

**REGISTER BY MAIL**

**Receipts Sent Via Email - Please Print Clearly!**  
**ATTENTION:** Copy as needed for each attendee or print additional forms at [www.summit-education.com](http://www.summit-education.com)

**Receipts Sent Via Email - Please Print Clearly!**  
**ATTENTION:** Copy as needed for each attendee or print additional forms at [www.summit-education.com](http://www.summit-education.com)

Email\* \_\_\_\_\_

Organization\_\_\_\_\_

Address2 \_\_\_\_\_

Phone\*                      EMAIL OR PHONE # REQUIRED!                      Ext.                     

### Payment Required For Registration

Check, credit card or PO# MUST accompany registration form.

☐ PO#: \_\_\_\_\_ (PO FORM required for registration)

Cardholder's Name: \_\_\_\_\_

Exp. Date: \_\_\_\_\_ 3 Digit CSC/CVC: \_\_\_\_\_

 PLEASE RETURN ENTIRE PANEL

- ☐ **Colorado Springs, CO** - August 11, 2014
- ☐ **Denver, CO** - August 13, 2014
- ☐ **Cheyenne, WY** - August 12, 2014

EARLY	REGULAR
<b>\$179</b>   Single Person	<b>\$199</b>   Single Person
<b>\$169</b>   2-4 People	<b>\$189</b>   2-4 People
<b>\$149</b>   5+ People	<b>\$169</b>   5+ People

\_\_\_\_\_

1. Online: [www.summit-education.com](http://www.summit-education.com)
2. Phone: (800) 433-9570
3. Fax: (615) 376-8233
4. Mail: Summit Professional Education  
PO Box 908 | Franklin, TN 37065

PO Box 908

Franklin, TN 37065

PRSR STD  
U.S. POSTAGE  
**PAID**  
NASHVILLE, TN  
PERMIT NO. 508

---

PDOCKV.0814.2

- **Medicare documentation requirements** for evaluations, re-evaluations, progress notes, discharge, and treatment notes

- Documenting patient's current level of function through the use of a **patient centered outcome measure**
- How to **document the medical necessity** of the services provided
- PQRS (Physician Quality Reporting System) requirements
- **G-Codes: Functional reporting required in 2014**
- **Medicare audit** and appeals process
- Find out **new changes** for 2014

**Colorado Springs, CO**  
August 11, 2014

**Cheyenne, WY**  
August 12, 2014

**Denver, CO**  
August 13, 2014

***Presented by Kristin Valdes, OTD, OT, CHT,*** owner and director of Hand Works Therapy. Dr. Valdes is a practicing occupational therapist, a certified hand therapist and has been in private practice for twenty years. She recently passed a Medicare third party audit and her experience is the practical basis of this workshop.

# Medicare Documentation Requirements

## *How to Comply with*

### *For Part B Therapy Services*

## An Important One-Day Workshop for All Physical and Occupational Therapists

*An Important One-Day Workshop for All Physical and Occupational Therapists*

*How to Comply with*

# Medicare Documentation Requirements

*For Part B Therapy Services*

**Presented by Kristin Valdes, OTD, OT, CHT**, owner and director of Hand Works Therapy. Dr. Valdes is a practicing occupational therapist, a certified hand therapist and has been in private practice for twenty years. She recently passed a Medicare third party audit and her experience is the practical basis of this workshop.

- **Medicare documentation requirements** for evaluations, re-evaluations, progress notes, discharge, and treatment notes
- Documenting patient's current level of function through the use of a **patient centered outcome measure**
- How to **document the medical necessity** of the services provided
- PQRS (Physician Quality Reporting System) requirements
- **G-Codes: Functional reporting required in 2014**
- **Medicare audit** and appeals process
- Find out **new changes** for 2014

<input checked="" type="checkbox"/> Occupational Therapists	<input checked="" type="checkbox"/> Long-Term Care Administrators
<input checked="" type="checkbox"/> Occupational Therapy Assistants	<input checked="" type="checkbox"/> Administrative Staff
<input checked="" type="checkbox"/> Physical Therapists	<input checked="" type="checkbox"/> Speech-Language Pathologists
<input checked="" type="checkbox"/> Physical Therapist Assistants	<input checked="" type="checkbox"/> Rehab Managers
<input checked="" type="checkbox"/> Healthcare Office Managers	<input checked="" type="checkbox"/> Social Workers

SCAN HERE



Help? [www.tinyurl.com/qrhelpt](http://www.tinyurl.com/qrhelpt)

 **SPEECH-LANGUAGE**  
CONTINUING EDUCATION AVAILABLE

**GT**  **APPROVED PROVIDER of**  
**CONTINUING EDUCATION**  
by The American Occupational  
Therapy Association, Inc.


**PHYSICAL THERAPY**  
 CONTINUING EDUCATION AVAILABLE

**Approved Provider**  
 Association of Business Video Schools  
  
 Approving Continuing Education



**SUMMIT**  
PROFESSIONAL EDUCATION

800-433-9570 | Online at [www.summit-education.com](http://www.summit-education.com)

The image contains three logos. The top logo is for 'SPEECH-LANGUAGE CONTINUING EDUCATION AVAILABLE' and features the SLP (Speech-Language Pathologist) logo. The middle logo is for 'NAB' (National Association of Board Administrators) and features the text 'NAB' in large letters above 'National Association of Board Administrators'. The bottom logo is for 'PHYSICAL THERAPY CONTINUING EDUCATION AVAILABLE' and features the PT (Physical Therapist) logo.



**SUMMIT**  
PROFESSIONAL EDUCATION

800-433-9570 | Online at [www.summit-education.com](http://www.summit-education.com)



### Dates & Locations

#### Colorado Springs, CO August 11, 2014

Embassy Suites Colorado Springs  
7290 Commerce Center Drive  
Colorado Springs, CO 80919  
(719) 599-9100

#### Cheyenne, WY August 12, 2014

Little America Hotel  
2800 West Lincolnway  
Cheyenne, WY 82001  
(307) 775-8400

#### Denver, CO August 13, 2014

Homewood Suites by Hilton DIA  
4210 Airport Way  
Denver, CO 80239  
(303) 371-4555

# Medicare Documentation Requirements

Changes to Medicare force therapists to constantly deal with changes in documentation for proper coding and reimbursement. Daily treatment notes must justify the necessity of the services that are billed to Medicare beneficiaries. Treatment notes that are intervention-based rather than those that demonstrate clinical skills and reasoning are subject to denial of payment. Therapists must know specific information that must be included in evaluations, re-evaluation, progress notes, and daily treatment intervention notes.

This workshop will provide you the current Medicare guidelines for outpatient physical and occupational therapy services according to the Centers for Medicare Services. You will learn proper documentation practices which protect you in the event of a Medicare audit, and ensure reimbursement for treatments delivered. You will practice writing patient goals and notes throughout the workshop, and these will be discussed so that you will be able to identify the changes that must be made within their own practice settings in order to become compliant with Medicare rules. This workshop will facilitate your understanding of the medical review process and teach proper documentation of the medical necessity of therapy services. The day will conclude with a session on measuring a patient’s current level of function using an outcome measure and reporting the findings to Medicare using G-Codes.

### About Your Program Instructor

**Kristin Valdes, OTD, OT, CHT**, is the owner and Director of Hand Works Therapy in Sarasota, Florida. Dr. Valdes has been in private practice for the past twenty years as a licensed occupational therapist, a certified hand therapist, and a doctor of occupational therapy. Her clinical expertise includes treatment of the hand, wrist, and elbow, shoulder, splinting, and arthritis. She has produced and presented training workshops and seminars locally and nationally on such topics as evidence-based medicine, elbow and shoulder rehabilitation, thumb osteoarthritis and management, upper extremity fracture management, and splinting. Her practice recently went through a Medicare audit and pre-payment paper review following the audit. She has synthesized the information that she has learned from her experience to share with other therapists to ensure that they are able to properly document the services that they provide to Medicare beneficiaries to avoid denial of payment or an unsuccessful audit. Dr. Valdes received her OTD with a specialization in hand rehabilitation from Rocky Mountain University of Health Care Professions. She is member of the Guatemala Healing Hands Medical Mission that provides rehabilitation services to the Guatemalan people.

### Learning Objectives

1. Define Medicare documentation requirements for evaluations, re-evaluations, progress notes, and treatment notes.
2. Document the patient’s current level of function through the use of an appropriate patient centered outcome measure.
3. Document the medical necessity of the services provided.
4. Identify the documentation timeframe requirements.
5. Explain fulfillment of the PQRS (Physician Quality Reporting System) requirements.
6. Define provision of G-Codes to Medicare for functional reporting.

### Join Our Faculty

Summit Professional Education is currently seeking qualified professionals to develop and teach workshops nationally. Visit [www.summit-education.com/instructor](http://www.summit-education.com/instructor) for more information.

### Workshop Outline

#### I. The Medical Review Process

- » The audit: What documentation is required
- » The appeals process: What are the stages and what to expect
- » Pre-payment paper review

#### II. Medicare Documentation: What is Required to Include in an Evaluation

##### ☒ HANDS-ON LAB

- » **Lab time:** Watch a real patient evaluation video and write patient goals and discussion of written goals
- » Common reasons for denials with specific examples of poorly written documentation will be provided
- » Necessary components of a Medicare evaluation

#### III. How to Document Your Patient’s Current Level of Function as Required by Medicare

- » Patient outcome measures available for therapists to use for a variety of diagnoses
- » How often must function be assessed
- » How to document progress toward functional goals

#### IV. Progress, Re-Evaluation, and Discharge Notes

##### ☒ HANDS-ON LAB

- » **Lab time:** Watch a patient treatment video and write a specific patient treatment note that documents the medical necessity of services that were provided and discussion of the notes
- » Elements that must be included
- » Timing requirements

#### V. G-Codes: Required Functional Reporting in 2014

- » What are G-codes
- » Functional reporting requirements
- » Guidelines for code selection

#### VI. PQRS (Physician Quality Reporting System)

- » Why you need to be participating in this program if you are in independent practice
- » What measures are appropriate for therapists to report
- » PQRS changes for 2014

**Please bring a sample of a current patient evaluation and treatment note with patient names and therapist names obscured.**

### Workshop Schedule

**7:30am – Registration & Breakfast**

**8:00am – Workshop Begins**

**11:30am - 12:30pm – Lunch On Your Own**

**3:30pm – Workshop Adjourns**

Your instructor will break for 15 minutes in the morning and afternoon at appropriate times.

attendee. If the cancellation is made within ten days or less, refunds will not be granted for any reason. A credit voucher will be issued that may be used toward a future seminar. Credit vouchers are transferable and do not expire. In cases of inclement weather where the seminar is conducted as scheduled, you may request a credit voucher toward a future seminar. If we must cancel or change the seminar for any reason, our liability is limited to the cost of tuition. If you register and do not attend, you are still responsible for payment.

**W-9:** To download a copy, logon to [www.summit-education.com/w-9](http://www.summit-education.com/w-9)  
**FEID Number:** 20-2064736

### Continuing Education Credit

**Speech-Language Pathologists & Audiologists** - This program is offered for 0.6 CEUs (Intermediate level, Related Area).

APPROVED PROVIDER

ASHA  
CONTINUING  
EDUCATION  
AMERICAN SPEECH-LANGUAGE-HEARING ASSOCIATION

Summit Professional Education is approved by the Continuing Education Board of the American Speech-Language-Hearing Association (ASHA) to provide continuing education activities in speech-language pathology and audiology. **See course information for number of ASHA CEUs, instructional level and content area.** ASHA CE Provider approval does not imply endorsement of course content, specific products or clinical procedures.

**Occupational Therapists** - Summit Professional Education is an AOTA Approved Provider of continuing education. This course is offered for 0.6 AOTA CEUs (6.0 contact hours). The assignment of AOTA CEUs does not imply endorsement of specific course content, products, or clinical procedures by AOTA. **KS:** This course meets the regulatory requirements specified by the Kansas State Board of the Healing Arts, in K.A.R. 100-Article 54-7(a)(2) subsection (e) regarding approved continuing education courses, 6.0 hours.

**Physical Therapists - CO:** This seminar meets accepted standards for continuing competence activities. Save your certificate of completion for the relicensing process and/or your employer, 6.0 hours. **KS:** This course meets the regulatory requirements specified by the Kansas State Board of the Healing Arts, in K.A.R. 100-Article 29-9(a)(1)(B) subsection (f) regarding approved continuing education courses, 6.0 hours. **NE:** This course meets the requirements set out in Nebraska state regulation 172-137-022.02-2 Acceptable Continuing Education for physical therapists and physical therapist assistants. Save your certificate of completion and the seminar brochure for relicensing, 6.0 hours. **WY:** This workshop meets accepted standards for continuing competence activities. Save your certificate of completion for the relicensing process and/or your employer, 6.0 hours.

**Healthcare Office Managers** - This seminar meets the criteria of the Professional Association of Health Care Office Management and is approved for 6.0 CEU(s). Pick up a PAHCOM certificate after the event.

**Long-Term Care Administrators** - Summit Professional Education is a Certified Sponsor of professional continuing education with the National Association of Long Term Care Administrator Boards (NAB) and has approved this program for 6.0 clock hours, approval # 1752015-6.00-10945-in. *State licensure boards have final authority on the acceptance of individual courses.*

**Social Workers** - Summit Professional Education, provider # 1201, is approved as a provider for social work continuing education by the Association of Social Work Boards (ASWB) [www.aswb.org](http://www.aswb.org), through the Approved Continuing Education (ACE) program. Summit Professional Education maintains responsibility for the program. Social workers participating in this course will receive 6.0 clinical continuing education clock hours.

**Home Care, Outpatient and Other Professionals** - This seminar qualifies for 6.0 continuing education hours as required by many national, state and local licensing boards and professional organizations. Save your course outline and certificate of completion, and contact your own board or organization for specific filing requirements.

**This event contains intermediate level content.**

#### SATISFACTORY COMPLETION

Participants must pay tuition fee, sign in, attend the entire seminar, complete an evaluation and sign out in order to receive a certificate of completion. Participants not fulfilling these requirements will not receive a certificate. Failure to sign in or out will result in forfeiture of credit for the entire workshop. No exceptions will be made. Partial credit is not available.

#### WORKSHOP HANDBOOK

Included with your registration you will receive a comprehensive manual compiled by the instructor.

**DISCLOSURES:** Guidelines exist whereby all speakers must disclose any relevant relationships. Kristin Valdes is compensated by Summit as an instructor and is the owner and Director of Hand Works Therapy for which she is compensated. She has no non-financial relationships to disclose.

**SCOPE OF PRACTICE:** Workshop content is not intended for use by participants outside of the regulatory scope of practice of their license(s). You are responsible for knowing what lies within and without your professional scope of practice.

**Have continuing education credit questions? Please email our CE Department at [ceinfo@summit-education.com](mailto:ceinfo@summit-education.com) for the latest approval status.**

#### THE SUMMIT GUARANTEE

Summit Professional Education is a national leader in high-quality educational products and services for today’s professional. Our seminars and training programs are designed to help professionals achieve improved performance and results in all areas. Our faculty is the “best of the best” in their fields of expertise, providing programs that really make a difference to participants. If for any reason you are not satisfied with the program, simply notify the registrar of your intent to withdraw from the program prior to the first morning break, turn in your workshop materials and receive a 100% refund or credit on a future program.

#### REGISTRATION, CONFIRMATION & CERTIFICATES

Confirmations of registration will be sent via email. A copy of your registration confirmation will serve as

your receipt for fees paid at the time of registration. Walk-ins are welcome but must register onsite. Please notify us at least thirty (30) days in advance if you have special needs or require assistance. Certificates are mailed to the seminar location 5 business days in advance. If your certificate is not available the day of the seminar, please complete a certificate request onsite and a copy will be sent to you. Hotel locations must occasionally be adjusted. Please provide an email address and phone number to receive any important updates.

#### SUBSTITUTION & CANCELLATION POLICY

Substitutions may be made at any time. Requests for cancellation must be received in writing by fax or mail ten (10) days prior to the seminar in order to receive a refund less a \$20.00 administrative charge per canceled



**800-433-9570 | [www.summit-education.com](http://www.summit-education.com)**