Very specific documentation requirements are in place for certain types of service delivery such as SNFs, including transitional care units (TCUs), subacute care units, and HHAs. Tables 5–2a and 5–2b summarize required documentation and forms according to service delivery areas.

In addition to documentation of assessments, certain language must be used in order to qualify for reimbursement. Again, terminology will change with the times, and it is necessary that the OT practitioner remain apprised of changes in this area. Table 5–3 lists terminology that is acceptable to be used by OT personnel, according to Medicare guidelines.