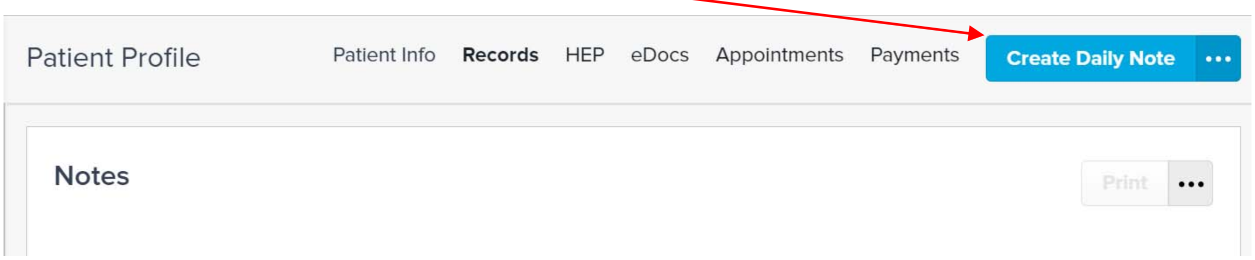
GO TO auth.webpt.com and log in. In the top right corner, click in the white **Search my Patients** box, and type in your patient name (first or last), then click **Search**.

Your patient should come up automatically. If not, double click on their name on the list.

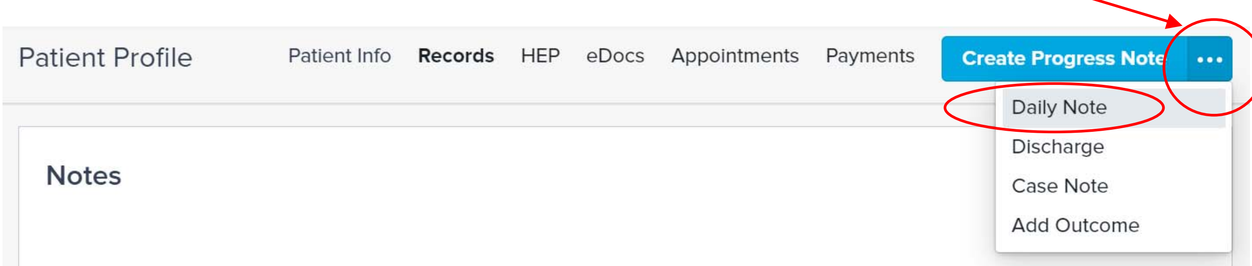
First, make sure you are in the correct case for the patient (ST, OT, or PT).

(if you are not, click on **Case** in blue to see a list of cases that you can choose from.

1 – Click **Create Daily Note Note**

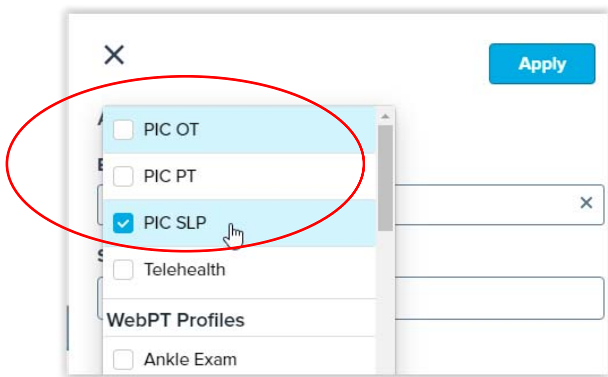


IF your client has an alert at the top that says that a Plan of Care is due – please let me know. This may or may not be true – It might just be a glitch from the transfer. If you do not see **Create Daily Note** button, click the button with 3 dots and select **Daily Note.**

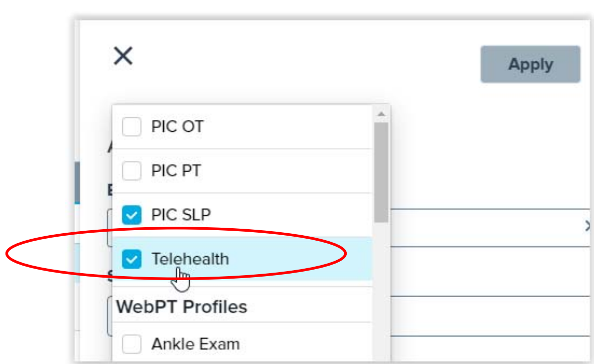


2 – **PROFILES** - Click on the 3 dots beside the word Sign, to access the Menu. Then click **Add Content.**

MAKE SURE that you see the Profile listed for your discipline in grey. If you do not, please see the next page for how to add it. (This Profile houses all of our required boxes/statements that Medicaid requires. If you accidentally delete any of those statements, or they disappear, please delete the Profile, Apply, and re-add the PIC ST, OT, or PT Profiles to get the statements to come back in.)

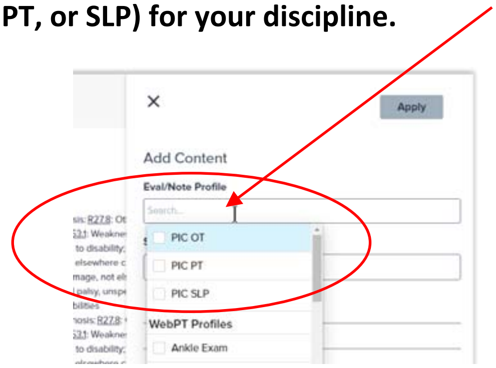


TELEHEALTH – if you see the client on telehealth, click in the checkbox beside **Telehealth** to add the **Telehealth** profile. This will bring in your Place of Service, Telehealth consent, and Doxy statements, which need to be on there if you are seeing through telehealth.

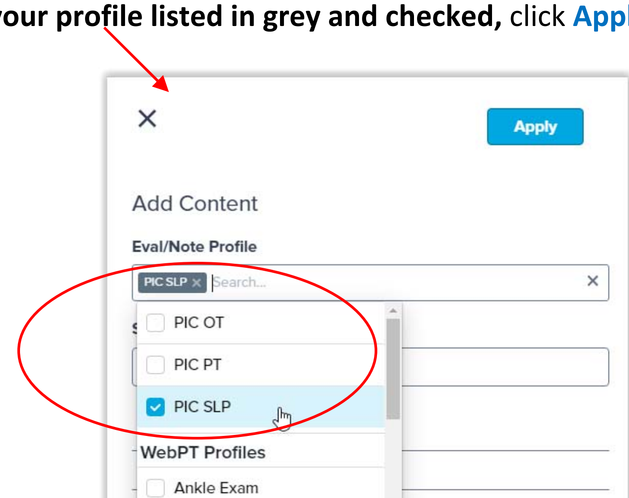


HOW TO ADD PROFILES:

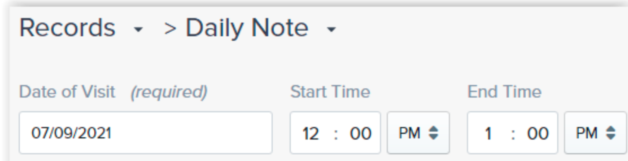
IF YOU DO NOT SEE YOUR PROFILE IN GREY - Once you click in to the line below Eval/Note Profile, you will see the PIC OT, PIC PT, & PIC SLP Profiles. **Click the profile (OT, PT, or SLP) for your discipline.**



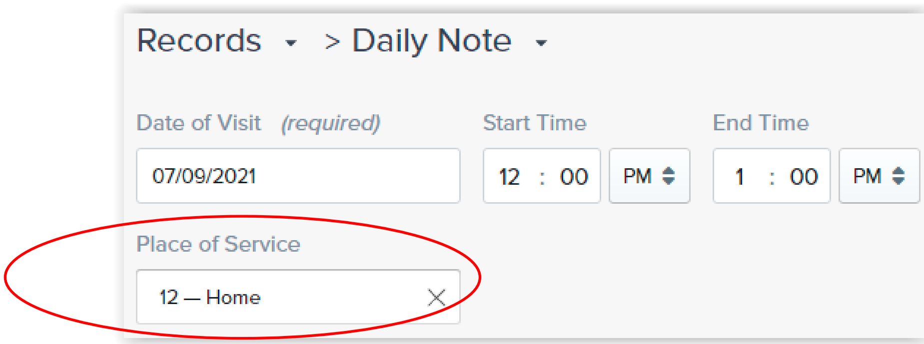
After you select your discipline, you should see it in grey and checked. **After you see your profile listed in grey and checked,** click **Apply**.



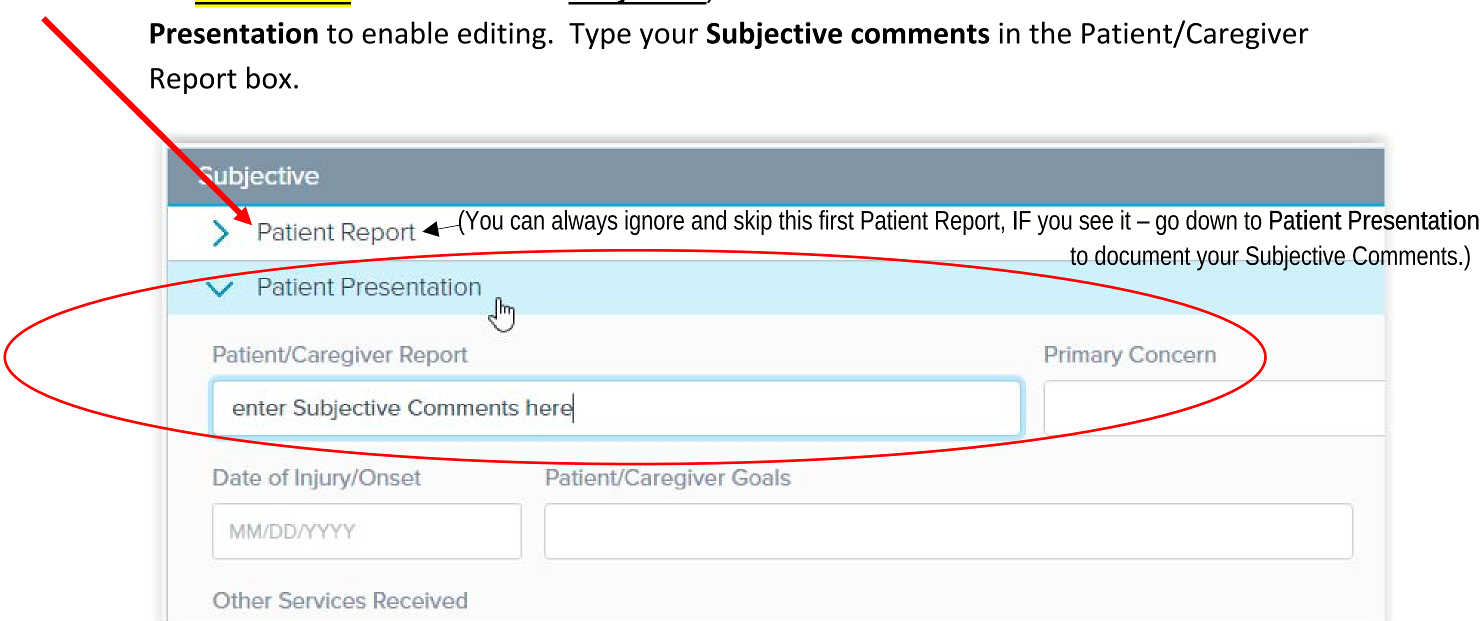
3 – Confirm your **Date of Visit**, then Enter in the **Start and End Time**



4 – **Place of Service** – should ALWAYS be **Home**, unless you are seeing the client thorugh Telehealth. If you are seeing them through **Telehealth**, choose Telehealth.

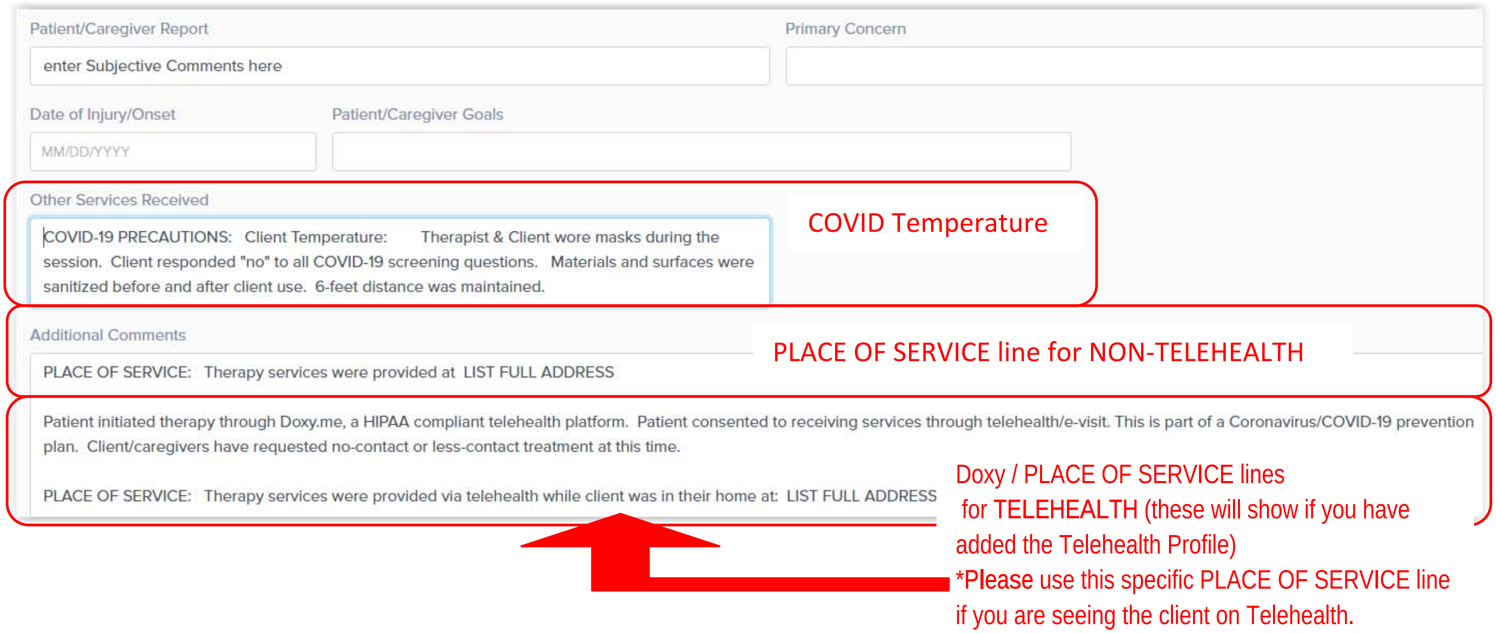


5 – **SUBJECTIVE** - Scroll down to **Subjective**, **Patient Presentation** section. Click on **Patient Presentation** to enable editing. Type your **Subjective comments** in the Patient/Caregiver Report box.

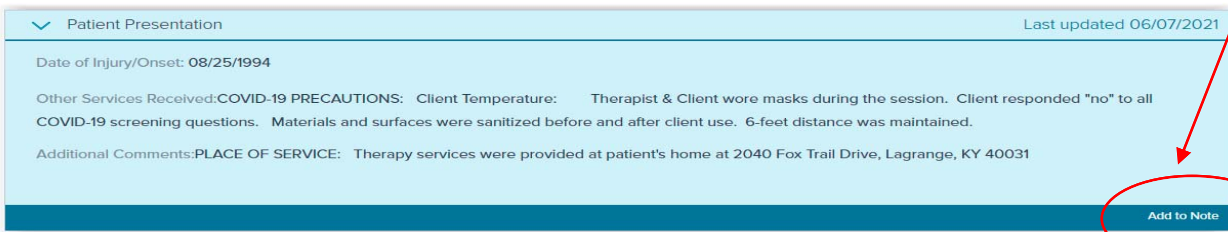


6 – Enter your **COVID-19 temperature**, and change the **PLACE OF SERVICE line IF needed**

(e..g, if you switch back and forth with telehealth/in-person, or change the physical location of where you provide therapy)



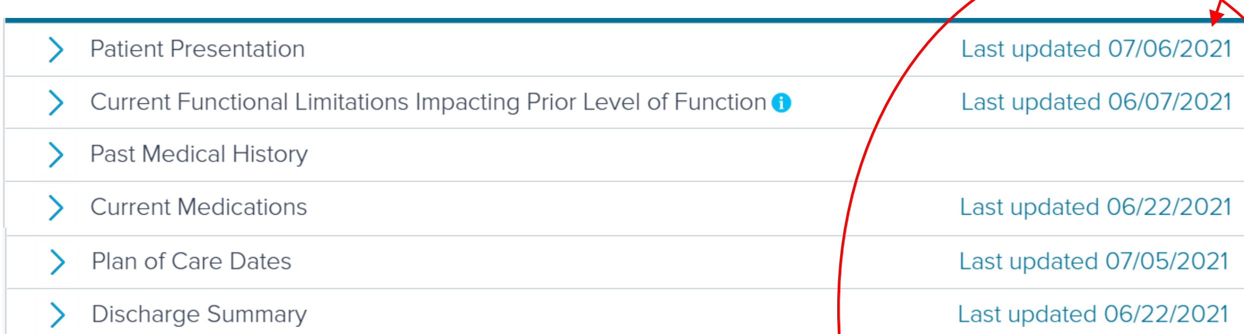
IMPORTANT – TEXT IN BLUE WILL ONLY SHOW ON THE CURRENT NOTE AND CARRY OVER TO THE NEXT NOTE IF YOU EDIT IT, OR IF YOU CLICK ADD TO NOTE.

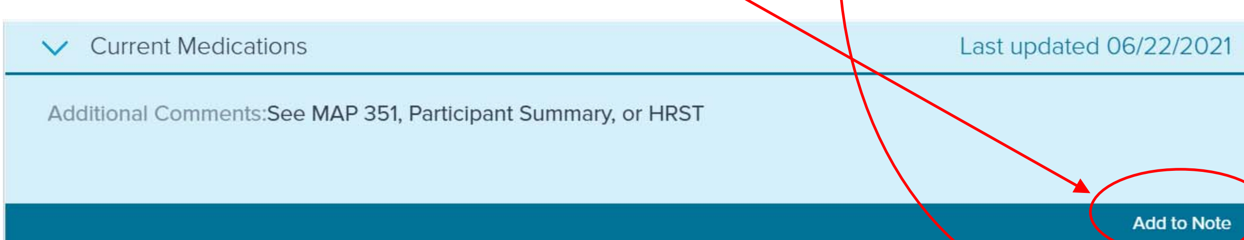


IF YOU DO NOT EDIT THE TEXT , OR HIT ADD TO NOTE, INFORMATION IN BLUE WILL NOT SHOW IN YOUR CURRENT NOTE OR CARRY FORWARD TO YOUR NEXT NOTE. If you do not edit text in a section **PLEASE hit Add to Note,** so that the info will show in the current note and carry over to the next note.

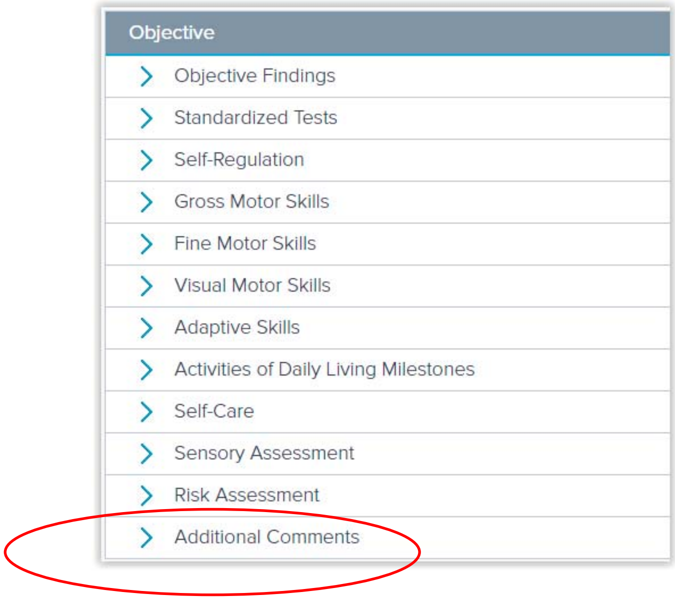
ALSO – ANYWHERE you see a "Last updated Date" – PLEASE CLICK IN TO THAT SECTION AND HIT ADD TO NOTE. If you do not do this, these fields will not carry over, and you will not have them when you need them on your next recert.

After you do your first recert in this system, you will really only need to do this "Adding to Note" on all fields on subsequent recerts (not every daily note). (data flows from recert-to-recert, and daily note – to – daily note.)

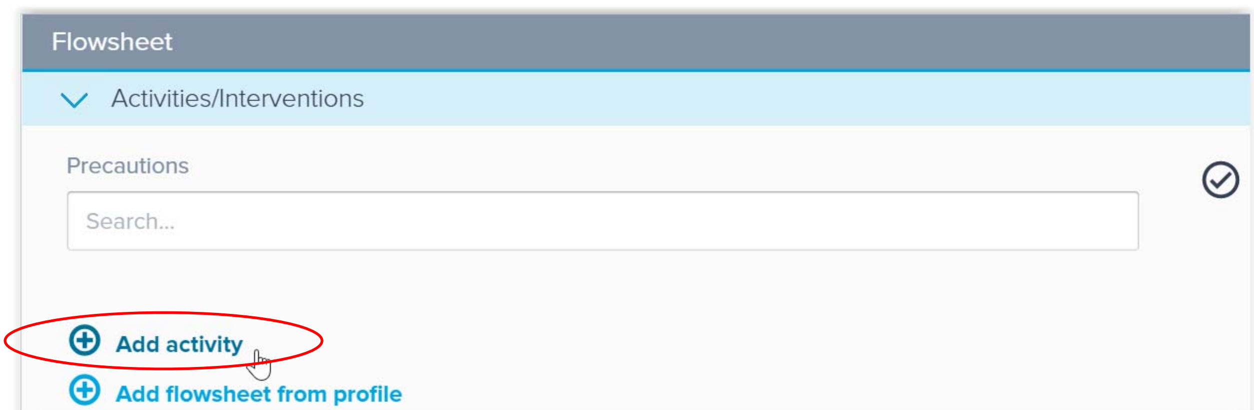




7 – **OBJECTIVE/INTERVENTIONS** - Scroll down to the **Objective**, **Additional Comments** section. THIS is where WebPT is advising to put/update your **Interventions**, if you used the Notes > Interventions tab in Revflow. If you did not use the Notes > Interventions tab in Revflow, you can skip this step.



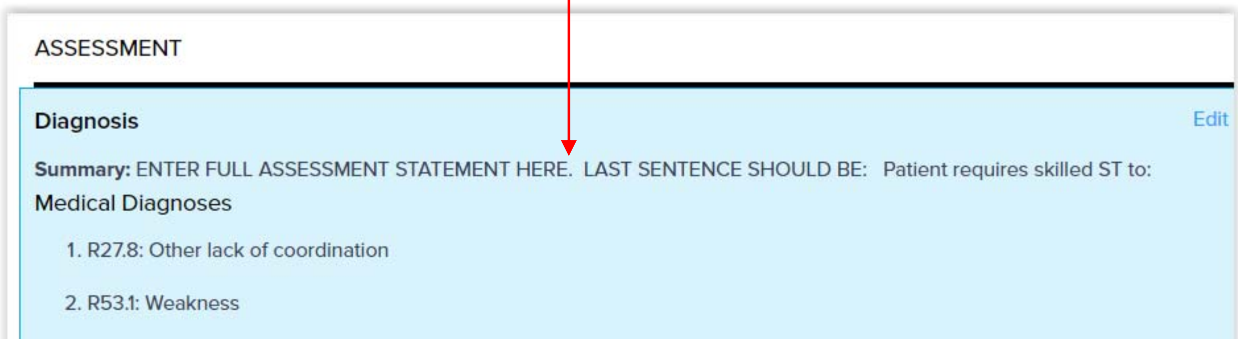
8 – **FLOWSHEETS** – this is an optional section. You may use this section if you choose to add Activities (kind of similar to the Notes > Interventions tab in Revflow).



9 – **ASSESSMENT** - Scroll down to the **Assessment** section. Click on the **Assessment, Diagnosis** Section to enable editing.

Under Diagnosis Summary – enter your **Assessment Statement**. for today's treatment visit.

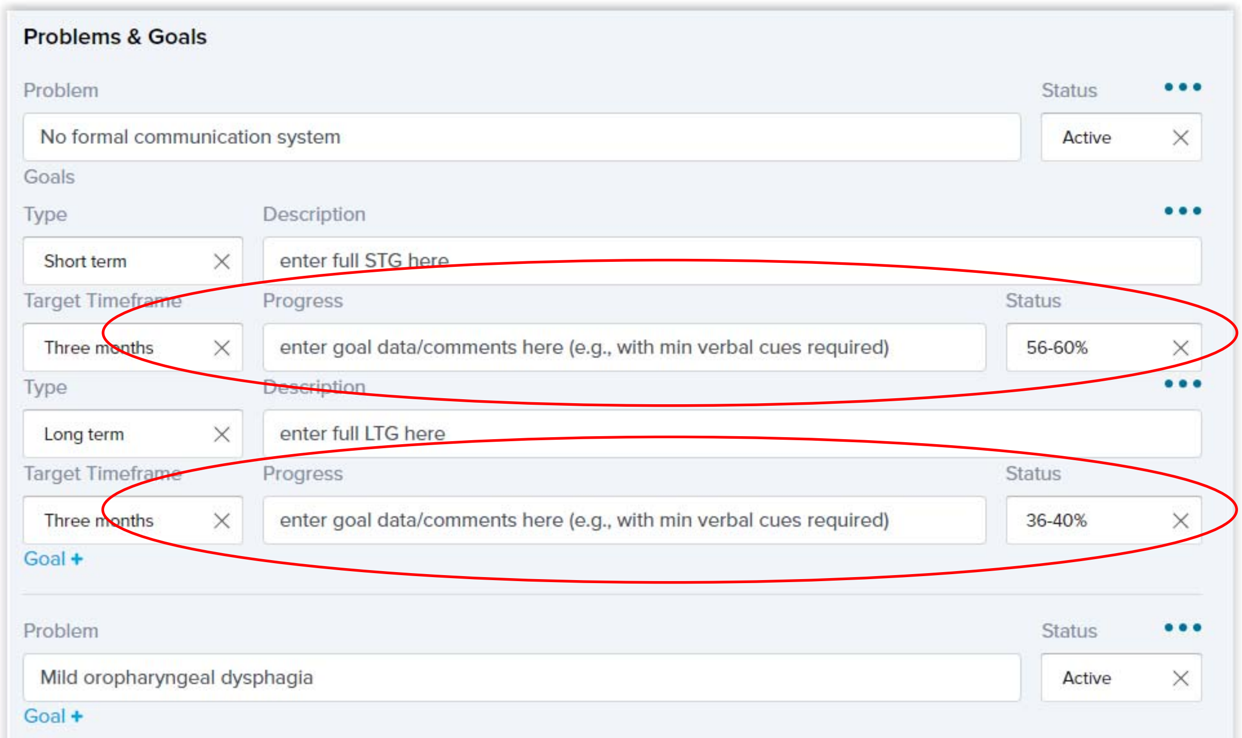
Please don't forget to always **leave/add the last "Skilled ST is required to __what & why__" sentence.**



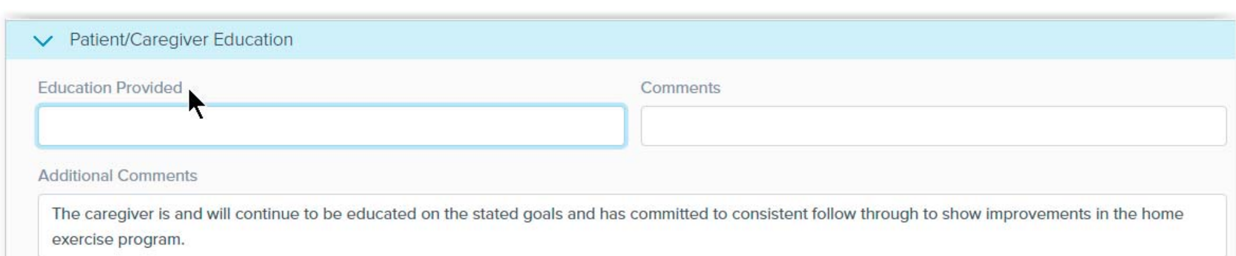
10 – <u>document Progress on Goals</u> – Scroll down to the **Problems & Goals** section. Click on the **Problems & Goals** section to enable editing.

****If you only documented daily treatment progress in your Goals section in Revflow, you will want to use the Goals section in WebPT. Use the Progress section to enter progress like you would have in Revflow.**

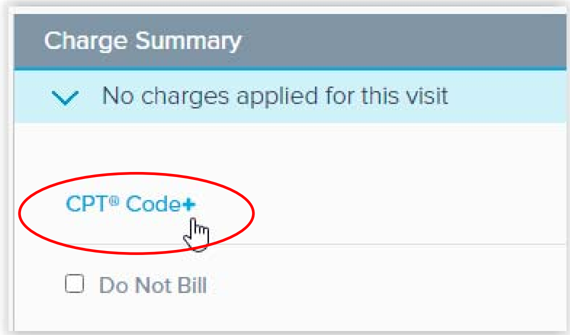
EXAMPLE



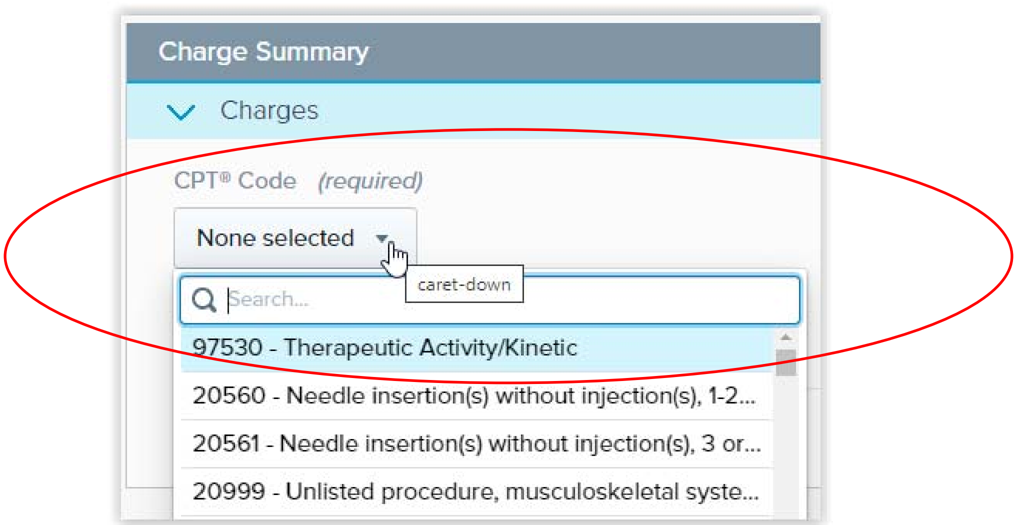
11 – Scroll down to **<u>Patient/Caregiver Education</u>**. Click on it to edit. Document any patient/caregiver education here (like you would have in the Notes > Interventions tab in Revflow)



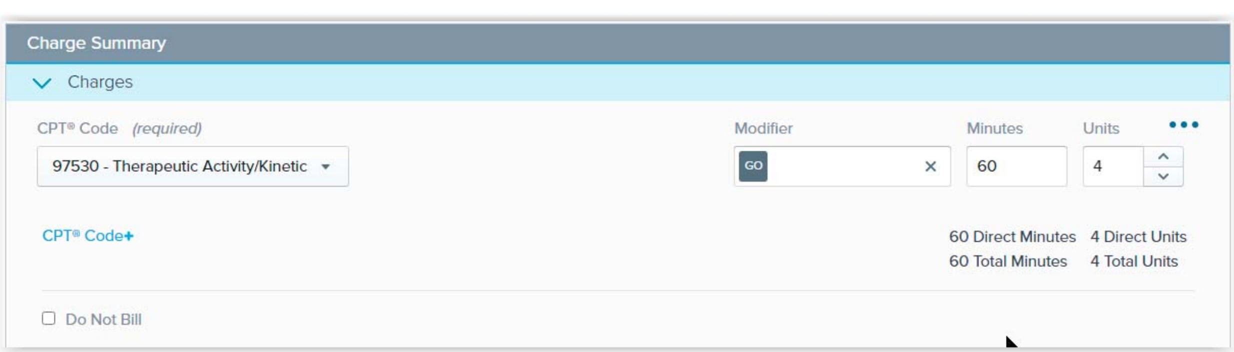
12 – **ENTER CHARGES** - Scroll down to Charge Summary. Hit CPT Code+ to add charges for this visit. If you have entered charges from a previous visit, they will carry over, and you won't need to add them again.



Click **None selected**, and it will pop up codes for you to search and choose from.



EXAMPLE OF CHARGE SUMMARY SCREEN. **DO NOT TRY TO DELETE OR ADD ANY MODIFIERS!**

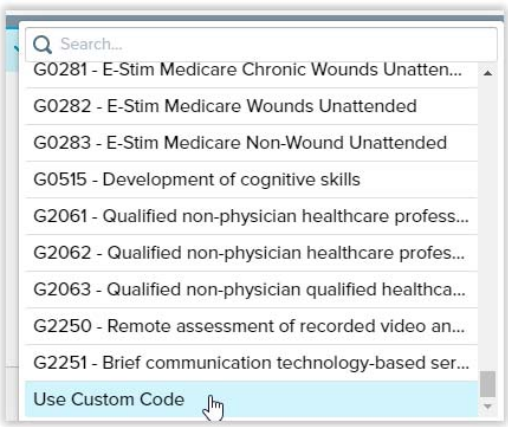


EPSDT, MPW, AND SELF PAY CODES - INSTRUCTIONS

**EPSDT, MPW, and Self Pay (use CASHVIS) codes should have automatically popped up from your last visit. If they did not, please enter them as a Custom Code, EXACTLY as listed below.

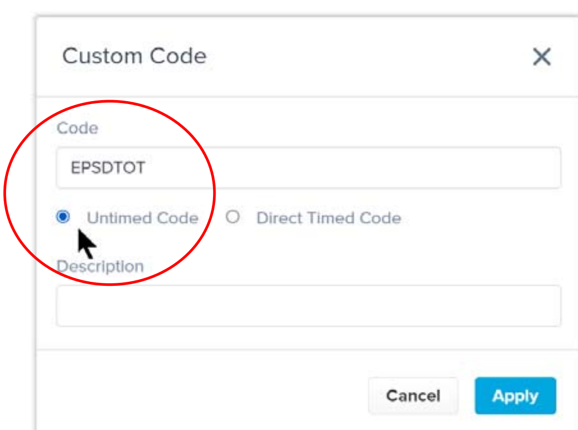
EPSDTST
EPSDTOT
DWMPWOT
CASHVIS

To do this, scroll ALL the way to the bottom of the code list (or you can start typing “Custom”), where it says “**Use Custom Code**.”



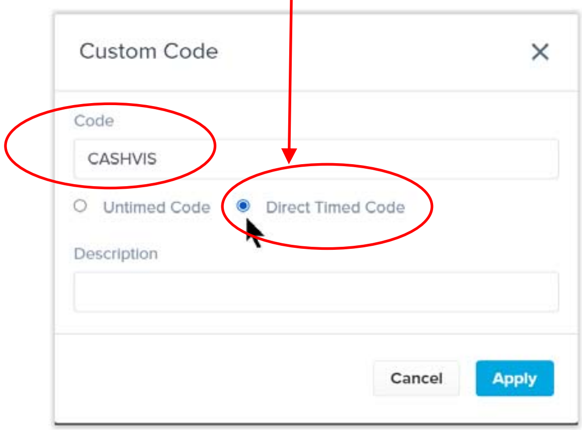
Click “**Use Custom Code**.”

<u>**EPSDTST**</u> or <u>**EPSDTOT**</u> – type <u>**EPSDTST**</u> or <u>**EPSDTOT**</u> in the Code field, and leave the button for **Untimed Code** selected.



EPSDTST
EPSDTOT

CASHVIS or DWWMPWOT – type CASHVIS or DWWMPWOT in the Code field, and select the button for **Direct Timed Code**.

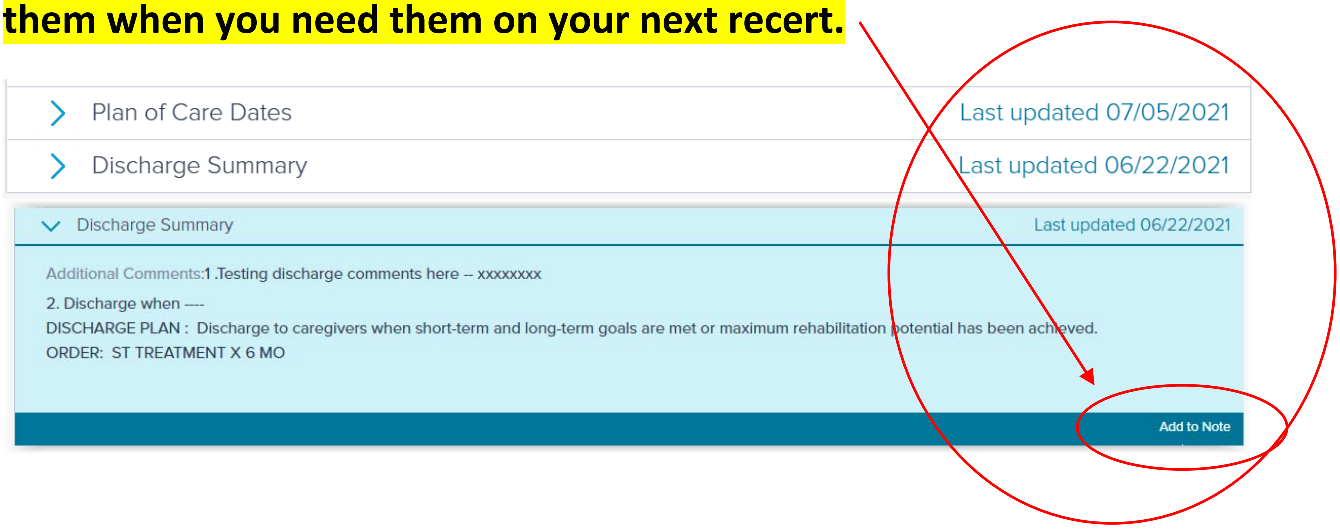


DWMPWOT
CASHVIS

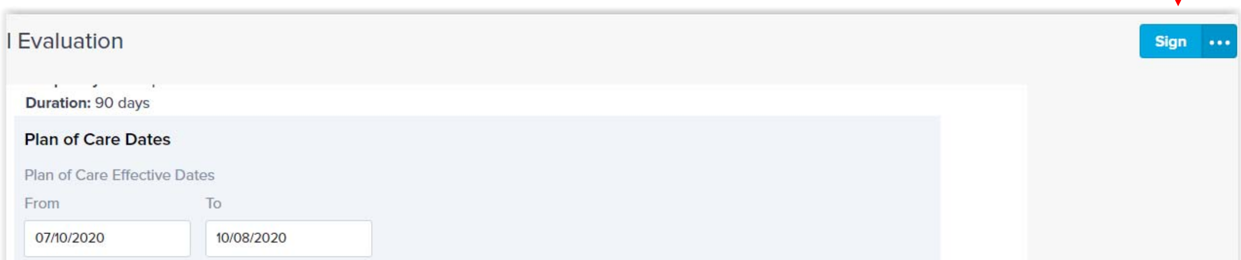
These custom codes should carry over to your next note, so you should not have to put them in again, unless you delete them out.

(In the future - if you are just doing a recert with no billed charges for treatment that day - select **Do Not Bill** instead of deleting charges.)

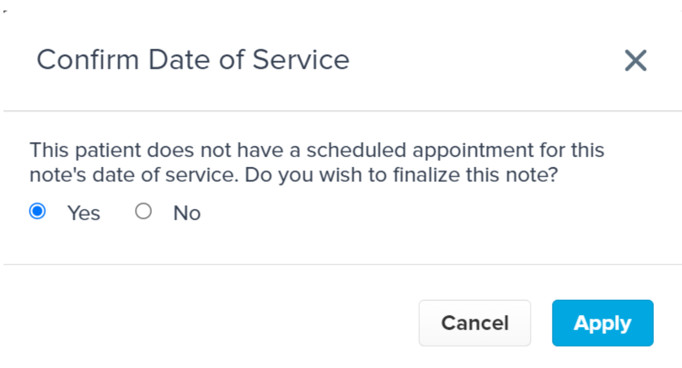
13 – don't forget **– ANYWHERE you see a "Last updated Date" – PLEASE CLICK IN TO THAT SECTION AND HIT ADD TO NOTE. If you do not do this, these fields will not carry over, and you will not have them when you need them on your next recert.**



14 – **SIGN** - After double checking that you have completed all of the above steps, click **Sign** in blue.



Click **Yes** on the below scheduling error to Confirm the Date of Service. We are still working to get clients on to your schedules.



YOU ARE NOW DONE WITH YOUR DAILY NOTE!! ☺