

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

**Course # 5340      Management and Finance in Physical Therapy      Spring 2020**

**COURSE SYLLABUS**

**Credit Hours:**            **3**

**Contact Hours:**        **Total: 45 hrs**  
Lecture: 3 hrs; Lab: 0 hrs; Clinic:      hrs

**Schedule:**

Monday            1:00 pm – 2:30 pm  
Wednesday      1:00 pm - 2:30 pm

**Coordinator/Instructor(s):**

Faculty: Rhonda Manning, PT, DPT, PCS  
Office location: *Campbell Bldg Rm 307*  
Phone #: (915) 747-7610  
E-mail: rajeske@utep.edu  
Office hours: Thursday 12:00 am – 2:00 pm or as posted  
Teaching Assistant: NA

**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 7D7) (Comprehension)
2. Participate in successful negotiation and conflict management, and evaluate underlying causes of workplace conflict. (PT MACS-#3; CAPTE 7D6, 7D7, 7D8,7D10) (Application)
3. Demonstrate methods to manage multiple tasks in a work day including 1) direct patient care, 2) indirect patient care including case management 3) documentation and 4) other duties as assigned. (PT MACS #5; CAPTE 7D1, 7D4,7D5,7D28, 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, 7D1, 7D4, 7D5, 7D28, 7D41, 7D43) (Synthesis)
5. Explain how third party payment systems or lack thereof impact the patient prognosis and continuum of care. (PT MACS #23; CAPTE 7D23, 7D41, 7D42) (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, 7D38, 7D42, 7D43) (Synthesis)
7. Analyze and interpret financial terms, conditions, and implications of insurance contracts. (PT MACS #24; 7B, 7D42) (Analysis)
8. Identify marketing and public relation principles as they relate to the PT practice. (PT MACS # 24; CAPTE 7D43) (Comprehension)
9. Demonstrate appropriate direction and supervision of the PTA and/or PT technician in case scenarios. (PT MACS #22; CAPTE 7D25, 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, 7D4,7D5) (Analysis)
11. Explain health care delivery systems and various practice settings for physical therapy patient and practice management. (PT MACS #2, 23, CAPTE 7B) (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, 7D41) (Evaluation)
13. Identify appropriate reporting agencies with regard to HIPAA, patient privacy, and fraud/waste/abuse laws. (PT MACS #7; CAPTE 7D2, 7D3) (Comprehension )

**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. Manning. 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)	10%
Module 1 Exam (written)	20%
Module 2 Exam (written)	20%
Module 3 Exam (written)	15%
Final Exam (written)	15%
Total	100%

**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://0-accessphysiotherapy.mhmedical.com.lib.utep.edu/content.aspx?bookid=1790&sectionid=121191116>. Accessed January 06, 2019.
- Page CG. eds. *Management in Physical Therapy Practices, 2e* New York, NY: McGraw-Hill; . <http://0-fadavispt.mhmedical.com.lib.utep.edu/content.aspx?bookid=1936&sectionid=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://0-fadavispt.mhmedical.com.lib.utep.edu/content.aspx?bookid=1860&sectionid=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.”
2. LMS-1009 “Application of PTA and OTA modifiers in 2020”
3. LMS-994 “Hot Topics in Federal Policy and Reimbursement”
4. LMS – 1006 “The Changing Landscape of Federal Payment, Coverage and Coding Policies.”

**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 accommodations, 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](mailto:cass@utep.edu) or go by 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>.
- **The UTEP Student Health Center:** Union East Suite 100; 915.747.5624; [www.utep.edu/chs/shc](http://www.utep.edu/chs/shc)
- **The UTEP Counseling and Psychological Services:** 202 Union West, 915.747.5302; [www.utep.edu/student-affairs/counsel](http://www.utep.edu/student-affairs/counsel)

**Additional Resources:**

- Division of Student Affairs. 915.747.5076, [www.utep.edu/student-affairs](http://www.utep.edu/student-affairs)
- DPT Library Research Guide: <http://libguides.utep.edu/pt>
- Writing Center: 915.747.5112. <https://uwc.utep.edu>
- Computer Labs: Independent Learning Center (ILC), 1<sup>st</sup> floor Campbell Building
- Military Student Success Center: 915.747.5342, [www.utep.edu/student-affairs/mssc](http://www.utep.edu/student-affairs/mssc)
- Student Wellness Program. 915.747.6738, [www.utep.edu/chs/wellness](http://www.utep.edu/chs/wellness)

**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](http://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](http://www.utep.edu/student-affairs/osccr/student-conduct/academic-integrity.html)

#### **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.*
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:
  - If you anticipate needing to come to class please notify Dr. Manning by email at [rajeske@utep.edu](mailto:rajeske@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:
  - *N/A*
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 or scrubs.*
5. **Late or Missed Assignments and Assessments Policy:** See current DPT Student Handbook “Written Examination Policy”. Additional course-specific policy is as follows:

- *At the instructor's discretion, late assignments may result in a 10% deduction on the assignment.*
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).

\*\*\*Attendance at two or more Spanish lunch and learn sessions will allow you to drop your lowest quiz grade.

Date	Topic	Reading Assignments	Reading Objectives
<b>Week 1</b> Wednesday Jan 22 3:30 – 5:00 Room 115	<b>Jan 22</b> - Course overview - CPT codes - Evaluation codes - <b>DUE – LMS 1006 certificate of completion</b>		Please read and review the material in order to meet the following objectives: 1. Define CPT codes and who owns them. 2. Explain the difference between CPT and ICD-10 codes. 3. Explain the difference between timed and untimed codes. 4. Explain the 8 min rule and how it applies to Medicare and private insurance billing. 5. Appropriately complete billing for single and double booked patients. 6. Explain the billing and reimbursement process to a potential client. 7. Explain an EOB statement to a potential client. 8. Explain common billing terminology. 9. Complete a CMS 1500 form using appropriate ICD-10 codes, CPT codes, and modifiers. 10. Complete an ABN and explain its purpose to a potential client including the options available for patients regarding payment and services provided. 11. Explain the MIPS program reporting guidelines. 12. Explain how PTs participate in the MIPS program. 13. Explain how APMs impact payment for physical therapy services. 14. Determine Medicare payment for CPT codes using the Physician Fee Schedule look-up tool on CMS website. 15. List the elements of letter of medical necessity. 16. Explain how the NCCI edits impact billing codes used per session and the modifiers required to decrease denials for payment.
<b>Week 2</b> January 27 1:00-2:30 Room 115	<b>Jan 27 &amp; 28</b> - 8 min Rule - Billing for services - Billing with multiple pts - ICD-10 codes - Documentation of skilled care - <b>DUE (1/28) – LMS 994 certificate of completion</b>	“Understanding Health Policy: A Clinical Approach, 7e” Chapter 4	
January 28 9:30-11:00 Room 115 MAKE UP (MLK)	<b>Jan 29 &amp; Feb 3</b> - Insurance terminology - CMS 1500 forms - Explanation of Benefits (EOB) - Billing cycle - Appeals process - Modifiers - <b>DUE (2/3) – LMS 1009 certificate of completion</b>	See Black Board Module 1 for additional readings	
January 29 8:00-9:30 Room 115	<b>Feb 3 &amp; 5</b> Medicare - Billing with students - Advanced Beneficiary Notice (ABN) - NCCI – National Correct Coding Initiative		
<b>Week 3</b> February 3 1:00-2:30 Room 115	<b>Feb 3 &amp; 5</b> Medicare - Billing with students - Advanced Beneficiary Notice (ABN) - NCCI – National Correct Coding Initiative		
February 5 1:00-2:30 Room 115	<b>Feb 5 &amp; 10</b> - Merit Incentive Payment System (MIPS) - Alternative Payment Models (APMs) - Physician Fee Schedule		
<b>Week 4</b> February 10 1:00-2:30 Room 115			

February 11 9:30 -11:00 Room 115 MAKE UP CSM	Written letter of medical necessity	Case #7 in O'Sullivan lab book	17. Write a letter of medical necessity for PT services and DME for a hypothetical patient.  *You are to come to class having reviewed the case and watched all videos pertaining to the given case.
February 12	<b>NO CLASS - Combined Sections Meeting</b>		
<b>Week 5</b> February 17 1:00-2:30 Room 115	<b>End of Module 1</b>	<b>EXAM #1:</b> This exam is worth 20% of your course grade. It will be multiple choice covering material from Weeks 1-4. There will be one essay question on this test.	
February 19 1:00-2:30 Room 115	Beginning of Module #2 Readiness assessment (iRAT and tRaT)  *Midterm Peer Assessment	"Understanding Health Policy: A Clinical Approach, 7e" Chapter 2 on Accessphysiotherapy	<ol style="list-style-type: none"> <li>1. Interpret basic financial terminology.</li> <li>2. Differentiate between a mission, values, and vision statement.</li> <li>3. Create a mission, values, and vision statement for your own clinic.</li> <li>4. Compare and contrast the benefits and adverse effects of different business tax structures.</li> <li>5. Determine the tax structure for your business.</li> <li>6. Analyze the local PT market using the SWOT process.</li> <li>7. Create a simulated payroll distribution for both salaried and hourly employees.</li> <li>8. Explain to a hypothetical employee the differences between gross pay and take home pay.</li> <li>9. Subdivide the FICO tax components of Medicare, Social Security taxes, and federal unemployment taxes, and federal tax withholdings for yourself in your proposed clinic.</li> <li>10. Differentiate between direct and indirect costs, and fixed versus variable costs.</li> <li>11. Develop a budget for your clinic.</li> <li>12. Justify the items on your budget.</li> <li>13. Utilize an organizational chart to explain the hierarchical organization of a business.</li> </ol>
<b>Week 6</b> March 2 1:00-2:30 Room 115	Healthcare Systems Statements (mission, vision, and values)  Organizational charts  *You will submit your statement drafts at the end of class	Page "Management in Physical Therapy Practices, 2e" Chapters 5, 7, 10  IRS Publication 15 (on BB)	
March 4 1:00-2:30 Room 115	SWOT/Market Analysis  *You will submit your market analysis draft at the end of class.		
<b>Week 7</b> March 9 1:00-2:30 Room 115	Tax structures *You will submit your tax structure and justification at the end of class.  Payroll		
March 9 1:00-2:30 Room 115	Payroll  *You will submit your proposed payroll at the end of class.		
<b>Week 8</b> March 11 1:00-2:30 Room 115	Classifying costs  *You will submit your proposed items by end of class.		
March 11 1:00-2:30 Room 115	Budgeting  *You will submit your draft budget at the end of class.		



<p><b>Week 9</b> March 16-20 NO CLASS</p>	 		
<p><b>Week 10</b> March 23 1:00-2:30 Room 115</p>	<p>Breakeven points and making a profit</p>		<p>14. Determine the breakeven point for a scenario.</p>
<p>March 25 1:00-2:30 Room 115</p>	<p>Productivity standards  Creating your fee schedule  *your draft fee schedule is due at the end of class.</p>		<p>15. Formulate productivity standards for a hypothetical business in manufacturing (without payroll) 16. Recommend the price for each service your clinic will offer. 17. Establish the productivity standards necessary to breakeven and make a profit for your clinic. (with payroll)</p>
<p><b>Week 11</b> March 30 1:00-2:30 Room 115</p>	<p>Business plan work day</p>		<p>Your completed <b>draft</b> of the full business plan is due today.</p>
<p>April 1 1:00-2:30 Room 115</p>	<p>End of Module #2</p>	<p><b>Exam #2: Worth 20% of your course grade</b> This exam will cover material from weeks 5-11. It will be largely multiple choice, and will include some mathematical calculations. You will be provided all charts and information necessary to answer the test questions.</p>	
<p><b>Week 12</b> April 6 1:00-2:30 Room 115</p>	<p>Readiness assessment for Module #3</p>	<p>Page textbook Chapters 6, 11-17</p>	<p>Management in PT practice</p>
<p>April 8 1:00-2:30 Room 115</p>	<p>Practice Act and Rules</p>	<p>Nosse Chapter 16</p>	<p>1. Explain PT licensure requirements in the State of Texas.</p>
<p><b>Week 13</b> April 13 1:00-2:30 Room 115</p>	<p>External Oversight Employment Law</p>	<p>LANGE text Chapter 10, 16</p>	<p>2. Explain the process of a new graduate obtaining both a temporary and permanent license.</p>
<p>April 15 1:00-2:30 Room 115</p>	<p>Risk Management</p>	<p>APTA Code of Ethics RIPS model article</p>	<p>3. Discuss renewal requirements for a PT or PTA license in Texas.</p>
<p><b>Week 14</b> April 20 1:00-2:30 Room 115</p>	<p>Management in various practice settings</p>		<p>4. List activities that qualify for CCUs in TX.</p>
<p>April 22 1:00-2:30 Room 115</p>	<p>Conflict resolution within the workplace  Ethical conflicts</p>		<p>5. State who is responsible for approving CCUs in TX. 6. Explain the PTA supervision rules by both CMS and TX PT Act and Rules. 7. Provide examples of behaviors that may be referred to the Board for disciplinary action. 8. List the documents are required to be posted in your place of business by the TX Board of PT Examiners. 9. Compare external oversight agencies and the consequences they can impose.</p>

			<ol style="list-style-type: none"> <li>10. Explain the role of policies and procedures manuals in risk management.</li> <li>11. Complete an incident report for a hypothetical workplace accident.</li> <li>12. Differentiate the managerial responsibilities in various practice settings.</li> <li>13. Utilize conflict management techniques in simulated workplace and clinical scenarios.</li> <li>14. Utilize the RIPS model to maneuver an ethical clinical situation.</li> </ol>
<b>Week 15</b> April 27 1:00-2:30 Room 115	End of Module #3	<b>Exam #3:</b> This will be a multiple choice test worth 15% of your course grade. It will cover weeks 12-15.	
April 29 NO CLASS	Practical for the 22s		
<b>Week 16</b> May 4 1:00-2:30 Room 115	Business Plan presentations		Completed business plan is due before class (8 a.m.) on BlackBoard. Your presentation will be open to members of the faculty in our program and other CHS programs.
May 6 1:00-2:30 Room 115	Review for final exam		
<b>FINAL EXAM</b>	<b>Final Course Exam</b>	This exam is worth 15% of your course grade. It is cumulative and will be more heavily weighted on modules 1 and 2 for practical application in scenarios. While this will be an application based exam, it will be primarily multiple choice.	