

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

**PT 5340                      Management and Finance in Physical Therapy                      Spring 2020**

**COURSE SYLLABUS**

**Credit Hours:                      3**

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

**Schedule:**  
Monday                      1:00 pm – 2:30 pm  
Wednesday                      1:30 pm - 3:00 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: Monday 12:00 pm – 1:00 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 Finance, 7B Management, 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 Management, 7D38, 7D42, 7D43) (Synthesis)
7. Analyze and interpret financial terms, conditions, and implications of insurance contracts. (PT MACS #24; 7B Finance, 7B Management, 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 Management, 7B Ethics and Values, 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 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, 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)	10%
Final Exam (written)	20%
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://0accessphysiotherapy.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://0fadavispt.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://0fadavispt.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-661 “Preventing Fraud, Abuse, and Waste ...”
  3. LMS-938 “HIPAA and Telehealth”
  4. LMS – 1006 “The Changing Landscape of Federal Payment, Coverage and Coding Policies.”
  5. LMS-550 “Navigating the Regulatory Environment”

**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 email 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/studentaffairs/mssc](http://www.utep.edu/studentaffairs/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/academicintegrity.html](http://www.utep.edu/student-affairs/osccr/student-conduct/academicintegrity.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.*
  - *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).

Quizzes and Class Assignments (20%):

1. LMS-353 “Leading the Team: A practical guide to working with PTAs.”
2. LMS-661 “Preventing Fraud, Abuse, and Waste ...”
3. LMS-938 “HIPAA and Telehealth”
4. LMS – 1006 “The Changing Landscape of Federal Payment, Coverage and Coding Policies.”
5. LMS-550 “Navigating the Regulatory Environment”

\*See Assignment drop boxes on BB for due dates.

6. Quizzes – expect 1 short readiness quiz per week. Each quiz will be 5-10 questions.


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.
- All clinics will be based in El Paso, TX.
- 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.
- Feedback on your draft proposal will be given by the instructor before April 5<sup>th</sup>. After this day, I will not review or assist with your business plan project.
- 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, 2021.
- A physical copy will be submitted to Dr. Manning's box in the DPT office no later than April 19<sup>th</sup> at 5 pm.
- An electronic copy will be submitted on Black Board by 5 pm on April 19<sup>th</sup>.

Date	Topic	Reading Assignments	Reading Objectives
<b>Week 1</b> Jan 18 No Class Holiday Wednesday 1:30 – 3:00 Virtual	<b>Jan 20</b> <ul style="list-style-type: none"> <li>- Course overview</li> <li>- CPT codes</li> <li>- Evaluation codes</li> <li>- NCCI – National Correct Coding Initiative</li> </ul>		Please read and review the material in order to meet the following objectives: <ol style="list-style-type: none"> <li>1. Define CPT codes and who owns them.</li> <li>2. Explain the difference between CPT and ICD-10 codes.</li> <li>3. Explain the difference between timed and untimed codes.</li> <li>4. Explain the 8 min rule and how it applies to Medicare and private insurance billing.</li> <li>5. Appropriately complete billing for single and double booked patients.</li> <li>6. Explain the billing and reimbursement process to a potential client.</li> <li>7. Explain an EOB statement to a potential client.</li> <li>8. Explain common billing terminology.</li> <li>9. Complete a CMS 1500 form using appropriate ICD-10 codes, CPT codes, and modifiers.</li> <li>10. Complete an ABN and explain its purpose to a potential client including the options available for patients regarding payment and services provided.</li> <li>11. Explain the MIPS program reporting guidelines.</li> <li>12. Explain how PTs participate in the MIPS program.</li> <li>13. Explain how APMs impact payment for physical therapy services.</li> <li>14. Determine Medicare payment for CPT codes using the Physician Fee Schedule look-up tool on CMS website.</li> <li>15. List the elements of letter of medical necessity.</li> <li>16. Explain how the NCCI edits impact billing codes used per session and the modifiers required to decrease denials for payment.</li> </ol>
<b>Week 2</b> January 25 1:00-2:30 Virtual Jan 27 1:30-3:00 Virtual	<b>Jan 25 &amp; 27</b> <ul style="list-style-type: none"> <li>- 8 min Rule</li> <li>- Billing for services</li> <li>- AMA vs CMS billing practices</li> <li>- Billing with multiple pts</li> </ul>		
<b>Week 3</b> February 1 1:00-2:30 Virtual February 3 1:30-3:00 Virtual	<b>Feb 1 &amp; Feb 3</b> <ul style="list-style-type: none"> <li>- Insurance terminology</li> <li>- Explanation of Benefits (EOB)</li> <li>- Billing cycle</li> </ul>	“Understanding Health Policy: A Clinical Approach, 7e” Chapter 4	
<b>Week 4</b> February 8 1:00-2:30 Virtual February 10 1:30-3:30 Virtual	<b>Feb 8 &amp; 10 Medicare</b> <ul style="list-style-type: none"> <li>- Billing with students</li> <li>- Advanced Beneficiary Notice (ABN)</li> </ul>	See BlackBoard Module 1 for additional readings	
<b>Week 5</b> February 15 1:00-2:30 Virtual February 17 1:30-3:30 Virtual	<b>Feb 15 &amp; 17</b> <ul style="list-style-type: none"> <li>- Alternative Payment Models (APMs)</li> <li>- Physician Fee Schedule</li> <li>- MIPS</li> </ul>		
<b>Week 6</b> Feb 22 1:00-2:30 Virtual	<b>Feb 22</b> <ul style="list-style-type: none"> <li>- ICD – 10 review</li> <li>- Documentation</li> <li>- Letters of Medical Necessity</li> </ul>		
Feb 24 1:30-3:00 Virtual	<b>Feb 24</b> <b>EXAM #1</b>		



<p><b>Week 7</b> March 1 1:00-2:30 Virtual</p> <p>March 3 1:30-3:00 Virtual</p>	<p><b>Business Plan</b> <u>March 01</u> Healthcare Systems Statements (executive summary, mission, vision, and value statements); Organizational charts</p>	<p>“Understanding Health Policy: A Clinical Approach, 7e” Chapter 2 on Accessphysiotherapy</p>	<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> </ol>
<p><b>Week 8</b> March 8 1:00-2:30 Virtual</p> <p>March 10 1:30 – 3:00 Virtual</p>	<p><u>March 03</u> SWOT/Market Analysis</p> <p><u>March 08</u> Classifying Costs</p> <p><u>March 10</u> Payroll</p>	<p>Page “Management in Physical Therapy Practices, 2e” Chapters 5, 7, 10</p>	<ol style="list-style-type: none"> <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> </ol>
<p>SPRING BREAK</p> 		<p>IRS Publication 15 (on BB)</p>	<ol style="list-style-type: none"> <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>
<p><b>Week 10</b> March 22 1:00-2:30 Virtual</p> <p>March 24 1:30-3:00 Virtual</p>	<p><u>March 22</u> Budgeting</p> <p><u>March 24</u> Breakeven analysis/ Profit determination/ Productivity standards</p>		
<p><b>Week 11</b> March 29 1:00-2:30 Virtual</p>	<p><u>March 29</u> Creating a fee schedule</p>		
<p>March 31 1:30-3:00 Virtual</p>	<p><u>March 31</u> Test #2</p>		

<p><b>Week 12</b> April 5 1:00-2:30 Virtual</p> <p><b>April 7</b> 1:30-3:00 Virtual</p>	<p><u>April 05</u> Practice Act and Rules</p> <p><u>April 7</u> External Oversight</p>	<p>Page textbook Chapters 6, 11-17</p> <p>Nosse Chapter 16</p> <p>LANGE text Chapter 10, 16</p>	<p><del>1. Explain PT licensure requirements in the State of Texas.</del></p> <p><del>2. Explain the process of a new graduate obtaining both a temporary and permanent license.</del></p> <p><del>3. Discuss renewal requirements for a PT or PTA license in Texas.</del></p> <p><del>4. List activities that qualify for CCUs in TX.</del></p> <p><del>5. State who is responsible for approving CCUs in TX.</del></p>
<p><b>Week 13</b> April 12 1:00-2:30 Virtual</p> <p>April 14 1:30-3:00 Virtual</p>	<p><u>April 12</u> Employment Law</p> <p><u>April 14</u> Risk Management</p>	<p>APTA Code of Ethics RIPS model article</p>	<p><del>6. Explain the PTA supervision rules by both CMS and TX PT Act and Rules.</del></p> <p><del>7. Provide examples of behaviors that may be referred to the Board for disciplinary action.</del></p> <p><del>8. List the documents are required to be posted in your place of business by the TX Board of PT Examiners.</del></p> <p><del>Compare external oversight agencies and the consequences they can impose.</del></p>
<p><b>Week 14</b> April 19 1:00-2:30 Virtual</p> <p>April 21 1:30-3:00 Virtual</p>	<p><u>April 19</u> Management in various practice settings</p> <p><u>April 21</u> Conflict resolution within the workplace</p>		<p>9. Explain PT licensure requirements in the State of Texas.</p> <p>10. Explain the process of a new graduate obtaining both a temporary and permanent license.</p> <p>11. Discuss renewal requirements for a PT or PTA license in Texas.</p> <p>12. List activities that qualify for CCUs in TX.</p>
<p><b>Week 15</b> April 26 1:00-2:30 Virtual</p> <p>April 28 1:30-3:00 Virtual</p>	<p><u>April 26</u> Ethical conflicts</p> <p><u>April 28</u> Test #3</p>		<p>13. State who is responsible for approving CCUs in TX.</p> <p>14. Explain the PTA supervision rules by both CMS and TX PT Act and Rules.</p> <p>15. Provide examples of behaviors that may be referred to the Board for disciplinary action.</p> <p>16. List the documents are required to be posted in your place of business by the TX Board of PT Examiners.</p>
<p><b>Week 16</b> May 3 1:00-2:30 Virtual</p> <p>May 5 1:30-3:00 Virtual</p> <p>Final EXAM Date to be posted on BB.</p>	<p><u>May 3</u> Business Plan Presentation</p> <p><u>May 5</u> Review for Final</p>		<p>17. Compare external oversight agencies and the consequences they can impose.</p> <p>10. Explain the role of policies and procedures manuals in risk management.</p> <p>11. Complete an incident report for a hypothetical workplace accident.</p> <p>12. Differentiate the managerial responsibilities in various practice settings.</p> <p>13. Utilize conflict management techniques in simulated workplace and clinical scenarios.</p> <p>14. Utilize the RIPS model to maneuver an ethical clinical situation.</p>