

**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 2022**

**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                      10:30 am – 12:00 pm

**Coordinator/Instructor(s):**

Faculty: Rhonda Manning, PT, DPT, PCS

Office location: *Campbell Bldg Rm 307*

Phone #: (915) 747-7610

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Office hours: Monday and Wednesdays 12:00 pm – 1:00 pm

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)	22% (5% individual/ 17% team)
Lab Assignments (written, psychomotor)	0%
Skills Check (psychomotor)	0%
Group business plan (Final)	22%
Module 1 Exam (written)	22%
Module 3 Exam (written)	12%
Final Exam (written)	22%
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.”

**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)

*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. Manning 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:
  - *If you anticipate needing to come to class late 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:
  - *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 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. Quizzes – expect 1 short readiness quiz per week. Each quiz will be 5-10 questions.
3. Assignments will be completed by the TBL team and graded as a group.

Date	Topic	Reading Assignments	Reading Objectives
<b>Week 1</b> Jan 17 No Class Holiday  Wednesday Jan 19 10:30-noon	<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 24 10:30 - noon  Jan 26 10:30 - noon	<b>Jan 24 - 26</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> <li>- Billing with students</li> </ul>		
<b>Week 3</b> January 31 10:30 - noon  February 2 10:30 -noon	<b>Jan 31- Feb 2</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 7 10:30 - noon  February 9 10:30 - noon	<b>Feb 7-9 Medicare</b> <ul style="list-style-type: none"> <li>- Advanced Beneficiary Notice (ABN)</li> <li>- Alternative Payment Models (APMs)</li> <li>- Physician Fee Schedule</li> <li>- MIPS</li> <li>- Documentation</li> </ul>	See BlackBoard Module 1 for additional readings	
<b>Week 5</b> February 14 10:30 - noon  February 16 10:30 - noon	<b>Feb 14</b> <ul style="list-style-type: none"> <li>- ICD – 10 review</li> <li>- Letters of Medical Necessity</li> </ul>		
<b>Week 6</b>	<b>Feb 16 EXAM #1</b>		

<b><u>Week 7</u></b>	<b><u>Business Plan</u></b> Healthcare Systems Statements (executive summary, mission, vision, and value statements);	"Understanding Health Policy: A Clinical Approach, 7e" Chapter 2 on Accessphysiotherapy	1. Interpret basic financial terminology. 2. Differentiate between a mission, values, and vision statement. 3. Create a mission, values, and vision statement for your own clinic.
<b><u>Week 8</u></b>	Organizational charts  SWOT/Market Analysis  Classifying Costs  Payroll	IRS Publication 15 (on BB)  <b>SEE 2-DAY INTENSIVE SCHEDULE AND OUTLINE AT THE END OF THIS DOCUMENT</b>	4. Compare and contrast the benefits and adverse effects of different business tax structures. 5. Determine the tax structure for your business. 6. Analyze the local PT market using the SWOT process. 7. Create a simulated payroll distribution for both salaried and hourly employees.
SPRING BREAK  	Breakeven analysis/ Profit determination/ Productivity standards  I WILL HAVE AN OPTIONAL, ONE TIME ZOOM SESSION TO ANSWER YOUR QUESTIONS ABOUT THESE TOPICS PRIOR TO THE 2-DAY INTENSIVE ON March 24 at 10 am (link below)		8. Explain to a hypothetical employee the differences between gross pay and take home pay. 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. 10. Differentiate between direct and indirect costs, and fixed versus variable costs. 11. Develop a budget for your clinic. 12. Justify the items on your budget.
<b><u>Week 10</u></b>			13. Utilize an organizational chart to explain the hierarchical organization of a business.
<b><u>Week 11</u></b>  <b><u>March 27 &amp; 28</u></b>  <b><u>Guest presentation</u></b>			

<b><u>Week 12</u></b> April 4 10:30 - noon  <b><u>April 6</u></b> 10:30 - noon	April 04 Practice Act and Rules  April 06 – EXAM #3 Open book exam on Practice Act	PT Practice Act and Rules (link on BB)	1. Explain PT licensure requirements in the State of Texas. 2. Explain the process of a new graduate obtaining both a temporary and permanent license. 3. Discuss renewal requirements for a PT or PTA license in Texas. 4. List activities that qualify for CCUs in TX.
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<p><b>Week 13</b> April 11 – 10:30 - noon  April 13 10:30 - noon</p>	<p>April 11 – Management in various practice settings  April 13- Risk Management <i>David Gallegos</i></p>	<p>APTA Code of Ethics RIPS model article</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. Compare external oversight agencies and the consequences they can impose. 9.Explain PT licensure requirements in the State of Texas. 10. Explain the process of a new graduate obtaining both a temporary and permanent license. 11. Discuss renewal requirements for a PT or PTA license in Texas. 12. List activities that qualify for CCUs in TX. 13. State who is responsible for approving CCUs in TX. 14. Explain the PTA supervision rules by both CMS and TX PT Act and Rules. 15. Provide examples of behaviors that may be referred to the Board for disciplinary action. 16. List the documents are required to be posted in your place of business by the TX Board of PT Examiners. 17. Compare external oversight agencies and the consequences they can impose. 10. Explain the role of policies and procedures manuals in risk management. 11. Complete an incident report for a hypothetical workplace accident. 12. Differentiate the managerial responsibilities in various practice settings. 13. Utilize conflict management techniques in simulated workplace and clinical scenarios. 14. Utilize the RIPS model to maneuver an ethical clinical situation.</p>
<p><b>Week 14</b> April 18 10:30 - noon  April 20 10:30 - noon</p>	<p>April 18 – Employment Law and Running a cash-based clinic <i>David Middaugh</i>  April 20 – Running a private clinic <i>Harry Koster</i></p>		
<p><b>Week 15</b> April 25 10:30 - noon  April 27 10:30 - noon</p>	<p>April 25 – External Oversight  April 27 – Conflict resolution within the workplace &amp; Ethical conflicts</p>		
<p><b>Week 16</b> May 3 10:30 - noon  May 5 10:30 - noon  Final EXAM Date to be posted on BB.</p>	<p>May 2 – Mock interviews <i>Multiple clinicians</i>  May 4 – Review for final exam</p>		

March 24 Q&A link

<https://utep-edu.zoom.us/j/82817705582?pwd=ZURENVlwd2J2dTAvZXNUNFNZEFVZz09>