

TotalABA Clinical Documentation

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Summary

The clinical portion of TotalABA currently consists of the following tabs: Assessments, Lesson Categories, Lesson Plans and Treatment Plans. Each one is described in further detail below. These pieces have been added in order to help your practice maintain, document, and analyze your student's history and progress.

Security

There are three different security permissions that may be granted to the users in the practice. If none of these are assigned, then the user will not have any access to the clinical records. If needed, customized security can be added to your practice, just let us know.

1. **Clinical Administrate** – Ability to create/modify/view lesson categories, lesson sub-categories and lesson plans. Additionally, can create/modify/view all assessments, Lessons and Treatment Plans.
2. **Clinical Modify** - Ability to create/modify/view all assessments, lessons and treatment plans. Can view lesson categories, lesson sub-categories and lesson plans.
3. **Clinical View** - Ability to view all records in the clinical portion (assessments, lesson categories, lesson sub-categories, lesson plans, lessons and treatment plans).

Initial Setup

Your practice will be required to setup the clinical information before it data can actually be collected for the students. Go to the **Clinical Setup** tab to access these items. This includes the following record types:

- **Therapy Types** – This is used to setup the different therapy disciplines performed by your practice. By default, ABA, Occupational and Speech will already exist.
- **Lesson Categories and Subcategories** – These are used to organize the lesson plans in your practice and will help locate the lesson plans when adding them to a treatment plan and/or a session.
- **Lesson Plan Templates** – This enables your practice to create templates for new lesson plans, including the prompts and responses. While the templates are not required they will help save time and potential mistakes. An ABA Trial Run template is automatically created for your practice with four prompts (Independent, Gestural, Verbal and Physical) and one response (Correct – yes/no).
- **Lesson Plans** – Lesson plans are used to record and monitor various data for the students over time.

Each of these sections are described in detail below.

Customization

Many areas of TotalABA may be customized including security, fields, reports, etc. Please contact us if any customization in your TotalABA site is desired.

Assessments

The assessment record allows your practice to document an evaluation of the student's current skill level. When an assessment is initially created, the type of assessment must be selected. The options are Initial Assessment and Reassessment. The reassessment contains additional fields that are not available on the initial assessment.

The assessment may be created from the Student or an existing Session. If it is created from a Session, it will be linked to both that session and student records.

An assessment may be signed-off by a user in the practice that has the Sign-Off permission. Once it has been signed off, the following occurs.

1. The sign-off user and date fields are populated.
2. The assessment may no longer be modified. However, Notes & Attachments may still be created.

Lesson Categories

Lesson categories are used to organize Lesson Plans at the highest level. Go to the **Clinical Setup** tab to access lesson categories. Examples of a lesson category are: Activities of Daily Living, School Skill. From the lesson category, subcategories are created for further classification of the lesson plans. Examples of a subcategory for Activities of Daily Living are: Prepare Shower and Test Water.

Lesson Plan Templates

Lesson plan templates are used to quickly create new lesson plans using the predefined settings. Selecting a lesson plan template when creating a new lesson plan will populate all of the information on the plan from the template. This is extremely useful when you have a lot of lesson plans to create that share the same settings/values. Note that lesson plan templates are only used for new lesson plans. Changes to a template will not affect existing lesson plans. Go to the **Clinical Setup** tab to access lesson plan templates. The following fields/sections are available on the template:

- **Template Name** – Enter the name of the template (e.g. ABA Trial Run).
- **Active** – Indicates if the template may still be used to create new lesson plans.
- **Therapy Type** – Select the type of therapy for the lesson plan. The therapy types are created and maintained by your practice and are used to organize the lesson plans.
- **Lesson Category** – This is the category that new lesson plans will be part of.

- **Lesson Subcategory** – This is the subcategory that new lesson plans will be part of.
- **Additional Details** – Enter any additional details regarding the lesson plan. This will be displayed in the Lesson Information section when performing the lesson and are useful to include any instructions, etc.
- **Layout Type** – Select the default layout type that is used when performing the lesson. This field is required. The values are below and a picture of both is available in the Examples section of this document.
 - **Compact** - This displays each lesson plan response on a single line and does not use icons. It is typically used when the lesson plan has several to many lesson plan responses.
 - **Expanded** – Uses icons where appropriate (e.g. yes/no response, prompts, and protest) and is useful when there is only one or two responses available on the lesson plan.
- **Target Observations** – The ideal number of observations that should be collected per lesson.
- **Include Protest Section** – If checked, then the “Did the Student Protest?” section (yes/no) will be available when performing a lesson.
- **Require Protest Selection** – If checked, the student protest (yes/no) must be selected when performing a lesson. This must be unchecked if Include Protest Section is not selected.
- **Require Prompt Selection** – If checked, then a prompt must be selected when performing a lesson. This must be unchecked if there have not been any prompts added.
- **Prompts** – Used to record what induced the student to make their response. Examples include (independent, gestural, verbal, etc.). Click the Add New button to create a new prompt on the template and use the Up/Down links to reorder the prompts as they should appear when performing a lesson.
 - **Name** – This is the full name of the prompt. It will be displayed when entering lesson observations unless a short name is entered.
 - **Short Name** – An optional, abbreviated named for the prompt which will be used when entering lesson observations and may also be used in reports.
- **Responses** – Used to record the student’s answers, reactions, etc. Multiple responses of varying data types may be recorded. Click the Add New button to create a new response on the template and use the Up/Down links to reorder the responses as they should appear when performing a lesson.
 - **Name** – This is the full name of the response. It will be displayed when entering lesson observations unless a short name is entered.
 - **Short Name** – An optional, abbreviated named for the response which will be used when entering lesson observations and may also be used in reports.
 - **Response Type** – Indicates the type of data to be collected for the response. Select from the following values.
 - **Yes/No** – Used to indicate if a correct response was made. In the expanded layout, Yes and No icons will be available. In the compact layout, this will be a checkbox. This type supports a % correct of the observations for reporting purposes.

- **1-10 Scale** – A value from one to ten may be recorded. A slider bar and a drop down list are both available to record the value. This type supports an average, high and low value of all the observations for reporting purposes.
- **Scoring %** - A value from one to one hundred may be recorded. A slider bar and a data input field are both available to record the value. This type supports an average, high and low value of all the observations for reporting purposes.
- **Numeric** – Any numeric value may be recorded in a data input field. This type supports an average, high and low value of all the observations for reporting purposes.
- **Free Text** – Text may be entered in a multi-line field.
- **Picklist** – A list of possible values are available via a drop down field. These values are defined in the Picklist Values field.
- **Picklist Values** – This is only available when the response type equals “Picklist”. Enter the values that should be available, separate each value by a new line.
- **Required** - Indicates if the response must have data entered/selected in order to save an observation. Typically this is checked if there is only one response on the lesson plan.
- **Help Text** – Optional text that is displayed when entering lesson observations (user will hover over the help icon next to the name/short name).

Lesson Plans

The lesson plan is used to setup the various programs that the students will be undertaking. Go to the **Clinical Setup** tab to access lesson plans. Once lesson observations have been recorded for a given lesson plan, the prompts and responses on the plan cannot be changed. If needed deactivate the lesson plan and create a new one. A lesson plan consists of the following fields.

- **Lesson Plan Name** – The name of the lesson plan.
- **Therapy Type** – Select the type of therapy for the lesson plan. The therapy types are created and maintained by your practice and are used to organize the lesson plans.
- **Active** – Indicates if the lesson plan may still be used in sessions and treatment goals.
- **Lesson Plan Template** – Select an existing lesson plan template to apply all the settings, prompts and responses from the template to the lesson plan. This will help speed up the process of creating new lesson plans and help eliminate errors.
- **Lesson Category** – Select the category the plan belongs to.
- **Lesson Subcategory** – Select the subcategory for the plan.
- **Additional Details** – Enter any additional details regarding the lesson plan. This will be displayed in the Lesson Information section when performing the lesson and are useful to include any instructions, etc.
- **Layout Type** – Select the default layout type that is used when performing the lesson. This field is required. The values are below and a picture of both is available in the Examples section of this document.

- **Compact** - This displays each lesson plan response on a single line and does not use icons. It is typically used when the lesson plan has several to many lesson plan responses.
- **Expanded** – Uses icons where appropriate (e.g. yes/no response, prompts, and protest) and is useful when there is only one or two responses available on the lesson plan.
- **Target Observations** – The ideal number of observations that should be collected per lesson.
- **Include Protest Section** – If checked, then the “Did the Student Protest?” section (yes/no) will be available when performing a lesson.
- **Require Protest Selection** – If checked, the student protest (yes/no) must be selected when performing a lesson. This must be unchecked if Include Protest Section is not selected.
- **Require Prompt Selection** – If checked, then a prompt must be selected when performing a lesson. This must be unchecked if there have not been any prompts added.
- **Prompts** – Used to record what induced the student to make their response. Examples include (independent, gestural, verbal, etc.). Click the Add New button to create a new prompt on the template and use the Up/Down links to reorder the prompts as they should appear when performing a lesson.
 - **Name** – This is the full name of the prompt. It will be displayed when entering lesson observations unless a short name is entered.
 - **Short Name** – An optional, abbreviated named for the prompt which will be used when entering lesson observations and may also be used in reports.
- **Responses** – Used to record the student’s answers, reactions, etc. Multiple responses of varying data types may be recorded. Click the Add New button to create a new response on the template and use the Up/Down links to reorder the responses as they should appear when performing a lesson.
 - **Name** – This is the full name of the response. It will be displayed when entering lesson observations unless a short name is entered.
 - **Short Name** – An optional, abbreviated named for the response which will be used when entering lesson observations and may also be used in reports.
 - **Response Type** – Indicates the type of data to be collected for the response. Select from the following values.
 - **Yes/No** – Used to indicate if a correct response was made. In the expanded layout, Yes and No icons will be available. In the compact layout, this will be a checkbox. This type supports a % correct of the observations for reporting purposes.
 - **1-10 Scale** – A value from one to ten may be recorded. A slider bar and a drop down list are both available to record the value. This type supports an average, high and low value of all the observations for reporting purposes.
 - **Scoring %** - A value from one to one hundred may be recorded. A slider bar and a data input field are both available to record the value. This type supports an average, high and low value of all the observations for reporting purposes.

- **Numeric** – Any numeric value may be recorded in a data input field. This type supports an average, high and low value of all the observations for reporting purposes. In the expanded layout, icons will be available to increment the value by 1 in either direction.
- **Free Text** – Text may be entered in a multi-line field.
- **Picklist** – A list of possible values are available via a drop down field. These values are defined in the Picklist Values field.
- **Picklist Values** – This is only available when the response type equals “Picklist”. Enter the values that should be available, separate each value by a new line.
- **Required** - Indicates if the response must have data entered/selected in order to save an observation. Typically this is checked if there is only one response on the lesson plan.
- **Help Text** – Optional text that is displayed when entering lesson observations (user will hover over the help icon next to the name/short name).

Lessons

Creating/Modify a Lesson

Lessons are created, modified and attached to a session. To create a new lesson, open the session and click on the New Lesson button in the lessons related records section. This section also lists any existing lessons for the session. The following fields are available when creating/modifying a lesson.

- **Lesson Plan** – Select the lesson plan that should be attached to the session. If a treatment plan is already part of the session and that treatment plan has one or more treatment goals, then only those treatment goals will be available for selection.
- **Start Date/Time** – The date and time of the lesson. It will default to the current date and time.
- **Use as Baseline** – Check this box if the lesson plan is part of a treatment goal and the observations should be used in the baseline calculations for the treatment goal. If more than one lesson has this selected, then the most recent lesson based on the Start Date/Time will be used.

Perform Lesson

Performing a lesson allows the therapist to record the student’s response(s) and additional information for the lesson based on the corresponding lesson plan. Once an observation is saved, the therapist will be able to record the next observation or cancel performing the lesson.

Click the Stop Lesson icon to end the recording of the observation for the current lesson. The existing observation will not be saved. Note that additional observations may still be recorded for the lesson at a later time.

Click the Clear Values icon to remove any selected for the Response, Prompt Level and Protest.

A summary of the prior observations is displayed while recording new observations (see the Lesson Responses section above the New Observations).

Lesson Observation Data Collection Left Pane

The left pane displays all treatment goals if the session has been linked to a treatment plan. Furthermore, it also shows any other lessons performed on the same date of service as the current session, regardless of the treatment plan. Hovering over one of the lessons will display applicable information and clicking on the icon at the end of the lesson (only appears if at least one observation has been collected) will open the Lesson Results page for the lesson in a new window.

Click on the **Change Settings** button at the top of the left pane when performing a lesson to make personalized settings for your user account. Click the **View Legend** button to view the various details of the left pane.

Switching Between Lessons

Various lessons plans may be quickly recorded while entering new observations. In the left pane there is a Quick New Lesson option that allows the user to select a new plan and start performing observations immediately.

Furthermore, if the session has a treatment plan selected, then all corresponding treatment goals will be listed on the left and may be clicked to perform that lesson.

Data Collection Settings

Click on the **Change Settings** button in the lesson observation left pane to access the data collection settings for your user account. The following settings are available.

- **Left Pane Percentage** – This controls the width of the lesson observation left pane relative to the screen size. Enter a percentage between 10 and 40 to customize the display. A value of 18 to 20 is recommended as a starting point.
- **Display Lessons with Zero Observations** – If checked, then lessons that have been created but do not have any observations recorded will be displayed in the lesson observation left pane.
- **Lesson Results Icon Color Rule** – Controls the icon that is displayed after each lesson in the left pane. Clicking on the icon will open the lesson results page in a new window, regardless of the rule.
 - —None— A solid green icon will display at the end of each lesson that has at least one observation.
 - Show Red if Negative Yes/No Response – If selected, any lesson that has at least one No response will have a red icon with an “x” in the center. Any lesson that has a response type of yes/no but does not have any No responses will have a green icon with a “v” in the center. Lessons that do not have a yes/no response type will have a solid green icon.
- **Display Info/Results Link** – If checked, in the lesson observation left pane there will be a “Lesson Results” link after the results icon and an “Additional Info” link after treatment goals without any current lessons. This may be helpful for users working on a tablet/cell phone where the hover option is not supported..

Bulk Observations

Bulk observations allow the therapist to quickly add multiple observations that share all of the same values to a lesson without performing the lesson for each individual observation. They will also be flagged as bulk observations when viewing the lesson.

Furthermore, bulk observations may be deleted individually, or all bulk observations for the given lesson may be deleted at once. Note: if bulk observations are deleted, then all of them regardless of their values will be deleted for the lesson.

Quick Lesson

Quick lesson can be used on sessions that have a treatment plan. It is also available from an existing lesson, letting the user quickly transition from one lesson to another. It allows the therapist to create the lesson and move directly into the observations with a minimal number of steps.

Viewing a Lesson

An existing lesson may be opened from a session or a treatment goal. A summary of all the observations will be displayed along with all the individual observations. Opening an individual observation will show all of the responses that were recorded along with the prompt level and student protest if applicable.

Lesson Results Page

The lesson results page is accessed from the left pane when performing observations or by clicking the Lesson Results button when viewing a lesson. This page shows summary details for the lesson/treatment goal along with all of the observations that have been recorded. For each observation it shows the date/time it was recorded along with the prompt level (if applicable) if the student protested (if applicable) and the value for each response for the lesson plan.

Therapy Types

Therapy types are used to setup the various disciplines performed by the practice. They help differentiate and organize the various lesson plans in the practice.

Treatment Plans

A treatment plan has many of the same fields as an assessment. The difference is that a treatment plan is used to determine what steps should be followed for that student moving forward. Furthermore, the treatment plan contains extra details for recording the student's progress for the record goals along with any recommendations for treating the student.

The treatment plan may be created from the student record or from an assessment. If created from an assessment, then the shared field types on the treatment plan (e.g. Assessment of Current Functioning) will default to the value from the assessment.

If a student has only one active treatment plan, then it will be automatically selected on all new sessions.

Only active treatment plans may be used on a session.

Treatment Goals

The Treatment goals section will allow a user to create one or more lessons plans that will be linked to the treatment plan. Even though a student may have performed the same lesson plan multiple times, each treatment goal will be one line item on the treatment plan with the following fields.

- **Objective** – This is the name of the lesson plan and is a picker that allows the user to select an active Lesson Plan.
- **Goal Details** – Used to specify how the lesson plan should be specifically implemented for the treatment plan and may be viewed from the lesson
- **Baseline Date** – This is the date of the most recent lesson where Use as Baseline is checked.
- **Average Level** - This is the % Correct average for all corresponding Lessons where the Treatment Plan is linked.
- **Current Level Date** - This is the most recent date (use start date) where the Treatment Plan is linked.
- **Target Date** – This is the objective date for the student to master the goal.
- **Target Observations** - The ideal number of observations that should be collected for the goal.
- **Lessons** – Indicates how many lessons that have been saved for the treatment goal.

Add Multiple Treatment Goals

Multiple treatment goals may be added at one time by clicking on the corresponding button when viewing a treatment plan. Enter the target observations and target date if applicable and it will be set on all goals that are added to the treatment plan. The lesson plans to be added may be filtered by:

- The user that created the lesson plan
- The lesson category
- The lesson subcategory

Hold down the CTRL key to select multiple goals and then click the **Add Goals** button to add them to the list. Once the goals have been added, a new filter and/or target values may be specified to add additional goals. Finally click **Save** to save the goals on the plan. Note that if you do not click save, none of the selected goals will be added to the treatment plan.

Treatment Goal Responses

The treatment goal responses show a summary of all response recorded for the corresponding lesson plan. The data displayed is dependent upon the response type. A target value may be entered for each treatment goal response (e.g. 80% correct). All the responses are listed when viewing the treatment goal and contain summary information for the observations collected.

- **Baseline** – This is the % correct average or average value (if numeric response type) for all corresponding Lessons where the Treatment Plan is linked and Use as Baseline is checked on the lesson.

- **Current Level** – This is the % Correct for the most recent (by start date/time) corresponding Lesson where the Treatment Plan is linked.

Recalculating Treatment Goal Data

Typically, the data on a treatment goal will be automatically calculated as lessons and lesson observations are entered into the application. However, there are instances where the treatment goals may need to be “manually” recalculated. This may occur if a lesson is changed after the observations are collected (e.g. use as baseline is checked, start date/time is changed). To recalculate the treatment goals on the treatment plan simply click the **Recalculate** button found at the top of the treatment plan.

General Recommendations

General Recommendations are used to add textual advice/suggestions for the student’s therapy to the treatment plan that are beyond the scope of the existing fields on the plan. They contain two fields, a subject and the recommendation itself. Multiple general recommendations may be added to the treatment plan.

Therapy Recommendations

Therapy Recommendations are used to add suggested procedure codes for the student’s therapy to the treatment plan. Multiple therapy recommendations may be added to the treatment plan. They consist of the following fields, however only the procedure is required to save the record.

- **Procedure** – Select the advised procedure code for the student.
- **Hours Per Month** – Enter the suggested hours per month that the student should receive the therapy.
- **Expected Duration** – Enter the number of months expected for the recommended procedure.
- **Comments** – Enter any comments for this therapy recommendation.

Examples

Lesson Categories/Plans

Below is an example of how the lesson categories, subcategories and plans can be setup in your practice.

- **Category:** Social Skills
 - **Subcategory:** Conversation Skills
 - **Plan:** Greeting
 - **Plan:** Taking turns talking
 - **Subcategory:** Group Meetings
 - **Plan:** Initial Greeting
 - **Plan:** Choosing a seat
- **Category:** Activities of Daily Living
 - **Subcategory:** Showering/Bathing
 - **Plan:** Prepare shower
 - **Plan:** Test water
- **Category:** Mathematics
 - **Subcategory:** Addition
 - **Plan:** Add single digits
 - **Plan:** Add double digits
 - **Subcategory:** Division
 - **Plan:** Division by 1
 - **Plan:** Division by 2
 - **Plan:** Division by 10

Compact versus Expanded Layout

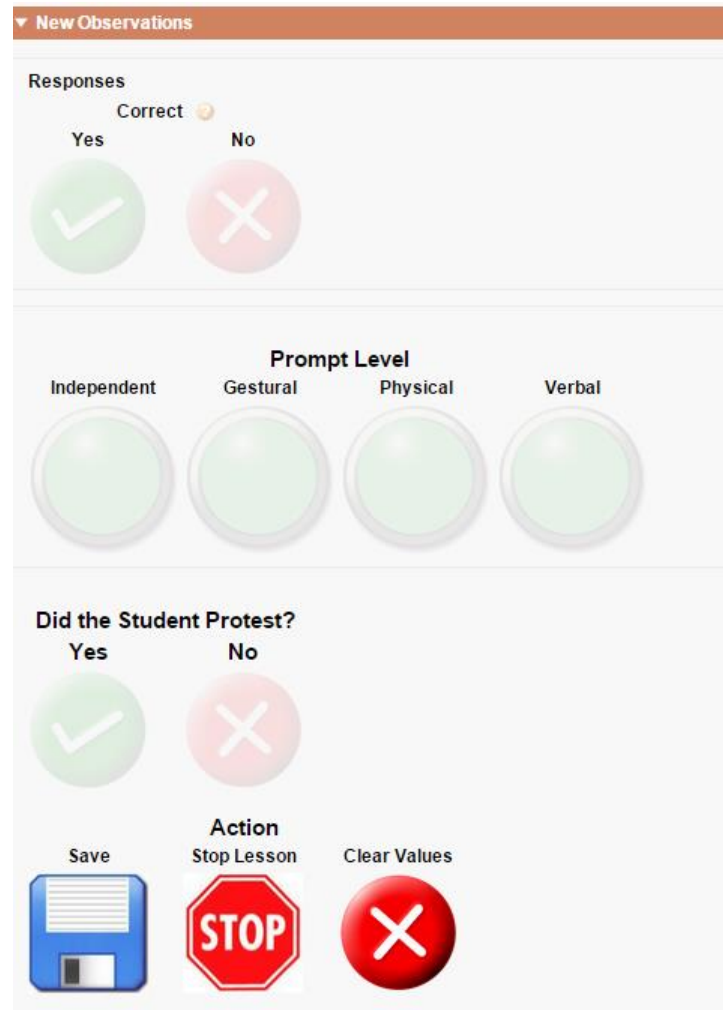
The two images below show the difference between the compact and the expanded layout for a lesson plan when performing the lesson. The lesson plan had a single yes/no response, four prompts and included the protest section.

Compact



The compact layout interface is a vertical stack of controls. At the top is a 'Responses' section with a 'Correct' label and a small square icon. Below this is a 'Prompt Level' dropdown menu set to '- None -'. Underneath is a 'Did the Student Protest?' dropdown menu, also set to '- None -'. At the bottom is an 'Action' section containing three buttons: 'Save' (a blue floppy disk icon), 'Stop Lesson' (a red octagonal stop sign icon), and 'Clear Values' (a red circle with a white 'X' icon).

Expanded



The expanded layout interface is a vertical stack of controls with more visual feedback. It starts with a 'New Observations' header. The 'Responses' section includes 'Correct' with a yellow smiley face icon, and 'Yes' (green circle with a white checkmark) and 'No' (red circle with a white 'X') buttons. The 'Prompt Level' section has four buttons: 'Independent', 'Gestural', 'Physical', and 'Verbal', all represented by green circles. The 'Did the Student Protest?' section has 'Yes' (green circle with a white checkmark) and 'No' (red circle with a white 'X') buttons. At the bottom, the 'Action' section includes 'Save' (blue floppy disk icon), 'Stop Lesson' (red stop sign icon), and 'Clear Values' (red circle with a white 'X' icon).