

# Skilled Physical Therapy Documentation Examples

**CAUTION! EXAMPLE ONLY!**  
\*\*\*DO NOT COMPLETE THIS FORM\*\*\*  
This is an example ONLY to illustrate Medicare's documentation requirements!  
This guide illustrates patients with: **STROKE**

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**HOME HEALTH FACE-TO-FACE ENCOUNTER CERTIFICATION ADDENDUM**  
*By the Inpatient Facility Physician*

PATIENT NAME: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_/\_\_\_\_/\_\_\_\_

**Certification of Encounter**  
I certify this patient is under my care and that I – or a qualified non-physician practitioner working with me – had a face-to-face encounter with this patient on \_\_\_\_/\_\_\_\_/\_\_\_\_  
Month Day Year

**Clinical Findings that Support Medical Necessity of Home Health Services**  
I have initiated the establishment of a plan of care and referred this patient to a community physician who will follow and periodically review the plan of care. I certify this patient is in need of the following intermittent skilled services which are medically necessary. Listed below are my clinical findings and how they support the patient's need for each skilled service(s).  
**A. Describe your clinical findings specific to this patient...**  
Dysphagia, weakness to one side of body, altered mental status, slurred speech resulting from CVA.

**B. Then describe how your clinical findings support the home health services ordered...**  
Oriented only to person and time, weakness to (L) side with facial drooping, impaired swallowing function requires tube feedings for nutrition via ppg. PT/WRN now therapeutic. SN for medication mgmt, lab work per MD orders, teaching and follow up with enteral feedings. PT to set up home program to improve balance and strength, increase safety with ambulation and transfers. OT to assist with training and exercise re: ADLs and household tasks. ST to evaluate and provide therapy to improve ability to swallow and communicate.

**Clinical Findings that Support Homebound Status**  
I certify this patient is homebound based on my clinical findings described below:  
**C. Describe how your clinical findings indicate the patient is currently homebound...**  
Decreased physical endurance with functional limitations (L) side. Bed to chair transfer only and requires assistance with ADLs. Balance remains compromised.

PLEASE NOTE: Ongoing Home Health services cannot be provided to the patient without full completion of this document. Please call Baptist Home Health Network at 282-7982 (Little Rock) or 1-800-650-6788 (toll free outside Little Rock area) if you have questions about completing this form.

Physician Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Physician's Printed Name (First and Last): \_\_\_\_\_

Please fax the completed form to: 501-202-7706 or 1-800-992-6448

SKILLED PHYSICAL THERAPY DOCUMENTATION EXAMPLES ARE CRUCIAL FOR ENSURING QUALITY PATIENT CARE, MEETING LEGAL REQUIREMENTS, AND FACILITATING EFFECTIVE COMMUNICATION AMONG HEALTHCARE PROVIDERS. PROPER DOCUMENTATION ENCAPSULATES THE PATIENT'S CONDITION, TREATMENT PLAN, PROGRESS, AND ANY CHANGES IN THERAPY. THIS ARTICLE EXPLORES THE KEY COMPONENTS OF SKILLED PHYSICAL THERAPY DOCUMENTATION, PROVIDES EXAMPLES, AND HIGHLIGHTS BEST PRACTICES FOR THERAPISTS TO FOLLOW.

## Importance of Skilled Physical Therapy Documentation

DOCUMENTATION IN PHYSICAL THERAPY SERVES SEVERAL VITAL FUNCTIONS:

1. **PATIENT CARE:** ACCURATE DOCUMENTATION ALLOWS THERAPISTS TO TRACK AND EVALUATE PATIENT PROGRESS, ENSURING THAT TREATMENT PLANS ARE EFFECTIVE AND ADJUSTED AS NECESSARY.
2. **LEGAL PROTECTION:** WELL-DOCUMENTED RECORDS PROTECT THERAPISTS AND HEALTHCARE FACILITIES IN CASE OF DISPUTES OR LEGAL ISSUES.
3. **INSURANCE REIMBURSEMENT:** INSURANCE COMPANIES REQUIRE DETAILED DOCUMENTATION TO JUSTIFY THE NEED FOR THERAPY SERVICES AND TO PROCESS CLAIMS.
4. **INTERDISCIPLINARY COMMUNICATION:** CLEAR DOCUMENTATION FOSTERS EFFECTIVE COMMUNICATION AMONG HEALTHCARE PROVIDERS, ENHANCING COLLABORATIVE CARE.
5. **QUALITY IMPROVEMENT:** ONGOING DOCUMENTATION HELPS IDENTIFY TRENDS IN PATIENT OUTCOMES, INFORMING QUALITY IMPROVEMENT EFFORTS.

# KEY COMPONENTS OF SKILLED PHYSICAL THERAPY DOCUMENTATION

EFFECTIVE DOCUMENTATION SHOULD INCLUDE SEVERAL ESSENTIAL COMPONENTS:

## 1. PATIENT INFORMATION

- DEMOGRAPHIC DETAILS: NAME, AGE, GENDER, CONTACT INFORMATION, AND INSURANCE DETAILS.
- MEDICAL HISTORY: RELEVANT PAST MEDICAL HISTORY, SURGERIES, AND CURRENT MEDICATIONS.
- REFERRAL INFORMATION: WHO REFERRED THE PATIENT AND THE REASON FOR REFERRAL.

## 2. INITIAL EVALUATION

THE INITIAL EVALUATION IS A COMPREHENSIVE ASSESSMENT THAT INCLUDES:

- SUBJECTIVE FINDINGS: PATIENT'S REPORTED SYMPTOMS, PAIN LEVELS, AND GOALS.
- OBJECTIVE FINDINGS: MEASURABLE DATA, SUCH AS RANGE OF MOTION (ROM), STRENGTH TESTS, AND FUNCTIONAL MOBILITY ASSESSMENTS.
- ASSESSMENT: CLINICIAN'S INTERPRETATION OF FINDINGS AND IDENTIFICATION OF PROBLEMS OR IMPAIRMENTS.
- PLAN OF CARE (POC): A DETAILED TREATMENT PLAN OUTLINING THE GOALS, INTERVENTIONS, FREQUENCY, AND DURATION OF THERAPY.

## 3. TREATMENT SESSIONS

EACH TREATMENT SESSION SHOULD BE DOCUMENTED WITH:

- DATE AND TIME: WHEN THE SESSION TOOK PLACE.
- TREATMENT INTERVENTIONS: SPECIFIC MODALITIES, EXERCISES, AND TECHNIQUES USED.
- PATIENT RESPONSE: PATIENT'S TOLERANCE, PAIN LEVELS DURING AND AFTER TREATMENT, AND ANY ADVERSE REACTIONS.
- PROGRESS TOWARD GOALS: EVALUATION OF PROGRESS RELATED TO THE ESTABLISHED GOALS.

## 4. DISCHARGE SUMMARY

AT THE END OF THERAPY, A DISCHARGE SUMMARY SHOULD BE CREATED THAT INCLUDES:

- FINAL ASSESSMENT: OVERVIEW OF PROGRESS MADE DURING THERAPY.
- DISCHARGE GOALS: GOALS ACHIEVED AND THOSE THAT WERE NOT MET.
- HOME EXERCISE PROGRAM (HEP): RECOMMENDATIONS FOR CONTINUED EXERCISES OR ACTIVITIES POST-DISCHARGE.
- FOLLOW-UP RECOMMENDATIONS: SUGGESTIONS FOR FURTHER TREATMENT OR EVALUATIONS IF NECESSARY.

# EXAMPLES OF SKILLED PHYSICAL THERAPY DOCUMENTATION

TO ILLUSTRATE THE COMPONENTS OF SKILLED PHYSICAL THERAPY DOCUMENTATION, HERE ARE DETAILED EXAMPLES:

## EXAMPLE 1: INITIAL EVALUATION

#### PATIENT INFORMATION:

- NAME: JOHN DOE
- AGE: 45
- GENDER: MALE
- INSURANCE: ABC HEALTH PLAN

#### MEDICAL HISTORY:

- CHIEF COMPLAINT: LOW BACK PAIN FOR 3 MONTHS, EXACERBATED BY LIFTING.
- PREVIOUS SURGERIES: NONE.
- CURRENT MEDICATIONS: NONE.

#### SUBJECTIVE FINDINGS:

- PATIENT REPORTS 6/10 PAIN ON A SCALE OF 0-10, WORSENER WITH PROLONGED SITTING AND STANDING.
- PATIENT EXPRESSES A DESIRE TO RETURN TO RECREATIONAL BASKETBALL.

#### OBJECTIVE FINDINGS:

- FUNCTIONAL MOBILITY: DIFFICULTY WITH BENDING AND LIFTING.
- ROM: LUMBAR FLEXION 30 DEGREES (NORMAL 60 DEGREES); EXTENSION 10 DEGREES (NORMAL 25 DEGREES).
- STRENGTH TESTING: HIP FLEXORS 4/5, LUMBAR EXTENSORS 3/5.

#### ASSESSMENT:

- IMPAIRED LUMBAR MOBILITY AND STRENGTH CONTRIBUTING TO FUNCTIONAL LIMITATIONS IN DAILY ACTIVITIES.

#### PLAN OF CARE:

- FREQUENCY: 2 TIMES/WEEK FOR 6 WEEKS.
- GOALS:
- INCREASE LUMBAR FLEXION TO 50 DEGREES BY 4 WEEKS.
- IMPROVE HIP FLEXOR STRENGTH TO 5/5 BY DISCHARGE.

## EXAMPLE 2: TREATMENT SESSION NOTE

DATE: 10/15/2023

TIME: 10:00 AM

#### TREATMENT INTERVENTIONS:

- WARM-UP: 10 MINUTES OF GENTLE LUMBAR STRETCHES.
- MAIN TREATMENT:
- CORE STABILIZATION EXERCISES (BRIDGES, PLANKS).
- MANUAL THERAPY FOR LUMBAR SPINE TO ENHANCE MOBILITY.

#### PATIENT RESPONSE:

- TOLERATED TREATMENT WELL; REPORTED PAIN DECREASED TO 4/10 DURING EXERCISES.
- NO ADVERSE REACTIONS NOTED.

#### PROGRESS TOWARD GOALS:

- LUMBAR FLEXION INCREASED TO 35 DEGREES; PATIENT ABLE TO PERFORM BRIDGE EXERCISE WITH MINIMAL ASSISTANCE.

## EXAMPLE 3: DISCHARGE SUMMARY

#### PATIENT INFORMATION:

- NAME: JOHN DOE
- DATE OF DISCHARGE: 11/28/2023

#### FINAL ASSESSMENT:

- PATIENT ACHIEVED SIGNIFICANT IMPROVEMENT IN LUMBAR MOBILITY AND STRENGTH.

- FINAL LUMBAR FLEXION: 55 DEGREES; HIP FLEXORS 5/5.

#### DISCHARGE GOALS:

- GOALS MET: PATIENT CAN NOW PERFORM DAILY ACTIVITIES WITH MINIMAL DISCOMFORT.

#### HOME EXERCISE PROGRAM (HEP):

- CONTINUE WITH PRESCRIBED EXERCISES 3 TIMES/WEEK.
- FOCUS ON CORE STABILITY AND LUMBAR STRETCHES.

#### FOLLOW-UP RECOMMENDATIONS:

- SUGGESTED FOLLOW-UP WITH PCP IF PAIN PERSISTS OR WORSENS.

## BEST PRACTICES FOR SKILLED PHYSICAL THERAPY DOCUMENTATION

TO ENSURE HIGH-QUALITY DOCUMENTATION, THERAPISTS SHOULD ADHERE TO THE FOLLOWING BEST PRACTICES:

1. BE CLEAR AND CONCISE: USE STRAIGHTFORWARD LANGUAGE AND AVOID JARGON TO ENSURE THAT DOCUMENTATION IS EASILY UNDERSTOOD BY ANYONE REVIEWING IT.
2. USE STANDARDIZED TERMINOLOGY: EMPLOY COMMON TERMS AND ABBREVIATIONS TO ENHANCE CLARITY AND CONSISTENCY.
3. DOCUMENT TIMELY: COMPLETE DOCUMENTATION SHORTLY AFTER TREATMENT TO ENSURE ACCURACY AND COMPLETENESS.
4. FOCUS ON MEASURABLE DATA: INCLUDE OBJECTIVE MEASURES WHENEVER POSSIBLE TO SUPPORT CLINICAL ASSESSMENTS.
5. REGULARLY REVIEW DOCUMENTATION: PERIODICALLY ASSESS DOCUMENTATION FOR AREAS OF IMPROVEMENT AND ENSURE COMPLIANCE WITH LEGAL AND ETHICAL STANDARDS.
6. PROTECT PATIENT PRIVACY: ENSURE THAT ALL DOCUMENTATION ADHERES TO HIPAA GUIDELINES AND PROTECTS PATIENT CONFIDENTIALITY.
7. ENGAGE IN CONTINUOUS EDUCATION: STAY UPDATED ON THE LATEST DOCUMENTATION STANDARDS AND PRACTICES THROUGH ONGOING EDUCATION AND TRAINING.

## CONCLUSION

IN SUMMARY, SKILLED PHYSICAL THERAPY DOCUMENTATION EXAMPLES SERVE AS A FOUNDATION FOR EFFECTIVE PATIENT CARE, LEGAL PROTECTION, AND QUALITY IMPROVEMENT IN PHYSICAL THERAPY PRACTICE. BY INCLUDING ESSENTIAL COMPONENTS SUCH AS PATIENT INFORMATION, EVALUATIONS, TREATMENT SESSIONS, AND DISCHARGE SUMMARIES, THERAPISTS CAN CREATE THOROUGH AND EFFECTIVE DOCUMENTATION. ADHERING TO BEST PRACTICES ENSURES THAT DOCUMENTATION REMAINS A VALUABLE TOOL FOR PATIENT CARE AND PROFESSIONAL ACCOUNTABILITY. THROUGH DILIGENT DOCUMENTATION, PHYSICAL THERAPISTS CAN ENHANCE THEIR PRACTICE AND ULTIMATELY IMPROVE PATIENT OUTCOMES.

## FREQUENTLY ASKED QUESTIONS

### WHAT IS SKILLED PHYSICAL THERAPY DOCUMENTATION?

SKILLED PHYSICAL THERAPY DOCUMENTATION REFERS TO THE DETAILED RECORDS MAINTAINED BY PHYSICAL THERAPISTS THAT OUTLINE THE ASSESSMENT, TREATMENT PLAN, INTERVENTIONS, AND PROGRESS OF A PATIENT DURING THERAPY SESSIONS.

## **WHY IS ACCURATE DOCUMENTATION IMPORTANT IN PHYSICAL THERAPY?**

ACCURATE DOCUMENTATION IS CRUCIAL AS IT ENSURES CONTINUITY OF CARE, PROVIDES LEGAL PROTECTION, SUPPORTS BILLING AND REIMBURSEMENT PROCESSES, AND HELPS IN ASSESSING PATIENT PROGRESS AND OUTCOMES.

## **WHAT KEY ELEMENTS SHOULD BE INCLUDED IN SKILLED PHYSICAL THERAPY DOCUMENTATION?**

KEY ELEMENTS INCLUDE PATIENT DEMOGRAPHICS, CLINICAL HISTORY, ASSESSMENT FINDINGS, TREATMENT GOALS, INTERVENTION DETAILS, PROGRESS NOTES, AND DISCHARGE SUMMARIES.

## **HOW OFTEN SHOULD PHYSICAL THERAPY DOCUMENTATION BE UPDATED?**

DOCUMENTATION SHOULD BE UPDATED AFTER EVERY THERAPY SESSION TO REFLECT THE PATIENT'S PROGRESS, ANY CHANGES IN TREATMENT, AND THE EFFECTIVENESS OF THE INTERVENTIONS APPLIED.

## **WHAT ARE SOME COMMON EXAMPLES OF PHYSICAL THERAPY DOCUMENTATION FORMATS?**

COMMON FORMATS INCLUDE SOAP NOTES (SUBJECTIVE, OBJECTIVE, ASSESSMENT, PLAN), NARRATIVE NOTES, AND FLOW SHEETS THAT SUMMARIZE PATIENT PROGRESS AND INTERVENTIONS.

## **HOW CAN TECHNOLOGY IMPROVE PHYSICAL THERAPY DOCUMENTATION?**

TECHNOLOGY CAN ENHANCE DOCUMENTATION THROUGH ELECTRONIC HEALTH RECORDS (EHRs), WHICH FACILITATE EASIER ACCESS, FASTER UPDATES, INTEGRATION WITH BILLING SYSTEMS, AND IMPROVED DATA MANAGEMENT.

## **WHAT ARE THE CONSEQUENCES OF POOR DOCUMENTATION IN PHYSICAL THERAPY?**

POOR DOCUMENTATION CAN LEAD TO MISCOMMUNICATION AMONG HEALTHCARE PROVIDERS, REDUCED QUALITY OF CARE, DENIED INSURANCE CLAIMS, AND POTENTIAL LEGAL ISSUES.

## **WHAT TRAINING IS AVAILABLE FOR IMPROVING PHYSICAL THERAPY DOCUMENTATION SKILLS?**

MANY ORGANIZATIONS OFFER WORKSHOPS, ONLINE COURSES, AND CERTIFICATION PROGRAMS FOCUSED ON DOCUMENTATION BEST PRACTICES, CODING, AND COMPLIANCE TO ENHANCE SKILLS IN THIS AREA.

## **HOW DO REGULATIONS INFLUENCE PHYSICAL THERAPY DOCUMENTATION PRACTICES?**

REGULATIONS SUCH AS HIPAA AND MEDICARE GUIDELINES DICTATE HOW PATIENT INFORMATION MUST BE DOCUMENTED, STORED, AND SHARED, ENSURING PATIENT PRIVACY AND PROPER BILLING PRACTICES.

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