

# Visit Note Forms Required by Each Agency

## Sweet Angels: Kinnser.net

**Eval:** "OT Eval" & "Physician Orders"

**Re-Eval:** "OT Re-Evaluation w/ Supervisory Visit" & "Physician Orders"

**Visit Note:** "COTA Visit" or "OT Visit"

**Discharge:** "OT Discharge Eval w/ Discharge Summary"

**OASIS (Agency) Discharge:** If Applicable: "OASIS C-2 Discharge OT"  
Or "OASIS C-2 Discharge OT (Non Billable)" if it's a non visit DC OASIS

**Missed Visit:**

Missed visits are accessed by

- 1) Opening hotbox
- 2) Scrolling over the specific visit to be missed
- 3) Scrolling to the far right and selecting the orange "Home" icon
- 4) This opens the missed visit form
- 5) Follow prompts

**Supervisory Visit:** "Occupational Therapy Supervisory Visit"

**Patient Requests Early DC:** COTA/OT who is notified of the request for DC must enter a Communication Note.

**Non Visit Discharge:** Discharge Summary (OT)

## Accent Care: Point Care (Tablet Based)

**Eval:** OT01

**Re-Eval:** OT33, Make sure to also complete the Physician's order- it is not Marked with a red asterisk at the OT33 visit like it is on the OT01

**Eval for New Cert Period:** OT06, Make sure to also complete the Physician's Order

**Re-Certification:** OT02, Physician Communication Note, Case Conference Note, Therapy Recertification Summary (All found under Coordination Notes)  
Make sure to also complete the Physician's order

**OT Follow Up Visit:** OT11

**COTA Follow Up Visit:** CT11- when plotting visits for a COTA always use this code

**Discharge:** OT19 & Discharge Summary (located under Notes section of chart), Narrative Note (Under Coordination Note section of Medical Record)

**OASIS Discharge:** OT18, Discharge Summary (located under Notes section of

chart), Narrative Note (Under Coordination Note section of Medical Record)

**Non Visit Discharge:** Discharge Summary (located under Notes section of chart), Narrative Note (Under Coordination Note section of Medical Record)

## **Progressive Home Care:** [progressivehhc.devero.com](http://progressivehhc.devero.com)

**Eval:** “Occupational Therapy Evaluation and Care Plan” & “Physician Orders”

**Re-Eval:** “Occupational Therapy Reassessment” & “Physician Orders”

**Visit Note:** “Occupational Therapy Visit Note”

**Discharge:** “Occupational Therapy Visit Note” & “Occupational Therapy Discharge Summary”

**OASIS (Agency) Discharge:** If Applicable: “OASIS Discharge” & “Discharge Summary”

**Missed Visit:** “Occupational Therapy Patient Missed Visit”

**Supervisory Visit:** “Occupational Therapy Supervisory Visit”

**Non Visit Discharge:** “Occupational Therapy Discharge Summary”

**Co-Signing Notes:** Scroll down to the “Notes Pending Co-Signature” section of The Dashboard to find notes requiring co-signature. Please review daily.

## **RX Home Health:** [rxstaffing.devero.com](http://rxstaffing.devero.com) and [companymileage.com](http://companymileage.com)

**Eval:** “OT Eval and Care Plan”, “Physician Orders” & “Inter-Office Communication Note” under the Shared Forms section

**Re-Eval:** “OT Eval and Care Plan” & “Physician Orders”

**Visit Note:** “Occupational Therapy Visit Note”

**Discharge:** “Occupational Therapy Visit Note”, “Discharge Summary” & “Inter-Office Communication Note” under the Shared Forms section

**OASIS (Agency) Discharge:** If Applicable: “OASIS Discharge” & “Discharge Summary”

**Missed Visit:** “Missed Visit” under Clinical Forms section

**Non Visit Discharge:** “Discharge Summary”

**Co-Signing Notes:** Scroll down to the “Notes Pending Co-Signature” section of The Dashboard to find notes requiring co-signature. Please review daily.

\*\*ALL RX Visits also require documenting mileage in [companymileage.com](http://companymileage.com)

## Kindred Home Health: [gentivalink.devero.com](http://gentivalink.devero.com)

**Eval:** "OT Evaluation Non OASIS" (Order is on page 7 of eval at bottom)  
Also must complete "KAH Home Care Consent Addendum" in DeVero or on paper. Patient must sign Consent Addendum in DeVero or on

paper,

Also: "Case Communication: Care Team Communication"

**Re-Eval:** "Occupational Therapy Reassessment Note" & "Physician Communication & Interim Order" Also must complete "KAH Home Care Consent Addendum" in DeVero or on paper. Patient must sign Consent Addendum in DeVero or on paper

**Visit Note:** "Occupational Therapy Visit Note"

**Discharge:** "Occupational Therapy Visit Note" & "Transfer/ Discharge Summary/ Case Conference Report".

**OASIS (Agency) Discharge:** If Applicable: "OASIS Discharge From Agency Occupational Therapy" & "Transfer/ Discharge Summary/ Case Conference Report"

**Missed Visit:** "Missed Visit Note"

**Re-Certification:** "OT OASIS Re-Cert". "Physician Communication & Interim Order" Also must complete "KAH Home Care Consent Addendum" in DeVero or on paper. Patient must sign Consent Addendum in DeVero or on paper

**OT Eval for a New Cert Period (When Nursing or PT completes Re-Cert OASIS):**

**Co-Signing Notes:** Scroll down to the "Notes Pending Co-Signature" section of The Dashboard to find notes requiring co-signature. Please review daily.

## Arias Home Health and American River Home Care: [accounts.axxessweb.com](http://accounts.axxessweb.com)

**Eval:** "OT Eval", "Physician Orders" and "OT Plan of Care" which auto-populates after submitting the eval

**Re-Eval:** "OT Re-Evaluation", "COTA Supervisory Visit" & "Physician Orders"

**Visit Note:** "COTA Visit" or "OT Visit"

**Discharge:** "OT Discharge" and "COTA Supervisory Visit"

**OASIS (Agency) Discharge:** If Applicable: "OASIS C-2 Discharge" & "Discharge Summary"

**Missed Visit:** "Missed Visit"

Missed visits are accessed by

- 1) Opening "My scheduled tasks" from the Dashboard
- 2) Scrolling over the specific visit to be missed
- 3) Scrolling to the far right and selecting "Missed Visit Form"

**Supervisory Visit:** "Occupational Therapy Supervisory Visit"

**Non Visit Discharge:** "OT Discharge Summary"

**Co-Signing Notes:** Check Axxess daily for notes pending co-signature. From the Chart: select "Schedule" tab and then select "Notes Pending Co-Signature"

## **Alars Home Health, Assurance Home Health & Excel Home Health: [dslhhc.com](http://dslhhc.com)**

**Eval:** "OT Eval" & "Physician Telephone Order"

**Re-Eval:** "OT Re-Evaluation" & "Physician Telephone Order Orders"

**Visit Note:** "COTA follow up Visit" or "OT follow-up Visit"

**Discharge:** "OT Discharge without OASIS"

**OASIS (Agency) Discharge:** If Applicable: "OT Discharge with OASIS"

**Missed Visit:** "Post a Missed Visit". In the visit calendar, click on the relevant (PT or OT) icon. When the drop down appears, select " Post a Missed Visit"

### **Case Conference Note (Alars only)**

In the visit calendar, select the icon with the 2 figures (male and female). The icon is found on the date of the SOC visit- the first day of the episode. This Open the Case Conference. Under the relevant OT/ PT section, select the corresponding deficits. Also enter frequency, duration and effective date under the "Comments/ Notes" section. Enter this information in to the Case Conference note on the day of the eval. Save, Review and Electronically Sign the note.