



# 19 Interventions/Goals

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## Purpose:

To guide therapists on what to document in the Interventions/Goals section for a discharge visit.

## Question Intent:

Per [Medicare Benefit Policy Manual Chapter 7 - Home Health Services](#), the Interventions/Goals section highlights the importance "that the home health records for every visit will reflect the need for skilled medical care provided."

It is a requirement that documentation of patient care is skilled in nature to justify professional therapy services. The core of skilled documentation must answer the following on each note:

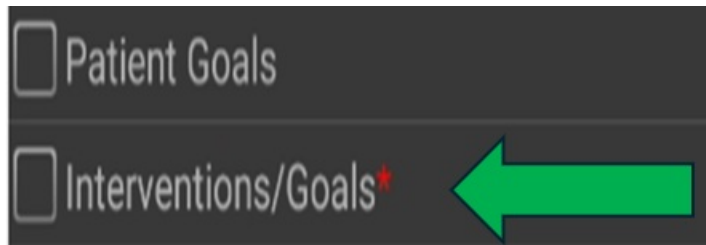
1. What did the therapist teach, train and/or instruct on?
2. What was the patient's reaction/response to care as noted by demonstrating learning of the training? (Teach Back)
3. What is the status of the care related to patients progress towards goals?

The *Show Details* content for each Intervention/Goal is now organized so that as the clinician scrolls down the content comes in order of selection to make it easy to find and organize. In general, the information will be in the order of an **(1) Introduction Visit Statement** followed by **(2) Content**, and finally the **(3) Concluding Statement**. Below you will find step by step instructions and an example of this format with each section of information identified:

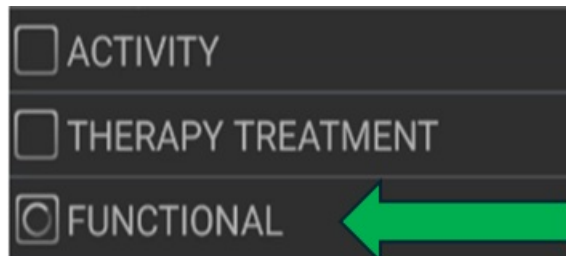
**NOTE** - see the [Maintenance Therapy](#) article to see how Interventions/Goals should be utilized for Maintenance Therapy patients.

## Response-Specific Instructions:

1. Click on Interventions/Goals in your visit note:
  - 1.



2. Within Interventions/Goals are Categories. You will select each category to see specific Interventions to document to:
  1. Categories:
    - 1.



3. Within the Category, specific Interventions that have been added by the Evaluating Therapist through [01 Pathways & New Order](#) will appear. Below are some ADL examples:
  - 1.

INTERVENTION: INSTRUCT PATIENT / CAREGIVER IN DRESSING UPPER BODY Last Visit Date:

Provided  Not Provided

INTERVENTION: INSTRUCT PATIENT / CAREGIVER IN SELF-FEEDING. Last Visit Date:

Provided  Not Provided

INTERVENTION: INSTRUCT PATIENT / CAREGIVER IN DRESSING LOWER BODY Last Visit Date:

4. Whenever an Intervention is marked as *Provided*, the *Show Details* feature will be used:

1.

INTERVENTION: TRAIN PATIENT / CAREGIVER WITH GROOMING / HYGIENE SKILLS

Provided  Not Provided

2.

OT33 - PATHWAYS, DEMO

Show Details

ENTER DETAILS

REQUIRED

5. The *Show Details* options are organized so that as the clinician scrolls down, the content comes in order of selection to make it easy to find and organize. In general, the information will be in the order of an (1) **Introduction Visit Statement** followed by (2) **Content**, and finally (3) **Concluding Statement**. Below provides an example of this format with each section of information identified:

Insert Intervention Details

1

THE PATIENT WAS INSTRUCTED REGARDING GROOMING WITH \* ASSISTANCE ON TODAYS VISIT:\*

2

TO CONSISTENTLY USE A COMFORTABLE AND STABLE SEATED POSITION WITH ALL GROOMING ITEMS WITHIN REACH AS WELL AS CLEARANCE FOR UPPER EXTREMITIES TO REACH ALL AREAS OF NECK, FACE, AND HAIR.

IN SETUP OF BATHROOM COUNTERTOP NEAR SINK WITH SOAP, WASHCLOTH, SHAVER, TOOTHBRUSH, AND TOOTH PASTE WITHIN SAFE REACHING DISTANCE.

IN PLACEMENT OF ASSISTIVE DEVICE NEXT TO COUNTERTOP AND TO MAINTAIN ONE HAND ON COUNTERTOP FOR STABILITY AT ALL TIMES WHILE USING CONTRALATERAL HAND TO PERFORM GROOMING TASKS.

TO WASH FACE USING A GENTLE, NON-ABRASIVE CLEANSER THAT DOES NOT CONTAIN ALCOHOL. WET FACE WITH LUKEWARM WATER AND USE YOUR FINGERTIPS TO APPLY CLEANSER. RESIST EXCESSIVE SCRUBBING AS THAT WILL IRRITATE SKIN. RINSE WITH LUKEWARM WATER AND PAT DRY WITH A SOFT TOWEL.

ENVIRONMENTAL SET-UP TO FACILITATE SELF MANAGEMENT WITH GROOMING / HYGIENE \*

PATIENT DEMONSTRATED TEACH-BACK \*% WITH INSTRUCTIONS AND EDUCATION AT END OF TODAYS TREATMENT.

3

PATIENT IS IMPROVING IN PROGRESS TOWARDS GOAL AS EVIDENCED BY \*. WILL CONTINUE WITH FURTHER TREATMENT TO MEET ESTABLISHED GOAL.

PATIENT HAS HAD NO MEASURABLE CHANGE IN GOAL PROGRESS SINCE LAST VISIT, BUT REHAB POTENTIAL REMAINS. WILL NEED FURTHER TREATMENT TO ENSURE PATIENT CAN SAFELY EXECUTE STRATEGIES.

PATIENTS PROGRESS HAS REGRESSED TOWARDS GOAL DUE TO \*. REHAB POTENTIAL REMAINS AND WILL NEED FURTHER TREATMENT TO ENSURE PATIENT CAN SAFELY EXECUTE STRATEGIES.

PATIENT IS PERFORMING IDENTIFIED GROOMING TASKS CONSISTENTLY AND SAFELY AS INSTRUCTED AND HAS MET GOAL.

PATIENT HAS REACHED MAXIUM REHABILITATION POTENTIAL WITH INTERVENTION. GOAL PARTIALLY MET. FURTHER SKILLED TREATMENT IS NO LONGER REASONABLE AND NECESSARY.

FURTHER EDUCATION NO LONGER REQUIRED DUE TO PATIENTS INABILITY TO IMPLEMENT AND OR DEMONSTRATE INSTRUCTIONS CONSISTENTLY. PATIENT HAS BEEN EDUCATED ON THE RISKS OF NON-ADHERENCE AND FURTHER SKILLED TREATMENT IS NO LONGER REASONABLE AND NECESSARY.

1.

6. It is required that three items from the *Show Details* are selected for every note. It is also required the therapist either 'free text' their skilled documentation, or use the pre-defined statements and customize accordingly. In summary, the Intervention Details should look like:

1. **Required** - the **(1) Introduction Visit Statement** - Statement that begins the documentation and is found at the top of the **Show Details** list. There is generally one statement and focuses on **what the therapist is teaching on**.

1.

1

Insert Intervention Details

THE PATIENT WAS INSTRUCTED REGARDING GROOMING WITH \* ASSISTANCE ON TODAYS VISIT:\*

2. 2 options: **(Required to do 1 or both)**

1. **Option 1** - Free text skilled documentation. An example for grooming above may read:

1. "in using 4ww with brakes locked to sit in front of bathroom mirror. Place hair brush within reach and brush with firm, short strokes to minimize tangles caught in brush."

2. **Option 2** - Pre-defined statements that are built in the **(2) Content:**

1.

2

TO CONSISTENTLY USE A COMFORTABLE AND STABLE SEATED POSITION WITH ALL GROOMING ITEMS WITHIN REACH AS WELL AS CLEARANCE FOR UPPER EXTREMITIES TO REACH ALL AREAS OF NECK, FACE, AND HAIR.


IN SETUP OF BATHROOM COUNTERTOP NEAR SINK WITH SOAP, WASHCLOTH, SHAVER, TOOTHBRUSH, AND TOOTH PASTE WITHIN SAFE REACHING DISTANCE.

IN PLACEMENT OF ASSISTIVE DEVICE NEXT TO COUNTERTOP AND TO MAINTAIN ONE HAND ON COUNTERTOP FOR STABILITY AT ALL TIMES WHILE USING CONTRALATERAL HAND TO PERFORM GROOMING TASKS.

TO WASH FACE USING A GENTLE, NON-ABRASIVE CLEANSER THAT DOES NOT CONTAIN ALCOHOL. WET FACE WITH LUKEWARM WATER AND USE YOUR FINGERTIPS TO APPLY CLEANSER. RESIST EXCESSIVE SCRUBBING AS THAT WILL IRRITATE SKIN. RINSE WITH LUKEWARM WATER AND PAT DRY WITH A SOFT TOWEL.

ENVIRONMENTAL SET-UP TO FACILITATE SELF MANAGEMENT WITH GROOMING / HYGIENE \*

2. The pre-defined statements are written as complete instructions and is intended to supplement a



therapist's unique patient note, but content should be changed to ensure the instructions are accurate by either adding or deleting sections that are not appropriate. It is not intended to be used in the fashion of cloning subsequent notes where there is identical verbatim language on every note. **It is the responsibility of the clinician to make each note unique and defensible.** Where appropriate, there are \* to indicate where specific information needs to be added. If the content is left unaltered, the record defines the training provided was as exactly as written, so a therapist needs to be aware they will be held accountable to what is documented, if audited.

3. Required - Teach Back statement from (2) Content:

1.

PATIENT DEMONSTRATED TEACH-BACK \*% WITH INSTRUCTIONS AND EDUCATION AT END OF TODAY'S TREATMENT.

4. Required - (3) Concluding Statement - The final step is the conclusion of the intervention. The therapist will decide if they will continue (top 3 in screenshot) or discharge (bottom 3 in screenshot) based on patient progress. **On the discharge visit one of the bottom 3 options (outlined in red in the screenshot below) should be chosen:**

1.

3

<input type="checkbox"/>	PATIENT IS IMPROVING IN PROGRESS TOWARDS GOAL AS EVIDENCED BY * . WILL CONTINUE WITH FURTHER TREATMENT TO MEET ESTABLISHED GOAL.
<input type="checkbox"/>	PATIENT HAS HAD NO MEASURABLE CHANGE IN GOAL PROGRESS SINCE LAST VISIT, BUT REHAB POTENTIAL REMAINS. WILL NEED FURTHER TREATMENT TO ENSURE PATIENT CAN SAFELY EXECUTE STRATEGIES.
<input type="checkbox"/>	PATIENTS PROGRESS HAS REGRESSED TOWARDS GOAL DUE TO * . REHAB POTENTIAL REMAINS AND WILL NEED FURTHER TREATMENT TO ENSURE PATIENT CAN SAFELY EXECUTE STRATEGIES.
<input type="checkbox"/>	PATIENT IS PERFORMING IDENTIFIED GROOMING TASKS CONSISTENTLY AND SAFELY AS INSTRUCTED AND HAS MET GOAL.
<input type="checkbox"/>	PATIENT HAS REACHED MAXIMUM REHABILITATION POTENTIAL WITH INTERVENTION. GOAL PARTIALLY MET. FURTHER SKILLED TREATMENT IS NO LONGER REASONABLE AND NECESSARY.
<input type="checkbox"/>	FURTHER EDUCATION NO LONGER REQUIRED DUE TO PATIENTS INABILITY TO IMPLEMENT AND OR DEMONSTRATE INSTRUCTIONS CONSISTENTLY. PATIENT HAS BEEN EDUCATED ON THE RISKS OF NON-ADHERENCE AND FURTHER SKILLED TREATMENT IS NO LONGER REASONABLE AND NECESSARY.

7. Here is an example of an OT selecting all required sections and using free text typing for content for a discharge with goals met:

1.

Insert Intervention Details

THE PATIENT WAS INSTRUCTED REGARDING GROOMING WITH \* ASSISTANCE ON TODAYS VISIT:\*

TO CONSISTENTLY USE A COMFORTABLE AND STABLE SEATED POSITION WITH ALL GROOMING ITEMS WITHIN REACH AS WELL AS CLEARANCE FOR UPPER EXTREMITIES TO REACH ALL AREAS OF NECK, FACE, AND HAIR.

IN SETUP OF BATHROOM COUNTERTOP NEAR SINK WITH SOAP, WASHCLOTH, SHAVER, TOOTHBRUSH, AND TOOTHPASTE WITHIN SAFE REACHING DISTANCE.

IN PLACEMENT OF ASSISTIVE DEVICE NEXT TO COUNTERTOP AND TO MAINTAIN ONE HAND ON COUNTERTOP FOR STABILITY AT ALL TIMES WHILE USING CONTRALATERAL HAND TO PERFORM GROOMING TASKS.

TO WASH FACE USING A GENTLE, NON-ABRASIVE CLEANSER THAT DOES NOT CONTAIN ALCOHOL. WET FACE WITH LUKEWARM WATER AND USE YOUR FINGERTIPS TO APPLY CLEANSER. RESIST EXCESSIVE SCRUBBING AS THAT WILL IRRITATE SKIN. RINSE WITH LUKEWARM WATER AND PAT DRY WITH A SOFT TOWEL.

ENVIRONMENTAL SET-UP TO FACILITATE SELF MANAGEMENT WITH GROOMING / HYGIENE \*

PATIENT DEMONSTRATED TEACH-BACK \*% WITH INSTRUCTIONS AND EDUCATION AT END OF TODAYS TREATMENT.

PATIENT IS IMPROVING IN PROGRESS TOWARDS GOAL AS EVIDENCED BY \*. WILL CONTINUE WITH FURTHER TREATMENT TO MEET ESTABLISHED GOAL.

PATIENT HAS HAD NO MEASURABLE CHANGE IN GOAL PROGRESS SINCE LAST VISIT, BUT REHAB POTENTIAL REMAINS. WILL NEED FURTHER TREATMENT TO ENSURE PATIENT CAN SAFELY EXECUTE STRATEGIES.

PATIENTS PROGRESS HAS REGRESSED TOWARDS GOAL DUE TO \* . REHAB POTENTIAL REMAINS AND WILL NEED FURTHER TREATMENT TO ENSURE PATIENT CAN SAFELY EXECUTE STRATEGIES.

PATIENT IS PERFORMING IDENTIFIED GROOMING TASKS CONSISTENTLY AND SAFELY AS INSTRUCTED AND HAS MET GOAL.

PATIENT HAS REACHED MAXIMUM REHABILITATION POTENTIAL WITH INTERVENTION. GOAL PARTIALLY MET. FURTHER SKILLED TREATMENT IS NO LONGER REASONABLE AND NECESSARY.

FURTHER EDUCATION NO LONGER REQUIRED DUE TO PATIENTS INABILITY TO IMPLEMENT AND OR DEMONSTRATE INSTRUCTIONS CONSISTENTLY. PATIENT HAS BEEN EDUCATED ON THE RISKS OF NON-ADHERENCE AND FURTHER SKILLED TREATMENT IS NO LONGER REASONABLE AND NECESSARY.

8. Once the asterisks are completed, this note would read as follows:

1.

Show Details

ENTER DETAILS

THE PATIENT WAS INSTRUCTED REGARDING GROOMING WITH MODIFIED INDEPENDENCE ON TODAYS VISIT:

PATIENT DEMONSTRATES ABILITY TO SAFELY SIT IN 4WW WITH WHEELS LOCKED AND PERFORM ALL GROOMING TASKS SAFELY AND INDEPENDENTLY IN FRONT OF BATHROOM SINK.

PATIENT DEMONSTRATED TEACH-BACK 100% WITH INSTRUCTIONS AND EDUCATION AT END OF TODAY'S TREATMENT.

PATIENT IS PERFORMING IDENTIFIED GROOMING TASKS CONSISTENTLY AND SAFELY AS INSTRUCTED AND HAS MET GOAL.

9. Following the Provided documentation, the system will ask 'HAS THE GOAL BEEN MET?'. It is important to understand that the Goal language is generic, derived from the Pathway selected. The therapist should go to Medical Records --> Order History to view their customized Goal to the patient to determine if the goal is 'Met' or 'Not Met'.

1. Following review of Goals in Order History, if the Goal is 'Met' the green 'Met' button will be selected:

1.

GOAL: PATIENT TOLERATES LEAST RESTRICTIVE DIET AND LIQUID CONSISTENCY WITH LEAST RISK OF ASPIRATION.

HAS THE GOAL BEEN MET?

2. If 'Not Met' is chosen, the Therapist will select a reason.

1.

HAS THE GOAL BEEN MET?

 Met

 Not Met

NOT APPLICABLE TO CLIENT'S POC

OUTCOME ACHIEVED ON PREVIOUS VISIT

ADDITIONAL TIME REQUIRED TO MEET INTERVENTION/GOAL

NOT APPLICABLE TO THE CLIENT'S POC AT THIS TIME

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