

**The University of Texas at El Paso
College of Health Sciences
Doctor of Physical Therapy Program**

PT 6340 Management and Finance in Physical Therapy Spring 2025

COURSE SYLLABUS

Credit Hours: 3

Contact Hours: Total: 45 hours
Lecture: 3 hours; Lab: 0 hours; Clinic: 0 hours

Schedule:
Monday 10:30 am – 12:00 pm
Wednesday 1:30 pm – 3:00 pm

Coordinator/Instructor(s):
Faculty: Katherine Reyes-Brooks, PT, DPT
Office location: OT offices, 105 Q
Phone #: 915-747-6122
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E-mail: kmreyesbrooks@utep.edu
Office hours: by appointment

Course Description: (catalog) Management theory and fiscal discipline relevant to healthcare delivery as it relates to physical therapy are presented. Alternate means and sources of healthcare delivery are assessed, as well as administrative factors that impact care giving. Concepts and strategies applicable to the marketing and management of physical therapy practice are discussed. The principles and ethics underlying effective conflict resolution are emphasized.

Student description: In this class you will learn the basic concepts from business to help you open and run your own clinic, marketing strategies, how to create a budget, and participate in the day-to-day administrative activities in your future workplace. You will also learn to accurately bill Medicare and private insurances. Finally, you will practice using ethical principles in various simulated situations.

Course Prerequisites for DPT Students: The UTEP DPT Program curriculum is a lock-step curriculum. Therefore, students must pass all courses in the prior semester of the DPT Program in order to enroll in courses in the subsequent semester. Faculty may consider exceptions for PT 6116 PT Capstone Project I and PT 6117 PT Capstone Project II.

Course Objectives:

Upon completion of this course, the student will be able to:

1. Explain the organizational structure at a place of employment, with consideration of one's own position within the organizational hierarchy, to facilitate patient care and treatment management. (PT MACS #24; CAPTE 7C2) (Comprehension)
2. Participate in successful negotiation and conflict management and evaluate underlying causes of workplace conflict. (PT MACS-#3; CAPTE 7B1, 7A, 7C3,7C1) (Application)
3. Demonstrate methods to manage multiple tasks in a workday including 1) direct patient care, 2) indirect patient care including case management 3) documentation and 4) other duties as assigned. (PT MACS #5; CAPTE 7B3, 7B1, 7D14, 7D29) (Application)
4. Cultivate an accountable management style that incorporates 1) effective use of human resources including PTA direction and supervision, 2) maximizing productivity, 3) identification of risk management issues, and 4) adherence to practice guidelines, legal statutes, and ethical standards. (PT MACS #6; CAPTE 7B Finance, 7B Management, 7B3, 7B1, 7D14, 7D20, 7D25) (Synthesis)
5. Explain how third-party payment systems or lack thereof impact the patient prognosis and continuum of care. (PT MACS #23; CAPTE 7D5, 7D20, 7D24) (Comprehension)
6. Formulate a private practice plan that includes a: mission/vision, marketing plan, and business plan with a budget reflecting anticipated costs, revenues, and profit for a physical therapy practice as key components while investigating regulatory and legal guidelines governing the practice. (PT MACS #24, 7B Management, 7D17, 7D24, 7D25) (Synthesis)
7. Analyze and interpret financial terms, conditions, and implications of insurance contracts. (PT MACS #24; 7B Finance, 7B Management, 7D24) (Analysis)
8. Identify marketing and public relation principles as they relate to the PT practice. (PT MACS # 24; CAPTE 7D25) (Comprehension)
9. Demonstrate appropriate direction and supervision of the PTA and/or PT technician in case scenarios. (PT MACS #22; CAPTE 7D7, 7D29) (Application)

10. Compare and contrast business and clinical ethics with respect to standards of practice and APTA core values. (PT MACS - #1, CAPTE 7B Management, 7B Ethics and Values, 7B1) (Analysis)
11. Explain health care delivery systems and various practice settings for physical therapy patient and practice management. (PT MACS #2, 23, CAPTE 7B Management) (Comprehension)
12. Assess federal statutes and health care policies pertaining to the practice of physical therapy and their impact on the healthcare environment and practice.
(CAPTE 7B Management, 7D20) (Evaluation)
13. Identify appropriate reporting agencies with regard to HIPAA, patient privacy, and fraud/waste/abuse laws. (PT MACS #7; CAPTE 7B) (Comprehension) **Curricular Threads:**

- **Cultural/Linguistic Engagement and Competence:** n/a

- **Evidence-Based Practice and Research:** n/a

- **Clinical Reasoning:**

- Using current billing policies (CMS and AMA) students will learn billing procedures and use of paper billing. The students will be able to complete proper documentation with the intent of treatment for proper billing codes.

- **Interprofessional Collaborative Practice:**

- Students will understand the impact of working with other disciplines and the impact on proper billing. Medicare (CMS) and private (AMA) billing guidelines will be used as well as the adjustments needed for PTA treatments and billing.

- Students will also learn how to bill and plan for treatment when there is a therapy cap/maximum billable amount with other rehab team members (OT, SLP).

Methods of Instruction: Assigned readings, lecture, case scenarios, and group and active learning opportunities.

Methods of Evaluation: Student competence and attainment of course objectives are assessed using a variety of methods. These methods and their contribution to the final grade are listed in the table below.

*A grade <75% on any assignment requires **the student** to meet with Dr. Reyes. It is the student's responsibility to approach the instructor.

<u>Item</u>	<u>Grade Composition</u>
Quizzes and Class assignments (written)	20%
Lab Assignments (written, psychomotor)	0%
Skills Check (psychomotor)	0%
Group business plan (Final)	20%
Module 1 Exam (written)	20%
Module 2 Exam (written)	20%
Final Exam (written)	20%
Course Evaluation	1%
Total	101%

Grading Scale: The following letter grade scale is used for the UTEP Doctor of Physical Therapy Program: (*For DRSC courses, substitute C=70-79, F=Below 70*)

<u>Letter Grade Scale</u>	<u>Numerical Grade Scale</u>
A	90-100
B	80-89
C	75-79
F	Below 75

Required Textbooks and Other Learning Resources:

- Bodenheimer T, Grumbach K. eds. *Understanding Health Policy: A Clinical Approach*, 7e New York, NY: McGraw-Hill.
<http://0accessphysiotherapy.mhmedical.com.lib.utep.edu/content.aspx?bookid=1790§ionid=121191116>. Accessed January 06, 2019.
- Page CG. eds. *Management in Physical Therapy Practices*, 2e New York, NY: McGraw-Hill; .
<http://0fadavispt.mhmedical.com.lib.utep.edu/content.aspx?bookid=1936§ionid=141075059>. Accessed January 10, 2019.
- O'Sullivan lab book. (Ackerman P, Atrice M, Foy T, Morrison S, Hopkins P, McDowell S. Patient With Complete Spinal Cord Injury, T9. In: O'Sullivan SB, Schmitz TJ. eds. *Improving Functional Outcomes in Physical Rehabilitation*, 2e New York, NY: McGraw-Hill; .
<http://0fadavispt.mhmedical.com.lib.utep.edu/content.aspx?bookid=1860§ionid=140752340>.)

- APTA Membership to access online readings and complete the online course: You all need APTA Membership to get free access to online readings and complete the online courses.
 1. LMS-353 "Leading the Team: A practical guide to working with PTAs."

Recommended Textbooks and Other Learning Resources:

Ledlow, GR & Coppola, MN. *Leadership for Health Professionals: Theory, Skills, and*

Applications. Jones & Bartlett Learning. Sudbury, MA. 2010. (ISBN: 9780763781514)

Nicholson, SK. *The Physical Therapist's Business Practice and Legal Guide*. Jones and Bartlett Publishers. Sudbury, MA. 2008. (ISBN-10: 0763740691)

Nosse and Friberg. *Managerial and Supervisory Principles for Physical Therapy*. Lippincott Williams & Wilkins. Philadelphia, PA; 2010. (ISBN 13: 978-0-7817-8132-9)

Hack, L & Hillyer, RW. *Business Skills in Physical Therapy: Defining Your Business*. APTA. Alexandria, VA. 2003. (ISBN: 978-1-931369-09-1)

Resources Available for Student Success:**Confidential Resources:**

- **Center for Accommodations and Support Services (CASS):** If you have or suspect a disability and need accommodation, you should contact the Center for Accommodations and Support Services (CASS) at 747-5148. You can also e-mail the office at cass@utep.edu or go to their office in Union Building East, room 106 (next to the UTEP post office). For additional information, visit the CASS website at <http://sa.utep.edu/cass>.

Additional Resources:

- DPT Library Research Guide: <http://libguides.utep.edu/pt>
- UTEP provides a variety of student services and support. Please refer to the QR code below for a listing of campus resources or visit https://www.utep.edu/advising/student_resources/student-success-resource-hub.html.



University Policies: All students are responsible for following UTEP policies and procedures found in the Handbook of Operating Procedures at www.utep.edu/vpba/hoop

Program Policies: All DPT students are responsible for following all policies and procedures documented in the current DPT Student Handbook. Course policies found in the DPT Student Handbook apply to all courses in the DPT curriculum. The current DPT Student Handbook may be found on the DPT Student Resources site on Blackboard.

Academic Integrity: The UTEP DPT Program has a “zero tolerance policy” for scholastic dishonesty. DPT students must demonstrate academic integrity at all times. The current DPT Student Handbook outlines specific definitions, expectations, details, and consequences related to academic integrity and scholastic dishonesty. Additional information related to academic integrity is available through the UTEP Division of Student Affairs at www.utep.edu/student-affairs/osccr/student-conduct/academic-integrity.html

For any referrals to OSCRR the instructor can request penalties up to and including failure of the course. Please ensure that all work submit is your own and that you are not sharing or accepting any previous/future assignments with others without the express permission of the course instructor.

Course-Specific Policies:

1. **Attendance Policy - Absences:** Refer to current DPT Student Handbook “Attendance and Classroom Behavior” for the DPT Program policy. Additional course-specific policy are as follows:
 - *Students are expected to attend all classes.*
 - *If you are feeling ill or need to isolate due to COVID exposure, please contact Dr. Reyes prior to class.*
2. **Attendance Policy - Tardiness & Early Departures:** Refer to current DPT Student Handbook “Attendance and Classroom Behavior” for DPT Program policy. Additional course-specific policy is as follows:

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- *If you anticipate needing to come to class late please notify Dr. Reyes by email at kmreyesbrooks@utep.edu*
 - *Treat this as a job and follow the same attendance practices that you would at work.*
3. **Electronic Devices:** Refer to current DPT Student Handbook “Electronic Devices” for DPT Program policy. Additional course-specific policy is as follows:
- *Some classroom activities will be completed without electronics due to the nature of the assignment in an effort to enhance participation and communication. Students are expected to follow these instructions.*
4. **Professional Behavior Policy:** See DPT Student Handbook “Attendance and Classroom Behavior”, “Professional Behaviors” and “Unprofessional Behavior:” for general program policy. Additional course-specific is as follows:
- *When guest lecturers or mock patients are present you are expected to present yourself in a professional manner. This means business casual, khakis and polos, or scrubs.*
 - *It is expected that students will come to class prepared to discuss material from readings and posted lectures. Class time will be spent primarily on active learning activities. As such students are expected to be prepared. If they are not, they will be asked to leave the class and must make an appointment with instructor to present their plan to be prepared for classes in the future.*
5. **Late or Missed Assignments and Assessments Policy:** See current DPT Student Handbook “Written Examination Policy”. Additional course-specific policy is as follows:
- *Late assignments will result in a **10% deduction** per day on the assignment. If the assignment is more than 3 days late, a 0 (zero) will be assigned.*
6. **Skills Check Policy:**
- Not applicable
7. **Practical Exam Policy:**
- Not applicable

Course Content and Schedule: (Note: Students will be notified of changes via Blackboard or email. Additional details may be available in supporting course documents provided by the course instructor).

Making Changes to Schedules for Examinations (not quizzes)

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- From the first day of the semester, the cohort has 14 calendar days to request a change in scheduled examination date based ONLY on conflicts with scheduled examinations in other classes. The request will be submitted to all responsible faculty members in writing. This request will include potential alternatives. The faculty will evaluate these requests and make a final decision within 7 days of receipt. Otherwise, examinations will not be changed.

Quizzes and Class Assignments (20%):

1. LMS-353 "Leading the Team: A practical guide to working with PTAs."
2. Quizzes – expect 1 short readiness quiz per week. Each quiz will be 5-10 questions.
3. Assignments will be completed individually.

Student Course Evaluation:

- The expectation is that each student will complete the online course evaluations distributed by UTEP at the end of the semester.
- See Student Handbook for instructions.
- Student name and course must be on the screenshot to receive credit.

PLEASE REFER TO THE SCHEDULE ATTACHMENT WITHIN THE SYLLABUS FILE

****Schedule is subject to change. While trying to remain consistent in the outline of date and information, it is very important that the class as a whole, understands the concepts prior to moving on. Adjustments may be necessary for optimal information coverage as well as to accommodate the multiple guest presenters we will have during the second part of the semester.****

Rubric Business Plan (10%):

See next pages for rubric.

- This will be done in groups. In addition to the typical clinical components, your group must also have contingency plans for COVID regulations at different threat levels.
- There is no limit on clinic location. However, a map of the proposed address, along with the physical therapy clinics within a 10 mile radius will need to be attached to the assignment.
- Each group may have personal investments of <\$10,000 per member. All additional costs must be financed.
- You may assume that you have 5-10 years of experience after PT school.
- You may have no more than 2 clinical specialists on staff.
- All items to be purchased will be submitted in an Appendix.
- Calculations should not be part of the business plan body. They may be included only in Appendices.
- It is recommended that you complete each component of this project as it is discussed in class.
- Your clinic specialty and population must be approved by February 28, 2024.
- Feedback on your draft proposal will be given by the instructor before March 20th. After this day, I will not review or assist with your business plan project.
- A physical copy will be submitted to Dr. Reyes' box in the DPT office no later than April 15th at 5 pm.
- An electronic copy will be submitted on Black Board by 12 pm on April 15th.

Students: _____

Criteria	Points available				Grade Draft	Grade Final
Grammar and Spelling	5 pts possible Correct grammar and spelling should be demonstrated throughout the paper	0-1 Multiple (>9) spelling errors, run-on sentences, or other grammatical errors	2-4 Some (6-8) grammatical or spelling errors found in the paper.	5 – No (<5) grammatical or spelling errors found in the paper.		
Executive Summary	4 pts possible: Each element to be graded for completeness and manner to which it adheres to the given guidelines in the course. Mission Statement Vision Statement Values Statement Executive summary of all aspects of the business	0-1 Did not complete components of the summary or the components are of poor quality.	2-3 Addressed some components in the summary requirements; incomplete summary or components; or is missing important information.	4 Addressed all components of the Executive Summary. Components are throughout and complete.		

Students: _____

Market Analysis	<p>3 pts possible Did the writer analyze the market appropriately considering the regulations, competition, and target population correctly?</p> <p>This should include a discussion of the rationale for site location and possible referring physician sources.</p>	0-1 Missing components of the market analysis or incorrectly analyzed the impacts of these forces on the market in question.	2-3 Addressed some of the impacts of the market on their target population; did not consider 1 component of the analysis; or made minimal mistakes in the impact on the market in question.	3 Addressed all components of the market analysis and properly interpreted market implications.		
Company Description	<p>2 pts possible Correctly described the clinic and target population.</p> <p>This should be similar to the Executive summary above, but focus only on the clinic services and target population.</p>	0 Did not define or describe the company correctly.	1 Only partially defined or described the company; used an inappropriate company type.	2 Correctly described the company and used appropriate legal structure for the clinic.		

Organizational Chart	3 pts possible Provide an organizational chart that defines the chain of command and responsibilities of each individual.	0-1 Has incorrect responsibility flow or lacks an organizational chart	2 Confusing chart that does not clearly delineate duties or chain of command.	3 Organizational chart organizes staff in logical manner that is easy to determine responsibly and chain of command.		
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Marketing Plan	2 pts possible Provides two different marketing ideas that target appropriate patient and referral populations. These should be distinct from one another and NOT include prescription pads or calendars. Mock ups of these should be included in the final presentation.	0 Lacks an appropriate marketing plan or does not target the appropriate patient population.	1 Provides only 1 marketing tool or 2 non-distinct marketing tools; Tools do not target the appropriate population or are confusing.	2 Provides 2 distinct marketing tools that are used appropriately for the target population.		
Budget	7 pts possible Provides a throughout budget with: funding request funding source fee schedule with justifications projections of revenue projections of expenses productivity requirements salary and benefits costs Fee schedule is distinct from the CMS Physician Fee Schedule.	0-2 Does not include 3 or more components of the required budget, lacks justification for revenue or expense projections.	3-5 Contains 4-6 of the required components of the budget, does not provide justifications or references for the revenues, expenses, ROI, or productivity requirements.	6-7 Provides throughout budget with all required components and projections.		

Sources or References	3 pts possible Provided a minimum of 3 sources for all aspects of the paper cited in AMA format.	0-1 – less than three sources used; poor quality sources; did not properly cite sources in paper; or reference appropriately.	2- used three sources not cited or referenced appropriately	3 – used three sources that were appropriately cited and referenced with AMA format		
Total Group grade				Points possible: 29		
Individual presentation	6 points During presentation is able to: answer questions about all aspects of the project including the rationale and justification for each element; actively participates in the presentation of the business plan; can articulate their contribution to the project; Dressed appropriately for presentation Arrives promptly for set-up and presentation of the group project	0-2 points Meets <3 of the requirements listed.	3-4 points Meets 3-5 of the requirements listed.	5 points Meets all of the requirements listed.		

Peer assessment: Please distribute **100 pts** among your teammates. No 2 teammates can have the same amount of points.

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