



Masters of Occupational Therapy Program

OCC 6016: Health Systems and Professional Documentation

3 units

Spring 2025

Wednesdays 12:30-2:15pm

Balboa Room 251

Final Exam: 5/6/26

Time: 12pm

Information	Specifics for the Course
Instructor title and name:	Professor Heather Distelrath, MS, OTR/L
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Email:	hdistelr@pointloma.edu
Office location and hours:	Tuesdays at 12:30-2 or by appointment

PLNU Mission

To Teach ~ To Shape ~ To Send

Point Loma Nazarene University exists to provide higher education in a vital Christian community where minds are engaged and challenged, character is modeled and formed, and service is an expression of faith. Being of Wesleyan heritage, we strive to be a learning community where grace is foundational, truth is pursued, and holiness is a way of life.

Course Description

This course will explore reimbursement systems, including local, state, and federal governmental agencies and private insurers' influence on payment and access to OT services. Students will gain familiarity with electronic medical record systems and develop skills to document effectively to ensure reimbursement and prevent the needs for engaging in the appeal process.

Program Learning Outcomes

PLO # 1: Use critical reasoning to provide evidence-based occupational therapy services across the lifespan, in a variety of service delivery models, health care settings, and community-based systems.

PLO # 2: Develop and utilize a therapeutic use of self during client interactions which supports the client's engagement in occupational therapy and achievement of the clients' goals.

PLO # 3: Provide services within a client-centered and occupation-based framework, with consideration of contextual factors which influence a persons', groups' and/or populations' ability to engage in meaningful occupational tasks and roles.

PLO # 4: Demonstrate compliance with legal, ethical, and professional standards when interacting with clients, service providers, and/or systems.

PLO # 5: Exhibit the ability to document, manage, and evaluate outcomes of services provided.

PLO # 6: Develop clinical programs which meet a need for underserved persons, groups, and/or populations in the community.

PLO # 7: Prepare diverse health care professionals as providers and leaders in the delivery of high quality, accessible, culturally responsive care within a highly technological and global environment.

Course Learning Outcomes

1. Advocate for social responsibility and equitable services to support health including addressing social determinants; and commitment to engaging in lifelong learning and leadership. (B.2.0)
2. Explain to the community of interest (e.g., consumers, potential employers, colleagues, third-party payers, regulatory boards, policymakers, and the public) the distinct nature of occupation and the evidence that occupation supports performance, participation, health, wellness, and well-being. (B.2.4)
3. Demonstrate knowledge of the use of technology in practice, including electronic documentation systems and telehealth technology. (B.3.18)
4. Demonstrate effective communication with clients, [care partners](#), communities, and members of the intraprofessional and interprofessional teams in a responsive and responsible manner that supports a team approach to promote client outcomes, including collaboration with occupational therapy assistant. (B.3.21)
5. Demonstrate knowledge of the principles of intraprofessional and interprofessional team dynamics to perform

effectively in different team roles to plan, deliver, and evaluate patient- and population-centered care as well as [population health](#) programs and policies that are safe, timely, efficient, effective, and equitable. (B.3.22)

6. Identify, analyze, and evaluate the influence of contextual factors and current federal, state, and local policy issues and structures on the delivery of occupational therapy services for persons, groups, or populations to promote and advocate for policy development and social systems as they relate to the practice of occupational therapy. (B.4.1)
7. Identify and analyze evolving service delivery models; changing federal, state, and local laws and regulations; and payment reform to advocate for occupational therapy. (B.4.2)
8. Demonstrate knowledge of various reimbursement systems and funding mechanisms (e.g., federal, state, local, third party, private payer), appeals mechanisms, treatment/diagnosis codes (e.g., CPT®, ICD, DSM® codes), and durable medical equipment coding (e.g., HCPCS) and documentation requirements (e.g., equipment justifications) that affect consumers and the practice of occupational therapy. (B.4.3)
- 9.
10. Demonstrate knowledge of the current published American Occupational Therapy Association (AOTA) *Occupational Therapy Code of Ethics* and *AOTA Standards of Practice* and use them as a guide for ethical decision making in professional interactions, client interventions, employment settings, and when confronted with personal and organizational ethical conflicts. (B.2.1)

Required Texts and Recommended Study Resources

NOTE: Students are responsible to have the required course textbooks prior to the first day of class. Students are also encouraged to begin reading the books in preparation for the class as soon as possible.

~~Braveman, B. (2022). *Leading and Managing Occupational Therapy Services: An Evidence-Based Approach* (3rd ed.). FA Davis. 978-1719640350.~~

Gateley, C. (2023). *Documentation Manual for Occupational Therapy* (5th ed.). SLACK, Inc. 978-1638220602.

Supplemental readings will be provided in Canvas

Assessment and Grading

Sample Assignment Distribution by Percentage:

In class activities	15%
Guided worksheets	10%
Assignments	40%
Midterm	15%
Final	20%

Sample Grading Scale:

A=93-100

A-=92-90

B+=87-89

B=83-86

C=73-76

D=63-66

B-=80-82

C-=70-72

D-=60-62

C+=77-79

D+=67-69

F=0-59

Content Warning

I acknowledge that each of you comes to PLNU with your own unique life experiences. This contributes to the way you perceive various types of information. In [class name], all of the class content, including that which may be intellectually or emotionally challenging, has been intentionally curated to achieve the learning goals for this course. The decision to include such material is not taken lightly. These topics include [list topics]. If you encounter a topic that is intellectually challenging for you, it can manifest in feelings of discomfort and upset. In response, I encourage you to come talk to me or your friends or family about it. Class topics are discussed for the sole purpose of expanding your intellectual engagement in the area of [subject/major], and I will support you throughout your learning in this course.

Trigger Warning

I acknowledge that each of you comes to PLNU with your own unique life experiences. This contributes to the way you perceive several types of information. In [class name], we will cover a variety of topics, some of which you may find triggering. These topics include [list topics]. Each time this topic appears in a reading or unit, it is marked on the syllabus. The experience of being triggered versus intellectually challenged are different. The main difference is that an individual must have experienced trauma to experience being triggered, whereas an intellectual challenge has nothing to do with trauma. If you are a trauma survivor and encounter a topic in this class that is triggering for you, you may feel overwhelmed or panicked and find it difficult to concentrate. In response, I encourage you to take the necessary steps for your emotional safety. This may include leaving class while the topic is discussed or talking to a therapist at the Counseling Center. Should you choose to sit out on discussion of a certain topic, know that you are still responsible for the material; but we can discuss if there are other methods for accessing that material and for assessing your learning on that material. Class topics are discussed for the sole purpose of expanding your intellectual engagement in the area of [subject/major], and I will support you throughout your learning in this course.

Incompletes and Late Assignments

All assignments are to be submitted/turned in by the beginning of the class session when they are due—including assignments posted in Canvas. Incompletes will only be assigned in extremely unusual circumstances. Late assignments will be deducted 10% of points for each late day.

PLNU Spiritual Care

Balboa Campus:

PLNU strives to be a place where you grow as a whole person. To this end, we provide resources for our graduate students to encounter God and grow in their Christian faith. At the Balboa campus, we have an

onsite chaplain, Rev. Kevin Portillo, who is available during class break times across the week. If you have questions, a desire to meet or share any prayer requests with Rev. Portillo, you may contact him directly at KevinPortillo@pointloma.edu.

PLNU Copyright Policy

Point Loma Nazarene University, as a non-profit educational institution, is entitled by law to use materials protected by the US Copyright Act for classroom education. Any use of those materials outside the class may violate the law.

PLNU Recording Notification

In order to enhance the learning experience, please be advised that this course may be recorded by the professor for educational purposes, and access to these recordings will be limited to enrolled students and authorized personnel.

Note that all recordings are subject to copyright protection. Any unauthorized distribution or publication of these recordings without written approval from the University (refer to the Dean) is strictly prohibited.

PLNU Academic Honesty Policy

Students should demonstrate academic honesty by doing original work and by giving appropriate credit to the ideas of others. Academic dishonesty is the act of presenting information, ideas, and/or concepts as one's own when in reality they are the results of another person's creativity and effort. A faculty member who believes a situation involving academic dishonesty has been detected may assign a failing grade for that assignment or examination, or, depending on the seriousness of the offense, for the course. For all student appeals, faculty and students should follow the procedures outlined in the University Catalog. See [Graduate Academic and General Policies](#) for definitions of kinds of academic dishonesty and for further policy information.

During the first week of class, you will be asked to submit an Academic Honesty Verification Statement. Submitting the statement is a requirement of this course. By submitting the Academic Honesty Verification Statement, you will be verifying all assignments completed in this course were completed by you. Carefully review the Academic Honesty Statement below.

Statement: "In submitting this form, I am verifying all the assignments in this course will be completed by me and will be my own work."

Artificial Intelligence (AI) Policy

The use of Artificial Intelligence (AI) tools (e.g., ChatGPT, iA Writer, Marmot, Botowski, GrammarlyGo, Perplexity, etc.) is prohibited in this course for any aspect of your work, including idea generation, drafting, editing, or final submissions. This course is designed to assess your independent critical thinking, writing, and research skills without the assistance of AI technologies. Violations of this policy will be treated as breaches of academic integrity.

PLNU Academic Accommodations Policy

PLNU is committed to providing equal opportunity for participation in all its programs, services, and activities in accordance with the Americans with Disabilities Act (ADA). Students with disabilities may request course-related accommodations by contacting the Educational Access Center (EAC), located in the Bond Academic Center (EAC@pointloma.edu or 619-849-2486). Once a student's eligibility for an accommodation has been determined, the EAC will work with the student to create an Accommodation Plan (AP) that outlines allowed accommodations. The EAC makes accommodations available to professors at the student's request.

PLNU highly recommends that students speak with their professors during the first two weeks of each semester/term about the implementation of their AP in that particular course. Accommodations are not retroactive so clarifying with the professor at the outset is one of the best ways to promote positive academic outcomes.

Students who need accommodations for a disability should contact the EAC as early as possible (i.e., ideally before the beginning of the semester) to assure appropriate accommodations can be provided. It is the student's responsibility to make the first contact with the EAC. Students cannot assume that because they had accommodations in the past, their eligibility at PLNU is automatic. All determinations at PLNU must go through the EAC process. This is to protect the privacy of students with disabilities who may not want to disclose this information and are not asking for any special accommodations.

Language and Belonging

Point Loma Nazarene University faculty are committed to helping create a safe and hospitable learning environment for all students. As Christian scholars we are keenly aware of the power of language and believe in treating others with dignity. As such, it is important that our language be equitable, inclusive, and prejudice free. Inclusive/Bias-free language is the standard outlined by all major academic style guides, including MLA, APA, and Chicago, and it is the expected norm in university-level work. Good writing and speaking do not use unsubstantiated or irrelevant generalizations about personal qualities such as age, disability, economic class, ethnicity, marital status, parentage, political or religious beliefs, race, gender, sex, or sexual orientation. Inclusive language also avoids using stereotypes or terminology that demeans persons or groups based on age, disability, class, ethnicity, gender, race, language, or national origin. Respectful use of language is particularly important when referring to those outside of the religious and lifestyle commitments of those in the PLNU community. By working toward precision and clarity of language, we mark ourselves as serious and respectful scholars, and we model the Christ-like quality of hospitality.

If you (or someone you know) have experienced other forms of discrimination or bias, you can find more information on reporting and resources at www.pointloma.edu/bias.

Sexual Misconduct and Discrimination

In support of a safe learning environment, if you (or someone you know) have experienced any form of sexual discrimination or misconduct, including sexual assault, dating or domestic violence, or stalking, know that accommodations and resources are available through the Title IX Office at

pointloma.edu/Title-IX. Please be aware that under Title IX of the Education Amendments of 1972, faculty and staff are required to disclose information about such misconduct to the Title IX Office.

If you wish to speak to a confidential employee who does not have this reporting responsibility, you can contact Counseling Services at counselingservices@pointloma.edu or find a list of campus pastors at pointloma.edu/title-ix or as shown in the PLNU Spiritual Care section of this syllabus.

If you (or someone you know) have experienced other forms of discrimination or bias, you can find more information on reporting and resources at www.pointloma.edu/bias

PLNU Course Modality Definitions

1. Online Courses: These are courses with class meetings where all instruction and interaction is fully online.
 - a. Synchronous Courses: At least one class meeting takes place at a designated time.
 - b. Asynchronous Courses: All class meetings are asynchronous.
2. Hybrid Courses: These are courses with class meetings that take place both in the classroom and online synchronously and/or asynchronously.
3. In-Person Courses: These are courses that meet in person with the instructor and students in a physical classroom setting. With approval by the area dean, this may include up to 25% of qualified class interactions through a Learning Management System (such as Canvas).

PLNU Attendance and Participation Policy

Regular and punctual attendance at all class sessions is considered essential to optimum academic achievement. Therefore, regular attendance and participation in each course are minimal requirements.

If the student is absent for more than 10 percent of class sessions, the faculty member will issue a written warning of de-enrollment. If the absences exceed 20 percent, the student may be de-enrolled without notice until the university withdrawal date or, after that date, receive an “F” grade.

Students who anticipate being absent for an entire week of a course should contact the instructor in advance for approval and make arrangements to complete the required coursework and/or alternative assignments assigned at the discretion of the instructor. Acceptance of late work is at the discretion of the instructor and does not waive attendance requirements.

Refer to [Academic Policies](#) for additional detail.

GPS Academic Resources

PLNU offers the following free academic resources virtually for Graduate Professional Studies (GPS) Students. Visit myPLNU through the links below for more information.

- **The GPS Writing Center** offers:
 - **Zoom Writers Workshops** offered each quad on a variety of helpful topics
 - **One-to-one appointments** with the Writing Coach
 - **Microlearning YouTube Video Library** for helpful tips anytime
 - **Research Help Guide** to help you start your research
 - The physical office is located on the third floor of the **Mission Valley Regional Center** off the student lounge
- **Academic Writing Resources Course**: Found on your Canvas Dashboard, this course is non-credit with 24/7 access, no time limits, and self-paced content. **Watch a quick video run-through** and take time now to explore!
- Grammarly: Students have unlimited FREE access to Grammarly for Education, a trusted tool designed to help enhance writing skills by providing real-time feedback, identifying areas for improvement, and providing suggestions. Grammarly's Generative AI is NOT available with our student accounts.
- **Tutoring**: Students have access to 24/7 live or scheduled subject tutoring through Tutor.com, including a Paper Drop-Off Service with feedback within 12 hours.

We are here to support you! Contact us anytime: GPSWritingCenter@pointloma.edu