

DIRECT HOME HEALTHCARE, INC.

CLINICAL DOCUMENTATION COMPETENCY CHECKLIST FOR OCCUPATIONAL THERAPISTS

Therapist: _____ Evaluator: _____ Date: _____

COMPETENCY AREA	YES	NO	COMMENTS
DEMONSTRATES ABILITY TO COMPLETE DOCUMENTATION RELATED TO THE FOLLOWING FUNCTIONS:			
Coordination of Services			
• Case management			
• Delivers services according to Plan of Care			
• Obtains orders to modify Plan			
• 60 day summary			
• Refers/uses community resources			
• Communication with physician and other members of the interdisciplinary team			
Transfer/Discharge of Client			
• Discharge Planning			
• Community Resources			
• Discharge Summary			
Regulatory Compliance			
• Medicare Qualifying Criteria			
• Homebound Status			
• Skilled Visits			
• Supervision of Home Health Aide or Therapy Assistant			
DEMONSTRATES ASSESSMENT SKILLS AND DOCUMENTS FINDINGS AND INTERVENTIONS			
Assessment Process			
• Health history and physical exam			
• Development of Care Plan			
• Establish goals and response to treatment			
• Discharge planning needs			
• Referrals to community resources			
Documentation per Agency and Medicare Guidelines			
• Physician Plan of Care			
• Progress Notes/Skilled Visit Notes			
• Summary reports			
• Care planning for Therapy Assistants			
• Care coordination activities			
• Reporting changes in client condition and need to modify plan of care			
• Interdisciplinary communication			
• Supervision of home health aide or therapy assistants			
DEMONSTRATES ABILITY TO ASSESS AND EVALUATE CLIENT STATUS, PERFORM AND DOCUMENT SPECIFIC TREATMENTS AND INTERVENTIONS			
• Pain evaluation that includes use of rating scale			
• Assessment of location, intensity, and duration of pain			

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• Use of alternative therapies			
• Mental status assessment			
• Ambulation and endurance			
• Sensory assessment and performance			
• Functional findings			
• Assistive devices: - Fit and adjustment - Orthotics - Adaptive equipment			
• Prosthesis fit and adjustment			
• Energy conservation exercises and adaptations			
• Functional assessments			
• Environmental assessment			
Use of Equipment			
• Hoyer Lifts			
• Walker			
• Wheelchair			
• Assistive devices			
• Ulcer prevention techniques			
DEMONSTRATES SKILL IN TEACHING CLIENTS AND IN DOCUMENTATION OF THE PLAN			
• Assess learning needs of client/family			
• Establishes teaching plan with measurable objectives and time frames			
• Documents client response			
• Evaluates effectiveness of plan			
• Documents response and progress toward goals			
• Modifies plan to accommodate client specific needs			
DEMONSTRATES KNOWLEDGE OF AGENCY SAFETY REQUIREMENTS AND ASSESSMENT OF SAFETY NEEDS IN THE HOME			
• Fire safety and use of extinguishers and warning devices			
• Hazardous materials			
• Emergency preparedness plan			
• Home safety evaluation (documentation/action taken)			
• Restraints			
• Personal safety practices			