



19 Therapy Goals/Status

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Purpose:

To guide therapists on the use of Therapy Goals/Status to objectively track goal progress throughout the patient's home health episode.

Question Intent:

The Therapy Goals/Status section is intended to track the objective progress of the primary components of your plan of care throughout the episode. It is important that these primary components are added at your Initial Visit (SOC or Evaluation) and documented towards throughout the episode by using the 'status' field to enter the current status at each visit.

Per [Medicare Benefit Policy Manual Chapter 7 - Home Health Services](#), the Therapy Goals/Status portion of our notes helps support that "the condition of the patient will improve materially in a reasonable and generally predictable period of time. Improvement is evidenced by objective successive measurements." This is essential in our Restorative Therapy documentation.

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

Response – Specific Instructions:

At Agency Discharge (18) and Discipline Discharge (19) visits the Therapist will select Therapy Goals/Status in their visit note and see full menu of available goals (in comparison to routine visit that only shows what has been associated to the patient). To quickly view the Therapy Goals/Status that are associated with the patient the therapist can go to Medical Records (top right menu) and select [Therapy History](#). This will open up the Therapy Goals/Status goals that should be addressed at the Discharge Visit:

Therapy Goals/Status History

FUNCTIONAL (OT)
FUNCTIONAL TESTS (OT)

FUNCTIONAL (PT)
BED MOBILITY (PT)

TRANSFERS (PT)

FUNCTIONAL TESTS (PT)

MOBILITY/GAIT

Therapy Goals/Status History

BED MOBILITY (PT)

ITEM: SIT TO LYING

Status	MD	
STG	STG Date	Comments
CGA	10/17/22	
LTG	LTG Date	Comments
SUP	11/7/22	

ITEM: LYING TO SIT SIDE OF BED

Status	MD	
STG	STG Date	Comments
CGA	10/17/22	
LTG	LTG Date	Comments
SUP	11/7/22	

To update a Status, the therapist will click on the category and the full THERAPY GOALS/STATUS display will open and be available to edit. The Therapist will click on the 'Status' drop down and choose the appropriate status based on patient presentation for the day's visit.

MOBILITY: WALK 150FT IN CORRIDOR

Status
 MN

Carryover Status
 Carryover Don't Carryover

Short Term Goal
 CGA

Date
 12/29/23

Comments
 WITH USE OF 4 WHEEL WALKER.

Set Comment

Long Term Goal
 MI

Date
 1/26/24

Comments
 WITH USE OF 4 WHEEL WALKER.

Set Comment

As this is the last visit for the discipline, the goal will either be Met (appear in purple as shown in image below), or Not Met. If the goal is Met, no further documentation is required within the Therapy Goals/Status feature. If the goal is Not Met, please use the 'Set Comment' button to place the visit date and rationale for the reason the goal was not met.

Goal Met Example:

ROM (PT)

RIGHT HIP FLEXION

Status	105		
STG		Date	Comments
75		12/24/21	
LTG		Date	Comments
100		1/7/22	

Goals Not Met Example (with comments):

MOBILITY: WALK 150FT IN CORRIDOR

SBA

Carryover Status
 Carryover Don't Carryover

Short Term Goal
 CGA

Date
 12/29/23

Comments
 WITH USE OF 4 WHEEL WALKER.

Set Comment

Long Term Goal
 MI

Date
 1/26/24

Comments
 WITH USE OF 4 WHEEL WALKER.

1/23/24 - PATIENT HAS REACHED MAX POTENTIAL OF SBA WITH USE OF 4 WHEEL WALKER FOR AMBULATION ON EVEN SURFACES DUE TO VARIABLE STRENGTH AND MOBILITY SECONDARY TO PARKINSONS DIAGNOSIS.

NOTE - It is important to document the status of each goal at the Discharge visit to comply with [Medicare Benefit Policy Manual Chapter 7 - Home Health Services](#) requirements, which note that "The therapist must document the measurement results which correspond to the therapist's discipline and care plan goals in the clinical record."



One major benefit of Therapy Goals/Status is that the status of each Goal selected is objectively tracked throughout the episode. To see the status from previous visits the therapist can press and hold a specific goal to see the History.

MOBILITY: WALK 150FT IN CORRIDOR

Status CGA
 STG
 CGA

History
 Clear

LTG
 MI

Date
 1/26/24

Comments
 WITH USE OF 4 WHEEL WALKER.

The history will appear with the following columns, this is valuable to see how the patient has progressed throughout the episode. This information can be utilized to see progress, plateau, or potentially regressions that may need to be addressed.

WALK 150FT

Date	Svc Code	Status	STG	Date	Comments	LTG	Date	Comments	Carryover
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Once the highest goal level is met the therapist will have the option to 'Carryover' or 'Don't Carryover'. When 'Carryover' is selected the Goal will remain with the patient episode and will appear on future visits. When 'Don't Carryover' is selected the Goal will not appear on future visits. It is recommended to select 'Don't Carryover' for all Therapy Goals/Status on a Discharge Visit.

MOBILITY: WALK 150FT IN CORRIDOR

Status
 MI

Carryover Status
 Carryover Don't Carryover

Short Term Goal
 CGA

Date
 12/29/23

Comments
 WITH USE OF 4 WHEEL WALKER.

Set Comment

Long Term Goal
 MI

Date
 1/26/24

Comments
 WITH USE OF 4 WHEEL WALKER.

Set Comment

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