



DOCUMENTATION

OBJECTIVES

- ▶ At the end of this session, the participants will be able to:
 - Define Person Centered Documentation
 - Explain Documentation “Do’s” and “Don’ts”
 - Explain the purpose of Progress Notes
 - Define an ISP
 - Explain the purpose of a Medical Report
 - Demonstrate the ability to document Progress Notes and a Medical Report

PERSON CENTERED DOCUMENTATION

- Agencies must follow certain guidelines in gathering material for their records:
 - Keep information that is only relevant
 - Inform individual from whom it collects information
 - By what authority the agency is allowed to gather info
 - Purposes for which info will be used

DOCUMENTATION “DO’S”

- Sign your name and title
- Write down date and shift time
- Use good grammar and write in complete sentences
- Write neatly and legibly; may want to print
- Use initials when referring to other people receiving services
- Write down facts and support it with details related to service plan

DOCUMENTATION “DO’S”

- Use a pen with dark ink
- Use positive statements
- Write down your actions in response to issues
- Write down why the person did not meet his or her goals for the day
- Write down notes as soon as possible
- Write a single line through errors and initials
- Note consultants or visitors

DOCUMENTATION “DO’S”

- Write in plain language that is easily understood
- Use layman’s terms
- Avoid initials and technical jargon
- Write to inform, not impress
- Avoid unnecessary words
- Keep sentences short and simple (sweet)
- “Be objective: “Just the facts, ma’am!”

DOCUMENTATION “DON'TS”

- Record opinions
- Scratch through, erase, or “white out” mistakes
- Use abbreviations
- Use slang
- Use words like “small” or “large”; rather, describe the size (like the size of a dime)

PURPOSE OF PROGRESS NOTES

- The purpose of progress notes is to document the individual's progress toward achieving goals identified in the Individual Service Plan (ISP)
- Progress notes aid communication between various caregivers and the consumer's family

INDIVIDUAL SERVICE PLAN

- ▶ Also known as ISP
- ▶ Contains important information about the consumer
- ▶ Is the consumer's history, a list of things to do, and a plan for making future hopes and dreams a reality
- ▶ Is unique to the individual

INDIVIDUAL SERVICE PLAN

- ▶ Is goal oriented
- ▶ Is structured for success
- Is supported by the team and the staff that work with the consumer
- ▶ Is outcome oriented so that each team member knows where, why, how and what they are expected to do and when they should do it

INDIVIDUAL SERVICE PLAN

- Is reinforced; goals are worked on and carried to the consumer's various environments (home, school or community) so that everyone knows what is expected wherever the consumer may be
- Provides the supports to make the difficult possible
- Planning for the consumer's independence requires knowledge of that person's history and how he/she adapts to different circumstances

PROGRESS NOTES

Person:_____

Month: _____

Year: _____

6/15/04	I got to work early today. I woke up John, he ate and then we went to the store. It was a good day.	Sharon D.
6/16/04 9:00AM – 4:00PM	John got up when I got there, dressed, hygiene, chores, meds. Had a bad day.	SFD
6/17/04	I worked overnight shift. He went to be after Letterman. He slept all night. I checked on him at midnight, 2am, 5 am and 8 am. He was still asleep when I left.	

PROGRESS NOTES

Person: John Smith

Month: June

Year: 2004

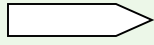
6/18/ 04 9:00 am - 4 pm	John was watching TV when I arrived. He had already taken his medication. I reminded him to take a shower and shave, he did it. We watched the Young & Restless, John said the he does not like soap operas and I told him he was silly, that this is a good show. John fell asleep, I made his lunch and woke him up to eat it. We talked about John's parents and their vacation. We went outside and talked to the neighbors by the pool. It was fun.	Sharon Delvisco
6/18/04 10 pm - 12 am	John watched TV until midnight. We had grapes during Letterman.	Teresa Gambino
6/18/04 12 am to 7 am	He went to bet ^{Error NJ} bed but did not go to sleep until after 2 am. He woke up at 6 am and said he had a headache. He took some Tylenol and went back to bed. He was asleep when I left.	

PROGRESS NOTES

Person: _____

Month: _____

Year: _____

	<i>Gourmente to thee thesote., soduife we wneee say it. He lefjks thereee reallhad.</i>	
	Sally got up late this morning. I think she is lazy.	<i>Jessica Rabbit</i>
8/10/ 04 7:20 pm	Betty arrived home from work at 5:15 pm. She said "I'm hungry", we made a sandwich.	Debbie Smith
8/10/ 04 9:00 am	Leojkklkj Sam paid all the bills tonight. After After supper.	<i>Joseph Blow</i>
8/10/ 04 1:20 pm	Gloria's mother came to see her today. When Gloria got back she took her medication and made  dinner. Tom Brady	
8/10/ 04 6:15 am	When I got here, first shift did not do anything, so Betty didn't get her bath.	<i>L Brown</i>

INDIVIDUAL SERVICE PLAN

Outcomes and Objectives

John Smith

Effective

**12/1/03 to
11/30/04**

Outcome 1: Financial Security and Stability

I will pay my bills and maintain my budget with support. I will go shopping as needed and compare prices with support.

Outcome 2: Health

I will, with reminders take my medication. I will schedule medical appointments with support. I will exercise with support. I will, with support, cook and eat healthy.

Outcome 3: Relationships

With support from DSP, I will visit others in apartment complex.

Outcome 4: Choices

With support from DSP I will look for bigger more affordable apartment.

Outcome 5: Self Esteem

With support from DSP, I will take care of my personal hygiene.

Outcome 6: Safe and Secure Life

With support from my DSP, I will check smoke alarms and fire extinguishers. I will prepare for hurricane season with support.

PROGRESS NOTE ACTIVITY

- ▶ You arrive for your shift at 8:50 am for your shift at 9 am. John is still asleep. He sleeps until 10 am. He gets up in a bad mood. You ask him to take his medicine and he said “No, not until after coffee.” He takes his medicine after he drinks his coffee. John took a shower and brushed his teeth. You remind him to comb his hair and shave. He put on his favorite blue shirt from the laundry basket and you point out that shirt is dirty and support him to choose the clean purple shirt. You tell him he can wash his clothes later and wear the blue shirt when it is clean. You load the dishwasher and vacuum the living room. You remind John to clean the bathroom and he cleans the shower, tub and toilet with only one reminder. John wants to go grocery shopping so you both make a grocery list and go to the store. He says he does not want milk even though he is out of milk. He buys apples and bananas and baked chips. He wanted some ketchup so you and John compared prices. John does not like Chek drinks even they cost less than Pepsi. He likes to drink Pepsi at night when he watches the Late Show. John talks to the cashier about the movie he watched on Lifetime last night while she is totaling up the order. The cashier watched the same movie but you did not see it.

PROGRESS NOTE ACTIVITY

Person: _____

Month: _____

Year: ____

DATE	NOTES

PROGRESS NOTES

- Should reflect the individual's service plan based upon their preferences, wishes, and desires toward achieving goals.
- Evidence that the person is making his \ her own choices.
- Documented time \ dates in the service plan should coincide with the progress notes.
- Write details on what the individual has done, accomplished, struggled with, and what is needed.
- Answer the who, what, where, how & when.

MEDICAL REPORT “DO’S”

- Should be completed after each medical, psychiatric or medical appointment. (A sample report form is included in Slide 21)
- Make sure medical professional signs the proper forms.
- Understand all recommendations and follow-up documentation before leaving doctor’s office.
- Follow agency procedures on this matter.

MEDICAL REPORTS PURPOSE

- To document all important information:
 - Date of birth
 - Name
 - Social Security Number
 - Phone Number
 - Insurance Information
 - Emergency contact
 - Diagnosis
 - Medical Professional's name and office information
 - Current medications and dosages
 - Allergies
 - Reason (s) for visit

SAMPLE MEDICAL REPORT FORM

- Name: _____ Date of birth: _____
- Address: _____
- Phone #: _____ SS #: _____
- Insurance Type: _____ Insurance #: _____
- Emergency Contact: _____
- Address: _____ Phone #: _____
- Medical Professional: _____ Title:

- Address: _____
- Current Medications: _____
- Allergies: _____
- Reason for Visit: _____
- Signature of Medical Professional: _____ Date: _____

SUMMARY

- ▶ Progress notes are legal documents
- ▶ Always maintain confidentiality

THE END