Course Prefix and Number: OCTA 208  
Credit Hours: 2

Course Title: Clinical Documentation I

Course Prerequisite: Enrollment in the OCTA program courses is limited to those students who have been selected and admitted to the professional phase of the program. Program courses are sequenced by semester and must be taken as a group each semester per program requirements and policies.

Textbooks/ Learning Resources:
- **Required textbook:**
  Sames; Documenting Occupational Therapy Practice, 3rd edition

- **Supplemental textbook:**
  Borcherding; The OTA’s Guide to Writing SOAP Notes, 3rd edition

Course Description:
This course will provide knowledge of the documentation process for occupational therapy assistants. Topics also include clinical reasoning skills, professional behaviors, use of language, and ethical and legal considerations.

Relationship to Curriculum Design:
Clinical documentation I is designed to introduce students to OT documentation to ensure accountability of service. Data gathering and the roles of the COTA are examined throughout the OT process. Medical terminology, grammar, and professional language are reviewed and built upon. Students will increase their observational and documentation skills through a variety of instructional methods.

Learning Outcomes:
At the end of this course the student will be able to:

- A. Demonstrate the role of the OTA in the documentation process.
- B. Demonstrate written communication competency by preparing thorough, accurate, logical, concise, timely, and legible documentation

Course Objectives:
To achieve the learning outcomes, the student will:

1. Identify commonly used abbreviations positive and negative buzzwords in documentation.B
2. Describe how models and frames of reference are reflected in documentation.B
3. Demonstrate proper procedures to protect the rights and confidentiality of clients and patients.B
4. Document Occupational Therapy services to ensure accountability of service provision and to meet standards for reimbursement of services. (B.5.32)A,B
5. Explain the roles and responsibilities of the OT and OTA for documentation and practice in various practice settings. A
6. Discuss the referral and screening process. A,B
7. Discuss the role of the OTA in the evaluation, goal writing and intervention process.
8. Complete observation notes in proper SOAP format. A,B
9. Describe role delineation for progress reporting, discharge planning, discontinuation, and referral. A,B
10. Gather and share data for the purpose of evaluating client(s)’ occupational performance in ADLs, IADLs, education, work, play, leisure and social participation. B
11. Describe the process of writing incident reports, appeal letters, meeting minutes grant writing and policies and procedures. B
12. Describe the roles of various other professionals within traditional and non-traditional settings. A,B
13. Identify and describe the clinical reasoning process. A,B
14. Identify when to recommend to the occupational therapist the need for referring clients for additional evaluation. (B.4.9) A,B
15. Document OT services to ensure accountability of service provision and to meet standards for reimbursement of services, adhering to the requirements of applicable facility, local, state, federal, and reimbursement agencies. (B.4.10) A,B

Topical Outline
I. Clinical Reasoning
   A. Process
   B. Role of the COTA
II. Use of Language
   A. Professional Communication
   B. Buzzwords, jargon, and abbreviations
   C. The OT Practice Framework
   D. Impact of Models and Frames of Reference
   E. General Tips for Good Documentation
III. Ethical and Legal Considerations
   A. Confidentiality and Records
   B. Fraud
   C. Plagiarism
IV. Clinical Documentation
   A. Client Identification: Referral and Screening
   B. Evaluation Reports
   C. Goal Writing
   D. Intervention Plans
   E. SOAP and other methods documenting
   F. Discontinuation summaries
V. Avoiding Common Mistakes
   A. Spelling
   B. Grammar
C. Paraphrasing

VI. SOAP *
A. S – subjective
B. O – objective
C. A – assessment
D. P - plan

VII. Administrative Documentation
A. Incident Reports
B. Appeal Letters

Course Grading
The student’s grade for this course will be based on:
- written Exams which comprise 60% of final grade (average of all written exams)
- Case Studies, documentation, assignments and participation which comprise 40% of final grade

Instructional methods include presentation, case studies, small group activities, and video presentation.

Course Requirements:
In order to receive a grade of “C” the student must earn 70% of the total possible points for the courses and achieve all of the course requirements listed below:
- satisfactory completion of all course assignments (minimum score of 75%)

Student Expectations:
- Course faculty will determine if class absence is excused. Unexcused absences will result in a zero (0) for the exam, assignment, or class participation due on the date of absence.
- One tardy will be excused per semester. All other tardies will constitute a decrease of one point each in final grade.
- Make-up work or exams for excused absences will be given at the discretion and convenience of the instructor.
- 5% will be deducted for each day an assignment is late.
- All written work will be typed and produced according to the APA Publication Manual, 6th edition unless otherwise indicated in assignment directions.
- Active participation during class time, community outings, fieldwork experiences, and other professional experiences is mandatory. Passive note taking and silent observation is not considered active participation.
- Professional development is an integral part of becoming an Occupational Therapy Assistant. Students are expected to accept constructive criticism from faculty and peers and modify behavior accordingly.
- ALL appointment requests with faculty must be made in writing via email.

Course Grading Scale:
A- 90% or more of total possible points; and minimum of 75% on program assignments; passing score on Fieldwork Student Evaluation Form

B- 80% or more of total possible points; and minimum of 75% on program assignments; passing score on Fieldwork Student Evaluation Form

C- 70% or more of total possible points; and minimum of 75% on program assignments; passing score on Fieldwork Student Evaluation Form

D- 60% or more of total possible points; and minimum of 75% on program assignments; passing score on Fieldwork Student Evaluation Form

F - Less than 60% of total possible points; or less than 75% on program assignments; below passing score on Fieldwork Student Evaluation Form

Students must have a “C” or better and a semester GPA average of 2.5 or better to receive credit toward the OTA program requirements and to move to the next level of coursework.

** Lab competencies are scored differently than written exams. All mistakes result in a point deduction for grading purposes. However, failure to demonstrate fundamental competency, safety or professionalism in the execution of the skill as evaluated by the course instructor(s) will result in an immediate failing score. The student will then be required to re-test on the skill preceding fall/spring clinical practice experiences with the specific scheduling and format for such being at the discretion of the primary course instructor but the responsibility of the student. The student will be given up to two additional testing attempts to demonstrate competency. If unable to safely, competently and professionally execute the skill on subsequent attempts, the student will be given a failing grade for the course and will not continue in the clinical program. The remediation scores will not replace the first attempt test score.

**Attendance Policy:** The college attendance policy, which is available at http://www.bpcc.edu/catalog/current/academicpolicies.html, allows that “more restrictive attendance requirements may apply to some specialized classes such as laboratory, activity, and clinical courses because of the nature of those courses.” The attendance policy of the OTA program is described in the OTA Clinical Handbook.

**Nondiscrimination Statement**

Bossier Parish Community College does not discriminate on the basis of race, color, national origin, gender, age, religion, qualified disability, marital status, veteran's status, or sexual orientation in admission to its programs, services, or activities, in access to them, in treatment of individuals, or in any aspect of its operations. Bossier Parish Community College does not discriminate in its hiring or employment practices.

Title VI, Section 504, and ADA Coordinator
Sarah Culpepper, Coordinator
Disability Services, D-112
6220 East Texas Street
Bossier City, LA 71111
Phone: 318-678-6539
Email: sculpepper@bpec.edu
Hours: 8:00 a.m.-4:30 p.m. Monday - Friday, excluding holidays and weekends.

Equity/Compliance Coordinator
Teri Bashara, Director of Human Resources
Human Resources Office, A-105
6220 East Texas Street
Bossier City, LA 71111
Phone: 318-678-6056
Hours: 8:00 a.m.-4:30 p.m. Monday - Friday, excluding holidays and weekends.

Reviewed by M. Allison 5/17