

# VIRTUAL

**DATE AND TIME**

September 28, 2024  
9:00am – 12:15pm

Register for either part or both parts

**Register Online**

<https://otac.site-ym.com/events/EventDetails.aspx?id=1889360&group=>

**Register by Fax**

916/294-0415

**Register by Mail**

Send form with payment to:

OTAC,

3620 American River Dr.,  
Suite 230

Sacramento, CA 95864

Registration must be received  
by September 24, 2024

**QUESTIONS?**

Contact OTAC staff:

Email [staff@otaonline.org](mailto:staff@otaonline.org)

Call toll-free (888) 686-3225



## Documentation Essentials: Deconstructing the Do's and Don'ts of Documentation (3 PDUs)

**Saturday, September 28, 2024 | 9:00am – 12:15pm | Virtual**

**Part 1: Understanding Documentation for Occupational Therapy:**

**Specialty Mental Health Services (1.5 PDUs) | 9:00am – 10:30am**

**Part 2: Understanding Documentation for Occupational Therapy:**

**Adult Outpatient Services (1.5 PDUs) | 10:45am – 12:15pm**

This presentation will briefly review core documentation considerations for occupational therapy services as a precursor to exploring critical elements of documentation across specialty mental health services and adult outpatient care settings. Identifying the who's, why's, and what's within documentation will be deconstructed. Additionally, the session will provide actionable insights on how to effectively advocate for increased therapy and support care when initial insurance authorization falls short. By navigating the do's and don'ts of documentation, you can improve reimbursement rates and ensure that your clients receive necessary care.

REGISTRATION FORM *One form per person. Please type or print clearly. Check appropriate boxes*

	PART 1	PART 2	BOTH PARTS
MEMBERS	<input type="checkbox"/> \$19	<input type="checkbox"/> \$19	<input type="checkbox"/> \$33
NONMEMBERS	<input type="checkbox"/> \$39	<input type="checkbox"/> \$39	<input type="checkbox"/> \$69

TOTAL DUE: \$ \_\_\_\_\_ Please review the cancellation/refund policy.

Name \_\_\_\_\_

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**PAYMENT OPTIONS: CHECK ONE**

Check (payable to OTAC) # \_\_\_\_\_  MasterCard  Visa  AMEX  Discover

Credit Card Number \_\_\_\_\_

Exp Date \_\_\_\_\_ VCode \_\_\_\_\_

Cardholder Name \_\_\_\_\_

Cardholder Signature \_\_\_\_\_ Date \_\_\_\_\_

**SUBMIT PAYMENT:**

Fax to: 916/294-0415, or  Mail to: OTAC, 3620 American River Dr., #230, Sacramento, CA 95864, or

**REGISTER ONLINE** - <https://otac.site-ym.com/events/EventDetails.aspx?id=1889360&group=>

**Cancellation/Refund Policy.** \$25 is retained to cover cancellation/refund processing costs. Written notice must be received in the OTAC office by September 24, 2024, to be eligible for refunds. No refunds after this date. Disclaimer: OTAC reserves the right to make changes to the program. No refunds will be made based on these changes.

## Documentation Essentials: Deconstructing the Do's and Don'ts of Documentation (3 PDUs)

### About This Presentation, About Our Presenters, and About The Program

#### ABOUT THIS PRESENTATION

This presentation will briefly review core documentation considerations for occupational therapy services as a precursor to exploring critical elements of documentation across specialty mental health services and adult outpatient care settings. Identifying the who's, why's, and what's within documentation will be deconstructed. Additionally, the session will provide actionable insights on how to effectively advocate for increased therapy and support care when initial insurance authorization falls short. By navigating the do's and don'ts of documentation, you can improve reimbursement rates and ensure that your clients receive necessary care.

Overall, we will review the nuts and bolts of documentation considerations:

- Audience (colleagues, family, payors, students, and the community)
- Requirements (payor, CBOT, HIPPA, ethical, supervisor, organization/manager)
- All Payors Are Not Alike. Understand the rules associated with the different insurance companies and payors to increase staffing efficiencies, payment, and productivity.
- Best Practices. Strategies for managing your time more effectively while meeting the requirements of the payors.

#### **Part 1: Understanding Documentation for Occupational Therapy: Specialty Mental Health Services (1.5 PDUs)**

**9:00am – 10:30am**

This session will describe the role of the discipline of occupational therapy within a specialty mental health services contracted agency. It will also explore case examples of documentation challenges 'myth vs reality' and Cal-AIM and the 2023 Detour into Direct Care and Collaborative Documentation.

#### **Part 2: Understanding Documentation for Occupational Therapy: Adult Outpatient Services (1.5 PDUs)**

**10:45am – 12:15pm**

This session will explore critical elements of denials and how to submit a clean claim for prompt payment within adult outpatient services. Attendees will:

- Understand the definition of medical necessity
- Know what is "required" along with the pitfalls within each note type in documentation to effectively get paid
- Understand the audit, denial, and appeal process, and
- Understand and utilize insurance guidelines to determine what the documentation needs to include to justify the codes being billed.

### About Our Presenters



**Sue Bowles, OTD, MBA, OTR/L**, has over 40 years of healthcare management experience. She is currently adjunct assistant professor of clinical occupational therapy in the USC Mrs. T.H. Chan Division of Occupational Science & Occupational Therapy at the University of Southern California. Bowles served

as the regional director for ancillary care strategies for 16 years providing consultation for outpatient private practices and health care systems. She was also a consultant for Anthem Blue Cross evaluating therapy documentation for payment of therapy services. Bowles served as manager of occupational therapy and manager of the outpatient therapy services at Cedars Sinai Health System for 20 years. Her expertise lies in her ability to evaluate the regulatory and compliance issues with therapy documentation and providing staff with the tools to effectively get paid for the services provided in addition to managing the day-to-day operations and leadership development. Bowles is a certified trainer for the Meyer's Briggs Type Indicator and has held many teambuilding and training events utilizing this tool at all levels in the organizations. She received a Bachelor of Science in occupational therapy from the University of Puget Sound, Master of Business Administration from Pepperdine University, and Doctorate in Occupational Therapy from the University of Southern California.



**Dana Granado, OTR/L**, is the occupational therapy manager at the Occupational Therapy Training Program (OTTP), overseeing the Occupational Therapy/Rehabilitation Department. She also serves as the program manager for the Loving

Interventions for Family Enrichment (LIFE) Program, where she partners alongside families, within an interdisciplinary team, to improve the quality of the parent-child relationship. In addition, Granado is the fieldwork coordinator for the occupational therapy student intern program at OTTP. She has been an occupational therapy practitioner for the past 24 years, working in community-based mental health. Her passion lies in working with families to promote communication, connection, and community.



**Marissa Marchioni, OTD, OTR/L**, is a committed occupational therapy practitioner holding master's and doctorate degrees from the University of Southern California (USC). She completed her clinical residency at USC Occupational Therapy Faculty Practice,

specializing in ergonomics and corporate wellness programs. Marchioni empowers clients to manage chronic conditions like obesity, diabetes, chronic pain, headaches, and behavioral health. With over a decade of experience in health and wellness, including roles as a personal trainer and fitness instructor, she brings invaluable practical insight to her practice. Additionally, Marchioni is experienced in teaching documentation practices and spearheading internal auditing processes for clinical documentation, significantly contributing to the reduction of therapist burnout.

## Special Topic Forum - VIRTUAL



**Shelby Surfas, OTD, OTR/L, BCP**, is associate professor of clinical occupational therapy with USC Mrs. T.H. Chan Division of Occupational Science and Occupational Therapy where she fulfills her roles as the director of occupational therapy at the Behavioral Health Institute

(BHI) at Children’s Hospital Los Angeles (CHLA) and the discipline director of the California Leadership and Education in Neurodevelopmental Disabilities (LEND) program. Surfas holds positions across interdisciplinary teams providing mental health supports for underserved and culturally diverse populations. Her passion and scholarly pursuits exist in the intersection of pediatrics, sensory integration, neurodevelopmental disabilities, mental health, through a lens of justice, equity, diversity and inclusion.

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### About This Special Topic Forum

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**To earn PDUs, registrants must complete the post event survey that is emailed out within one week following the event.**

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