Defensive Documentation: What You Don’t Know May Hurt You

Intended Audience: PT, PTA, OT, OTA, SLP  Intermediate Level:  Contact Hours: 7 hours
Presenter: Paula Eppenstein, PT, MS; Emily Becker, PT, MS; Jaime Gorska, OTR/L

Course Description

This course will cover and review the necessary components of documentation required to support the need for therapy services and the provision of skilled treatment by the clinician. With ongoing changes to regulatory and third party payer requirements, it is essential for therapists to stay current with the criteria utilized for determining medical necessity and the provision of reasonable and necessary services when documentation is audited. Definitions of key documentation terms will be reviewed, tips will be provided to help strengthen the content of your documentation as well as a discussion on how to minimize your risk as an organization and practitioner through use of audits and quality improvement activities. Case studies and small group discussion will be used to provide opportunities to apply techniques discussed throughout this session. Participants are encouraged to bring a sample of their documentation to use during the course as part of their own “self-audit”. A documentation tool-kit will be provided to pull the information together and allow the clinician to immediately implement these strategies in clinical practice.

Course Objectives

1. Describe the necessary components of medical necessity criteria.
2. Describe necessary documentation components to meet regulatory and professional standards.
3. Identify documentation strategies to help support medical necessity.
4. Describe how to effectively document the delivery of skilled intervention in your treatment encounter notes.
5. Describe the components of an effective and objective goal.
6. Identify ways to use skilled terminology to link documentation with appropriate billing codes for defensible claims.
7. Identify strategies to apply to minimize risks for denial
8. Discuss a framework for Quality Assurance initiatives related to documentation auditing processes and systems monitoring compliance within organizations.

Course Agenda

7:30 a.m.  Registration / Breakfast  12:15 p.m.  Writing Clear and Objective Goals
8:00 a.m.  What is Medical Necessity?  1:15 p.m.  Potential Legal Pitfalls in Documentation
          What is Reasonable and Necessary?
8:45 a.m.  Professional Standards and Regulatory Guidelines  2:15 p.m.  Break
9:30 a.m.  Break
9:45 a.m.  Effective Documentation of Skilled Intervention  2:30 p.m.  Dealing with Denials
11:30 a.m. Lunch provided  3:00 p.m.  Minimizing Risk through Audits and Q&A

Sponsored by:
Marianjoy Rehabilitation Hospital
26W171 Roosevelt Road
Wheaton, IL 60187

www.Marianjoy.org/MPLI
Presenter

Paula Goga Eppenstein, PT, MS, Supervisor for Clinical Development for Marianjoy Rehabilitation Hospital. She received her undergraduate and master’s degree from Northwestern University. She has worked with the adult and geriatric client in various levels of care over the years and has lectured on the topics of geriatric and neurological rehabilitation, lower extremity casting, cultural diversity, documentation and mentorship. She received the Geraldine S. Taylor Fellowship for Physical Therapists at the Rehabilitation Institute of Chicago for the development of casting protocols for the lower extremity.

Emily Becker, PT, MS, Coordinator of Clinical Development for Marianjoy Rehabilitation Hospital. She has the shared responsibility for planning, implementation, and evaluation of educational projects and strategies for Marianjoy Rehabilitation Hospital. Emily holds a graduate degree in Physical Therapy from Washington University and has 10 years of experience in the physical therapist field in rehabilitation service roles including direct care provider, quality assurance manager, facility manager, academic clinical coordinator for a physical therapy assistant program, Federation of State Boards of Physical Therapy exam item writer, Federation of State Boards of Physical Therapy exam task force member, and consultant as an expert witness. Emily is a current member of the American Physical Therapy Association and Associate Member of the Federation of State Boards of Physical Therapy. She currently serves the physical therapy profession as a Federation of State Boards Reviewer for Continued Competence, Member of the Health Policy and Administration Section of the APTA Member Student Mentorship Committee, Health Policy and Administration Section of the APTA Programming Committee Member.

Jaime Gorska, OTR/L, Coordinator of Clinical Development for Marianjoy Rehabilitation Hospital. She received her degree in occupational therapy from Western Michigan University. She has worked with the adult and geriatric patient population in the acute care, inpatient rehabilitation, outpatient, and day rehabilitation levels of care and has specialized in the treatment of neurological conditions and the assessment and management of visual perceptual disorders. She has lectured on the topics of visual perceptual disorders and documentation and has been instrumental in developing the Marianjoy Quality Assurance Peer Review Program at both Marianjoy and a Marianjoy partnership hospital. In her role as Clinical Development Coordinator, she routinely participates in documentation audits, associate coaching sessions, resource development, and monitoring of the Marianjoy Peer Review Quality Assurance Program.

Contact Hours

Illinois Department of Financial and Professional Regulation (IDFPR): Physical Therapists

This course has been approved for 7 continuing education hours for physical therapy practitioners. The Illinois Department of Financial and Professional Regulation, Division of Professional Regulation has certified Marianjoy Rehabilitation Hospital has complied with the provisions of the Illinois statutes and/or rules and regulations and is hereby authorized to sponsor the above named course as a Continuing Education offering.

Marianjoy Rehabilitation Hospital is an approved provider for the American Occupational Therapy Association to offer continuing education in occupational therapy. This Intermediate level program awards occupational therapists .7 AOTA CEUs or 7 contact hours. Assignment of AOTA CEUs does not imply endorsement of specific course content, products, or clinical procedures by AOTA.

This course is offered for .7 ASHA CEUs (Intermediate Level, Professional Area). A full listing of faculty disclosures for ASHA approved courses is available at: www.marianjoy.org/MPLI

This educational activity's planners and the presenter(s) have indicated they have no bias or conflict of interest. Marianjoy Rehabilitation Hospital has not received any commercial support for this program. The planners of this course have no relevant financial or non-financial interests to disclose.
REGISTRATION INSTRUCTIONS

1. Select the course(s) you are registering for from the menu below.
   Please Note: If registering for a group rate, please complete a registration form for each participant. All registration forms must be included with payment.

2. Complete participant and payment information and return this entire form.

MARCH 5-7, 2014
Preparing for the CRRN Exam: You Can Do It!
Registration Deadline: 2-26-14
☐ SINGLE REGISTRATION FEE: $350
☐ GROUP REGISTRATION FEE PER REGISTRANT: $330
   (2 or more from one facility)

MARCH 15, 2014
Differential Diagnosis Among Motor Speech Disorders: The Rules of the Game
Registration Deadline: 3-18-14
☐ SINGLE REGISTRATION FEE: $275
☐ GROUP REGISTRATION FEE PER REGISTRANT: $255
   (2 or more from one facility)

MAY 9, 2014
Defensive Documentation: What You Don’t Know May Hurt
Registration Deadline: 5-2-14
☐ SINGLE REGISTRATION FEE: $150
☐ GROUP REGISTRATION FEE PER REGISTRANT: $130
   (2 or more from one facility)

MAY 16-18, 2014
PNF: Improving Trunk Function Through Distal and Proximal Input
Registration Deadline: 5-9-14
☐ SINGLE REGISTRATION FEE: $660
☐ GROUP REGISTRATION FEE PER REGISTRANT: $640
   (2 or more from one facility)

JUNE 7, 2014
Making Sense of Low Back Pain: A Systematic and Evidenced-Based Approach to the Examination & Treatment of Low Back Disorders
Registration Deadline: 5-31-14
☐ SINGLE REGISTRATION FEE: $275
☐ GROUP REGISTRATION FEE PER REGISTRANT: $255
   (2 or more from one facility)

PARTICIPANT INFORMATION:

Name __________________________________________
Organization ___________________________________
Billing Address ___________________________________
City/State/ZIP ___________________________________
Phone __________________________________________
E-Mail __________________________________________
☐ Check here to receive email updates on future classes.

DISCIPLINE:
☐ OT  ☐ OTA  ☐ PT  ☐ PTA  ☐ Nurse  ☐ SLP
☐ School Couns.  ☐ Other ________________________
☐ Social Worker: license # _______________________

Registration Questions? Call 630-909-6923

PAYMENT METHOD:

☐ CHECK made payable to “Marianjoy Rehabilitation Hospital”
☐ VISA   ☐ MASTERCARD   ☐ AMEX   ☐ DISCOVER

Account Number ________________________________
Exp. Date __________________ CVV# ______________
Name on Card __________________________________
Signature ______________________________________

RETURN METHOD:

MAIL: Mail entire completed form to:
Marianjoy Rehabilitation Hospital
Attn: Jaime Gorska
26W171 Roosevelt Road • Wheaton, IL 60187

EMAIL: Email completed form to education@marianjoy.org

FAX: Fax completed form with payment information to 630-909-6960

PHONE: 630-909-6923

CANCELLATION/REFUND POLICY
A tuition refund less $50.00 administrative fee is available if your cancellation request is received in writing within 7 days prior to the program date. No refunds will be granted after that date. In the unlikely event that Marianjoy must cancel an educational event for any reason, you will receive a full refund of your paid tuition. Marianjoy does not assume responsibility for any other expenses incurred by the registrant.

NOTE: Due to fluctuations in room temperature, please bring a sweater or light jacket.

PHOTO CONSENT: Please note that photos will be taken during these classes and may be used in marketing materials. If you prefer not to have your likeness used in photos, please let a Marianjoy Professional Learning Institute associate know and we will make the appropriate accommodations.