ]  
Discharge Planning Comments: [ ]

8. Then you save and exit; it will not prompt you to sign off on the note

Test, Clayton | All Providers | Save | Cancel

Conversion Note for Clayton Test - Visit: NV Payor: TRICA 10002 Tricare East Region

**Patient Information**  
Patient: Clayton Test | MR #: 0001839 | DOB: 03-01-10 | Age: 11y 1d | Case: ST001

**Record Information**  
Date: 03-02-21 | Time: 01:34p | Therapist: JEGR | Assigned: JEGR | Loc: VAL.FL | Ref: 00011 | Type: Conversion Note | Eval: SLT Standard

**Plan**  
☐ Initiate Therapy ☐ PT ☐ OT ☒ SLT  
☒ Continue Therapy  
☐ No Services Needed  
☐ Recheck  
☐ Home Program

**Frequency/ Duration**  
Frequency/ duration: 2 visits per Week for 52 Week  
Treatment Duration: [ ]

**Discharge Planning**  
Criteria for discharge: [ ]  
Discharge Planning Comments: [ ]

**Recommendations For Further Assessments**  
Recommendations for Further Assessments: [ ]  
Comment: [ ]

**Comments (S)**  
[ ]

**Discharge Planning**  
Criteria for discharge: [ ]  
Discharge Planning Comments: [ ]

**Frequency/ Duration**  
Frequency/ duration: 2 visits per Week for 52 Week  
Treatment Duration: [ ]

**Discharge Planning**  
Criteria for discharge: [ ]  
Discharge Planning Comments: [ ]





## ALL ABOUT SPEECH & LANGUAGE

### Conversion Note AASL Procedure for Speech Language Pathologists

**Conversion Note**

Date of Visit:	03-02-21	Therapist:	Jenna Graepel
Patient Name:	Test, Clayton	Referring MD:	Christopher Wilke
Patient #:	0001839		
Date of Birth:	03-01-2010		
Age:	11 years, 1 day	Certification Period:	07-22-20 to 07-22-21

Diagnosis:  
F80.89 Other developmental disorders of speech and language  
NO NARRATIVE REQUIRED - CONVERSION NOTE FOR DATA ENTRY USE ONLY

Save and Return to Note   **Save and Exit**

9. Goals should then roll forward for the first treatment session.

10. Goals rolling forward trouble shooting—see CM until procedure is written

Sometimes therapists do wait to write the conversion note until after the first visit once they get eyes on a new client if any goals need to get added etc; this is done on a case-by-case basis. Please communicate with your CM if this course of action is taken in starting with a client who has a previous evaluation from another facility.

#### Adding or Changing Goals

11. For a new client to AASL who comes in with an accepted, valid initial evaluation from another clinic, create a conversion note of the goals from that evaluation prior to the first session. This is the approved document that Tricare has on file for this patient prior to them coming to our office that we have agreed to accept as the dates are still within the valid timespan. Make the goals as close as possible, if not verbatim, to what was listed on the plan of care.

12. After the first few sessions (3-6), if you believe that many of the goals from the outside accepted report are not a good fit for the child (i.e., goals have been largely met already, where child is at upon getting to know them/their current skill levels), you may open a progress note. This will be easier for you documentation-wise and allow you to be able to better adjust the goals. By doing this, you can ensure documented progress by the next progress note/re-evaluation (whichever is sooner). This does not have to be a thorough progress note, just an update of the goals to be more appropriate for the client, better guide your plan of care and reflect it more accurately. There needs to be a statement within the



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progress note explaining these modifications. It is imperative that you provide a rationale within comment sections of the goals; explain WHY you are adding/changing.

1. If you only need to change minor parameters for at most 1-2 goals, like cue levels, % accuracy, or to mark a goal as MET, then you may do so in the context of a treatment note. This should only be done for the occasional minor change or adjustment of a goal or two so that it does not flag Tricare in any way and cause disruption for the child's case. If you are changing criteria, change the goal's status to "UPDATED", and make the appropriate modifications right there in your daily note. All other changes should be done in a progress note even if it falls earlier than what would typically be required.

Example 1: If you met a goal in current plan of care done by AASL and you need to update/modify (i.e. increase % accuracy, decrease cueing level etc.) the goal prior to progress note time

Update the goal, change the status to Updated, then in the comments section write "GOAL MET and the date the goal was met." Keep this in the comments section for all future notes until Progress note time, so it is clear that the goal has been met/progress has been made within the designated 6 month window. (See below).

Short Term Goal	Status	Comments	Start Date	End Date
Label subjective pronouns he/she in 60% of opportunities over 3 consecutive sessions given minimal verbal and visual cues.	UPDATE D	GOAL MET 8/20/21 at 60% , updated criteria to 80%  *Put Date of session and keep this at the top of all future notes until Progress Note Time		



**Conversion Note AASL Procedure for Speech Language Pathologists**

Example 2: If you need to change goal criteria from an evaluation not conducted at AASL:

Short Term Goal	Status	Comments	Start Date	End Date
Label subjective pronouns he/she in 60% of opportunities over 3 consecutive sessions given minimal verbal and visual cues.	Updated	Criteria Lowered due to current level of client functioning; client currently differentiates between 'boy' and 'girl' in less than 50% of opportunities.		

The other example, would be if we are getting a goal from an outside report that is unrealistic or set too high and you want to be able to show progress by progress note time, you would change the goal status to updated, change the criteria in the goal itself and then just comment in the comments section the following "criteria lowered due to current level of client functioning." Keep this in the comment box for all future notes as well until progress note time.



## PROCEURE AGREEMENT LOG

(Name)

(Date)