

Pediatrics OT Sample Reports © 2011

Includes:

- *Plan of Care*
- *Initial Evaluation*
- *Progress/ Treatment Note*
- *Discharge Summary*



Documentation the Right Way



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Occupational Therapy

Plan of Care (Initial Evaluation)

Page 1 of 2

Patient Name: Smith, Charlie

Date: 1/17/2011 12:18 PM

Medical Record #: CB549

DOB: 1/14/2005

Account #: 74348290

SOC Date: 1/17/2011

Provider: Action Rehabilitation Services

Provider #: 17238940

Treating Clinician: Olivia Orin, MS, OTR/L

Medicare #: NA

Visits From SOC: 1

Medicaid #: 17238470

	Onset Date	Code	Description
Primary Diagnosis:	2/14/2005	783.42	DELAYED MILESTONES
Other Diagnosis:	12/22/2010	781.3	LACK OF COORDINATION

Case History: Charlie is a 6 year old boy who was referred to Occupational Therapy due to his parents concerns that he was behind other children of his age in motor skills and classroom performance. He is an active young man, and has trouble sitting still and remaining on task during the evaluation.

Initial Level

Goals

Self Care Activities: Button coat or shirt, Limited - Minimal assistance with cueing

Self Care Activities: Button coat or shirt, Independent by 2/18/2011

Self Care Activities: Button and zip pants, Extensive - Moderate assistance

Self Care Activities: Button and zip pants, Limited - Minimal assistance with cueing by 3/18/2011

School Activities: Coloring, Coloring-cannot stay within boundaries

School Activities: Coloring, Coloring-Fills 50% of image by 3/18/2011

Socialization with Parent(s)/Caregiver(s): Interactions with therapist, Child does not spontaneously initiate eye contact

Socialization with Parent(s)/Caregiver(s): Interactions with therapist, Child demonstrates appropriate eye contact to situation by 3/18/2011

Fine Motor Coordination: Activity: Cutting, Tools Used: Adaptive scissors, Ineffective hold on scissors during tasks

Fine Motor Coordination: Activity: Cutting, Tools Used: Adaptive scissors, Able to hold scissors effectively by 2/18/2011

Gross Motor Coordination: Activity: Catch and throw a ball, Tools Used: Ball, Attempts to perform task, but poor motor planning interferes

Gross Motor Coordination: Activity: Catch and throw a ball, Tools Used: Ball, Demonstrates good motor planning for task requested by 2/18/2011

Gross Motor Coordination: Activity: Ascending stairs, Tools Used: Rail, Unable to alternate steps when ascending stairs

Gross Motor Coordination: Activity: Ascending stairs, Tools Used: Rail, Able to alternate steps when ascending stairs by 2/18/2011

Visual Motor/Visual Perceptual: Child to smoothly track target object across midline separately from head movements.

Child to be able to copy straight line, circle, and square from near on same paper.

Sensory Integration Goals: Child to tolerate washing his hands and drying with a rough towel.

Impairment Short Term Goals

Functional Long Term Goals

Child to participate in age appropriate school activities.

Skilled Analysis of Safety Deficits or Problems: Due to impaired proximal stability and sensory integration and coordination problems, this child was unable to participate in age appropriate activities.

Patient / Caregiver concurs with treatment plan and established goals:

Yes

Impairment Observations

Charlie demonstrates full active range of motion in all extremities. Hypotonicity and decreased strength limits endurance for age appropriate activities.

Peabody Developmental Motor Scales

	Raw Score	Age Equivalent	Percentile	Standard Score
Stationary	42	35 months	5	5
Locomotion	108	24 months	2	4
Object Manipulation	27	32 months	5	5

Patient Name: Smith, Charlie **Date:** 1/17/2011 12:18 PM
Medical Record #: CB549 **DOB:** 1/14/2005
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Grasping	42	20 months	1	3
Visual Motor Integration	100	27 months	2	4

	GMQ	FMQ	TMQ
Quotients	66	61	60

Peabody Developmental Motor Scales Comments: The Peabody Developmental Motor Scale is composed of sub-tests that measure the interrelated abilities of a child in early motor development as it relates to gross and fine motor skills. The Gross Motor Quotient (GQM) measures the ability to utilize the large muscle systems of the body to move from place to place and to perform gross motor tasks. The Fine Motor Quotient (FMQ) measures a child's ability to use their hands and arms to grasp and manipulate objects, such as stacking blocks or to draw and color.

Muscle Tone

Location: Bilateral Shoulder Girdle

Muscle Tone: Hypotonic

Muscle Tone Comments: Demonstrates poor proximal stabilization due to low tone which is interfering with fine and gross motor tasks. Will compensate with stabilization during fine motor tasks.

Dominance

Upper Extremity: Right

Lower Extremity: Not Established

Eye: Not Established

Neuro-Muscular/Neuro-Motor Comments: Poor dominance establishment indicative of poor hemispheric specialization.

Interventions (CPT Code)

Occupational Therapy Evaluation 97003
Sensory Integrative Technique - Direct contact 97533
Therapeutic Activities - Direct patient contact 97530
Neuromuscular Reeducation - Therapeutic Procedure - 1+ Areas 97112
Self Care/Home Management Training - Direct contact 97535

Frequency of OT: Three times weekly

Duration of OT: 6 months

Greg House

Date/Time

I certify the need for these services furnished under this plan of treatment while under my care.

Olivia Orin, OTR/L

1/9/2011
3:59:17 PM

Olivia Orin, MS, OTR/L

Date

State License #: OT 1234



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Occupational Therapy

Initial Evaluation

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Patient Name: Smith, Charlie	Date: 1/17/2011 12:18 PM
Medical Record #: CB549	DOB: 1/14/2005
Account #: 74348290	SOC Date: 1/17/2011
Provider: Action Rehabilitation Services	
Provider #: 17238940	
Treating Clinician: Olivia Orin, MS, OTR/L	

Patient Information

Address: 123 Oak Street	Physician: Greg House
	Physician #: NPI# 45679
City, State, Zip: Nashville, Tennessee 37215-4818	
Occupation: Unknown	# of Approved Visits: 48
Gender: Male	Medicaid #: 17238470
Contact Person: Wilma Brown	Medicare #: NA

Rehabilitation Information / History

	Onset Date	Code	Description
Primary Diagnosis:	2/14/2005	783.42	DELAYED MILESTONES
Other Diagnosis:	12/22/2010	781.3	LACK OF COORDINATION

Recent Occupational Therapy: School system-within last sixty days

Prior Functional Status: Developmental Delays

Weight Bearing Status: No restrictions

Safety Measures: No safety measures need to be taken at this time

Rehabilitative Prognosis: Good rehab potential to reach the established goals

Mental Status: Alert and oriented in all spheres - cooperative and motivated

Assessment Method: Clinical Observation, Standardized Testing, Parent/Caregiver Interview

Case History: Charlie is a 6 year old boy who was referred to Occupational Therapy due to his parents concerns that he was behind other children of his age in motor skills and classroom performance. He is an active young man, and has trouble sitting still and remaining on task during the evaluation.

Gestation History: Charlie's mother reports that she had gestational diabetes during her pregnancy, and had her labor induced at 35 weeks due to the size of the baby. Birth weight was 6.8 pounds and vaginal delivery was uncomplicated. He did stay in the hospital for 10 days due to problems with his lung development.

Education Level: First Grade

School Name: Percy Priest Elementary School

Communication: Verbal skills functional for evaluation; learns best through demonstration

Behavior Cognition: Difficulty participating in standardized testing; Friendly and cooperative; Enjoys therapists attention and interaction; Difficulty transitioning between activities

Areas of Occupation

Self Care Activities

Goal Completion Date: 2/18/2011

Activities: Button coat or shirt

Initial: Limited - Minimal assistance with cueing

Goal: Independent

Patient Name: Smith, Charlie **Date:** 1/17/2011 12:18 PM
Medical Record #: CB549 **DOB:** 1/14/2005
Account #: 74348290 **SOC Date:** 1/17/2011
Provider: Action Rehabilitation Services
Provider #: 17238940
Treating Clinician: Olivia Orin, MS, OTR/L

Goal Completion Date: 3/18/2011

Activities: Button and zip pants
Initial: Extensive - Moderate assistance
Goal: Limited - Minimal assistance with cueing

Self Care Activities Comments: Charlie has difficulty with clothing fasteners due to decreased coordination, tone, and strength in his hands. He is able to dress independently except for buttoning of his coat or shirt and fastening his pants. He would like to be able to button a zip his pants independently so that he can go to the bathroom at school without assistance.

School Activities

Goal Completion Date: 3/18/2011

Activities: Coloring
Initial: Coloring-cannot stay within boundaries
Goal: Coloring-Fills 50% of image

School Activities Comments: Charlie demonstrates close visual monitoring of fingers when he is performing these tasks, suggestive of decreased kinesthetic sensation.

Socialization with Parent(s)/Caregiver(s)

Goal Completion Date: 3/18/2011

Activities: Interactions with therapist
Initial: Child does not spontaneously initiate eye contact
Goal: Child demonstrates appropriate eye contact to situation

Socialization with Parent(s)/Caregiver(s) Comments: Charlie does not initiate eye contact when spoken to.

Assessment

Strengths: Desire to please; Learns well through demonstration; Supportive family network

Limitations/Barriers/Areas to Improve: Decreased bilateral motor skills; Decreased body awareness; Decreased fine motor coordination; Decreased gross motor coordination; Decreased sensory processing skills; Visual motor skill deficits

Recommended Home Activities: Allow extra time for written work; Chucky Cheese play time; Decrease distraction during activities requiring concentration; Encourage reaching across midline during play; Give praise for participation in tasks; Hanging from bars on swing set; Heavy work tasks-carrying trash barrels, laundry baskets; Play the Twister game

Goals

Skilled Analysis of Safety Deficits or Problems: Due to impaired proximal stability and sensory integration and coordination problems, this child was unable to participate in age appropriate activities.

Functional Goals; Long Term: Child to participate in age appropriate school activities.

Patient / Caregiver concurs with treatment plan and established goals:

Yes

Performance Skills and Components

Peabody Developmental Motor Scales

	Raw Score	Age Equivalent	Percentile	Standard Score
Stationary	42	35 months	5	5
Locomotion	108	24 months	2	4
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Patient Name: Smith, Charlie **Date:** 1/17/2011 12:18 PM
Medical Record #: CB549 **DOB:** 1/14/2005
Account #: 74348290 **SOC Date:** 1/17/2011
Provider: Action Rehabilitation Services
Provider #: 17238940
Treating Clinician: Olivia Orin, MS, OTR/L

Visual Motor Integration	100	27 months	2	4
	GMQ	FMQ	TMQ	
Quotients	66	61	60	

Peabody Developmental Motor Scales Comments: The Peabody Developmental Motor Scale is composed of sub-tests that measure the interrelated abilities of a child in early motor development as it relates to gross and fine motor skills. The Gross Motor Quotient (GQM) measures the ability to utilize the large muscle systems of the body to move from place to place and to perform gross motor tasks. The Fine Motor Quotient (FMQ) measures a child's ability to use their hands and arms to grasp and manipulate objects, such as stacking blocks or to draw and color.

Fine Motor Coordination

Fine Motor **Goal Completion Date:** 2/18/2011
Activity: Cutting **Tools Used:** Adaptive scissors
Initial: Ineffective hold on scissors during tasks
Goal: Able to hold scissors effectively

Gross Motor Coordination

Gross Motor **Goal Completion Date:** 2/18/2011
Activity: Catch and throw a ball **Tools Used:** Ball
Initial: Attempts to perform task, but poor motor planning interferes
Goal: Demonstrates good motor planning for task requested

Gross Motor **Goal Completion Date:** 2/18/2011
Activity: Ascending stairs **Tools Used:** Rail
Initial: Unable to alternate steps when ascending stairs
Goal: Able to alternate steps when ascending stairs

Coordination Comments: Charlie demonstrates poor proximal stabilization and kinesthetics which interfere with his gross motor coordination. Difficulty in bilateral tasks for crossing midline is indicative of poor bilateral integration.

Muscle Tone

Location: Bilateral Shoulder Girdle
Muscle Tone: Hypotonic

Muscle Tone Comments: Demonstrates poor proximal stabilization due to low tone which is interfering with fine and gross motor tasks. Will compensate with stabilization during fine motor tasks.

Dominance

Upper Extremity: Right
Lower Extremity: Not Established
Eye: Not Established

Neuro-Muscular/Neuro-Motor Comments: Poor dominance establishment indicative of poor hemispheric specialization.

Visual Motor/Visual Perception

Visual Processing/Tracking: Avoids eye contact, Loss of target object at midline when tracking left to right, Hesitates going up and down steps

Visual Perceptual Skills: Difficulty recognizing differences in form shape from previous image, Difficulty visually localizing requested object from environment

Visual Motors Skills: Difficulty copying simple shapes on same paper, Watches hand while writing

Visual Perceptual Tests: Test of Visual Perceptual Skills (TVPS)

Results: TEST OF VISUAL PERCEPTUAL SKILLS (4 to 13 years): Visual Discrimination: 4.3 yr Visual Memory: 4.2 yr Visual Spatial Relation: 4.5 Visual Form Constancy: <4.0 yr Visual Sequential Memory: <4.0 yr Visual Figure Ground: 4.5 yr Visual Closure: 4.5 yr

Patient Name: Smith, Charlie	Date: 1/17/2011 12:18 PM
Medical Record #: CB549	DOB: 1/14/2005
Account #: 74348290	SOC Date: 1/17/2011
Provider: Action Rehabilitation Services	
Provider #: 17238940	
Treating Clinician: Olivia Orin, MS, OTR/L	

Visual Motor/Visual Child to smoothly track target object across midline separately from head movements.
Perceptual Goals: Child to be able to copy straight line, circle, and square from near on same paper.

Sensory Integration

Sensory Tolerance: Complains of labels/tags in clothing, Dislikes getting hands dirty, Does not like to wear shoes

Praxis/Motor Planning: Tends to run on playground, but not climb or explore equipment, Poor sequencing of motor tasks

Kinesthesia/Body Awareness: Avoids climbing or jumping, Low muscle tone, Seeks deep pressure stimulation

Bilateral Integration: Poor bilateral motor coordination, Will turn body to avoid reaching across midline

Registration of Sensory Input: Dislikes noisy items such as vacuum cleaners and lawn mowers, Excessive pressure demonstrated during activities

Auditory Processing: Difficulty understanding nuances of language, Auditory attention - Distractible to irrelevant stimuli

Proprioception: Excessive pressure is used during writing and coloring tasks, Child tends to seek out activities involving proprioceptive input

Self-Regulation/Arousal: Difficulty getting to sleep or staying asleep, Disorganized behaviors, Has difficulty calming after exercise or becoming upset

Self-Stimulatory Behaviors: Self rocking behaviors

Sensory Integration Goals: Child to tolerate washing his hands and drying with a rough towel.

Impairment Observations


Charlie demonstrates full active range of motion in all extremities. Hypotonicity and decreased strength limits endurance for age appropriate activities.

Interventions (CPT Code)

Occupational Therapy Evaluation 97003
 Sensory Integrative Technique - Direct contact 97533
 Therapeutic Activities - Direct patient contact 97530
 Neuromuscular Reeducation - Therapeutic Procedure - 1+ Areas 97112
 Self Care/Home Management Training - Direct contact 97535

Frequency of OT: Three times weekly

Duration of OT: 6 months

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Olivia Orin, MS, OTR/L	Date/Time
State License #: OT 1234	



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Occupational Therapy

Progress / Treatment Note

Patient Name: Smith, Charlie	Date: 1/19/2011 10:07 AM
Medical Record #: CB549	DOB: 1/14/2005
Account #: 74348290	SOC Date: 1/17/2011
Provider: Action Rehabilitation Services	
Provider #: 17238940	
Treating Clinician: Olivia Orin, MS, OTR/L	

	Onset Date	Code	Description
Primary Diagnosis:	2/14/2005	783.42	DELAYED MILESTONES
Other Diagnosis:	12/22/2010	781.3	LACK OF COORDINATION

Time In: 10:00 AM **Time Out:** 11:00 AM

OT Interventions and CPT Codes Consisted of:	CPT Code	Modifiers	Minutes	Units
Therapeutic Activities - Direct patient contact	97530		40	3
Neuromuscular Reeducation - Therapeutic Procedure - 1+ Areas	97112		15	1
Total Minutes: 55 Total Timed Minutes: 55 Total Untimed Minutes: 0				
Total Units: 4 Total Timed Units: 4 Total Untimed Units: 0				
Pain In: 0 Pain Out: 0				

Intervention Comments:

Mother reported that Charlie was excited about attending therapy today.

Functional Activities:

	Cueing	Quantity / Accuracy
Play or leisure performance		on 5 consecutive trials
Social - interpersonal skills		40%
Motor operations - crossing the midline		3/10 trials
Motor operations - motor control		1/4 trials

Skilled Analysis of Safety Deficits or Problems:

Due to impaired proximal stability and sensory integration and coordination problems, this child was unable to participate in age appropriate activities.

Skills/Impairment Observations:

Sensory awareness; Social appropriateness; Strength

Impairment Observations Comments:

Charlie was able to hold scissors and cut 1 inch line with encouragement. Charlie was able to catch and throw an 18 inch ball with verbal cues to stay on task. Throws to therapist were within 6 feet of target. Charlie was able to attain eye contact with therapist when therapist performed tasks at eye level. Eye contact was not sustained.

Goals

Fine Coordination Goal: Able to hold scissors effectively - Cutting - Adaptive scissors by 2/18/2011


Gross Coordination Goal: Demonstrates good motor planning for task requested - Catch and throw a ball - Ball by 2/18/2011

Socialization Activity Goal: Child demonstrates appropriate eye contact to situation - Interactions with therapist by 3/18/2011

Patient's response to OT Interventions:	Good
Patient's progress toward established goals:	Good

Patient Name: Smith, Charlie
Medical Record #: CB549
Account #: 74348290
Provider: Action Rehabilitation Services
Provider #: 17238940
Treating Clinician: Olivia Orin, MS, OTR/L

Date: 1/19/2011 10:07 AM
DOB: 1/14/2005
SOC Date: 1/17/2011

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Olivia Orin, MS, OTR/L	Date/Time
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Occupational Therapy

Discharge Summary

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Patient Name: Smith, Charlie	Date: 2/18/2011 01:33 PM
Medical Record #: CB549	DOB: 1/14/2005
Account #: 74348290	SOC Date: 1/17/2011
Provider: Action Rehabilitation Services	
Provider #: 17238940	
Treating Clinician: Olivia Orin, MS, OTR/L	

Patient Information

Address: 123 Oak Street	Physician: Greg House
	Physician #: NPI# 45679
City, State, Zip: Nashville, Tennessee 37215-4818	
Occupation: Unknown	# of Approved Visits: 48
Gender: Male	Medicaid #: 17238470
Contact Person: Wilma Brown	Medicare #: NA

Discharge Information

	Onset Date	Code	Description
Primary Diagnosis:	2/14/2005	783.42	DELAYED MILESTONES
Other Diagnosis:	12/22/2010	781.3	LACK OF COORDINATION

Patient / Caregiver was given proper notification of Discharge:	Yes
No further Occupational Therapy intervention is indicated at this time in this setting:	Yes
Patient's physician has been notified that patient has been discharged from Occupational Therapist's care:	Yes
Reasons for Discharge: Maximal Level Reached	

Areas of Occupation

Self Care Activities

	Met: Yes	Goal Completion Date: 2/18/2011
Activities: Button coat or shirt		
Initial: Limited - Minimal assistance with cueing		
Goal: Independent		
Final Level: Able to button coat/shirt		
	Met: Yes	Goal Completion Date: 3/18/2011
Activities: Button and zip pants		
Initial: Extensive - Moderate assistance		
Goal: Limited - Minimal assistance with cueing		
Final Level: Able to button and zip pants		

School Activities

	Met: Yes	Goal Completion Date: 3/18/2011
Activities: Coloring		
Initial: Coloring-cannot stay within boundaries		
Goal: Coloring-Fills 50% of image		
Final Level: Coloring-Fills 75% of image		

Socialization with Parent(s)/Caregiver(s)

Patient Name: Smith, Charlie	Date: 2/18/2011 01:33 PM
Medical Record #: CB549	DOB: 1/14/2005
Account #: 74348290	SOC Date: 1/17/2011
Provider: Action Rehabilitation Services	
Provider #: 17238940	
Treating Clinician: Olivia Orin, MS, OTR/L	

Met: No**Goal Completion Date:** 3/18/2011**Activities:** Interactions with therapist**Initial:** Child does not spontaneously initiate eye contact**Goal:** Child demonstrates appropriate eye contact to situation**Final Level:** Child demonstrates eye contact upon request**Assessment**

Recommended Home Activities: Allow extra time for written work; Chucky Cheese play time; ; Encourage reaching across midline during play; Give praise for participation in tasks; Hanging from bars on swing set; Heavy work tasks-carrying trash barrels, laundry baskets; Play the Twister game

Goals

Skilled Analysis of Safety Deficits or Problems: This child is now able to participate in age appropriate activities.

Functional Goals; Long Term: Child to participate in age appropriate school activities. - Met

Performance Skills and Components**Peabody Developmental Motor Scales****Object Manipulation****Fine Motor Coordination****Met:** Yes**Goal Completion Date:** 2/18/2011**Activity:** Cutting**Tools Used:** Adaptive scissors**Initial:** Ineffective hold on scissors during tasks**Current:** Able to cut out shape within ¼ inch of line**Goal:** Able to hold scissors effectively**Gross Motor Coordination****Met:** Yes**Goal Completion Date:** 2/18/2011**Activity:** Catch and throw a ball**Tools Used:** Ball**Initial:** Attempts to perform task, but poor motor planning interferes**Current:** Demonstrates good motor planning for task requested**Goal:** Demonstrates good motor planning for task requested**Met:** Yes**Goal Completion Date:** 2/18/2011**Activity:** Ascending stairs**Tools Used:** Rail**Initial:** Unable to alternate steps when ascending stairs**Current:** Able to alternate steps when ascending stairs**Goal:** Able to alternate steps when ascending stairs**Visual Motor/Visual Perceptual Goals:** Child to smoothly track target object across midline separately from head movements. MET.**Perceptual Goals:** Child to be able to copy straight line, circle, and square from near on same paper. MET.**Sensory Integration Goals:** Child to tolerate washing his hands and drying with a rough towel. MET.**Impairment Observations**

Charlie has demonstrated excellent gains with coordination, visual motor/perception and sensory processing skills.

Interventions (CPT Code)


Occupational Therapy Evaluation 97003

Sensory Integrative Technique - Direct contact 97533

Patient Name: Smith, Charlie
Medical Record #: CB549
Account #: 74348290
Provider: Action Rehabilitation Services
Provider #: 17238940
Treating Clinician: Olivia Orin, MS, OTR/L

Date: 2/18/2011 01:33 PM
DOB: 1/14/2005
SOC Date: 1/17/2011

Therapeutic Activities - Direct patient contact 97530
Neuromuscular Reeducation - Therapeutic Procedure - 1+ Areas 97112
Self Care/Home Management Training - Direct contact 97535

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