



## COURSE OUTLINE: OPA209 - DOCUMENTATION SKILLS

Prepared: Joanna MacDougall/Andrea Sicoli

Approved: Rebecca Keown - Dean

<b>Course Code: Title</b>	OPA209: DOCUMENTATION SKILLS FOR OTA/PTA
<b>Program Number: Name</b>	3022: OCCUP/PHYSIO/ASSIST
<b>Department:</b>	OTA/PTA ASSISTANT
<b>Academic Year:</b>	2025-2026
<b>Course Description:</b>	The purpose of this course is to prepare the student for the documentation responsibilities of the OTA/PTA. It will prepare them for their fieldwork experiences by providing them with the necessary skills to read and comprehend medical records and to document appropriately in medical charts/files, both in written format and electronically. Documentation practice takes place in the classroom and during fieldwork experiences.
<b>Total Credits:</b>	2
<b>Hours/Week:</b>	2
<b>Total Hours:</b>	28
<b>Prerequisites:</b>	CMM115, OPA110, OPA115, OPA118
<b>Corequisites:</b>	There are no co-requisites for this course.
<b>Vocational Learning Outcomes (VLO's) addressed in this course:</b>	<p><b>3022 - OCCUP/PHYSIO/ASSIST</b></p> <p>VLO 1 Communicate appropriately and effectively, through verbal, nonverbal, written and electronic means, with clients, their significant others, occupational therapists, physiotherapists, and members of the interdisciplinary health care team and others.</p> <p>VLO 2 Participate in the effective functioning of interdisciplinary health care teams to optimize client physical and occupational functions.</p> <p>VLO 5 Practice in a legal, ethical, and professional manner within the role of a therapist assistant.</p> <p>VLO 6 Document client records in a thorough, objective, accurate, and timely manner within the role of the therapist assistant.</p> <p>VLO 8 Perform the roles and responsibilities of the therapist assistant effectively through the application of relevant knowledge of health sciences, psychosocial sciences, health conditions, resource management, and clinical procedures.</p>
<b>Essential Employability Skills (EES) addressed in this course:</b>	<p>EES 1 Communicate clearly, concisely and correctly in the written, spoken, and visual form that fulfills the purpose and meets the needs of the audience.</p> <p>EES 2 Respond to written, spoken, or visual messages in a manner that ensures effective communication.</p> <p>EES 6 Locate, select, organize, and document information using appropriate technology and information systems.</p> <p>EES 7 Analyze, evaluate, and apply relevant information from a variety of sources.</p> <p>EES 10 Manage the use of time and other resources to complete projects.</p>



EES 11 Take responsibility for ones own actions, decisions, and consequences.

**Course Evaluation:**

Passing Grade: 60%, C

A minimum program GPA of 2.0 or higher where program specific standards exist is required for graduation.

**Books and Required Resources:**

Documentation for Physical Therapist Assistants by Bircher  
Publisher: F.A. Davis Edition: 6th  
ISBN: 9781719643085  
9781719647359

**Course Outcomes and Learning Objectives:**

<b>Course Outcome 1</b>	<b>Learning Objectives for Course Outcome 1</b>
1. Demonstrate an understanding of the organization and presentation of a medical record.	1.1 Review Source Oriented and Problem Oriented formats of medical records 1.2 Review the organization of the documentation content, including SOAP and DARP methods 1.3 Discuss the principles for documenting in a medical record 1.4 Discuss the purpose of the progress note
<b>Course Outcome 2</b>	<b>Learning Objectives for Course Outcome 2</b>
2. Demonstrate knowledge and use of medical terminology used for reporting and recording	2.1 Explain medical vs. rehab diagnosis, impairments and functional limitations 2.2 Explain basic principles of and demonstrate an understanding of the language and terms used in rehabilitation/medicine (prefixes, suffixes etc.) 2.3 Demonstrate proper spelling and pronunciation of medical terms
<b>Course Outcome 3</b>	<b>Learning Objectives for Course Outcome 3</b>
3. Demonstrate knowledge and use of abbreviations for various medical terms used in reporting and recording.	3.1 Explain and understand common medical abbreviations 3.2 Proper use of upper and lowercase letters when using abbreviations 3.3 Understand the use of abbreviations in the medical record
<b>Course Outcome 4</b>	<b>Learning Objectives for Course Outcome 4</b>
4. Demonstrate an understanding of the variations in documentation expectations of the OTA/PTA between agencies/facilities.	4.1 Explain the differences between the documentation responsibilities of the Registered OT/PT vs. the OTA/PTA 4.2 Describe various formats for the presentation of content in a medical record 4.3 Discuss ways to adapt documentation to meet the agency or facility policies, procedures and format  4.4 Explain and list different policies regarding documentation of informed consent 4.5 Describe documentation procedures when a client refuses treatment 4.6 Review documentation procedures for completing an incident report
<b>Course Outcome 5</b>	<b>Learning Objectives for Course Outcome 5</b>



	5. Demonstrate skill in applying the principles of documentation.	5.1 Describe the differences between and accurately identify subjective and objective information and document appropriately 5.2 Demonstrate the ability to write a progress note that effectively relates to the information in the Registered OT or PT initial evaluation 5.3 Demonstrate the ability to effectively document data collection during the assessment, intervention and discharge stages of treatment
	<b>Course Outcome 6</b>	<b>Learning Objectives for Course Outcome 6</b>
	6. Demonstrate and apply an understanding of confidentiality as it relates to client information and agency documentation.	6.1 Review the rules of confidentiality 6.2 Describe documentation procedures for releasing information about a clients condition and treatment
	<b>Course Outcome 7</b>	<b>Learning Objectives for Course Outcome 7</b>
	7. Demonstrate knowledge of the OTA/PTA role within an effective office organization.	7.1 Describe the function of documentation as it relates to clerical, communication, and maintenance skills 7.2 Explore and practice using online platforms for health practitioners to schedule/book appointments and complete documentation and charting.
	<b>Course Outcome 8</b>	<b>Learning Objectives for Course Outcome 8</b>
	8. Demonstrate and apply consistent use of therapeutic communication skills	8.1 Discuss effective and professional written and verbal reporting skills for both written and electronic documentation.

**Evaluation Process and Grading System:**

Evaluation Type	Evaluation Weight
1. Weekly Class Activities/Assignments	40%
2. Assignments	30%
3. Final Assessment	30%

**Date:**

December 15, 2025

**Addendum:**

Please refer to the course outline addendum on the Learning Management System for further information.

