



# Communiqué

## ⚡ The Discharge Summary – Who “Does” It?

*§322.1 (e) Discharge. The supervising PT is responsible for the content and validity of the discharge summary and must sign it. A PTA may provide clerical assistance with a discharge summary.*

People frequently call the Board asking whether a PTA may “do” a discharge summary. Although PTAs are being given increasing responsibility for patient care in many settings, they do not have the legal authority to do a discharge summary. To understand the PTA’s role in the discharge summary, it’s helpful to look at both the role of documentation as well as the role of the PTA.

<i>Contents</i>	
<b>Discharge Summary – Who Does It?</b> .....	<b>1</b>
<b>Disciplinary Action</b> .....	<b>5</b>
<b>PT Rule Update</b> .....	<b>6</b>

### What Must the PT Document?

In the documentation cycle, you have the written evaluation, the plan of care, the treatment notes from each treatment session, the re-evaluation(s) that may be required, and the discharge summary. A PT is the only person who can “do” (be responsible for) the evaluation, the plan of care, the reevaluation, and the discharge summary. Those documents record the results of evaluative processes performed by the PT, i.e., clinical judgments based on data collected by the PT and/or the PTA. The only person who must sign any of these documents is the PT, because the PT is totally responsible for the creation and completion of these documents, as well as for all of the clinical decisions recorded by these documents.

### What Must the PTA Document?

A PTA must “do” (be responsible for) the treatment note for any treatment he provides. A treatment note is a direct communication between the PTA and the PT. Its purpose is to inform the PT of the services provided by (or under the supervision of) the PTA, the status of the patient, and any observations the PTA considers useful and necessary. A PTA treatment note is not intended to be direct communication to any other person, such as the referring doctor, the patient’s case manager or the Director of Rehab. A PTA treatment note may include subjective opinions of a patient’s status or suggested changes to the plan of care because it is a direct communication between the PTA and the PT. A PTA MUST sign the treatment note if he provides the treatment – because he is responsible for the treatment and the documentation of it. Only the name of the supervising PT needs to be included, no co-signature is required.

### The Discharge Summary

If the discharge summary is solely the responsibility of the PT, why is there confusion about whether a PTA can “do” the discharge summary? The confusion probably stems from two things: 1) the fact that a PTA may provide “clerical assistance” with the discharge summary, and 2) the fact that a PTA may make the last visit.

*(continued on next page)*

### Clerical Assistance

The Board uses the phrase “clerical assistance” to describe the kind of assistance a secretary provides, in other words, the kind of assistance that requires no knowledge of physical therapy at all. It includes transcribing notes from a tape to a written document, or entry from handwritten notes into a computer document. A PTA may provide such assistance to the PT, and does not sign the document as the author.

### Collection of Data

The PTA may also collect and record measurable, objective data, such as goniometric measurements, in the discharge summary. However, this is not clerical assistance but physical therapy assistance – it can be done only by a person with the appropriate education, i.e., the PTA or the PT.

### “Doing” the Discharge

The evaluative statements and decisions in the discharge summary must come directly from the PT. The PT must sign the summary and is responsible for the content and validity of it. In other words, a PTA may collect data, but any evaluative decision that results in a discharge must be made and documented by the PT. That’s “doing” the discharge – and so, the PTA never does the discharge.

### Last Visit vs Discharge

People often confuse the “last visit” with the discharge, assuming that the person who makes the last visit is “doing” the discharge. However, the discharge is actually a decision about the status of the patient’s progress; the discharge summary is merely a reflection of that decision. If the PTA makes the last visit, he does not “do” the discharge. The PT may choose to discharge the patient on the basis of the last reevaluation and any additional data provided later by the PTA.

### ***Update Your Profile at [TexasOnline Professional Profiles](#)***

- *Your Information Online and Available to the Public 24/7*
- *List Your Specialty Certifications, Practice Settings, Translation Services, Insurance Accepted, and More*
- *Add a Link to Your Own Website*



## **Disciplinary Action Taken by the Board On February 9, 2007**

### **Reinstatement with Restrictions**

**Sharon Standoff, PTA #2027548 (Dripping Springs)** – requested reinstatement of a license previously suspended for practicing under the influence of drugs. Violation of §453.351 of the Act. **Board Order reinstated the license with restrictions.**

**Patricia Ehrhardt, PTA #2008660 (Bellingham, WA)** – requested reinstatement of a license previously suspended for practicing under the influence of drugs. Violation of §453.351 of the Act. **Board Order reinstated the license with restrictions.**

**Sandra Ryan, PT #1048569 (Victoria)** – requested reinstatement of license previously revoked due to felony conviction. Violation of §453.351 of the Act and §53.021 of the Occupations Code. **Board Order reinstated the**

## Disciplinary Action Taken On MAY 4, 2007

### Practiced with Expired License

**Andrew Solis, PTA #2021820 (San Antonio)** – practiced with an expired license. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order required eight (8) hours of community service.**

**Mark Labhart, PT #1044048 (Whitesboro)** – practiced with an expired license. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order required sixty (60) hours of community service.**

**Stan Ashton, PT #1078160 (Midland)** – practiced with an expired license. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order required sixty (60) hours of community service.**

**W. Gordon Eiland, PT #1057388 (Tyler)** – practiced with an expired license. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order suspended his license for twenty-one (21) days.**

**Betty Warren, PTA #2028355 (Amarillo)** – practiced with an expired license. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order required eight (8) hours of community service.**

**Gilbert Martinez, PTA #2006003 (San Antonio)** – practiced with an expired license. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order required sixty (60) hours of community service.**

**Terrie Matthews, PTA #2036721 (Plainview)** – practiced with an expired license. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order required sixty (60) hours of community service.**

**Sandra Smith, PT #1029288 (College Station)** – practiced with an expired license. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order suspended her license for sixty (60) days.**

### Failed CE Audit

**Holly High, PT #1106227 (Krum)** – failed CE audit: lacked proof of sufficient hours taken within the renewal period. Violation of §453.351 of the Act and Chapter 341 of the Board rules. **Board Order required thirty (30) hours of community service.**

**Risty Delumpa, PT #1155398 (Houston)** – failed CE audit: lacked proof of sufficient hours taken within renewal period. Violation of §453.351 of the Act and Chapter 341 of the Board rules. **Board Order required thirty (30) hours of community service and lacking CE hours.**

**Sagira Vora, PT #1145001 (Kirkland, WA)** – failed CE audit: lacked proof of ethics course taken within renewal period. Violation of §453.351 of the Act and Chapter 341 of the Board rules. **Board Order required thirty (30) hours of community service.**

**Jenna Lambert, PT #1090280 (Lewisville)** – failed CE audit: lacked proof of sufficient hours taken within renewal period. Violation of §453.351 of the Act and Chapter 341 of the Board rules. **Board Order suspended her license for thirty**

**Samsha Jamal, PT #1145712 (McKinney)** – failed CE audit: lacked proof of sufficient hours taken within the renewal period. Violation of §453.351 of the Act and Chapter 341 of the Board rules. **Board Order required thirty (30) hours of community service.**

**Jill Buie, PT #1060788 (Waxahachie)** – failed CE audit: lacked proof of sufficient hours taken within renewal period. Violation of §453.351 of the Act and Chapter 341 of the Board rules. **Board Order required thirty (30) hours of community service.**

**Frances Dolan, PT #1136083 (Kerrville)** – failed CE audit: lacked proof of sufficient hours taken within renewal period. Violation of §453.351 of the Act and Chapter 341 of the Board rules. **Board Order required sixty (60) hours of community service.**

**Linda Rettig, PT #1103570 (Plano)** – failed CE audit: lacked proof of sufficient hours taken within renewal period. Violation of §453.351 of the Act and Chapter 341 of the Board rules. **Board Order suspended her license for thirty (30) days.**

**(30) days and required lacking CE hours.**

### Abandonment

**Paul Pendergrass, PTA #2044113 (Crosby)** – practiced in a manner detrimental to the public health and welfare by abandoning his position and patients without providing sufficient prior notice. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order required sixty (60) hours of community service.**

**Denise Cope, PT #1014819 (Houston)** – practiced in a manner detrimental to the public health and welfare by abandoning her position and patients without providing sufficient prior notice. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order suspended her license for thirty (30) days.**

### Documentation

**Bettye Klempin, PT #1018414 (Allen)** – practiced in a manner detrimental to the public health and welfare by failing to accurately record treatment notes – compiling daily notes in multiple formats that she was unable to reproduce for the patients' files. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order suspended her license for fifteen (15) days.**

**Roberto Bermudez, PT #1038115 (Houston)** – practiced in a manner detrimental to the public health and welfare by inaccurately documenting patient treatment notes. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order suspended his license for thirty (30) days.**

### Other

**Rick De Los Santos, PTA #2012928 (San Antonio)** – practiced in a manner detrimental to the public health and welfare by attempting to make contact with a patient after 11 p.m. at night. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order suspended his license for fifteen (15) days.**

**Rebecca Halbert, PTA #2048138 (Spring)** – practiced in a manner detrimental to the public health and welfare by treating a patient without seeking reevaluation by the PT, after patient's subsequent surgical procedure. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order suspended her license for thirty (30) days.**

**Julianne Sloyer, PTA #2014650 (Corpus Christi)** – practiced in a manner detrimental to the public health and welfare, resulting in a patient's fall and injury. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order suspended her license for thirty (30) days and required additional CE.**

**Romulo Nacional, PT #1042596 (San Antonio)** – failed to properly supervise an unlicensed individual. Violation of §453.351 of the Act and Chapter 322 of the Board rules. **Board Order required sixty (60) hours of community service.**

## **PT RULE UPDATE**

### **PROPOSED AMENDMENTS AND NEW RULES PENDING**

The Board voted to adopt the following rule amendment May meeting. You can find the full text of the rules at <http://www.ecptote.state.tx.us/pt/rules.html>.

§329.5, Licensure Requirements for Foreign-Trained Applicants

If you have comments or questions about the proposed rules, please contact Nina Hurter, PT Coordinator, at [nhurter@mail.capnet.state.tx.us](mailto:nhurter@mail.capnet.state.tx.us) or 512/305-6900.