



Progress Note AASL Procedure for Occupational Therapists

Progress Notes AASL Procedure for Occupational Therapists

Table of Contents

Tracking Progress Note Due Dates	2
Caseload Tab.....	3
Progress Note Tab.....	7
Treatment Plan Tab	11
Recommendation/Plan Tab	22
Discharge Planning.....	23
Charges	25



Progress Note AASL Procedure for Occupational Therapists

1. Tracking Progress Note Due Dates

- It is the responsibility of the treating therapist(s) to:
 - track due dates for re-evaluations/progress notes
 - keep their dashboard up-to-date (i.e., remove discharged or covered clients)
 - ensure due dates are accurate (i.e., conversion note clients require manual updates)
- To track upcoming Progress Notes and Re-evaluations, use the chart below:

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 progress notes are missed. Change appointment type in Raintree to PNOT3 or PNOT6 accordingly for the appointment with the date closest to when the Progress Note is due (not after due date).

<u>Date to start scheduling</u>	<u>Upcoming Re-eval/Progress Note Dates</u>
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 AASL Procedure for Occupational Therapists

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

2. Caseload Tab

The screenshot shows the 'Case Load' tab in the software. The table below represents the data visible in the interface:

Patient Name	Case Name	Case	End	Auth End	rem	Rx End	rem	Next Visit	Last Visit	#	Next Due	#	Next MD
Clayton Test	Occupational Thera...	OT001	03-06-23	16						0	01-17-23 PN ...		

The 'Next Due' column for the 'Clayton Test' case is circled in red in the original image.

- Use dashboard to determine what progress notes are upcoming
- EMR system will also auto-prompt you when you log into daily notes when progress notes are due and will auto-change the note type for you if you complete during a treatment session OR you can go in and change the note type under TYPE to Progress note with OT Standard.



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

Test, Clayton | All Providers | Station: 8 | allaboutspeech.raintreinc.com:10056

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

Patient Information
 Patient: Clayton Test
 DOB: 03-01-10 Age: 12

Histories | Progress Note Evaluation Services ST Evaluations

☐ 92521 Eval of Speech
☐ 92522 Eval ST Sound
☐ 92523 Eval Sound Production
☐ 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

Additional Services
☐ Parent/Therapist Interview
☐ Home Visit
☐ Screening
☐ Late Fee (10 Min)

Therapy Procedures
 Enter 15 Min increments
☐ 97150 Group
☐ 97530 Therapeutic Activity
☐ Therapeutic Activities 30 Min-SP
☐ Therapeutic Activities 45 Min-SP
☐ Therapeutic Activities 60 Min-SP
☐ 92507 Speech/Hear Therapy 30 Min
☐ Speech/Hearing Therapy 45 Min-SP
☐ Speech/Hearing Therapy 60 Min-SP

Diagnosis 1-4
 1 F80.89 Other developmental disorder...
 2
 3
 4

Time In: **Time Out:**
Total Minutes: **Timed:** **Untimed:**
Nonbillable: **Treatment Time:** 0

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

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

Posting Information
 Posted By:
 Billed: 0.00 Cosigner:
 Expected: 0.00 Bill Doc:
 POS: Bill Loc:

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

Case Information

#	Type	Case Name	Start	End	DOI	Primary Diagnosis	Primary Payor	nextpr
ST002	LTERM	Speech Therapy	01-27-22				A Tricare East Region - T...	09-23-23
ST001	LTERM	Speech Therapy	03-10-21	09-01-21		Other developmental disor...	A Tricare East Region - T...	09-06-21
OT001	LTERM	Occupational Therapy	02-15-22			Delayed milestone in child...	A Tricare East Region - T...	01-17-23

☐ Hide Closed / Discharged Cases

Visit History

Date	Time	Template	Description	Case Name	Provider Name	Loc	Case	Signed	Posted	Post Rev	Amended
03-27-23	08:45a	LINOT	Progress Note	Speech Therapy	Baylee Skjefte, COTA/L	VALFL	ST002				
03-24-22	09:53a	INOTE	Interim Note			VALFL	00000		NV		
09-07-21	12:47p	INOTE	Interim Note			VALFL	00000		NV		
09-01-21	11:35a	LINOT	Discharge Note	Speech Therapy	Jenna Lowrey, MS CCC-SL...	VALFL	ST001		NV		
08-24-21	01:41p	INOTE	Interim Note		Madison Jackson, M.S., C...	VALFL	00000		NV		
05-12-21	10:08a	INOTE	Interim Note			VALFL	00000		NV		
03-10-21	09:00a	LINOT	Initial Evaluation	Speech Therapy	Jenna Lowrey, MS CCC-SL...	VALFL	ST001		\$		
07-22-20	03:00p	INOTE	Interim Note			VALFL	00000		NV		
07-22-20	02:59p	INOTE	Interim Note			VALFL	00000		NV		

chart and hit A to add under Visit History, then select Long-Term Therapy Note. When it

Page 2 of 27 813 words Text Predictions: On Accessibility: Unavailable

77°F Heavy t-storms 5:30 PM 5/24/2023

- 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



Test, Clayton

Help

Case < Menu Picture ▾ Waiting List

Visit Info Therapy Tracking Documents/Tasks Communication Admin All Records RTConnect History

Case Information

#	Type	Case Name	Start	End	DOI	Primary Diagnosis	Primary Payor	nextpr	visitPr
ST002	LTERM	Speech Therapy	01-27-22				A Tricare East Region - T...	09-23-23	
ST001	LTERM	Speech Therapy	03-10-21	09-01-21		Other developmental disor...	A Tricare East Region - T...	09-06-21	
OT001	LTERM	Occupational Therapy	02-15-22			Delayed milestone in child...	A Tricare East Region - T...	01-17-23	

☐ Hide Closed / Discharged Cases

Active Expired On Hold

Visit History

Date Range	Time	Template	Location	Provider	Case	Signed	Posted	Post Rev	Amended
03-27-23	08:45a	LTI	therapy	Baylee Skjefte, COTA/L	VALFL ST002				
03-24-22	09:53a	INC			VALFL 00000		NV		
09-07-21	12:47p	INC			VALFL 00000		NV		
09-01-21	11:35a	LTI	therapy	Jenna Lowrey, MS CCC-SL...	VALFL ST001	•	NV		
08-24-21	01:41p	INC		Madison Jackson, M.S., C...	VALFL 00000		NV		
05-12-21	10:08a	INC			VALFL 00000		NV		
03-10-21	09:00a	LTI	therapy	Jenna Lowrey, MS CCC-SL...	VALFL ST001	•	\$		
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
- Consultation Note
- Group Attendance
- Group Attendance Ticket
- Group Member Visit
- Group Periodical Posting Ticket
- Group Visit
- Interim Note
- Long Term Therapy Note
- Service Ticket



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

Test, Clayton

Save Cancel Help

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 13y, Case ST002

Record Information: Date 03-27-23, Time 08:45a, Therapist BASK, Assigned BASK, Loc VALFL, Ref 00011, Type Progress Note

Load Template: IEVAL Save

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

Charges: Miscellaneous Select Service, Chg Exp

Additional Services: Services / Supplies, Unit Amount

Collect Payment: Amount, Copy 0.00, Ref#, Type, Method, Type, Check #, Receipt, Post payment

Therapy Procedures: Enter 15 Min increments, Chg Exp

97150 Group
97530 Therapeutic Activity
Therapeutic Activities 30 Min-SP

Insurance / Payor Information

Posting Information

Page 4 of 28 813 words Text Predictions: On Accessibility: Unavailable

77°F Heavy t-storms

Search

5:35 PM 5/24/2023

Test, Clayton

Save Cancel

Service Ticket for Clayton Test - Visit: 2 Payor: TRICA 10002 Tricare East Region

Patient Information: Patient Clayton Test, MR # 0001839, DOB 03-01-10, Age 11y 8m, Case OT001

Record Information: Date 11-04-21, Time 10:39a, Therapist BASK, Assigned BASK, Loc STMPA, Ref 00011, Type Service Ticket

Load Template: Save

OT Standard
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

Charges: Miscellaneous Select Service, Chg Exp

Additional Services: Services / Supplies, Unit Amount

Collect Payment: Amount, Copy 0.00, Ref#, Type, Method, Type, Check #, Receipt, Post payment

Therapy Procedures: Enter 15 Min increments, Chg Exp

97150 Group
97530 Therapeutic Activity
Therapeutic Activities 30 Min-SP
Therapeutic Activities 45 Min-SP
Therapeutic Activities 60 Min-SP
92507 Speech/Hear Therapy 30 Min
Speech/Hearing Therapy 45 Min-SP

Insurance / Payor Information: A 10002 Tricare East Region, TRICA

Posting Information: Posted By, Billed 0.00, Expected 0.00, Cosigner DIMC, Bill Doc DIMC, Bill Loc

Main Menu: Dashboard, Scheduler, Patient Files, Daily Ledger, Reports / Forms, Connect, Tables, Utilities, What's Up, Exit

70°F Partly sunny

10:39 AM 11/4/2021

- Then go through the tabs and update across the following:
 - Progress Note
 - Treatment Plan
 - Recommendations/Plan
 - Charges



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

3. Progress Note Tab

All About Speech & Language - dat User: BSjkefte Station: 5 allaboutspeech.raintreinc.com:10056

Test, Clayton

Save Cancel Add Edit Delete Help

Patient Information
Patient: Clayton Test MR #: 0001839
DOB: 03-01-10 Age: 13y Case: OT001

Record Information
Date: 03-27-23 Time: 08:45a
Therapist: BASK Assigned: BASK
Loc: VALFL Ref: 00011
Type: Progress Note
OT Standard

Load Template Save

Histories Progress Note Treatment Plan Recommendations/Plan Charges Tracking

Clinical Impression

Strengths

Strengths	Comment
Good Play Skills	
Happy	
Highly Motivated	
Playful and Motivated	
Supportive Concern...	

Family Strengths

Family Strengths	Comment
Advocates for Child	
Comforts Child	
Good Carryover	

Contraindications

Contraindications a... Alert

Status

Treatment Frequency:
Attendance: Consistent

Assessment

Since the start of this POC, Clayton has met 3 short term goals and 1 long term goals. Clayton is eager to participate in all directed tasks

Diagnosis 1-4 5-8 9-C

- 1 R62.0 Delayed milestone in childhood
- 2 F82 Specific developmental disorder of motor fu...

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

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
------------------	---------

Contraindications

Contraindications and Precautions

Status

Treatment Frequency:
Attendance:

Assessment

Diagnosis 1-4 5-8 9-C

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



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

Test, Clayton

Save Cancel Add Edit Delete Help

Patient Information
Patient: Clayton Test
DOB: 03-01-10 Age: 13y ... Case: OT001

Record Information
Date: 03-27-23 Time: 08:45a
Therapist: BASK Assigned: BASK
Loc: VALFL Ref: 00011 Type: Progress Note
OT Standard

Load Template
Save

Histories Progress Note Treatment Plan Recommendations/Plan Charges Tracking

Clinical Impression

Strengths
Strengths Comment
Good Play Skills
Happy
Highly Motivated
Playful and Motivated
Supportive Conc...

Family Strengths
Family Strengths Comment
Advocates for Child
Comforts Child
Good Carryover

Status
Treatment Frequency:
Attendance: Consistent

Assessment
Since the start of this POC, Clayton has met 3 short term goals and 1 long term goals. Clayton is eager to participate in all directed tasks

Strengths
Favorites All Items
Quick find:
☐ Age Appropriate Language Skills
☐ Age Appropriate Speech 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

1 R62.0 < Delayed milestone in childhood
2 F82 < Specific developmental disorder of motor fu...

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
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



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

Test, Clayton

Save Cancel Add Edit Delete Help

Patient Information
 Patient: Clayton Test
 MR #: 0001839
 DOB: 03-01-10 Age: 13y ... Case: OT001

Record Information
 Date: 03-27-23
 Time: 08:45a
 Therapist: BASK
 Assigned: BASK
 Loc: VALFL
 Ref: 00011
 Type: Progress Note
 OT Standard

Load Template
 Save

Histories Progress Note Family Strengths

Clinical Impressions
 Strengths
 Good Play Skills
 Happy
 Highly Motivated
 Playful and Motivated
 Supportive Concern...

Family Strengths
 Family Strengths
 Advocates for Child
 Comforts Child
 Good Carryover

Contraindications
 Contraindications a... Alert

Status
 Treatment Frequency:
 Attendance: Consistent

Assessment
 Since the start of this POC, Clayton has met 3 short term goals and 1 long term goals. Clayton is eager to participate in all directed tasks

Diagnosis 1-4 5-8 9-C
 1 R62.0 Delayed milestone in childhood
 2 F82 Specific developmental disorder of motor fu...

- Strength and family strengths: This will auto-populate from the evaluation. Add any additional strengths if you feel are applicable.

Test, Clayton

Save Cancel Help

Strengths
 Strengths
 Good Play Skills
 Happy
 Highly Motivated
 Playful and Motivated
 Supportive Concern...

Family Strengths
 Family Strengths
 Advocates for Child
 Comforts Child
 Good Carryover

Contraindications
 Contraindications a... Alert

Status
 Treatment Frequency:
 Attendance: Consistent

Assessment
 Clayton is eager to participate in all directed tasks
 Fine and Visual Motor
 At the initial eval, Clayton was unable to copy pre-writing development. He is now able to NPC

Diagnosis 1-4 5-8 9-C
 1 R62.0 Delayed milestone in childhood
 2 F82 Specific developmental disorder of motor fu...
 3
 4

Comments
 Consistent
 Inconsistent

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

- Status:



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

- Treatment Frequency- Select from the drop-down box if the client is consistent or inconsistent. In the Comment, feel free to comment on how the clients attendance is. For example, if “Limited progress towards goals 2/2 high cancellation rate”.

The screenshot shows the 'All About Speech & Language' software interface. The top bar includes the user name 'BSKjette', station '5', and the URL 'allaboutspeech.raintreeinc.com:10056'. The main form is titled 'Test, Clayton' and has tabs for 'Save', 'Cancel', and 'Help'. The form is divided into several sections:

- Strengths:** A list of strengths including 'Good Play Skills', 'Happy', 'Highly Motivated', 'Playful and Motivated', and 'Supportive Concern...'. There are icons for adding, deleting, and moving items.
- Family Strengths:** A list of family strengths including 'Advocates for Child', 'Comforts Child', and 'Good Carryover'. There are icons for adding, deleting, and moving items.
- Status:** A section with a 'Treatment Frequency' dropdown set to 'Consistent' and a 'Comments (5)' text area. This section is circled in red.
- Assessment:** A section with a text area containing the text: 'Clayton is eager to participate in all directed tasks. Fine and Visual Motor. At the initial eval. Clayton was unable to copy pre-writing development. He is now able to NPC'. This section is circled in red.
- Contraindications:** A section with a 'Contraindications a...' dropdown and an 'Alert' button.
- Diagnosis 1-4:** A section with a list of diagnoses: '1 R62.0 Delayed milestone in childhood', '2 F82 Specific developmental disorder of motor fu...', '3', and '4'.

At the bottom of the form, there are buttons for 'All Previous Notes', 'Initial Evaluation', 'Progress / Re-Evaluations', 'Last Note', and 'Update Rollforward Data'. The bottom of the screen shows a Windows taskbar with the date '5/31/2023' and time '10:08 AM'.

- **Assessment:** Right click on the box below “Assessment” and click “Edit”. This will open up the text box. Here you will write a narrative note comparing any progress made from the evaluation and current level of status on the goal areas. See your CM to provide you examples.



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

4. Treatment Plan Tab

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: 13y Case: OT001

Record Information
 Date: 03-27-23
 Time: 08:45a
 Therapist: BASK
 Assigned: BASK
 Loc: VALFL
 Ref: 00011
 Type: Progress Note
 OT Standard

Goals

#	Goals	Revised	Time	Start	End	Status	Progress	CPT	Duration
001	Clayton will NPC his name onto a single line with <...	03-27-23	08:45a	03-27-22		Ongoing	0%		

Select Goals to Include

Treatment Plan Summary
 Pronosis for Achieving Goals: Short term goals are anticipated to be achieved in

- Click on each LTG and then hit address and for each STG. Add in commentary of progress for each short and long term goal. Note the box has text limits so be to the point when commenting on each STG objective! *You must DOUBLE CLICK to edit any portion of a row for a STG

*****REPORTING PROGRESS*****

- Update and/or add any new goals (COTAs, check in with OTR signing off on your notes , if warranted, or change the status of the goal per the drop down in this section (i.e. Ongoing, Hold, Discontinued, Met etc.) – COTAs will meet & discuss goals w/ OTR during weekly meetings.
- Starting a month out, you MUST include the following information in your daily note:
- Date & assist level related to that goal (example below)



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

Test, Clayton

Save Cancel Add Edit Delete Help

Patient: Clayton Test MR #: 0001839 Case #: OT001 Time: 08:45a Revised: 03-27-23

Category / Progress
LT Goal #: OT001-001 Category: OT003 Fine Motor and Visual Motor

Long Term Goal (Alt L for List)
Clayton will NPC his name onto a single line with <3 line regard errors on 3/4 sessions.
PN: Clayton is able to NPC his name using 1" boxes to aid in letter sizing and consistency

Effective Dates / Status
Start Date: 03-27-22 End Date: Status: Ongoing

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

Short Term Goals
Status: Short Term Goal
Ongoing Clayton will cut simple geometric ...

Comments
PN: 4/28 cut with max A
4/30: mod A
5/2 min A

Page 12 of 25 792 words Text Predictions: On Accessibility: Investigate 72°F Sunny 9:21 AM 5/25/2023

Test, Clayton

Save Cancel Add Edit Delete Help

Patient Information
Patient: Clayton Test MR #: 0001839 Case #: OT001 Time: 08:45a Revised: 03-27-23

Category / Progress
LT Goal #: OT001-001 Category: OT003 Fine Motor and Visual Motor

Long Term Goal (Alt L for List)
Clayton will NPC his name onto a single line with <3 line regard errors on 3/4 sessions.
PN: Clayton is able to NPC his name using 1" boxes to aid in letter sizing and consistency

Short Term Goals
Status: Ongoing
Short Term Goal: Clayton will cut simple geometric shapes wi
Comments: PN: Clayton is able to cup shapes with max A. Continue STG
Start Date: 3/27/22 End Date: Addressed:

Page 12 of 25 Russell 2000 -1.62% 11:42 AM 5/31/2023

- Upon the date of the progress note, this prior information will be used to report most recent progress. At this time, you will remove these comments (located in the short term goal comment box, they should be populating from the previous month's daily notes) and provide data for an accurate goal measure.



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

All About Speech & Language - dat User: BSkjefte Station: 5 allaboutspeech.raintreinc.com:10056

Test, Clayton

Save Cancel Add Edit Delete Help

Patient Clayton Test MR # 0001839 Case # OT001 Time 08:45a Revised 03-27-23

Category / Progress
LT Goal # OT001-001 Category OT003 Fine Motor and Visual Motor

Long Term Goal (Alt L for List)
Clayton will NPC his name onto a single line with <3 line regard errors on 3/4 sessions.
PN: Clayton is able to NPC his name using 1" boxes to aid in letter sizing and consistency

Effective Dates / Status
Start Date 03-27-22 End Date
Status Ongoing

Daily Progress / Activity
Progress 0% CPT Duration

Short Term Goals

Status	Short Term Goal	Comments	Start Date	End Date	Ad...
Ongoing	Clayton will cut simple geometric ...	PN:Clayton is able to cut cur...	3/27/22		

PN:Clayton is able to cut curved lines using spring loaded scissors with max A for paper awareness. Continue STG

Page 11 of 28 792 words Text Predictions: On Accessibility: Investigate

72°F Sunny 9:17 AM 5/25/2023

*****Commenting on going for Ongoing*****



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

All About Speech & Language - dat User: BSkjette Station: 5 allaboutspeech.rainforestinc.com:10056

Test, Clayton

Save Cancel Add Edit Delete Help

Long Term Goals DOB: 03-01-10 Age: 13 yrs 2 mos

Patient Information
Patient Clayton Test MR # 0001839 Case # OT001 Time 08:45a Revised 03-27-23

Category / Progress
LT Goal # OT001-001 Category OT003 Fine Motor and Visual Motor

Long Term Goal (Alt L for List)
Clayton will NPC his name onto a single line with <3 line regard errors on 3/4 sessions.
PN: Clayton is able to NPC his name using 1" boxes to aid in letter sizing and consistency

Short Term Goals

Status Ongoing

Short Term Goal Clayton will cut simple geometric shapes with max A 4/...

Comments PN: Clayton is able to cup shapes with max A. Continue STG

Start Date 3/27/22

End Date

Addressed

OK

Select Goals to Include Unselect All

Treatment Recap UNK

Russell 2000 -1.62%

11:42 AM 5/31/2023

All About Speech & Language - dat User: BSkjette Station: 5 allaboutspeech.rainforestinc.com:10056

Test, Clayton

Save Cancel Add Edit Delete Help

Long Term Goals DOB: 03-01-10 Age: 13 yrs 2 mos

Patient Information
Patient Clayton Test MR # 0001839 Case # OT001 Time 08:45a Revised 03-27-23

Category / Progress
LT Goal # OT001-001 Category OT003 Fine Motor and Visual Motor

Long Term Goal (Alt L for List)
Clayton will NPC his name onto a single line with <3 line regard errors on 3/4 sessions.
PN: Clayton is able to NPC his name using 1" boxes to aid in letter sizing and consistency

Short Term Goals

Status Ongoing

Short Term Goal Clayton will cut simple geometric shapes with max A 4/...

Comments PN: Clayton is able to cup shapes with max A. Continue STG

Start Date 3/27/22

End Date

Addressed

OK

Select Goals to Include Unselect All

Treatment Recap UNK

Russell 2000 -1.62%

11:42 AM 5/31/2023



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

*****CHANGING A GOAL TO MET*****

The screenshot shows the 'Short Term Goals' dialog box in the AASL software. The 'Status' dropdown is set to 'Met'. The 'Short Term Goal' text field contains 'Pin A for paper management on 3/4 sessions.' The 'End Date' field is set to 3/27/23. Red arrows highlight these three fields.

- If a short- or long-term goal is being discontinued or met, be sure to add an end date.

*****COMMENTING ON LTGS*****

The screenshot shows the 'Long Term Goal' (LT Goal # ST001-003) in the AASL software. The 'Effective Dates / Status' section shows the 'Status' dropdown set to 'Met'. A red arrow points to this dropdown. The 'Long Term Goal' text field contains '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'.



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

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

Patient Information
Patient: Clayton Test
MR #: 0001839
Case #: OT001
Time: 09:53a
Revised: 10-28-21

Category / Progress
LT Goal #: OT001-001
Category: [Dropdown]

Long Term Goal (Alt L for List)
Clayton will independently complete an age-expected ADL skill with use of adaptive strategies as needed as demonstrated in 80% of opportunities.
COMMENT HERE--- "MET" -OR- "ONGOING- COMMENT ON CURRENT LEVEL OF PROGRESS"

Effective Dates / Status
Start Date: 10-28-21
End Date: [Dropdown]
Status: Ongoing

Daily Progress / Activity
Progress: [Dropdown] CPT: [Dropdown] Duration: [Dropdown]

Short Term Goals

Status	Short Term Goal	Comments	Start Date	End Date	Ad...
Ongoing	Clayton will complete upper and lower...	Clayton completes upper and lower...	10-28-21		Yes

- DO NOT select any percentage for the LTG



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

Test, Clayton Speech, Holly

Save Cancel

Category / Progress
LT Goal # OT001-001 Category

Long Term Goal (Alt L for List)
Clayton will independently complete an age-expected ADL skill with use of adaptive strategies as needed as demonstrated in 80% of opportunities.
COMMENT HERE--- "MET" -OR- "ONGOING- COMMENT ON CURRENT LEVEL OF PROGRESS"

Effective Dates / Status
Start Date 10-28-21 End Date
Status Ongoing

Daily Progress / Activity
Progress CPT Duration

Short Term
0%
10%
20%
25%
30%
40%
50%
60%
70%
75%
80%
90%
100%

Select Goals to Include
Unselect All

Treatment Recap
Total 0

Rollforward from a previous note

gnoff
r discharge reason

n discontinued
d/met goals

QAD Copy

78°F Cloudy 10:21 AM 10/28/2021

***** ADDING GOAL *****

Test, Clayton Dashboard

Save Cancel Add Edit Delete Find Print

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 Therapist JEGR Loc VALFL Type Progress Note
Time 02:11p Assigned JEGR Ref 00011 SLT Standard

Load Template
Save

Goals
Goals Revised Start End Status Progress CPT Duration
001 Demonstrate improved semantic skills by labeling ta... 03-03-21 03-03-21 New 0%
002 Demonstrate improved syntactic skills by labeling/u... 03-03-21 03-03-21 New 0%

Add
Edit
Delete
Find
Print
Copy cell
Copy row
Copy selected rows

Select Goals to Include
Unselect All Show met goal

Treatment Recap
UNK 0

Prognosis
Go
Fair
Poor

Goal updated / added this visit
Goal that has been met
Goal that has been discontinued
Show discontinued/met goals

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

2:17 PM 3/3/2021



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

Test, Clayton Dashboard

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

Patient Information
Patient Clayton Test MR # 0001839 Case # ST001 Time 02:11p Revised 03-03-21

Category / Progress
LT Goal # ST001-003 Category

Long Term Goal (Alt L for List)

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	Ad...
--------	-----------------	----------	------------	----------	-------

Goal that has been discontinued
Show discontinued/met goals

Test, Clayton Dashboard

Progress Note Long Term Goals - DOB: 03-01-2010 Age: 11 yrs 8 mos

Patient Information
Patient Clayton Test MR # 0001839 Case # OT001 Time 10:39a Revised 11-04-21

Category / Progress
LT Goal # OT001-002 Category

OT Categories

Code	Description
OT001	Postural Control
OT002	Upper Extremity Strength and Control
OT003	Fine Motor and Visual Motor
OT004	Transfers
OT005	Range of Motion
OT006	Activities of Daily Living
OT007	Adaptive Equipment
OT008	Attention
OT009	Play
OT010	Floor Mobility
OT011	Motor Planning

Select Goals to Include
Select All

Treatment Recap

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

discontinued
3/met goals



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

Test, Clayton

Save Cancel

Main Menu

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

Patient Information

Patient Clayton Test MR # 0001839 Case # OT001 Time 10:39a Revised 11-04-21

Category / Progress

LT Goal # OT001-002 Category OT003 Fine Motor and Visual Motor

Long Term Goal (Alt L for List)

Clayton will improve his fine and visual motor skills by cutting a 6 inch line with min assist on 80% of opportunities

Effective Dates / Status

Start Date 11-04-21 End Date Status New

Daily Progress / Activity

Progress 0% CPT Duration

Short Term Goals

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

Select Goals to Include

Select All

Treatment Recap

Add row

Test, Clayton

Save Cancel Add Edit Delete

Main Menu

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

Patient Information

Patient Clayton Test MR # 0001839 Case # OT001 Time 10:39a Revised 11-04-21

Category / Progress

LT Goal # OT001-002 Category OT003 Fine Motor and Visual Motor

Long Term Goal (Alt L for List)

Clayton will improve his fine and visual motor skills by cutting a 6 inch line with min assist on 80% of opportunities

Effective D

Start Date

Status

Daily Prog

Progress

Short Term

Status

Start Date

End Date

Ad...

n discontinued

d/met goals

Status

Quick find:

- ☐ Discontinued
- ☐ Met
- ☒ New
- ☐ Ongoing
- ☐ Partially Met

Save



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

Test, Clayton

Save Cancel Add Edit Delete

Main Menu

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

Patient Information

Patient Clayton Test MR # 0001839 Case # OT001 Time 10:39a Revised 11-04-21

Category / Progress

LT Goal # OT001-002 Category OT003 Fine Motor and Visual Motor

Long Term Goal (Alt L for List)

Clayton will improve his fine and visual motor skills by cutting a 6 inch line with min assist on 80% of opportunities

Effective Dates / Status

Start Date 11-04-21 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					

Select Goals to Include Select All

Treatment Recap

70°F Partly sunny 10:55 AM 11/4/2021

**Right click to edit and type in the goal

Test, Clayton

Save Cancel Add Edit Delete

Main Menu

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

Patient Information

Patient Clayton Test MR # 0001839 Case # OT001 Time 10:39a Revised 11-04-21

Category / Progress

LT Goal # OT001-002 Category OT003 Fine Motor and Visual Motor

Long Term Goal (Alt L for List)

Clayton will improve his fine and visual motor skills by cutting a 6 inch line with min assist on 80% of opportunities

Effective Dates / Status

Start Date 11-04-21 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					

Select Goals to Include Select All

Treatment Recap

70°F Partly sunny 10:56 AM 11/4/2021



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

Test, Clayton

Save Cancel Add Edit Delete

Main Menu

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

Patient Information

Patient: Clayton Test
DOB: 03-01-10 Age: 11 yrs 8 mos

MR #: 0001839 Case #: OT001 Time: 10:39a Revised: 11-04-21

Category / Progress

LT Goal #: OT001-002 Category: OT003 Fine Motor and Visual Motor

Long Term Goal (Alt L for List)

Clayton will improve his fine and visual motor skills by cutting a 6 inch line with min assist on 80% of opportunities

Effective Dates / Status

Start Date: 11-04-21 Status: New

Daily Progress / Activity

Progress: 0% Short Term Goal: Clayton will lace beads onto a firm tip string

Short Term Goals

Status: New

Start Date: 11/4/21

End Date:

Addressed:

OK

Test, Clayton

Save Cancel

Main Menu

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

Patient Information

Patient: Clayton Test
DOB: 03-01-10 Age: 11 yrs 8 mos

MR #: 0001839 Case #: OT001 Time: 10:39a Revised: 11-04-21

Category / Progress

LT Goal #: OT001-002 Category: OT003 Fine Motor and Visual Motor

Long Term Goal (Alt L for List)

Clayton will improve his fine and visual motor skills by cutting a 6 inch line with min assist on 80% of opportunities

Effective Dates / Status

Start Date: 11-04-21 End Date: Status: New

Daily Progress / Activity

Progress: CPT Duration: 11-04-21

Short Term Goals

Status	Short Term Goal	Comments	Start Date	End Date	Ad...
New	Clayton will lace beads onto a firm tip...		11/4/21		

Short Term Goal

- You can get with your CM to get current clients as examples,



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

5. Recommendation/Plan Tab

The screenshot displays the 'Recommendations/Plan' tab in the AASL software. The patient is Clayton Test (MR # 0001839, DOB 03-01-10, Age 11y 2d, Case ST001). The record date is 03-03-21, and the therapist is JEGR. The recommendation is set to 'Continue therapy', and the frequency is 2 visits per week for 52 weeks. The tolerance for treatment is set to 'fair'. The discharge planning section is also visible.

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

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

Frequency / Duration
Current Frequency/Duration: 2 visits per week for 52 weeks
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
Discharge Planning Comments

- Recommendation: Select continue therapy or discharge
- Select the parent consent box
- Select tolerance for treatment



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

6. Discharge Planning

Test, Clayton | All About Speech & Language RPM - dat | User: JGraepel | Station: 6 | allaboutspeech.raintreeinc.com:10056

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

Discharge Planning
Criteria for discharge
[] Add row

Discharge Planning Comments

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

Test, Clayton | All About Speech & Language RPM - dat | User: JGraepel | Station: 6 | allaboutspeech.raintreeinc.com:10056

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

Discharge Planning
Criteria for discharge
[] Add row

Discharge Planning Comments

Criteria for discharge
Favorites All Items
Quick find:
☐ Client can continue therapy and maintain status with a home program
☐ Client has achieved maximum functional benefit from therapy
☐ Client has adapted to impairment with assistive equipment
☐ Client has returned to baseline function
☐ Client is able to perform ADLs with minimal to no assistance
☒ Client no longer demonstrates functional impairment or delay
☒ Plateau in response to therapy/lack of progress towards goals
☒ Testing shows client no longer has a developmental delay
☒ The responsible adult has had instruction on the home program



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

Test, Clayton

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.

Discharge Planning
Criteria for discharge

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

Criteria for discharge

- ☐ Client can continue therapy and maintain status with a home program
- ☐ Client has achieved maximum functional benefit from therapy
- ☐ Client has adapted to impairment with assistive equipment
- ☐ Client has returned to baseline function
- ☐ Client is able to perform ADLs with minimal to no assistance
- ☒ Client no longer demonstrates functional impairment or delay
- ☒ Plateau in response to therapy/lack of progress towards goals
- ☒ Testing shows client no longer has a developmental delay
- ☒ The responsible adult has had instruction on the home program

Save (F10)

Include attendance data on the POC ☐

Buttons: All Previous Notes, Initial Evaluation, Progress / Re-Evaluations, Last Note, Update Rollforward Data, POC signed, No Active IFSP, Patient Menu, Treatment Summary, Plan of Care, Preview, Save



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

7. Charges

- 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

*****DURING SESSION WITH CHARGES SELF PAY*****

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

- Evaluation Services:** Includes 'OT Evaluations' with options for 97165 (Low Complexity), 97166 (Moderate Complexity), 97167 (High Complexity), and 97168 (Re-Evaluation). There is also an option for 'Evaluation Done Outside'.
- Therapy Procedures:** Under the heading 'Enter 15 Min increments', there are checkboxes for various services including 97150 Group, 97530 Therapeutic Activity, and several 92507 Speech/Hear Therapy sessions (30, 45, 60, 90 minutes) and Group Speech Therapy.
- Miscellaneous Select Service:** Includes checkboxes for COVID-19 PPE, Consultation, Family/Therapist Interview, Parent/Therapist Interview, Home Visit, Screening, and Late Fee (10 Min).
- Additional Services / Supplies:** A table with columns for 'Unit' and 'Amount'.
- Insurance / Payor Information:** Includes fields for 'Bill To', 'Payor Set', and checkboxes for 'Returned Check Fee', 'Cancellation Fee', 'No Show Fee', 'No Visit', and 'No Service Ticket'.
- Diagnosis:** A section for entering diagnosis codes, with 'R13.11 Dysphagia, oral phase' entered in the first field.
- Collect Payment:** Includes fields for 'Amount', 'Type', 'Method', 'Check #', 'Copay' (0.00), 'Ref #', and 'Receipt'.
- Posting Information:** Includes fields for 'Posted By', 'Billed' (0.00), 'Expected' (0.00), 'POS', 'Cosigner' (DIMC), 'Bill Doc' (DIMC), and 'Bill Loc'.

A red arrow points to the 'Therapy Procedures' section, specifically to the 'Enter 15 Min increments' heading. The bottom of the screen shows a Windows taskbar with various application icons and a system tray indicating the time as 10:01 AM on 10/28/2021.



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

*****DURING SESSION WITH TRICARE INSURANCE*****

Test, Clayton

Save Cancel

Patient: Clayton Test MR # 0001839 Date: 10-28-21 Time: 09:53a Therapist: BASK Loc: STMPA Type: Discharge Note

OT Evaluations

Chg Exp

97165 - Eval Low Complexity

97166 - Eval Moderate Complexity

97167 - Eval High Complexity

97168 - Re-Evaluation

OT Standard

Required for Signoff

Please enter discharge reason

Diagnosis 1-4

1 R62.0 Delayed milestone in childhood

2

3

4

Time In: Timed

Time Out: Untimed

Total Minutes: Nonbillable

Check Units Treatment Time: 0

Location of Treatment

Collect Payment

Amount Copay 0.00

Type Ref#

Method Type

Check # Receipt

Post payment

Posting Information

Posted By

Billed 0.00 Cosigner DIMC

Expected 0.00 Bill Doc DIMC

POS Bill Loc

Posting Review

Show Charge Recap

Insurance / Payor Information

A 10002 Tricare East Region TRICA

Payor Set Skip Copay

Returned Check Fee

Cancellation Fee

No Show Fee

No Visit

No Service Ticket

Therapy Procedures

Enter 15 Min Increments

Chg Exp

97150 Group

97530 Therapeutic Activity

Therapeutic Activities 30 Min-SP

Therapeutic Activities 45 Min-SP

Therapeutic Activities 60 Min-SP

92507 Speech/Hear Therapy 30 Min

Speech/Hearing Therapy 45 Min-SP

Speech/Hearing Therapy 60 Min-SP

Speech/Hearing Therapy 90 Min-SP

Group Speech Therapy

Transfer Charges

77°F Rain coming 9:56 AM 10/28/2021

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

Test, Clayton

Save Cancel

Patient: Clayton Test MR # 0001839 Date: 03-02-21 Time: 01:15p Therapist: JEGRL Loc: VALFL Type: Progress Note

OT Evaluations

Chg Exp

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

OT Standard

Diagnosis 1-4

1 F80.89 Other developmental disorder...

2

3

4

Time In: Timed

Time Out: Untimed

Total Minutes: Nonbillable

Check Units Treatment Time: 0

Location of Treatment

Collect Payment

Amount Copay 0.00

Type Ref#

Method Type

Check # Receipt

Post payment

Posting Information

Posted By

Billed 0.00 Cosigner

Expected 0.00 Bill Doc

POS Bill Loc

Create Task

Show Charge Recap

Insurance / Payor Information

A 10002 Tricare East Region TRICA

Payor Set Skip Copay

Returned Check Fee

Cancellation Fee

No Show Fee

No Visit

No Service Ticket

Therapy Procedures

Enter 15 Min Increments

Chg Exp

97150 Group

97530 Therapeutic Activity

Therapeutic Activities 30 Min-SP

Therapeutic Activities 45 Min-SP

Therapeutic Activities 60 Min-SP

92507 Speech/Hear Therapy 30 Min

Speech/Hearing Therapy 45 Min-SP

Speech/Hearing Therapy 60 Min-SP

Speech/Hearing Therapy 90 Min-SP

Group Speech Therapy

Transfer Charges

AASL Therapist Hat V1 - Word 1:57 PM 3/2/2021



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

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 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

Refresh
End of D... (1) Review Pt P2...
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 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

All About Speech & Language RPM - dat User: JGraepel Station: 6 allaboutspeech.raintreinc.com:10056

File Edit Insert Format Paragraph View Tools Help

Tahoma 20

Progress Note

Date of Visit:	03-03-21	Therapist:	Jenna Graepel
Patient Name:	Test, Clayton	Referring MD:	Christopher Wilke
Patient #:	0001839		
Date of Birth:	03-01-2010		
Age:	11 years, 2 days	Certification Period:	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)

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



ALL ABOUT SPEECH & LANGUAGE

Progress Note AASL Procedure for Occupational Therapists

Date of Visit: 03-03-21 **Thera**
Patient Name: Test, Clayton **Refer**
Patient #: 0001839
Date of Birth: 03-01-2010 **Certif**
Age: 11 years, 2 days

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.

Enter Password

User ID: JEGR User Name: Jenna Graepel

Password: [REDACTED]

Signature Comment

☒ Save and Sign Off

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

- 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.

Updated June 2023