



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

## Contents

Tracking Re-Evaluation and Progress Note Due Dates.....	2
Appointment and Note Type .....	5
Drafting Progress Note in EMR System- Progress Note Tab.....	11
Adding, Meeting, Discontinuing Goals for Progress Notes (Treatment Plan Tab) .....	15
Recommendations and Charges Tabs .....	27
Cosigns:.....	31
Shared Clients: .....	32



## ALL ABOUT SPEECH & LANGUAGE

### **Progress Note Procedure for Speech Language Pathologists**

#### **Tracking Re-Evaluation and Progress Note Due Dates**

1. It is the responsibility of the treating therapist(s) to:
  1. track due dates for re-evaluations/progress notes
  2. keep their dashboard up-to-date (i.e., remove discharged or covered clients), NOTE: be sure to monitor Flex Schedule clients and communicate with your fellow therapists on sharing the responsibilities for progress notes and re-evaluations.
  3. ensure due dates are accurate (i.e., conversion note clients require manual updates)
2. To track upcoming Progress Notes and Re-evaluations, use the chart below:

It is the responsibility of the treating therapist(s) to track due dates for re-evaluations and progress notes. Raintree is a tool that should be utilized to efficiently track these due dates and this document contains the procedure for utilizing the Caseload Tab in a therapist's Dashboard to do so. Login to Raintree and go to your respective Dashboard, locating your Caseload Tab. See chart below for tracking to ensure no re-evaluations are missed.

<b><u>Date to start scheduling</u></b>	<b><u>Upcoming Re-eval Dates</u></b>
End of January	March and April
End of February	April and May
End of March	May and June
End of April	June and July
End of May	July and August
End of June	August and September
End of July	September and October
End of August	October and November
End of September	November and December
End of October	December and January



## ALL ABOUT SPEECH & LANGUAGE

### Progress Note Procedure for Speech Language Pathologists

End of November	January and February
End of December	February and March

3. To update your Caseload tab, log into Raintree and go to your respective Dashboard, locating the tab titled “Case Load”:

4. Remove clients seen for coverage, or clients no longer on your caseload by doing the following:
1. Select the client by checking the box next to their name
  2. Select the Remove from Active Caseload button, located at the bottom of the screen. This will remove this client from your caseload list.
  3. If the client dropped out or was discharged, please be sure to complete a discharge note prior to removing them from your caseload.



# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

Dashboard Edit Print Move Patient to Waiting List

Case Load

Patient Name	Case Name	Case	End	Auth End	rem	Rx End	rem	Next Visit	Last Visit	#	Next Due	#	Next MD
	Speech Therapy Di...	ST001	04-07-22	02-12-22	20			10-11-21	10-04-21	30	01-08-22 PN ...		
	Speech Therapy Di...	ST002	01-05-22	05-18-22	33			10-11-21	10-04-21	54	01-10-22 PN ...		
	Speech Therapy Di...	ST001	06-29-22					10-11-21	10-05-21	15	06-29-22 RE		
	Speech Therapy Di...	ST001	04-19-22	03-18-22	16			10-11-21	10-05-21	34	12-25-21 PN ...		
	Speech Therapy Di...	ST001	12-02-21	01-05-22	9			10-11-21	10-06-21	1...	12-02-21 RE ...		
	Speech Therapy Di...	ST001	05-05-22	04-03-22	16			10-11-21	10-06-21	35	11-01-21 PN ...		
	Speech Therapy Di...	ST001	07-07-22					10-11-21	10-06-21	17	07-07-22 RE		
	Speech Therapy Di...	ST001	05-04-22					10-11-21	10-06-21	41	05-04-22 RE		
	Speech Therapy Di...	ST001	07-21-22	01-05-22	12			10-11-21	10-06-21	1...	01-17-22 PN ...		
	Speech Therapy Di...	ST001	04-21-22	03-18-22	15			10-11-21	10-06-21	35	10-18-21 PN ...		
	Speech Therapy Di...	ST001	02-01-22					10-12-21	09-30-21	42	02-01-22 RE		
	Speech Therapy Di...	ST001	03-01-22			08-20-22	94	10-12-21	10-05-21	45	08-30-21 PN ...		
	Speech Therapy Di...	ST001	03-22-22			05-25-22	69	10-12-21	10-06-21	48	09-20-21 PN ...		
	Speech Therapy Di...	ST001		01-08-22	15			10-13-21		0			
	Speech Therapy Di...	ST002	01-26-22	09-09-22	14			10-13-21	09-22-21	20			
	Speech Therapy Di...	ST001						10-19-21	09-28-21	1	09-28-22 RE		
	Speech Therapy Di...	ST002						10-20-21	09-13-21	1	09-13-22 RE		

☐ All
 ☐ Recently Closed
 ☐ Needs Check
 ☐ Soon Needs Check
 ☐ Case On Hold

Visit Utilization Report
 Prescription Report
 Create Discharge Task
 Close Case
 Remove from Active Caseload

IFSP/IEP Report
 Chart Audit Report
 Create Discharge Note
 Refresh Totals
 Leave case status unchanged

To manually update re-evaluation and progress note due dates, do the following:

1. Select the name with your mouse:

Dashboard Edit Print Move Patient to Waiting List

Case Load

Patient Name	Case Name	Case	End	Auth End	rem	Rx End	rem	Next Visit	Last Visit	#	Next Due	#	Next MD
	Speech Therapy Di...	ST001	02-25-22			08-20-21	22		09-09-21	13	02-25-22 RE		
	Speech Therapy Di...	ST001	09-17-21						09-30-21	94	09-12-21 PN ...		
	Speech Therapy Di...	ST001	08-25-22	11-25-21	12			10-07-21	09-22-21	4	02-21-22 PN ...		
	Speech Therapy Di...	ST001	11-25-21					10-07-21	09-27-21	76	11-25-21 RE		
	Speech Therapy Di...	ST001	06-01-22					10-07-21	09-27-21	22	06-01-22 RE		
	Speech Therapy Di...	ST001	05-04-22	04-01-22	35			10-07-21	09-30-21	15	10-31-21 PN ...		
	Speech Therapy Di...	ST001	06-29-22					10-07-21	09-30-21	14	06-29-22 RE		
	Speech Therapy Di...	ST001	05-12-22					10-07-21	09-30-21	33	05-12-22 RE		
	Speech Therapy Di...	ST001	12-14-21					10-07-21	09-30-21	69	12-14-21 RE		
	Speech Therapy Di...	ST001	07-20-22	10-22-21	5			10-07-21	09-30-21	11	01-16-22 PN ...		
	Speech Therapy Di...	ST001	05-24-22	03-18-22	26			10-07-21	10-04-21	1...	11-20-21 PN ...		
	Speech Therapy Di...	ST001	06-29-22					10-07-21	10-05-21	15	06-29-22 RE		
	Speech Therapy Di...	ST001	06-22-22			06-08-22	78	10-07-21	10-05-21	26	12-19-21 PN ...		
	Speech Therapy Di...	ST001	06-10-22	01-07-22	12	09-10-22	100	10-07-21	10-05-21	4			
	Speech Therapy Di...	ST001	03-23-22					10-07-21	10-05-21	34	03-23-22 RE		
	Speech Therapy Di...	ST001	03-22-22			05-25-22	76	10-08-21	10-05-21	42	09-20-21 PN ...		
	Speech Therapy Di...	ST001	02-09-22	02-05-22	22			10-11-21	09-27-21	53			

☐ All
 ☐ Recently Closed
 ☐ Needs Check
 ☐ Soon Needs Check
 ☐ Case On Hold



## ALL ABOUT SPEECH & LANGUAGE

### **Progress Note Procedure for Speech Language Pathologists**

#### **2. Select Edit.**

#### **3. Enter the Progress Report Next Due date based on the POC dates (6 months from evaluation date).**

#### **Appointment and Note Type**

1. You may change the appointment type in Raintree prior to checking in the appointment if you wish; you may still have to change the Note Type once opening the EMR. This is ONLY if you are charting the Progress Note in lieu of a treatment note for that session.
2. Right click on the appointment in Raintree, select Edit. Then change the "Type" to progress note, available in the drop-down list. This should turn the appointment RED.



# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

All About Speech & Language - dat User: JGraepel Station: 17 allaboutspeech.raintreelinc.com:10056

All Providers

View Add Edit Delete Cancel Find ± - Help >

Appointments: AUTO

All Providers -- Friday -- 12-23-22

	Baylee Skjefte	A. Colleen Blazina	Jenna Graepel
45			
8 AM			
15			
30			
45			
9 AM			
15			
30			
45			
10 AM			
15			
30			

Patient Files  
 Appointment History  
**Edit**  
 Add  
 Move To Waiting List  
 Copy  
 Cut  
 Delete - no history  
 Cancel - w/ history  
 No Show  
 Check In  
 Check Out  
 Clear Status  
 Hide Cancells/No Shows

Visit / Encounter  
 Appointment Card  
 Fax  
 Google Map  
 Post Payment  
 Patient Chart  
 Relink Appointments  
 Print Receipt  
 RTCognect  
 Send Blast Alerts  
 Confirm Appointment Manually  
 Resend Appointment Reminder  
 Welcome Letter/Patient Forms  
 Telehealth Waiting Room

Dec 2022  
 Sun Mon Tue Wed Thu Fri Sat  
 27 28 29 30 1 2 3  
 4 5 6 7 8 9 10  
 11 12 13 14 15 16 17  
 18 19 20 21 22 23 24  
 25 26 27 28 29 30 31  
 1 2 3 4 5 6 7

**Holly Speech**  
 Patient Insurance Contacts  
 PN 0000722  
 DOB 01-18-2003  
 Sex F  
 Case FC  
 Status SETUP  
 Balance 0.00  
 Copay/Deductible  
 Address 1452 Bloomingdale Avenue  
 City Valrico FL 33596  
 Pref Phone  
 Primary Cell  
 Home Phone  
 Email  
 Comment  
 Visit# N/A

67°F Mostly sunny 11:37 AM 12/19/2022

Appointment

Appointment History

Date 12-23-22 Time 09:00a

Provider JEGR Jenna Graepel

Location STMPA All About Speech & Language - S. Tampa

Referral

Type STX30 ST Treatment

Case ST001 Speech Therapy, Payor: + Patient Resp

Length 30 minutes

Patient 0000722 Speech, Holly T

Pref Name Pronoun

DOB 01-18-2003

Primary Cell

Home Phone

Email

Comment

Update Future Comments

Status

Appointment

Appointment History

Date 12-23-22 Time 09:00a

Provider JEGR Jenna Graepel

Location STMPA All About Speech & Language - S. Tampa

Referral

Type PNST3 PN Speech 30 min

Case ST001 Speech Therapy, Payor: + Patient Resp

Length 30 minutes

Patient 0000722 Speech, Holly T

Pref Name Pronoun

DOB 01-18-2003

Primary Cell

Home Phone

Email

Comment

Update Future Comments

Status



# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

All About Speech & Language - dat User: JGraepel Station: 17 allaboutspeech.raintreeinc.com:10056

All Providers All Providers

View Add Edit Delete Cancel Find ± = Help

← Appointments: AUTO

All Providers -- Friday -- 12-23-22

	Baylee Skjefte	A. Colleen Blazina	Jenna Graepel
30			
45			
8 AM			
15			
30			
45			
9 AM			Holly Speech PNST3
15			
30			
45			
10 AM			
15			
30			

72°F Sunny

4:07 PM 12/19/2022

Dec 2022 Sun Mon Tue Wed Thu Fri Sat

27 28 29 30 1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30 31

1 2 3 4 5 6 7

Patient Insurance Contacts

PN DOB Sex Case FC Status Balance Copay/Deductible Visit#

Address City Pref Phone Primary Cell Home Phone Email Comment

Secondary Cell Work Phone

- If completing a Progress Note outside a treatment session, you can also go into the patient chart and hit A to add under Visit History, then select Long-Term Therapy Note. When it populates the note going forward on the upper right-hand side you will then need to change the Note Type to Progress Note and then under that make sure you add from the dropdown SLT Standard. You will not assign charges to this note type if it is not completed during a treatment session





# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

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

Test, Clayton All Providers

Save Cancel Add Edit Delete Print Relink

← 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 disorder	A Tricare East Region - TRICA

☐ Hide Closed / Discharged Cases

Active Expired On Hold

Visit History

Date Range	Time	Template	Description	Case Name	Provider Name	Loc	Case	Signed	Posted	Post Rev	Amended
07-22-20	03:00p	INOTE	Interim Note			VALFL	00000		NV		
07-22-20	02:59p	INOTE	Interim Note			VALFL	00000		NV		

Add Print Relink

Print Notes Fax/Email Notes

Not Signed Signed Off Amended / Cosigned Canceled / No Show

Visit Report Role Records

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

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 disorder	A Tricare East Region - TRICA

☐ Hide Closed / Discharged Cases

Active Expired On Hold

Visit History

Date Range	Time	Template	Description	Case Name	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





# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

Service Ticket for Clayton Test - Visit: 1 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: 01:47p  
 Therapist: JEGR Assigned: JEGR Loc: VALFL Ref: 00011

**Type**: Service Ticket

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

**Evaluation Services**  
 ST Evaluations  
☐ 92521 Eval of Speech Fluency  
☐ 92522 Eval ST Sound Production  
☐ 92523 Eval Sound Prod w.Lang  
☐ 92524 Analysis of Voice & Resonance  
☐ 92506 Speech/Hearing Evaluation  
☐ 92610 Evaluate Swallowing Function  
☐ 92597 Oral Speech Device Eval  
☐ Speech Re-Evaluation - SP  
☐ Evaluation Done Outside

**Miscellaneous**  
 Select Service  
☐ COVID-19 PPE Co...  
☐ Consultation  
☐ Family/Therapist Interview  
☐ Parent/Therapist Interview  
☐ Home Visit  
☐ Screening  
☐ Late Fee (10 Min)

**Additional Services**  
 Services / Supplies  
 Unit Amount

**Insurance / Payor Information**  
 A 10002 Tricare East Region  
 Bill To: TRICA  
 Payor Set: ☐ Skip Copay  
☐ Returned Check Fee  
☐ Cancellation Fee

**Posting Information**  
 Posted By:  
 Billed: 0.00  
 Expected: 0.00  
 POS:  
 Copay: 0.00  
 Ref#:   
 Type: Receipt  
 Post payment

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**  
 PT Standard  
 PT Infant/Toddler  
 PT Torticollis  
 PT Positioning  
 OT Standard  
 OT Sensory  
 OT Neuro  
 OT Infant/Toddler  
 OT Positioning  
**SLT Standard**  
 SLT Follow Up Clinic

**Plan**  
☐ Initiate Therapy  
☐ Continue Therapy  
☐ No Services Needed  
☐ Recheck  
☐ Home Program

**Frequency/ Duration**  
 Frequency/ duration  
 2 visits per week  
 Treatment D:  
 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

- Assign charges only if you made the weekly treatment session the Progress Note; if you did it separately via the client chart, there will be no visit/no service ticket selected so charges are not enabled



# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

\*\*\*\*\*DURING SESSION WITH CHARGES\*\*\*\*\*

Test, Clayton | All Providers | Save | Cancel

Progress 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 1d | Case: ST001

**Record Information**  
Date: 03-02-21 | Time: 01:15p | Therapist: JEGR | Assigned: JEGR | Loc: VALFL | Ref: 00011 | Type: Progress Note | SLT Standard

**Charges**

**Evaluation Services**

ST Evaluations	Chg	Exp
<input type="checkbox"/> 92521 Eval of Speech Fluency		
<input type="checkbox"/> 92522 Eval ST Sound Production		
<input type="checkbox"/> 92523 Eval Sound Prod w.Lang		
<input type="checkbox"/> 92524 Analysis of Voice & Resonance		
<input type="checkbox"/> 92506 Speech/Hearing Evaluation		
<input type="checkbox"/> 92610 Evaluate Swallowing Function		
<input type="checkbox"/> 92597 Oral Speech Device Eval		
<input type="checkbox"/> Speech Re-Evaluation - SP		
<input type="checkbox"/> Evaluation Done Outside		

**Therapy Procedures**

Enter 15 Min increments

	Chg	Exp
<input type="checkbox"/> 97150 Group		
<input type="checkbox"/> 97530 Therapeutic Activity		
<input type="checkbox"/> Therapeutic Activities 30 Min-SP		
<input type="checkbox"/> Therapeutic Activities 45 Min-SP		
<input type="checkbox"/> Therapeutic Activities 60 Min-SP		
<input checked="" type="checkbox"/> 92507 Speech/Hear Therapy 30 Min	100.00	100.00
<input type="checkbox"/> Speech/Hearing Therapy 45 Min-SP		
<input type="checkbox"/> Speech/Hearing Therapy 60 Min-SP		

**Miscellaneous Select Service**

	Chg	Exp
<input type="checkbox"/> COVID-19 PPE Co...		
<input type="checkbox"/> Consultation		
<input type="checkbox"/> Family/Therapist Interview		
<input type="checkbox"/> Parent/Therapist Interview		
<input type="checkbox"/> Home Visit		
<input type="checkbox"/> Screening		
<input type="checkbox"/> Late Fee (10 Min)		

**Additional Services**

Services / Supplies	Unit	Amount

**Insurance / Payor Information**

A 10002 Tricare East Region | TRICA

Bill To: | Payor Set: | Returned Check Fee: ☐ Skip Copay: ☐

**Diagnosis 1-4**

1 F80.89 < Other developmental disorder...  
2 <  
3 <  
4 <

**Collect Payment**

Amount: | Type: | Method: | Check #: | Copay: 0.00 | Ref#: | Receipt: | Post payment: |

**Posting Information**

Posted By: | Billed: 100.00 | Expected: 100.00 | POS: | Cosigner: | Bill Doc: | Bill Loc: |

\*\*\*\*\*OUT OF SESSION, NO CHARGES\*\*\*\*\*

Test, Clayton | All Providers | Save | Cancel

Progress 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 1d | Case: ST001

**Record Information**  
Date: 03-02-21 | Time: 01:15p | Therapist: JEGR | Assigned: JEGR | Loc: VALFL | Ref: 00011 | Type: Progress Note | SLT Standard

**Charges**

**Evaluation Services**

ST Evaluations	Chg	Exp
<input type="checkbox"/> 92521 Eval of Speech Fluency		
<input type="checkbox"/> 92522 Eval ST Sound Production		
<input type="checkbox"/> 92523 Eval Sound Prod w.Lang		
<input type="checkbox"/> 92524 Analysis of Voice & Resonance		
<input type="checkbox"/> 92506 Speech/Hearing Evaluation		
<input type="checkbox"/> 92610 Evaluate Swallowing Function		
<input type="checkbox"/> 92597 Oral Speech Device Eval		
<input type="checkbox"/> Speech Re-Evaluation - SP		
<input type="checkbox"/> Evaluation Done Outside		

**Therapy Procedures**

Enter 15 Min increments

	Chg	Exp
<input type="checkbox"/> 97150 Group		
<input type="checkbox"/> 97530 Therapeutic Activity		
<input type="checkbox"/> Therapeutic Activities 30 Min-SP		
<input type="checkbox"/> Therapeutic Activities 45 Min-SP		
<input type="checkbox"/> Therapeutic Activities 60 Min-SP		
<input type="checkbox"/> 92507 Speech/Hear Therapy 30 Min		
<input type="checkbox"/> Speech/Hearing Therapy 45 Min-SP		
<input type="checkbox"/> Speech/Hearing Therapy 60 Min-SP		
<input type="checkbox"/> Speech/Hearing Therapy 90 Min-SP		
<input type="checkbox"/> Group Speech Therapy		

**Miscellaneous Select Service**

	Chg	Exp
<input type="checkbox"/> COVID-19 PPE Co...		
<input type="checkbox"/> Consultation		
<input type="checkbox"/> Family/Therapist Interview		
<input type="checkbox"/> Parent/Therapist Interview		
<input type="checkbox"/> Home Visit		
<input type="checkbox"/> Screening		
<input type="checkbox"/> Late Fee (10 Min)		

**Additional Services**

Services / Supplies	Unit	Amount

**Insurance / Payor Information**

A 10002 Tricare East Region | TRICA

Bill To: | Payor Set: | Returned Check Fee: ☐ Skip Copay: ☐

**Diagnosis 1-4**

1 F80.89 < Other developmental disorder...  
2 <  
3 <  
4 <

**Collect Payment**

Amount: | Type: | Method: | Check #: | Copay: 0.00 | Ref#: | Receipt: | Post payment: |

**Posting Information**

Posted By: | Billed: 0.00 | Expected: 0.00 | POS: | Cosigner: | Bill Doc: | Bill Loc: |

**Charges**

☒ No Visit | ☒ No Service Ticket



## ALL ABOUT SPEECH & LANGUAGE

### Progress Note Procedure for Speech Language Pathologists

5. Print any necessary documents to complete (protocols, questionnaires etc. as a part of progress note preparations, if warranted)

#### Drafting Progress Note in EMR System- Progress Note Tab

- 1 Include information across the following:
  - a. Strengths and Family Strengths
  - b. Status/Attendance
  - c. Assessment

The screenshot displays the EMR system interface for 'All About Speech & Language RPM'. The main window is titled 'Progress Note for Clayton Test - Visit: 1 Payor: TRICA 10002 Tricare East Region'. The interface is divided into several sections:

- Patient Information:** Patient: Clayton Test, MR #: 0001839, DOB: 03-01-10, Age: 11y 2d, Case: ST001.
- Record Information:** Date: 03-03-21, Time: 02:11p, Therapist: JEGR, Assigned: JEGR, Loc: VAL.FL, Ref: 00011, Type: Progress Note, SLT Standard.
- Load Template:** Buttons for 'Load Template' and 'Save'.
- Progress Note Tab (highlighted with a red circle):** Contains a 'Clinical Impression' section with a 'Strengths' sub-section. The 'Strengths' section has a text area for 'Strengths' and a 'Comment' field.
- Family Strengths:** A section with a text area for 'Family Strengths' and a 'Comment' field.
- Status:** A section with a 'Treatment Frequency' dropdown and an 'Attendance' dropdown.
- Assessment:** A section with a text area for 'Assessment'.
- Contraindications:** A section with a text area for 'Contraindications and Precautions'.
- Diagnosis 1-4:** A section with a dropdown menu showing 'F80..89 Other developmental disorders of speech an...'.



# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

Test, Clayton Dashboard

Save Cancel Add Edit Delete

Progress 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 2d Case: ST001

**Record Information**  
Date: 03-03-21 Time: 02:11p  
Therapist: JEGR Assigned: JEGR  
Loc: VALFL Ref: 00011  
Type: Progress Note SLT Standard

Load Template Save

Histories Progress Note Treatment Plan Recommendations/Plan Charges Tracking

**Clinical Impression**

**Strengths**

Strengths Comment

Family Strengths Comment

**Contraindications**  
Contraindications and Precautions

**Diagnosis 1-4** 5-8 9-C

1 F80.89 Other developmental disorders of speech an...  
2  
3

Status  
Treatment Frequency:  
Attendance

Assessment

Comments (5)

2:46 PM 3/3/2021

Test, Clayton Dashboard

Save Cancel Add Edit Delete

Progress 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 2d Case: ST001

**Record Information**  
Date: 03-03-21 Time: 02:11p  
Therapist: JEGR Assigned: JEGR  
Loc: VALFL Ref: 00011  
Type: Progress Note SLT Standard

Load Template Save

Histories Progress Note Treatment Plan Recommendations/Plan Charges Tracking

**Clinical Impression**

**Strengths**

Strengths Comment

Family Strengths Comment

**Strengths**

Quick find:

- ☐ Age Appropriate Speech Skills
- ☐ Age Appropriate Language Skills
- ☐ Age Level Cognitive Skills
- ☒ Attention
- ☒ Cooperative
- ☐ Good Auditory Skills
- ☐ Good Fine Motor Skills
- ☐ Good Gross Motor Skills
- ☐ Good Interaction Skills
- ☐ Good Play Skills
- ☐ Good Social Pragmatic Skills
- ☐ Good use of Gestures
- ☐ Good Visual Attention
- ☐ Good Visual Motor Skills
- ☒ Happy
- ☒ Highly Motivated
- ☐ Playful and Motivated
- ☐ Supportive Concerned Family

**Diagnosis 1-4** 5-8 9-C

1 F80.89 Other developmental disorders of speech an...  
2  
3

Status  
Treatment Frequency:  
Attendance

Assessment

Comments (5)

2:47 PM 3/3/2021



# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

Test, Clayton Dashboard

Save Cancel Add Edit Delete

Progress 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 2d Case: ST001

**Record Information**  
Date: 03-03-21 Time: 02:11p  
Therapist: JEGR Assigned: JEGR  
Loc: VALFL Ref: 00011

Type: Progress Note  
SLT Standard

Load Template Save

Histories Progress Note Treatment Plan Recommendations/Plan Charges Tracking

**Clinical Impression**

**Strengths**

Strengths Comment

Family Strengths

Family Strengths Comment

Good Carryover  
Involved  
Observant  
Supportive

Status  
Treatment Frequency:  
Attendance:

**Assessment**

**Diagnosis 1-4** 5-8 9-C

1 F80.89 Other developmental disorders of speech an...  
2  
3

**Strengths**

Quick find:

☐ Age Appropriate Speech Skills ☐ Good Visual Motor Skills  
☐ Age Appropriate Language Skills ☒ Happy  
☐ Age Level Cognitive Skills ☒ Highly Motivated  
☒ Attention ☐ Playful and Motivated  
☒ Cooperative ☐ Supportive Concerned Family

☐ Good Auditory Skills  
☐ Good Fine Motor Skills  
☐ Good Gross Motor Skills  
☐ Good Interaction Skills  
☐ Good Play Skills  
☐ Good Social Pragmatic Skills  
☐ Good use of Gestures  
☐ Good Visual Attention

Save (F10)

Test, Clayton Dashboard

Save Cancel Add Edit Delete

Progress 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 2d Case: ST001

**Record Information**  
Date: 03-03-21 Time: 02:11p  
Therapist: JEGR Assigned: JEGR  
Loc: VALFL Ref: 00011

Type: Progress Note  
SLT Standard

Load Template Save

Histories Progress Note Treatment Plan Recommendations/Plan Charges Tracking

**Clinical Impression**

**Strengths**

Strengths Comment

Attention  
Cooperative  
Happy  
Highly Motivated

**Family Strengths**

Family Strengths Comment

**Contraindications**

Contraindications and Precautions

**Diagnosis 1-4** 5-8 9-C

1 F80.89 Other developmental disorders of speech an...  
2  
3

Add row

Status  
Treatment Frequency:  
Attendance:

**Assessment**





# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

Test, Clayton Dashboard

Save Cancel Add Edit Delete

Progress 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 2d Case: ST001

**Record Information**  
Date: 03-03-21 Time: 02:11p  
Therapist: JEGR Assigned: JEGR  
Loc: VALFL Ref: 00011

Type: Progress Note  
SLT Standard

Load Template Save

Histories Progress Note Treatment Plan Recommendations/Plan Charges Tracking

**Clinical Impression**

**Strengths**

Strengths  
Attention  
Cooperative  
Happy  
Highly Motivated

Family Strengths

Family Strengths Comment

Status  
Treatment Frequency:  
Attendance

Assessment

Diagnosis 1-4 5-8 9-C

1 F80.89 Other developmental disorders of speech an...

2

3

Family Strengths

Quick find:

☐ Advocates for Child  
☒ Comforts Child  
☐ Encouraging  
☒ Good Carryover  
☒ Involved  
☐ Involved Extended Family  
☒ Observant  
☒ Supportive

2:48 PM 3/3/2021

Test, Clayton Dashboard

Save Cancel Add Edit Delete

Progress 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 2d Case: ST001

**Record Information**  
Date: 03-03-21 Time: 02:11p  
Therapist: JEGR Assigned: JEGR  
Loc: VALFL Ref: 00011

Type: Progress Note  
SLT Standard

Load Template Save

Histories Progress Note Treatment Plan Recommendations/Plan Charges Tracking

**Clinical Impression**

**Strengths**

Strengths  
Attention  
Cooperative  
Happy  
Highly Motivated

Family Strengths

Family Strengths Comment

Status  
Treatment Frequency:  
Attendance

Assessment

Diagnosis 1-4 5-8 9-C

1 F80.89 Other developmental disorders of speech an...

2

3

Family Strengths

Quick find:

☐ Advocates for Child  
☒ Comforts Child  
☐ Encouraging  
☒ Good Carryover  
☒ Involved  
☐ Involved Extended Family  
☒ Observant  
☒ Supportive

2:49 PM 3/3/2021



## ALL ABOUT SPEECH & LANGUAGE

### Progress Note Procedure for Speech Language Pathologists

Be sure to avoid use of “delay” when describing child’s areas of weakness. Use “deficit” or “impairment” instead. Additionally, use “qualitative assessment” in place of “informal assessment.”

### Adding, Meeting, Discontinuing Goals for Progress Notes (Treatment Plan Tab)

11. Under Goals, you are going to hit A to add.





# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

All About Speech & Language RPM - dat User: JGraepel Station: 2 allaboutspeech.raintreinc.com:10056

Test, Clayton

Save Cancel Add Edit Delete Find Print

Main Menu

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

Initial Evaluation 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: 09:00a Therapist: JEGR Assigned: JEGR Loc: VALFL Ref: 00011 Type: Initial Evaluation Eval: SLT Standard

Load Template Save

History Subjective Objective Findings Assessment Treatment Plan Recommendations Charges Tracking Setup

Goals Activity Log

Goals

#	Goals	Revised	Start	End	Status	Progress	CPT	Duration
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Add Find Print </div>								

Select Goals to Include

Unselect All Hide met goals

Goal not updated this visit Goal updated / added this visit Goal that has been met Goal that has been discontinued

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

4:33 PM 3/17/2021

- Under Category select your long-term goal area from the drop-down arrow. Then you write your long-term goal. Please see google drive for updated pick list goals that include LTG with the STG by goal area to help you in writing appropriate long-term goals.



## ALL ABOUT SPEECH & LANGUAGE

### Progress Note Procedure for Speech Language Pathologists

Test, Clayton

Save Cancel

Long Term Goals - DOB: 03-01-2010 Age: 11 yrs 0 mos

Patient Information  
Patient: Clayton Test MR # 0001839 Case # ST001 Time 09:00a Revised 03-10-21

Category / Progress  
LT Goal # ST001-001 Category <

Long Term Goal (Alt L for List)

Effective Dates / Status  
Start Date 03-10-21 End Date Status New

Daily Progress / Activity  
Progress 0% CPT Duration Progress

Short Term Goals

Status	Short Term Goal	Comments	Start Date	End Date	Ad...
--------	-----------------	----------	------------	----------	-------

Goal that has been discontinued  
☐ Show discontinued/met goals

4:35 PM 3/17/2021

Test, Clayton

Find Add Edit Deactivate Print Select

Long Term Goals - DOB: 03-01-2010 Age: 11 yrs 0 mos

Patient Information  
Patient: Clayton Test MR # 0001839 Case # ST001 Time 09:00a Revised 03-10-21

Category / Progress  
LT Goal # ST001-001 Category ST001 Receptive Language

Speech Category

Code	Description	Filter
ST001	Receptive Language	
ST002	Expressive Language	
ST003	Pragmatic / Social Skills	
ST004	Speech and Phonological Development	
ST005	Oral Motor / Respiratory Development	
ST006	Voice Fluency	
ST007	Assistive Technology	
ST008	Communication Skills	
ST009	Reading, writing, and spelling	
ST010	Feeding and Swallowing	
ST011	Reasoning and Problem Solving	

Goal that has been discontinued  
☐ Show discontinued/met goals

4:35 PM 3/17/2021

13. You do not need to fill in progress on "New" goals
14. Under Short-Term Goal, you are going to go down to the toolbar where you see the star with the little + and drop-down arrow box next to it. On the web-based version, you will



## ALL ABOUT SPEECH & LANGUAGE

### Progress Note Procedure for Speech Language Pathologists

see a star. When you click this, you will hit Load Template. Then all the templates that we have current “pick lists” for across STG areas will populate here. Select the ones that apply to your LTG objective then the entire template will load. You can toggle over the goal area to see the entire goal. If you have to edit the goal, click on the goal to highlight it in purple, then right click and edit the goal.

The screenshot displays the 'Long Term Goals' interface for a patient named Clayton Test (DOB: 03-01-2010, Age: 11 yrs 0 mos). The interface includes a sidebar menu with options like Dashboard, Scheduler, Patient Files, Daily Ledger, Reports / Forms, Engagement Center, Tables, Utilities, What's Up, and Exit. The main content area shows the 'Long Term Goal (Alt L for List)' section with a description: 'Demonstrate improved listening comprehension skills by responding to verbal or visual stimuli in 80% of over three consecutive sessions given fading verbal, visual, and tactile cues'. Below this, there are fields for 'Effective Dates / Status' (Start Date: 03-10-21, End Date: , Status: New) and 'Daily Progress / Activity' (Progress: 0%, CPT: , Duration: ). A progress bar is visible on the right. At the bottom, there is a 'Short Term Goals' section with a table for tracking goals. A red circle highlights a star icon in the bottom toolbar, which is used to load templates. The status bar at the bottom shows the time as 4:36 PM on 3/17/2021.



# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

All About Speech & Language RPM - dat User: JGraepel Station: 2 allaboutspeech.raintreinc.com:10056

Test, Clayton

Save Cancel

Main Menu

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

Long Term Goals - DOB: 03-01-2010 Age: 11 yrs 0 mos

Patient Information  
Patient: Clayton Test MR # 0001839 Case # ST001 Time 09:00a Revised 03-10-21

Category / Progress  
LT Goal # ST001-001 Category ST001 Receptive Language

Long Term Goal (Alt L for List)  
Demonstrate improved listening comprehension skills by responding to verbal or visual stimuli in 80% of over three consecutive sessions given fading verbal, visual, and tactile cues

Effective Dates / Status  
Start Date 03-10-21 End Date Status New

Daily Progress / Activity  
Progress 0% CPT Duration

Short Term Goals

Status	Short Term Goal	Comments	Start Date	End Date	Ad...

Load Template

Goal that has been discontinued  
☐ Show discontinued/met goals

4:37 PM 3/17/2021

All About Speech & Language RPM - dat User: JGraepel Station: 2 allaboutspeech.raintreinc.com:10056

Test, Clayton

Save Cancel Add Edit Delete

Main Menu

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

Long Term Goals - DOB: 03-01-2010 Age: 11 yrs 0 mos

Patient Information  
Patient: Clayton Test MR # 0001839 Case # ST001 Time 09:00a Revised 03-10-21

Category / Progress  
LT Goal # ST001-001 Category ST001 Receptive Language

Long Term Goal (Alt L for List)  
Demonstrate improved listening comprehension skills by responding to verbal or visual stimuli in 80% of over three consecutive sessions given fading verbal, visual, and tactile cues

Effective Dates / Status  
Start Date 03-10-21 End Date Status New

Daily Progress / Activity  
Progress 0% CPT Duration

Short Term Goals

Status	Short Term Goal

Templates

Templates	Ownership
<input type="checkbox"/> Pragmatics_Intermediate	Group
<input type="checkbox"/> Pragmatic_Advanced	Group
<input type="checkbox"/> Reading/Spelling_PhonologicalAwareness	Group
<input type="checkbox"/> Reading_Comprehension	Group
<input type="checkbox"/> Reading_Decoding/Encoding	Group
<input type="checkbox"/> ReceptiveLanguage_Elementary&Older	Group
<input checked="" type="checkbox"/> ReceptiveLanguage_Preschool	Group

Delete Edit raw data

Show only personal templates  
Show unavailable templates

Load Close

4:38 PM 3/17/2021



# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

The screenshots show the 'All About Speech & Language RPM' software interface. The top screenshot displays the 'Short Term Goals' list with a red arrow pointing to a goal. The bottom screenshot displays a 'Short Term Goals' dialog box with a red arrow pointing to the 'Short Term Goal' field.

**Top Screenshot: Short Term Goals List**

Status	Short Term Goal	Comments	Start Date	End Date	Act
New	Follow 1/2 step directions with e...				
New	Follow familiar environmental/rudime...				
New	Answer who/what/where/when/whu...				
New	Answer preferential ye...	Follow 1/2 step directions with embedded (CHOOSE ONE: spatial, sequential, temporal conditional, etc.) concepts in 80% of trials over three consecutive sessions given fading verbal, visual, and tactile cues			
New	Answer factual yes/no questions in 8...				

**Bottom Screenshot: Short Term Goals Dialog Box**

Status	New
Short Term Goal	Follow 1/2 step directions with embedded (C...
Comments	
Start Date	1/1/21
End Date	
Addressed	

15. This will mostly be necessary for articulation goals when you are inputting the specific sounds that need to be addressed in treatment.
16. You will then go through and delete out with the red X button (or trash icon on web-based version) the short- term goals that are not needed to start this plan of care. We



# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

usually select no more than 4-5 short-term goal objectives as these can be updated at the time of the progress note, 6 months going forward from the date of the initial evaluation OR if short-term goals are being met and new goals need to get added sooner than this. Be sure to put the start date in each STG as well.

The screenshot shows the 'All About Speech & Language RPM' software interface. The window title is 'All About Speech & Language RPM - dat User: JGraepel Station: 2 allaboutspeech.raintreeinc.com:10056'. The patient name is 'Test, Clayton'. The window has a menu bar with 'Save', 'Cancel', 'Add', 'Edit', and 'Delete'. The main content area is divided into several sections:

- Category / Progress:** LT Goal # ST001-001, Category ST001 Receptive Language.
- Long Term Goal (Alt L for List):** Demonstrate improved listening comprehension skills by responding to verbal or visual stimuli in 80% of over three consecutive sessions given fading verbal, visual, and tactile cues.
- Effective Dates / Status:** Start Date 03-10-21, End Date, Status New.
- Daily Progress / Activity:** Progress 0%, CPT, Duration.
- Short Term Goals:** A table with columns: Status, Short Term Goal, Comments, Start Date, End Date, Ad... The table contains four rows of goals, all with a status of 'New'. The last row is highlighted in blue: 'Identify 5 attributes/adjectives ...'. Below the table is a 'Delete row' button, which is circled in red.

On the right side of the window, there is a 'Duration' section and a checkbox for 'Goal that has been discontinued'.

17. Then you hit save.



## ALL ABOUT SPEECH & LANGUAGE

### Progress Note Procedure for Speech Language Pathologists

Test, Clayton

Save Cancel Add Edit Delete

Patient Clayton Test MR # 0001839 Case # ST001 Time 09:00a Revised 03-10-21

Category / Progress  
LT Goal # ST001-001 Category ST001 Receptive Language

Long Term Goal (Alt L for List)  
Demonstrate improved listening comprehension skills by responding to verbal or visual stimuli in 80% of over three consecutive sessions given fading verbal, visual, and tactile cues

Effective Dates / Status  
Start Date 03-10-21 End Date Status New

Daily Progress / Activity  
Progress 0% CPT Duration

Short Term Goals

Status	Short Term Goal	Comments	Start Date	End Date	Ad...
New	Follow 1 step directions with embed...		1/1/21		
New	Answer who and what questions in 8...				
New	Answer preferential yes/no que...				

Rollforward from a previous note

18. You will repeat this process for as many LTG areas you have with STG area objectives.  
Use the google drive Pick List/Updated Goals Document to help you as a reference

Test, Clayton

Save Cancel Add Edit Delete Find Print

Initial Evaluation 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 09:00a Therapist JEGR Loc VALFL Type Initial Evaluation Assigned JEGR Ref 00011 Eval SLT Standard

Goals

#	Goals	Revised	Start	End	Status	Progress	CPT	Duration
001	Demonstrate improved listening comprehension skill...	03-10-21	03-10-21		New	0%		
002	Demonstrate improved semantic skills by labeling ta...	03-10-21	03-10-21		New	0%		

Select Goals to Include  
Unselect All Hide met goals

Treatment Recap  
UNK 0

Treatment Plan Summary  
Prognosis for Achieving Goals  
Short term goals are anticipated to be achieved in  
Long term goals are anticipated to be achieved in





## ALL ABOUT SPEECH & LANGUAGE

### Progress Note Procedure for Speech Language Pathologists

19. Update and/or add any new goals, if warranted, or change the status of the goal per the drop down in this section. WE ONLY USE Ongoing, Discontinued, or Met. WE DO NOT use Hold or Updated goal status, nor to we enter "Almost Met" or "Partially Met"

20. To Update goals, do the following

Test, Clayton Dashboard

Save Cancel Add Edit Delete

Category / Progress  
LT Goal # ST001-003 Category ST001 Receptive Language

Long Term Goal (Alt L for List)  
Demonstrate improved listening comprehension skills by responding to verbal or visual stimuli in 80% of over three consecutive sessions given fading verbal, visual, and tactile cues

Effective Dates / Status  
Start Date 03-03-21 End Date  
Status New

Daily Progress / Activity  
Progress 0% CPT Duration

Short Term Goals

Status	Short Term Goal	Comments	Start Date	End Date	Ar
Ongoing	Follow 1/2 step directions with embe...	Clayton follows one step spatial ...	1/1/21		Ye
Ongoing	Follow familiar environmental/ru...	Clayton follows familiar envi...	1/1/21		Y
Ongoing	Answer who/what/where/when/why ...				
Ongoing	Answer preferential yes/no questions...				
Ongoing	Answer factual yes/no questions in 8...				

Rollforward from a previous note

Include attendance data on the POC ☐

Update Rollforward Data

2:35 PM 3/3/2021



## ALL ABOUT SPEECH & LANGUAGE

### Progress Note Procedure for Speech Language Pathologists

Test, Clayton Dashboard

Save Cancel Add Edit Delete

Category / Progress  
LT Goal # ST001-003 Category ST001 Receptive Language

Long Term Goal (Alt L for List)  
Demonstrate improved listening comprehension skills by responding to verbal or visual stimuli in 80% of over three consecutive sessions given fading verbal, visual, and tactile cues

Effective Dates / Status  
Start Date 03-03-21 End Date 1.0 0.8

Short Term Goals

Status: Ongoing (circled in red)

Short Term Goal: Follow familiar environmental/rudimentary go...

Comments: Clayton follows familiar environmental directions in over 90% of opportunities, given minimal to no cues. Goal Met.

Start Date: 1/1/21

End Date:

Addressed: Yes

OK

Progress

Goal that has been discontinued  
Show discontinued/met goals

Include attendance data on the POC ☐

All Previous Notes Initial Evaluation Progress / Re-Evaluations Last Note Update Rollforward Data

2:37 PM 3/3/2021

**\*IF A STG IS DISCONTINUED OR MET, BE SURE TO PUT AN END DATE!**

Test, Clayton Dashboard

Save Cancel Add Edit Delete

Category / Progress  
LT Goal # ST001-003 Category ST001 Receptive Language

Long Term Goal (Alt L for List)  
Demonstrate improved listening comprehension skills by responding to verbal or visual stimuli in 80% of over three consecutive sessions given fading verbal, visual, and tactile cues

Effective Dates / Status  
Start Date 03-03-21 End Date 1.0 0.8

Short Term Goals

Status: Met (circled in red)

Short Term Goal: Follow familiar environmental/rudimentary go...

Comments: Clayton follows familiar environmental directions in over 90% of opportunities, given minimal to no cues. Goal Met.

Start Date: 1/1/21

End Date: 3/3/21 (circled in red with a red arrow pointing to it)

Addressed: Yes

OK

Progress

Goal that has been discontinued  
Show discontinued/met goals

Include attendance data on the POC ☐

All Previous Notes Initial Evaluation Progress / Re-Evaluations Last Note Update Rollforward Data

2:38 PM 3/3/2021

**\*SAME GOES FOR ANY LTG DISCONTINUED/MET (ALONG WITH STATUS CHANGE)**



# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

Test, Clayton Dashboard

Category / Progress  
LT Goal # ST001-003 Category ST001 Receptive Language

Long Term Goal (Alt L for List)  
Demonstrate improved listening comprehension skills by responding to verbal or visual stimuli in 80% of over three consecutive sessions given fading verbal, visual, and tactile cues

Effective Dates / Status  
Start Date 01-01-21 End Date  
Status Ongoing

Daily Progress  
New  
Ongoing  
Met

Short Term

Status	Short Term Goal	Comments	Start Date	End Date	Ad...
Met	Follow 1/2 step directions with embe...	Clayton follows one step spatial ...	1/1/21	3/3/21	Yes
Met	Follow familiar environmental/rudime...	Clayton follows familiar environ...	1/1/21	3/3/21	Yes

Rollforward from a previous note

Include attendance data on the POC ☐

All Previous Notes Initial Evaluation Progress / Re-Evaluations Last Note Update Rollforward Data

Test, Clayton Dashboard

Category / Progress  
LT Goal # ST001-003 Category ST001 Receptive Language

Long Term Goal (Alt L for List)  
Demonstrate improved listening comprehension skills by responding to verbal or visual stimuli in 80% of over three consecutive sessions given fading verbal, visual, and tactile cues

Effective Dates / Status  
Start Date 01-01-21 End Date 03-03-21  
Status Met

Daily Progress / Activity  
Progress 80% CFT Duration

Short Term Goals

Status	Short Term Goal	Comments	Start Date	End Date	Ad...
Met	Follow 1/2 step directions with embe...	Clayton follows one step spatial ...	1/1/21	3/3/21	Yes
Met	Follow familiar environmental/rudime...	Clayton follows familiar environ...	1/1/21	3/3/21	Yes

Rollforward from a previous note

Include attendance data on the POC ☐

All Previous Notes Initial Evaluation Progress / Re-Evaluations Last Note Update Rollforward Data

- Under Treatment Plan Summary, select prognosis, then list what STG and LTG are going to be achieved. Generally, we do 6 months for STG and 12 months for LTG; if a client has more severe deficits, you can put LTG for by discharge.



# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

All About Speech & Language RPM - dat User: JGrael Station: 2 allaboutspeech.rainforestinc.com:10056

Test, Clayton

Save Cancel

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

Patient: Clayton Test DOB: 03-01-10 Age: 11y Case: ST001 Date: 03-10-21 Time: 09:00a Therapist: JEGR Loc: VALFL Type: Initial Evaluation Eval: SLT Standard

Histories Subjective Objective Findings Assessment Treatment Plan Recommendations Charges Tracking Setup

Goals Activity Log

#	Goals	Revised	Start	End	Status	Progress	CPT	Duration
001	Demonstrate improved listening comprehension skill...	03-10-21	03-10-21		New	0%		
002	Demonstrate improved semantic skills by labeling ta...	03-10-21	03-10-21		New	0%		

Select Goals to Include

Unselect All Hide met goals

Goal not updated this visit Goal updated / added this visit Goal that has been met Goal that has been discontinued

Hide discontinued/met goals

Treatment Recap UNK 0

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

Certification dates From 03-10-21 To 03-08-22

Reviewed By

1 to 2 months 3 months 3 to 6 months 6 months 9 months 12 months 18 months

All About Speech & Language RPM - dat User: JGrael Station: 2 allaboutspeech.rainforestinc.com:10056

Test, Clayton

Save Cancel

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

Patient: Clayton Test DOB: 03-01-10 Age: 11y Case: ST001 Date: 03-10-21 Time: 09:00a Therapist: JEGR Loc: VALFL Type: Initial Evaluation Eval: SLT Standard

Histories Subjective Objective Findings Assessment Treatment Plan Recommendations Charges Tracking Setup

Goals Activity Log

#	Goals	Revised	Start	End	Status	Progress	CPT	Duration
001	Demonstrate improved listening comprehension skill...	03-10-21	03-10-21		New	0%		
002	Demonstrate improved semantic skills by labeling ta...	03-10-21	03-10-21		New	0%		

Select Goals to Include

Unselect All Hide met goals

Goal not updated this visit Goal updated / added this visit Goal that has been met Goal that has been discontinued

Hide discontinued/met goals

Treatment Recap UNK 0

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

Certification dates From 03-10-21 To 03-08-22

Reviewed By

6 months 3 months 6 months 9 months 12 months 24 months 36 months by discharge



## ALL ABOUT SPEECH & LANGUAGE

### Progress Note Procedure for Speech Language Pathologists

#### Recommendations and Charges Tabs

22. Fill in Recommendations to continue with plan of care

- Recommendation: Continue treatment or Discharge?

**Patient Information**  
Patient: Clayton Test  
MR #: 0001839  
DOB: 03-01-10 Age: 11y 2d Case: ST001

**Record Information**  
Date: 03-03-21 Time: 02:11p  
Therapist Assigned: JEGR  
Loc: VALFL Ref: 00011 Type: Progress Note

**Recommendation**  
Continue therapy (selected)  
Patient and/or informed consent: Continue therapy (selected)  
Tolerance to treatment: fair

**Frequency / Duration**  
Current Frequency/Duration: 2 visits per Week for 52 Week  
Treatment Duration: [ ]  
Update Frequency / Duration  
Total Visits: 104 Used: 1 Remaining: 103  
Adjust Visits  
Update POC Dates / Send POC  
Manually Adjust POC Dates  
POC From: 07-22-20 To: 07-22-21 Total: 104 Used: 1 Rem: 103

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

- Plan: write a small blurb about plan of care (similar to recommendations portion of an evaluation)
- Family Education and Follow Up: did you conduct wrap-ups? Did parent sit in on sessions? Please note here.



# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

Test, Clayton

Save Cancel Add Edit Delete

Histories Progress Note Treatment Plan Recommendations/Plan Charges Tracking

Recommendation: Continue therapy

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

Tolerance to treatment is: **excellent** ☐ good ☐ fair ☐ poor

**Plan**

Based on informal assessment, clinical observation, and parent report, skilled speech language therapy is still warranted at this time. Clayton continues to present with functional voice, fluency, oral motor, and articulation skills. Informal assessment revealed receptive, expressive, and pragmatic language skills as continued areas of need. Therapy should continue to target comprehension and application of vocabulary concepts through...

**Family Education and Follow up**

Parent present for all sessions, provided continuous education regarding plan of care, home practice activities, and rationale behind activities presented in therapy. Parent demonstrates understanding of education, is eager to learn, and receptive to carrying over/implementing activities at home.

**Frequency / Duration**

Current Frequency/Duration: 2 visits per Week for 52 Week

Treatment Duration: [ ]

Update Frequency / Duration

Total Visits: 104 Used 1 Remaining 103

Adjust Visits

☐ Update POC Dates / Send POC

Manually Adjust POC Dates

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

POC To: 07-22-21

	From	To	Total	Used	Rem
RX	07-22-20	07-22-21	104	1	103

**Discharge Planning**

Criteria for discharge

Discharge Planning Comments

Add row

All Previous Notes Initial Evaluation Progress / Re-Evaluations Last Note Include attendance data on the POC ☐ Update Rollforward Data

23. Fill in the criteria for discharge, if changed from eval/re-eval

Test, Clayton

Save Cancel Add Edit Delete

Histories Progress Note Treatment Plan Recommendations/Plan Charges Tracking

Recommendation: Continue therapy

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

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

**Plan**

Based on informal assessment, clinical observation, and parent report, skilled speech language therapy is still warranted at this time. Clayton continues to present with functional voice, fluency, oral motor, and articulation skills. Informal assessment revealed receptive, expressive, and pragmatic language skills as continued areas of need. Therapy should continue to target comprehension and application of vocabulary concepts through...

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

POC To: 07-22-21

	From	To	Total	Used	Rem
RX	07-22-20	07-22-21	104	1	103

**Discharge Planning**

Criteria for discharge

Discharge Planning Comments

Add row

All Previous Notes Initial Evaluation Progress / Re-Evaluations Last Note Include attendance data on the POC ☐ Update Rollforward Data





# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

The screenshots show the 'All About Speech & Language RPM' software interface. The top screenshot displays the 'Progress Note' form for 'Test, Clayton'. The form includes sections for 'Recommendation', 'Plan', 'Family Education and Follow up', and 'Discharge Planning'. A 'Criteria for discharge' pop-up window is open, listing various criteria for discharge, such as 'Client can continue therapy and maintain status with a home program' and 'Client has achieved maximum functional benefit from therapy'. The bottom screenshot shows the same form, but with a 'Save (F10)' button highlighted in a red circle, indicating the final step in the procedure.

- Save and Exit and/or Save and Sign off on the note





# ALL ABOUT SPEECH & LANGUAGE

## Progress Note Procedure for Speech Language Pathologists

Test, Clayton

Save Cancel Add Edit Delete

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

**Patient Information**  
Patient: Clayton Test  
DOB: 03-01-10 Age: 11y 2d Case: ST001

**Record Information**  
Date: 03-03-21 Time: 02:11p  
Therapist: JEGR Assigned  
Loc: VALFL Ref: 00011  
Type: Progress Note  
SLT Standard

**Load Template**  
Save

**Refresh**  
End of D... (1) Review Pt Pg...  
More Filters

**4-21 - 03-04-21**  
Description

**by Group**

**Recommendation**  
Continue therapy  
☐ Patient and/or caregiver consents to treatment plan and goals and gives verbal informed consent.  
Tolerance to treatment is: ☒ excellent ☐ good ☐ fair ☐ poor

**Plan**  
Based on informal assessment, clinical observation, and parent report, skilled speech language therapy is still warranted at this time. Clayton continues to present with functional voice, fluency, oral motor, and articulation skills. Informal assessment revealed receptive, expressive, and pragmatic language skills as continued areas of need. Therapy should continue to target comprehension and application of vocabulary concepts through...

**Family Education and Follow up**  
Parent present for all sessions, provided continuous education regarding plan of care, home practice activities, and rationale behind activities presented in therapy. Parent demonstrates understanding of education, is eager to learn, and receptive to carrying over/implementing activities at home.

**Frequency / Duration**  
Current Frequency/Duration: 2 visits per Week for 52 Week  
Treatment Duration: Update Frequency / Duration  
Total Visits: 104 Used 1 Remaining 103  
Adjust Visits  
☐ Update POC Dates / Send POC  
Manually Adjust POC Dates  
POC From: 07-22-20 POC To: 07-22-21  
From To Total Used Rem  
RX 07-22-20 - 07-22-21 104 1 103

**Discharge Planning**  
Criteria for discharge  
Client no longer demonstrates functional impairment or has achieved goals set fort...

**Discharge Planning Comments**

File Edit Insert Format Paragraph View Tools Help

Tahoma 20

**Progress Note**

<b>Date of Visit:</b> 03-03-21	<b>Therapist:</b> Jenna Graepel
<b>Patient Name:</b> Test, Clayton	<b>Referring MD:</b> Christopher Wilke
<b>Patient #:</b> 0001839	
<b>Date of Birth:</b> 03-01-2010	
<b>Age:</b> 11 years, 2 days	<b>Certification Period:</b> 07-22-20 to 07-22-21

**Diagnosis:**  
F80.89 Other developmental disorders of speech and language

**PROGRESS NOTE:**

Strengths	Comment
Attention	
Cooperative	
Happy	
Highly Motivated	

Family Strengths	Comment
Comforts Child	
Good Carryover	
Involved	
Observant	
Supportive	

Attendance: Consistent

Attendance to therapy has been consistent. Parents continue to adhere to all cancellation policies and procedures.

Clayton Test, an eleven year old boy, continues to present with delays across articulation, receptive language, expressive language, and pragmatic language skills. Based on formal and informal assessment, the need for therapeutic support is warranted at this time.

1: 1

Save and Sign Off Save and Mark Reviewed Save and Return to Note Save and Exit

Shortcut Alt+S (Alt+S)



**Progress Note Procedure for Speech Language Pathologists**

- Be sure to give the note a read-through to ensure no glaring typos or errors before signing off on the document. This is a last impression a doctor, family, or insurance reviewer will be seeing from us, so take care in your review.
- If a parent/caregiver requests to have the progress 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.
- NOTE: Do not sign off on a client's daily note if they have an open evaluation or progress note. When you see a client for a daily treatment session who has a re-evaluation open, do not address or comment on ANY goals in the daily note until the re-evaluation is signed off. This causes issues for NEW, MET, or DISCONTINUED goals not to be able to roll forward automatically. While the re-evaluation is "open," please input your data into the assessment portion. Once the re-evaluation or progress note has been signed off, you can then address the goals and add your data to the short- or long-term goals and comment boxes and sign off on the note.

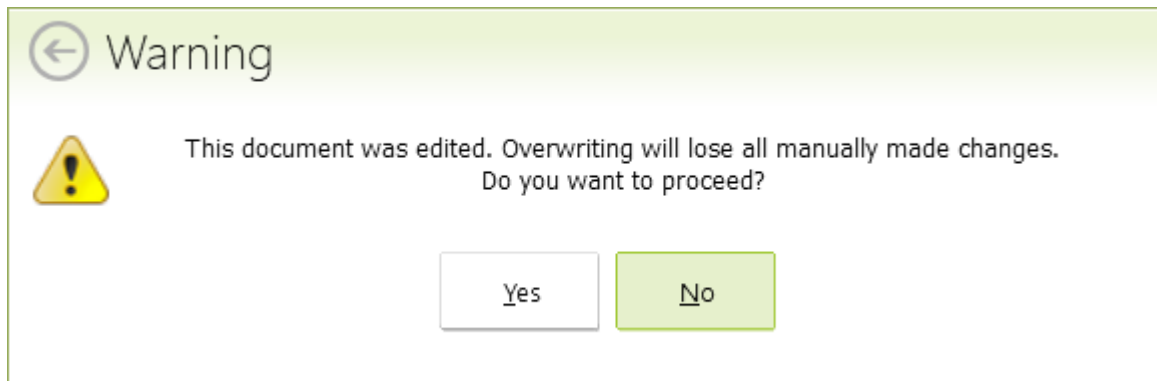
**Cosigns:**

24. When starting as a clinician here at AASL, all documentation will require a cosign. Upon your completion/sign off of a note, it will be sent to someone in Quality Division for review.
25. Cosigns are required for the purposes of ensuring consistency of documentation across the team. Additionally, TRICARE does require a cosign until a clinician becomes an approved provider.
26. Once a note is signed, it will be removed from the Cosignee's Dashboard onto the Cosigner's dashboard. Daily notes should be completed within two business days, progress notes or discharge notes within 2-4 business days, and evaluations/re-evaluations within two weeks.
27. If there are any edits that need to be made to documentation, the Cosigner will send an email outlining specific feedback. The cosigner will also designate a time which within these edits need to be made. If no time frame is specified, changes must be made within 48 hours of receiving this feedback to ensure timely completion of documentation.
28. Please do all edits within the note template/detail. Do not edit the final draft page. Edits made in the final draft page result in a change to the note that prevents billing from adding charges. Billing will not be able to post charges until signed by cosigner if this occurs. It will look like this:



## ALL ABOUT SPEECH & LANGUAGE

### **Progress Note Procedure for Speech Language Pathologists**



29. Tips for optimizing the cosign routine:

- Familiarizing yourself with procedures as outlined in the Therapist Hat Pack
- Being proactive about seeking feedback may help reduce the time it takes for editing/completing documentation
- If you want feedback prior to signing a note, please communicate this to the Quality Division in a timely fashion so there is ample time for review.

#### Shared Clients:

30. Often time clinicians will “share” a client (i.e Billy is seen by Ms. A Monday and Ms.B Wednesday). Please be sure to consult with the other treating clinician regarding data collection for continuity of care purposes.