

ICE *Lesson Plan*

DOCUMENTING LEVELS OF ASSISTANCE



This lesson plan is designed to supplement your lecture on how to determine and document levels of assistance provided during a treatment session.



Learning Objectives

By the end of this activity, the successful student will be able to:

1. Document levels of assistance to meet standards for reimbursement of therapy services.

This activity supports the requirements for:

- The Accreditation Council for Occupational Therapy (ACOTE) standards B.4.29
- The Commission on Education for Physical Therapy Education (CAPTE) standard 7D32

LEARNING ACTIVITIES



Watch

Assign this video for students to watch before, during, or after class: **IADLs: Washing Dishes While Standing**. In this 3-minute video, the clinician facilitates both upper and lower extremity control as the client washes dishes in standing.



Discuss

Stimulate small or large group discussions with questions, such as:

1. What does it mean to document in an objective and measurable manner?
2. What are the Medicare requirements for documenting levels of assistance?
3. How is the Functional Independence Measure (FIM) used to document levels of assistance? How can the principles of the FIM be used for documenting instrumental activities of daily living (IADL)?
4. What level of assistance is required for this client to ambulate from the door to the sink?
5. What level of assistance is required for this client to wash dishes while standing?
6. Consider how documentation changes when providing a score for the entire task as a whole versus individual steps within the task. In this case, consider the difference between levels of assistance for “washing dishes” versus levels of assistance for “scrubbing with right hand,” “stabilizing plate with left hand,” and “standing at the sink.” How does this provide a clearer picture of the amount of assistance needed? How does this help you set your goals?
7. Is the therapist using a remedial or compensatory approach in this treatment session?
8. How does the therapist increase awareness and incorporate use of the affected extremity?



Create an assignment

REFLECTION:

Have students complete a reflection paper or worksheet using the discussion questions provided. This would be great to use in a flipped classroom!

SIMULATION:

To differentiate between minimal assistance, moderate assistance, and maximum assistance, have students role play and document this scenario with a simulated patient that needs more or less assistance.

DOCUMENTATION:

- Have students document this treatment session using SOAP note format.
- Have students write a goal for this client's next treatment. Be sure that the goal is objective, measurable, functional, and realistic.

EXAMINATION:

Use this video to assess ability to document a treatment session and/or generate potential treatment goals and activities.



Watch more!

Search the ICE Video Library for additional videos on this topic.

Here are five examples:

- **IADLs: Arranging Flowers While Standing**
- **Self-Care: Donning Shirt and Jacket**
- **IADLs: Making a Sandwich**
- **Self-Care, Part 1: Oral Hygiene at the Sink in Acute Care**
- **IADLs: Facilitating Hand Function While Making Iced Tea**

Developed by:
Amanda K. Giles, OTD, OTR/L
Assistant Professor
Division of Occupational Therapy
College of Health Professions
Medical University of South Carolina