

PAPERWORK REQUIREMENTS FOR OCCUPATIONAL & PHYSICAL THERAPY SERVICES SUPERVISED BY TMCSEA

TMCSEA Paperwork Requirement Goal- Document student progress as it relates to their educational programming in compliance with best practice principles, ISBE guidelines, and professional national/state Occupational & Physical therapies rules & regulations.

Objectives

- Track goal progress
- Document supervision
- Document other related information regarding therapy. (Communication, phone calls, team meetings, information that affects therapy)

Paperwork

Therapy Intervention Plan, Progress and Communication

- Intervention plan.
- Supervisor visits with date, time and signature.
- Parent, teacher, other related services, and educational staff communications as it relates to therapy. Report the topic, outcome and therapy responsibilities.
- Team meetings report the topic, outcome and therapist's responsibility.
- Phone calls
- Equipment change and/or modifications

Therapy Logs

- Student performance in measureable terms (goal box chart when appropriate).
Examples- stood on left foot 3 seconds, worked on ADL, button 3/5 in 30 seconds, session shorted due to field trip, formed 10 out of 26 UC letters using handwriting with tears, 15 minutes sensory based activities no behavior changes, splint fit well.
- Each entry should be dated, include time and signature.
- Additional people present
- Interventions used and student response
- Modification to task or environment
- Assistive or adaptive devices used or fabricated
- Training, education or consultation.
- Student's attendance or reason missed.
- Supervisors should review and sign monthly.

IEP Goals/Objectives

- Update student IEP goals per district requirements. Copies are given the students home districts and place in the students working file. All updates are reviewed by supervising therapist. At the end of the school year one copy of the updated goals, containing all of the updates in placed in the students working file.
Example- able to button 3/5 in 3/5 trials within 30 seconds; can form 15 of 26 LC letters without a demonstration; lost 5° shoulder flexion and 10° hip extension since last measurement. **Goal Met and Goal Not Met are not acceptable.**

Annual Review Reports

- See Annual Review Guidelines
- Annual Review Reports are reviewed and signed by a supervising therapist PRIOR to the annual review meeting.

Supervisor Time Sheet

- COTA's are responsible for these time sheets. Make sure your supervisor signs on a regular basis.

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"Therapist must be accountable for intervention time and for information regarding student progress. Each therapist should maintain a working file for each student containing the intervention plan, daily progress notes, data collection and other information as appropriate." These documents can be accessed by parents when student identifiable information has been shared with another person (ISBE 2003 pg. 34).

Therapy Intervention Plan, Progress and Communication

- "The intervention plan is separate from the IEP and provides information about occupational therapy delivery." (Frolek Clark, G., & Chrndler, B, (2013) pg. 115)
- "Documentation of supervision and instruction to parent and paraprofessionals is also achieved through treatment notes (ISBE 2003 pg. 35)."

Therapy Logs

- The services contact (therapy log) provides a chronological record of client-practitioner interactions and is often used in legal situations. (Frolek Clark, G., & Chrndler, B, (2013) pg. 115)
- "The frequency, format and location for maintenance of these notes are left up to the LEA. Content should include: attendance and participation; activities, techniques and modalities used; Equipment issued or fabricated and specific instructions for the use of the item; and student response to therapy, related back to the IEP." (ISBE 2003 pg. 35)

IEP Goals/Objectives *The LEA should determine the format of the progress report. The content must reflect progress toward the annual IEP goals and "the extent to which that progress is sufficient to enable the child to achieve the goals by the end of the year." (ISBE 2003 pg. 35)*

Annual Review Reports *"Using the evaluation data and the educational outcomes expected in conjunction with intervention, the occupational therapist and physical therapist should develop an intervention plan to guide the direction of therapeutic programming. ...it should reflect the strategies and methods used to address the educational goals, ...define behavior, baseline performance data and ongoing data collection information. (ISBE 2003 pg. 35) "A progress report is a written narrative summary of student progress that is provided to the educational team to document student response to any interventions implemented. Annual reports of progress are included as part of the student's annual review IEP review and update. Therapist may integrate their report into the IEP or write a separate report. Regardless, content should include a summary of the interventions used to meet objectives, progress towards goals, present level of performance and continued educational needs related to therapy." (ISBE 2003 pg. 35-36)*

Resources

Frolek Clark, G., & Chrndler, B, (2013) *Best Practices for Occupational Therapy in Schools*
Bethesda, MD: American Occupational Therapy Association press

Illinois State Board of Education. (2003). *Recommended Practices for Occupational and Physical Therapy Services in Illinois Schools*

McEwen, I. (2009) *IDEA: Providing Physical Therapy Services Under Parts B & C of the Individuals with Disabilities Education Act*, 2nd Edition. Alexandria: Section of Pediatrics, American Physical Therapy Association

Updated 10/3/01 zy

Updated 1/17/07 zy

Updated 1/24/07 bf

Updated 2/7/07 Z=CM²

Updated 10/09 Z=TM²C

Updated 5/15 Z=TM²C+COTA+PTA