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On June 15, 2020, the Rehab Optimization project will be implemented, streamlining workflow. New documentation forms, a Multipatient Task List and tasking will be included with this optimization. This flyer will outline the new workflow for the Inpatient Physical, Occupational, and Speech Therapist.

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### Workflow for PT/OT/SLP

- The provider has entered a consult order for your discipline.
  - A task for the Evaluation will go to the Multipatient Task List (MPTL).
- From the MPTL, the therapist will locate the patient and double-click the **Evaluation** task to open the documentation form.
- **Daily Notes, Progress Notes, and the Discharge Summary** documentation forms will be accessed from the Adhoc folder.

**NOTE:** Documentation of charges occurs within the Evaluation, Daily Note, Progress Note, and Discharge Summary forms.

### Adhoc Folder Structure

- Each Therapy discipline will only see their own Note types in Adhoc.

### Documenting a Task from the MPTL

- **Double-click** the desired task to open up the documentation form.
- If all of the required documentation fields have been completed, the task on the MPTL will have a green check mark and have a status of **Complete**.



- **Refresh** the MPTL by clicking the **minutes ago** button to remove the task from the MPTL.
- Forms that do not have all required fields documented will go to the MPTL with a status of **In-Process**.
  - Clicking an **In-Process** task will open the previously started form.

### Evaluation Forms

Key information about the Evaluation form is listed below.

- Double-click the **Evaluation** task in the MPTL to document the Evaluation form.
  - Document the required fields and those sections that are applicable to the patient.
  - In the **Assessment** section, **Evaluation Complexity** will populate **Low, Moderate, or High Complexity** based on documentation in the Evaluation.
    - Documentation fields that feed into this calculation are:
      - **Examination of Body Systems** – located in the **Assessment** section.
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- **Clinical Decision Making** – located in the **Assessment** section.
- **History of Comorbidities/Personal Factors Impacting Plan of Care** – located in the **Past Medical History, Problems, and Diagnosis** section.
- **Presentation of Characteristics** – located in the **General Information** section.
- If the **Evaluation Complexity** calculation differs from what the therapist has documented, the therapist should review the documentation fields that contribute to the calculation and adjust as needed.

**NOTE:** **Speech Therapy does not have Evaluation Complexity in the Plan section.**

➤ **Documenting a Problem**

- Locate and open the **History, Problems** section.
- Use the **IMO search** field for entering a **new Problem**.
  - Right-click the newly added Problem to add details such as **Age** or **Date of Onset**.
- Click **+ Add** to search for Problems that do not come up in IMO Search.
- Problems should be added if the problem for which the patient is being seen for is not on the **Problem list**, and when the patient reports a new problem.

**NOTE:** **Therapists do NOT add a Problem under Diagnosis (Problem) being Addressed this Visit.**

➤ **Pain Screening-Primary**

- If Pain education is given to the patient, document **Yes**.
- Document **Not appropriate at this time** if Pain education is not being given to the patient.

➤ **Coordination of Care**

- Use this section to document who care of the patient was coordinated with.

➤ **Hybrid Time Based Charges and Time Spent with Patient sections**

- Refer to the **Rehab Therapy Charge** flyer for detailed information on documenting charges.

➤ **Additional Information**

- Document in this free text box information that there is not a discreet documentation for.

➤ Click the green checkmark to sign the **Evaluation** form.

➤ The MPTL will open with the **Evaluation task** displaying a green check mark in the first column and with a **Status of Complete**.

➤ **Refresh** the MPTL and the completed task will drop off.

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## Daily Note Forms

**NOTE:** If the patient receives a treatment on the day of the Evaluation, the therapist should complete the Evaluation and a Daily Note.

- Locate the Daily Note in the Acute Therapy or the IRF Therapy folder in Adhoc.

**NOTE:** The documentation notes content is the same in both the Acute Therapy and IRF folders. The only difference is the wording Acute or IRF at the end of their names.

- Document the required fields and those sections that are applicable to the patient.

**NOTE:** Certain documentation from the Evaluation form will pull forward to the Daily Note. Click in the documented sections to pull in data from the Evaluation.

## Progress Note Forms

- Progress Notes are accessed from the Acute Therapy and the IRF Therapy folders in Adhoc.
- Data will pull from the Evaluation and the Daily Note.

## Documenting Cancelled/Missed Units

- If the patient is too fatigued to continue the treatment or misses part of their therapy session due to another reason, the number of Missed Units, Missed Minutes, and the Reason are documented at the bottom of the Time Spent with Patient section located in each of the documentation forms.
- If the patient misses an entire therapy session, document in the Missed Therapy Minutes form for your discipline located in Adhoc.

## Discharge Summary Forms

- The Discharge Summary forms are NOT tasked to the MPTL.
- On the patients last visit, the therapist will access the Discharge Summary form from the Acute Therapy or IRF Therapy folder in Adhoc.
- Documentation from the Daily Note and Progress Note will pull forward to the Discharge Summary form.
  - Click in each previously documented sections to pull data forward into the Discharge Summary.
- If the patient is discharged from the hospital or Inpatient Rehab Unit before receiving therapy that day, the Discharge Summary form should be documented based on the last visit.
  - The therapist would indicate the number of Missed Units or Missed Minutes in the Cancelled/Missed Time subsection of Time Spent with Patient.

**NOTE:** Any form that does not have all required fields documented will fire a task to the MPTL even though the form was not originally tasked to the MPTL. These tasks will be found on the Physical and Occupational Tx tab, and Speech Language Pathology tab.

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### **Student Documentation**

- After a student therapist completes a documentation form, the licensed therapist will get a task on the MPTL for the form with a Status of **Pending Validation**.
- The student's documentation forms will display in **Form Browser** with a status of **(In-Process)**.
- The licensed therapist will double-click the task to open the student's documentation.
- The documentation should be reviewed. The therapist is required to document something in the note in order to sign the form.
- After the licensed therapist signs the form, in **Form Browser** the status of the form will display as **(Auth (Verified))**.

### **Saving a Note**

- If a therapist is working on a documentation form and is not able to complete it in one sitting, the form should be **Saved** rather than signed.
- Click the **Save Disc icon** next to the **Sign icon**.
- If the saved note has **required fields that have not been documented yet**, navigate to the MPTL and click the task to open the previously started note.
  - In **Form Browser**, this note would have a **red tile** and have a status of **(In-Progress)**.
- To complete a saved note that had **all required fields documented**, navigate to **Form Browser** and locate the saved form.
  - In **Form Browser**, this note would have a **blue tile** and a status of **(In-Progress)**.
  - Right-click the form and select **Modify form**.
  - Once the form is completed, click the **Sign icon**.
  - The status in **Form Browser** will update to **(Auth (Verified))**.