



The Georgia Collaborative ASO

Person Centered Documentation

September 25 and 26, 2017



Introductions

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**This presentation was
initiated by the State QI Council to help improve
the quality of documentation across the State.**

Disclaimer

This training provides specific guidance about person centered documentation.

Please note that this training is not all inclusive of all documentation requirements for NOW/COMP providers. Additional information can be found in the DBHDD Provider Manual and NOW and COMP Manuals.



**Remember,
you are
documenting
my story!**

IDD Standards for Documentation

Provider Manual for Community Developmental Disability Providers Section III: Documentation (September 2017)

- Meaningful
- Tells an accurate story
- Individual's response
- Strengths, needs, preferences and abilities
- Implementation of interventions: services, supports, care and treatment given
- Issues, experiences or events occurring



DCH NOW/COMP Waiver Manual Documentation Template

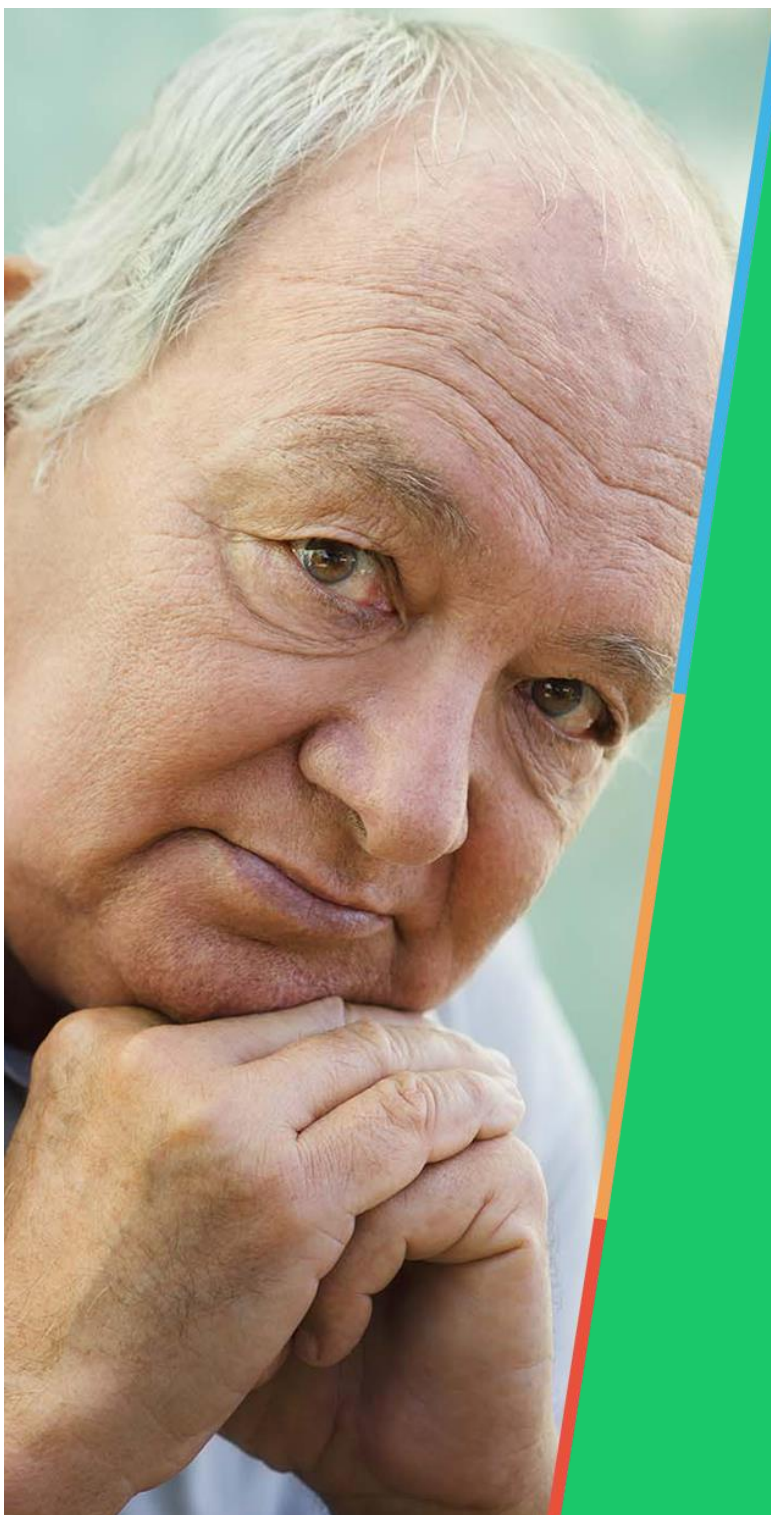
- **Appendix S** (pg. 183) is a template with accompanying definitions/instructions organizations can use to document their supports and services provided. It includes checkboxes for routine supports, a section to code a person's responses to training on goals, and sections to address progress or lack of progress.
 - If you use this template, we recommend utilizing this training to support your documentation in the areas where free form text can be used to capture person centered details.
 - Disclaimer: The use of this template does not guarantee compliance with all policies/standards for documentation.

General Documentation Tips To Remember



Documentation Should be:

- **Clear** to an outside reader
- Written in a **professional** and **timely** manner
- Written as if the document will be **published** on the front page of a newspaper
- **Written** and **signed** by the person providing the services



PURPOSE OF PERSON CENTERED PROGRESS NOTES



What is the Purpose of Person Centered Progress Notes?

- Showing progress/lack thereof
- Knowing when things are accomplished
- Recording events in peoples' lives
- Sharing the learning with others who support the person
- Adding to the knowledge about what makes the person's heart sing
- Enhancing the quality of life for people



Your Notes May Not Be Person Centered Because:

- Not sure what to include in a Note
- Not sure what is considered person centered
- Not confident in written skills
- Don't feel empowered to try new things
- Not sure how much detail is really needed
- Documentation format does not encourage person centered detail
- Only documenting on a goal



Documentation Content to Avoid

- Reads like an event log: Sam got up, went to the bathroom, ate breakfast, watched TV, went to the bathroom, got dressed...
- Staff “assisted” without defining the type of assistance given or on what parts of a task: Staff assisted John with eating lunch.
- Details that are not relevant to the person and/or the supports and services being received (not noteworthy) For example:
 - Amount of food eaten or what was provided for lunch.
 - Detailed descriptions of clothing.
 - Obvious events, e.g. arrived, left, used the restroom, ate lunch.
- Using “chose to” to describe what the person did rather than choices made and offered.



Documentation Content to Avoid

- Redundancy, repeating the same events the same way every day:
 - Day 1: Put up belongings, sat with group, worked on sorting skills, ate lunch, prepared to go home, went home.
 - Day 2: Put up belongings, sat with group, worked on counting skills, ate lunch, prepared to go home, went home.
- Inclusion of phrases like “No *problems* to report.”
- Failure to use People First Language: ex: allowed, consumer, compliant.
- Reporting data that does not match the criteria on the objective.
- Not providing details on how a person responded to an activity or event: ex: Claire had fun today.



TRULY PERSON CENTERED NOTES MUST HAVE DETAIL REGARDING:

- ✓ **Responses to activities**
- ✓ **Responses that are new**
- ✓ **Any activity outside the routine**
- ✓ **New experiences**
- ✓ **Any information that adds to your knowledge of what is Important To & For the person.**

Do's and Don'ts



DOS

- Preferences
- Important To & For
- Learned New



DON'TS

- Not Important
- No Impact
- Not Meaningful

Key Questions to Consider When Documenting

How did the person respond?

- What did they like or dislike in the activity?
- What emotions were observed?
- How do you know?

What did you learn new about the person?

- Did the person or you get a new idea or another area to explore?
- Did they say anything/express a preference? Can you include a quote?
- What choices/opportunities were offered and chosen?

Key Questions to Consider When Documenting

What progress did the person demonstrate?

- What gifts or talents were demonstrated?
- What did they do well?
- What do you need to change based on the person's response?
- Did the person's response demonstrate progress or not and how do you know that?
- How much help did you give the person? What kind of help and on what parts of the task?
- What will you do differently next time?

Measure to tell if the note is Person Centered

A good PC Note describes the activity such that an unfamiliar reader **can see the activity** in their mind's eye.

You should be able to **act it out**.



Can you act this out?

“Had a soda, gathered his things and prepared to go home.”

VS

“Charlie finished his last Wii bowling game of the day with his best score ever of 105. He told staff he was going to break that record the next day when he plays. He said sitting there all afternoon had made him thirsty, checked his pocket to make sure he had the money for a soda, and headed for the Coke machine. He bought a Sprite and asked Maria if she would like some of it in a cup. She eagerly accepted his offer and he shared some after he got her a cup from the cabinet. They chatted briefly while enjoying their soda. He checked the classroom clock and noted it was nearing time to leave, then went to his locker and gathered his lunchbox, art from the day, and his jacket. He asked staff to help him with the jacket zipper and staff was able to verbally coach him through zipping it by himself, generating a big smile from both of them. When his ride pulled up, he greeted the driver and waved to Maria, saying “See ya tomorrow!”

Which note tells the person's story?

Willie was in the bed. Willie got up at 7:23 and was assisted in the bathroom. He then got dressed with staff assistance. He wore his jeans, his red polo shirt and socks and tennis shoes. He sat in the living room and watched TV till 7:55. He ate 100% of his breakfast, and then watched TV until lunch. He was changed and ate lunch late at 12:45. He had a ham sandwich cut up into bite size pieces, fruit cup, and punch. He ate 100% of his meal. Staff had to tell him to slow down. He watched TV and then went to his room to lie down. He napped for an hour. When he got up, Willie and his roommates went to the park to feed the ducks. Willie had a good day at the park.

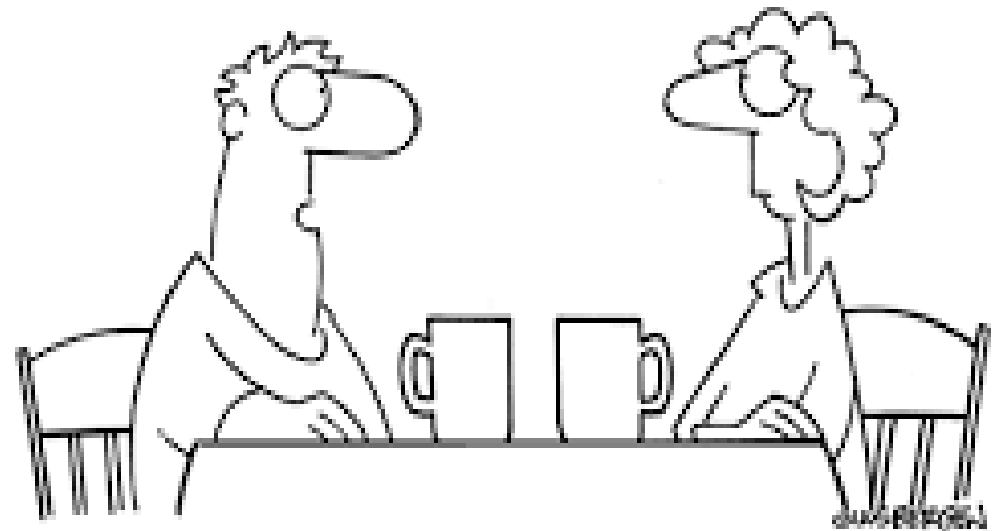
VS

This morning Willie was in a good mood - singing and smiling. Staff coached Willie through getting dressed for the day. He pointed to the picture of the eggs in his picture book, showing he wanted a hot breakfast. He helped fix breakfast, getting two eggs out of the refrigerator and with coaching broke them in a bowl. Willie started eating quickly and was reminded to “slow down”, explaining he might choke. Willie continued so staff made a game out of counting to 5 between bites, which worked. After breakfast, using the communication book, he pointed to the park. Staff asked him to get some crackers from the cabinet to feed the ducks...

How to Capture Information from a Person Who Does Not Communicate Using Words

- Know the person's "yes" and "no"
- If unsure how to read the yes/no, start with a known "like" or "yes"
- Describe in detail the person's body language in response to the action/question, etc.
- Describe in detail the person's facial expressions
- Include trial and error opportunities (educated guesses) to verify what the person is communicating
- Be patient and wait for a response
- Document any new communication observed from the person

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"I do so show my emotions! When I burp in a higher octave, it means I'm happy!"

Key Areas to Remember:





**Remember, you
are
documenting
my story!**



Next Training: WRITING PERSON CENTERED NOTES FOR GOALS AND OBJECTIVES

<Insert Date/Time>

Questions and Feedback





Evaluate the Training



Thank you!

For Georgia Collaborative ASO general inquiry or questions please email:

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For Delmarva Foundation general inquiry or questions please email:

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