
PTA Documentation Guide

This guide outlines the documentation workflow for licensed Physical Therapist Assistants (PTAs) within MedSoft. Please note this role should only be used for Licensed PTAs, not Aides.

Appointment

Each PTA can be added to the Appointment Calendar as a Calendar Resource. Please see the **PTA User Account Creation Guide** for details. Appointments for PTAs should be scheduled and checked in on their calendar within MedSoft.

Patient Center

Within the Patient Center, patients who are treated by a PTA should have the PTA listed in the “Other Practitioner” box.

The screenshot shows the MedSoft Patient Center interface. At the top, there is a navigation bar with tabs: Detail, Documentation, Notes, Tasks, Records, Patient, Financials, and Me. Below this, there is a sub-navigation bar with 'Patient Detail' and 'Links'. The main content area shows several fields: 'Patient Designation' with a dropdown showing '2 items checked'; 'Status*' with a dropdown showing 'Open' and a red text label 'Remaining Visits: 0'; 'Therapist*' with a dropdown showing 'Physician1 Physician1'; and 'Other Practitioner' with a dropdown showing 'PTA1'. A green arrow points to the 'PTA1' option in the 'Other Practitioner' dropdown.

Documentation

PTAs have access to complete Daily Notes for patients they have treated. The Documentation Workflow within MedSoft is as follows:

1. Patient is checked in for an appointment and seen by PTA.
2. PTA documents Daily Note.
 - a. Follow the standard MedSoft workflow to select the appropriate Date of Service from the Pending Documentation tab within the Patient Center.
 - b. On the “Treatment” tab of the Daily Note, PTA selects the appropriate therapist from the “Therapist Assigned” drop-down.

c. Upon completion of Daily Note, PTA clicks the “Submit for PT Approval” button.

3. When the PTA submits the Daily Note for PT Approval:

a. A task is automatically generated for the Therapist selected on the “Treatment” tab of the Daily Note. On the Task screen, the Therapist will see a “Documentation” task with the Description “Therapist Approval of Daily Note.”

	Baggins, Frodo	08/21/2017	Therapist Approval of Daily Note	Documentation	High	Physician1 Physician1
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Callout boxes: One points to 'Baggins, Frodo' with text 'Click Patient's name to hyperlink to Patient Center.' Another points to 'Physician1 Physician1' with text 'Therapist for approval is selected by PTA within the Daily Note.'

b. The status of the exam is updated to “Pending PT Approval” within both the Patient Center and the Incomplete Documentation widget.

Pending Documentation		Completed Documentation		
Show	10	entries	Filter:	
	DOS	Appointment Type	Account Number	Status
	7/21/2017	RP	16-00200	Pending PT Approval

Callout box: One points to the 'Status' column with text 'Pending PT Approval'.

4. Therapist accesses documentation by (1) clicking the patient’s name in the Task screen, (2) clicking the Patient’s Name in the Incomplete Documentation widget, or (3) searching within the Patient Center.
5. Therapist opens the appropriate exam, identifiable by the “Status” column on the Pending Documentation screen, which reads “Pending PT Approval.”
6. Therapist clicks “Complete” on the Daily Note. Once the “Complete” button is clicked:
 - a. PTA and PT signatures are co-signed on the PDF of the Daily Note.
 - b. Documentation Task for the Therapist is automatically completed.
 - c. Completed exam falls off the Incomplete Documentation widget.