Documentation Training Storyboard

<table>
<tr><th>Slide #</th><th>Script</th></tr>
<tr><td>1.</td><td>Welcome to this training on documentation.

Please click the blue button to begin.</td></tr>
<tr><td>2.</td><td>In this training we will:
Explain the purpose of documentation
Explore the best practices for documentation
And, finally, practice documenting several scenarios.
Let’s get started.

Please click the next button to continue.</td></tr>
<tr><td>3.</td><td>Documentation is a tool that is used to:
Record the work of an agency employee
Record a consumer’s situation, strengths, weaknesses, and needs
Evaluate and monitor the services that a consumer receives
And create a permanent record of a consumer’s care</td></tr>
<tr><td>4.</td><td>Documentation:
Provides accountability for agency employees and captures their successes in working with consumers.
Allows an unfamiliar colleague to understand a consumer’s situation and pick up where a previous colleague was helping the consumer.
Allows agency employees to identify opportunities for additional or more supportive care.
Finally, it creates an example for teaching others who are newer to the agency.</td></tr>
<tr><td>5.</td><td>Documentation also creates opportunities for effective communication.

Good documentation supports communication between the different departments in our agency. It also helps us communicate clearly and effectively with our funders and partners.

Good documentation also ensures that agency employees with different disciplines or backgrounds are able to understand one another and draw upon one another’s expertise.</td></tr>
<tr><td>6.</td><td>In addition to all of the other benefits, good documentation also ensures continuity of care or services for a consumer if another agency employee or outside entity becomes involved in their care.</td></tr>
<tr><td>7.</td><td>Please answer the question: documentation should do which of the following things?

Click the submit button after choosing your answers.</td></tr>
<tr><td>8.</td><td>Please answer the question: Which of the following are benefits of documentation?

Click the submit button after choosing your answers.</td></tr>
</table>

9.	Now that we've reviewed the benefits of good documentation, let's discuss what it looks like in practice. When creating documentation: • **Use professional language**. For instance, instead of using casual or emotional expressions, use objective and neutral ones. Rather than writing, "Mr. Smith was grumpy with me on the phone" you could document, "Mr. Smith expressed verbal agitation when asked about bathing." This is important because the documentation can be accessed by various people for different purposes. You don't know who may look at your documentation after you're done, and you want them to have the best impression of your work. • **Never blame anyone in your documentation**. This includes the consumer, the consumer's care givers, any agency personnel, and any personnel from our partners, such as the Department of Job and Family Services. • **Avoid expressing frustration in your documentation.** Even if this is your second call, and you've had a really challenging time with the consumer or with JFS, it isn't appropriate to let your emotions show in your documentation. Just stick to the facts and write, "Made second call to Mr. Jones. There was no answer. Will call back later this week" • **Always use third-person writing with person-centered language.** When referring to consumers, use their first and last name or mister/misses as appropriate. Avoid using "I" or "me," and instead use your job title when necessary. For instance, "This resource specialist obtained verbal consent from Mr. Smith to talk to his spouse."
10.	• **Organize your documentation chronologically**, so that it can be easily understood by anyone who accesses it at any point. This includes detailing the previous steps that you have already taken and the next steps you plan to take with the consumer. • **Complete documentation in the mandated timeframe (as close to real-time as possible).** • **Do what you say you're going to do. If you document that you're going to call someone back or send out a letter, make sure you actually do those things.** • **Proofread and utilize good grammar.** Good grammar is important because it helps to convey ideas and information with precision, clarity and professionalism • **As a last step, be sure to finalize all documentation in the system.**
11.	This table demonstrates some alternative ways to get your meaning across, while remaining professional and objective in your documentation. Instead of writing the consumer is mad, angry, or upset, you can write that they were verbally agitated or expressing frustration. Instead of writing the consumer is stubborn or uncooperative, you can write they were reluctant to participate or resistant to the suggested option. Instead of lazy or unmotivated, write displaying a lack of engagement. And, instead of saying clingy or needy, write seeking additional support or guidance. Additionally, it is a good idea to reduce the grittiness of a situation in your documentation. Report the facts, without going into salacious details.

12.	On this slide, there are several documentation practices. These are in the green shapes. Drag these practices to the gold shapes, which are labeled good practices and poor practices. When you are happy with your answers, click the blue submit button.
13.	When creating documentation, include: • Who you talk with • What you observe or hear • What you do (any actions that you take) And when the interaction took place.
14.	Also include: • If the interaction took place via a phone call. • Why the interaction took place, or the intended goal for the interaction. Specify if this interaction was a follow-up to a request the agency received. • Be sure to document what topics were discussed, including any information the consumer shares. Any statements that the consumer makes that you believe are important can be enclosed in quotation marks in your documentation. Also, you should include information you obtained from other people relevant to the consumer’s case. An example of this is something an informal caregiver shares with you that impacts the consumer.
15.	Finally, documentation should also include: • Information on a consumer’s preferences for their care. Remember we always advise the consumer or explain information to the consumer, we never tell the consumer what to do or which choices to make. • Verification that a consumer agreed or consented to the plan for their care. Obtain consent for doing actions on behalf of an individual, while following mandated reporting guidelines. Please note that this is not applicable in cases where a person’s health or safety may be at risk. If a person’s health or safety is at risk, take appropriate action, such as contacting adult protective services, regardless of consent. • The next steps for the consumer, including items to follow up on, scheduled phone calls, assessments, or contacts
16.	Please answer the question: Which of the following items should not be included in documentation? Click the submit button after choosing your answers.
17.	Please answer the question: Which of the following items should be included in documentation? Click the submit button after choosing your answers.
18.	Also, avoid acronyms and abbreviations. Acronyms or abbreviations that seem really obvious to an agency employee could have a different meaning to someone in a different field.

	Your supervisor may have a list of approved acronyms that are okay to use. However, in most cases, it's best to simply spell out the acronym so that there is no confusion. Avoid being too "wordy" but do include all important information. To ensure the consumer receives the best possible care, it's important to provide accurate and relevant information for the next employee who reviews your documentation. Provide enough information for them to have an accurate understanding of the consumer's situation. Always follow through on what you say you're going to do. If you document that you will follow-up with a consumer, make sure you actually do follow up with them. Following up with consumers is important because it ensures the continuity of care and that consumers are not overlooked. If you're worried about remembering to follow-up, you can always add the task to your Outlook calendar, which will generate a reminder. Additionally, never backdate or fabricate your documentation. If you are late in updating case notes, mark that clearly in the system with the words "Late Entry" and include the date when the interaction took place.
19.	Remember: All phone calls and visits must be documented. If you call and obtain a voicemail, give yourself credit for the call. Also, planned future activities should be documented, including scheduled calls and letters sent in the mail. Upload supplemental or supportive documentation so that it is recorded in a consumer's record. If an item is mailed out to a consumer, you can upload a PDF version of the file so that it is attached to their record.
20.	If you make a mistake when you're creating documentation, create an additional note to correct it. You can write "Addendum Note" in the subject field and refer to the specific date and time of the incorrect note. Then, explain what the correction is and share the correct information.
21.	Read the following scenario carefully. On the next slide you will be asked to create documentation.
22.	Pretend you are Angela Lewis and document the previous scenario in the box below. You can go back and re-read the prompt as necessary. Your progress will be saved. When you are finished, click the submit button.
23.	Consider your documentation. Did you include: • Person-centered language? • The 5 Ws (Who, what, when, where, why)? • Samantha Milliard's consent to explore eligibility for the passport program? • Angela's next steps?
24.	Read the following scenario carefully. On the next slide you will be asked to create documentation.

25.	Pretend you are Mark Lee and document the previous scenario in the box below. You can go back and re-read the prompt as necessary. Your progress will be saved. When you are finished, click the Submit button.
26.	Consider your documentation. Did you include: • When and how the agency received the initial request? • When and how Mark followed up on the request? • Thomas' needs and challenges? • Mark's recommendations to meet those needs?
27.	Read the following scenario carefully. On the next slide you will be asked to create documentation.
28.	Pretend you are Emily Kiko and document the previous scenario in the box below. You can go back and re-read the prompt as necessary. Your progress will be saved. When you are finished, click the Submit button.
29.	Consider your documentation. Did you include: • When and why Emily called? • Emily's actions • Emily's next steps?
30.	As we wrap up this training on documentation, Please know that we recognize documentation can be challenging and time consuming. However, it should also be a priority. The documentation that you complete is like a baton that will be passed on to the next agency employee that works with the consumer. When you are documenting items, remember that in the future a colleague will be relying upon your notes. Good documentation protects you as a professional, it protects the agency as an organization, and it protects the people that we serve by ensuring we're meeting their needs.
31.	Thank you for completing this training on documentation. Please click the green exit button.