**Therakids Employee Training Manual**

1. Expectations:
   1. Professionalism at all times
   2. Professional clothing attire
   3. Arrive on time to meetings and treatments
      1. If running late, make sure to contact school/teachers
   4. Requesting day off/sickness
      1. Contact supervising therapist, Kathy/Traci, and school as soon as possible
      2. Make arrangements for rescheduling or having treatments/meetings covered
      3. Must have prior approval for any planned vacations
2. Important Contacts:
   1. Kathy Wassink
      1. 618-973-615
      2. [therakids@hotmail.com](mailto:therakids@hotmail.com)
   2. Traci Hartritch
      1. 618-978-2511
      2. [thartritch@therakids.org](mailto:thartritch@therakids.org)
   3. Jennifer McDonald
      1. 618-746-9209
      2. [jmcdonald@therakids.org](mailto:jmcdonald@therakids.org)
   4. Jackie Hay
      1. 618-973-8160
      2. [jhay@therakids.org](mailto:jhay@therakids.org)
3. Email:
   1. [www.therakids.org](http://www.therakids.org)
   2. click “login” tab at the top
   3. Username (1st initial and last name) and password
      1. Contact Jennifer if you have not received your logins
   4. Click three lined bars at top, by Therakids, PC logo
   5. Select email from choices on side
   6. Email address and password again
   7. \*\*Best practice to check email daily during work week\*\*
4. Time Card:
   1. Complete steps 1a-c.
   2. Select date, start time, and end time
   3. Click “select district”
   4. Type in district and name should pop up
   5. Under comments, type in what you did that day (ie. 6 K-5 treatments at GES, documentation, consultation with teachers, IEP paperwork)
   6. Mileage- Enter in any mileage obtained if driving between schools
   7. Lunch- Enter in time **spent away** from work for lunch
   8. \*\*Midstate schools only\*\* Enter in grade level (preK, K-8, 9-12)
   9. Click Save Time Card
   10. Remember to enter in time for the work you are completing, not necessarily what school you may be at.
   11. Make sure time cards are entered in by **last day of the month**.
   12. \*\*\*Best practice to complete daily\*\*\*
   13. If you are not able to complete paperwork within working hours, contact Kathy/Traci
   14. If you add time to time card **AFTER** the last day of the month, contact Traci.
5. Employee Files:
   1. Complete steps 1a-d
   2. Select “employee files” on side
   3. Important forms:
      1. Student Attendance Sheet
      2. Weekly Progress Note
      3. Pay and Benefits Information
      4. PT/OT goal banks
      5. Schedule Template
      6. OT Request for Assistance Assessment
   4. Several other useful forms and handouts to be used, as needed
6. Paychecks:
   1. Paychecks will be sent to your account at the end of each month. See Pay and Benefits Information under Employee Files.
   2. Paychecks are a month behind. For example: If you start working on October 1, you will not be paid until the end of November
   3. If you have any questions/concerns regarding your paycheck, contact Kathy/Traci
   4. Paychecks.inuit.com
      1. Paycheck stub
      2. W2 Forms
7. Student Files:
   1. Attendance sheet stapled to inside front of file or easily viewable
   2. Weekly documentation forms
   3. Any other important IEP papers
   4. Dr’s script
8. Doctor Scripts:
   1. Utilize new script on Embrace which includes NPI number
      1. When under a student name in Embrace, click “District Documents”
      2. Scroll down to find “OT/PT Physician’s Prescription with NPI”
      3. Fill out information and fax to Dr’s office
      4. When received back-
         1. Place copy in student file and provide copy to supervising OT/PT
         2. \*\*Midstate\*\* Give copy to your supervisor or Brittany Reynolds.
      5. Scripts will then be scanned into Embrace and dates entered for billing
9. Medicaid Billing
   1. Entering Medicaid billing should be completed- day (ideally), weekly (best practice), monthly (minimum)
   2. Supervising OT/PT will cosign your billing monthly. If your billing is not completed by end of month the OT/PT will notify Brittany.
   3. If you get the yellow highlighted information indicating that the prescription dates need updated, please notify your supervising OT/PT ASAP
   4. IEIN Number-
      1. ALL therapists must have
      2. **Everyone will need this for billing this yea**r, if you do not have already. Here are directions to obtain one. Please go to the Illinois State Board of Education Website ([isbe.net](http://isbe.net/)). Click on Educator Licensure. Click on "Click Here For First Time Access To The ELIS System".  Complete the ELIS for Educator Account Sign Up. You will enter your SSN. Create your own login and password using your Therakids email address. Click Continue and follow the prompts. Once you are signed up it should give you an IEIN number. Please keep that number and login information in your records.
10. Embrace:
    1. Annual Reviews- OT/COTA, PT/PTA, SLP should have a list of Annual Review dates for caseload and should be reviewed weekly in order to stay ahead of meetings
    2. If you have noticed an annual review should be coming up, contact supervising OT/PT and/or student’s caseload
    3. Communication between OT/COTA and PT/PTA is critical regarding meeting notifications
    4. COTA’s need to update PRESENT LEVELS under Functional Performance in student’s IEP
       1. This should be completed well enough in advance of meeting, at least 5 days prior. However, it is important to know your districts protocol as some send out drafts 10 days before
       2. Present Levels should consist of how the student is performing on his/her goals in detail. So much detail that a person who has never met the student knows exactly how they are doing on their OT goals. Be specific on any goals student met. Last sentence on present levels should tell us where the student is functioning (i.e., student continue to exhibit delays with fine motor/visual motor and self-help skills that are impacting his/her performance at school and it is recommended that student continue to receive direct OT/PT services)
       3. **\*\*See note template\*\***
    5. COTA/OT, PT/PTA should be communicating on goals for students. If you and supervising therapist have agreed, COTA /PTA can enter goals. There should be communication with teacher and other team members to write functional and appropriate goals for that student
    6. If discharging a student, discuss with supervising therapist first and then teachers. In some cases, parent contact may be needed, by supervising therapist, prior to the meeting. It is important to work as a team with supervising therapists and teachers.
11. Attending IEP Meetings:
    1. COTAs/PTAs must have prior approval from supervisor prior to attending an annual review meeting on their own, IF DISTRICT AND SUPERVISING THERAPIST APPROVES
    2. OTR/COTA, PT/PTA team must decide what AR meetings COTA/PTA can attend
    3. Initial Domain, Re-Eval, Initial Eval meetings should be attended by OTR/RPT
12. Screeners (Binder):
    1. Notify your supervising OTR/PT of teacher concern. Therapy team will discuss who should complete the screener
    2. Utilize appropriate screener (under employee files) for student’s grade and area of concern
    3. Once screener is completed, submit short note of findings to supervising therapist, discuss recommendations, and follow up with teacher
    4. Make sure you follow proper protocol of district if needing signed parent permission prior to screening
13. Types of Meetings:
    1. Annual Review-
       1. Occur at least once a year, but more if needed
       2. COTA/PTA should enter in present levels and update/discuss goals with supervising therapist
       3. Updated educational placement page(s)
       4. Add any classroom accommodations as needed
    2. Domains meeting-
       1. This meeting is to discuss current data and need, if any, for an evaluation
       2. Ideally, you will be aware of any OT/PT concerns prior to meeting
       3. Depending on district…..you may need to enter information under “Consent for Reevaluation” or “Consent for Initial evaluation”
          1. Type in any information you know on student under MOTOR box
          2. Additional Evaluation Data Needed- Type in specific evaluation completed or “fine motor/visual motor eval” “gross motor eval”, etc. If no eval needed, type None
          3. Sources from which data will be obtained- Type in Occupational Therapist or Physical Therapist. If no eval needed, type N/A
    3. Re-evaluation Meeting or Initial evaluation meeting-
       1. This meeting will be scheduled approx. 60 days, or less (depending on district), from when consent for evaluation was completed
       2. Registered therapist will need to have completed evaluation and report prior to this meeting.
       3. Evaluation information/recommendation should be entered in under PRESENT LEVELS OF FUNCTIONAL PERFORMANCE, DOCUMENTATION OF EVALUATION RESULTS (under MOTOR box)
       4. If student does not qualify for services, nothing else will need to be completed
       5. If student DOES qualify, you will also need to complete the following pages:
          1. Goals
          2. Educational Placement Page(s)
          3. Make sure there is a statement on Eligibility Determination page under adverse effect (i.e., fine motor/visual motor delays, gross motor delays). And then in next box, type in “occupational therapy services to address fine motor/visual motor delays”, etc….)