

# Documentation

Annual Review, EOQ reports, Medicaid billing and Weekly documentation



# Update Annual Review

## Update within 10 days prior to meeting date!

Login into embrace

- Outreachtime.com
  - EmbraceEP
  - Choose/click on students name
  - Click on current IEP/AR (look for the checkmark)
  - Choose present levels
    - Scroll until you find functional performance
    - Document on students current level of progress

# Sample of Annual Review

Student receives direct OT services for deficits in fine motor and visual motor skills. Student completes fine motor strength activities with fair strength, endurance and coordination skills. Student continues to use a full fist grasp on his writing tool and benefits from a small, broken writing utensil when coloring/writing. Student has been working on copying pre-writing strokes/shapes demonstrating independence with line down/across, circle and square with 70% accuracy. Student requires maximal assistance for more complex shapes of diagonal lines, triangle, and X for proper formation and pencil control. When completing visual motor/perceptual skills student requires minimal to moderate assistance for accuracy demonstrating 60%. It is recommended that Student continues to receive direct occupational therapy services to further increase his performance and participation within the school environment.



# Updating Goals

Typically, you will collaborate with the registered therapist when updating goals.

Touch base with classroom teacher or other pertinent staff to see what classroom concerns are.

Goal bank on therakids website under employee files



# Components to goals

What is the reasoning behind poor handwriting, coloring, cutting, difficulty with completing self help skills or self regulation skills.

Could it be visual motor/visual perceptual, fine motor/upper body strength, attention to task, endurance, crossing midline, bilateral coordination, memory, executive functioning etc.?

Don't just update or create goals specifically for writing, coloring, cutting, self help skills or self regulation skills.

Examples:

Student will improve fine motor and upper body strength activities needed to improve written communication by completing 5 minutes of strength, endurance and coordination activities independently.

Student will complete visual motor/visual perceptual activities with focus on coordination needed for legible handwriting with moderate assistance as needed with an overall accuracy of 75%.

# Update EOQ reports

"I am finally caught up on my massive amounts of paperwork." - said no therapist ever.



somee cards  
user card

Login into embrace

EmbraceIEP

Choose student

Click current annual review/IEP

Click on Occupational therapy goals

Scroll down to first STG

Click/add a progress evaluation

State students current level of status

Save and return to student list

# Medicaid billing

Login into outreachtime.com

EmbraceDS

Click on current month

Choose student

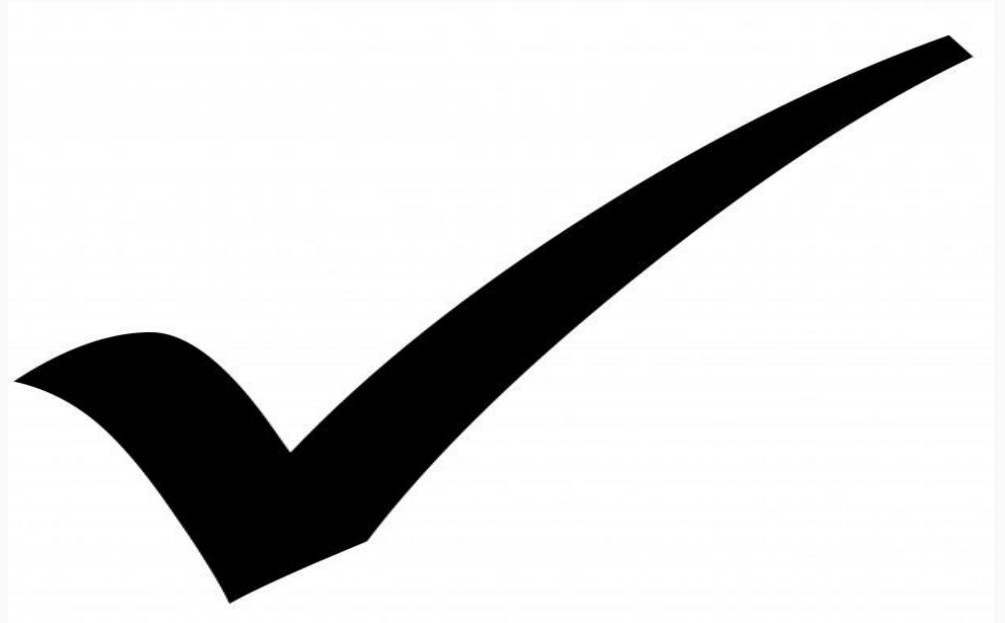
Mark signature box

Add date student was seen

Choose service code (direct/absent)

Minutes student was seen

Simple description of treatment (fine/visual motor activities)



# Weekly Documentation

Subjective: document what was completed during treatment session

Example: Student completed fm strength activities of....for 5 minutes demonstrating fair strength, endurance and coordination skills

Student copied/imitated simple sentences with minimal verbal and visual prompts for line adherence and spacing with an overall acc of 75%

Student colored simple picture with whole arm movement, 75% coverage and maximal deviations of ½" outside of the lines

Student cut simple straight bold lines with choppy movements and moderate assistance to stabilize paper with "helper" hand demonstrating ¼" deviations off the line.

