



OBSERVE, RECORD, REPORT INSIGHTS FOR THE SUPPORT STAFF

AN ENHANCEMENT OPPORTUNITY

OBSERVE, REPORT, and RECORD-The Workbook

May 2010

Insights for the Support Staff and Direct Care Staff (DCS)

TRAINING OBJECTIVES:

- To enhance the knowledge of the DCS working with agencies caring for consumers with developmental disabilities.
- To increase the confidence level of the DCS in observing for changes in health or mental status of the consumer with developmental disabilities
- To enlighten the DCS as to report what is observed
- To reiterate the importance of recording what is observed and reported through adequate documentation.
- To encourage DCS in working PROactively rather than Reactively-and save lives!

RESOURCES USED FOR THIS TRAINING:

- ✗ A SURVIVAL GUIDE TO DOCUMENTATION INVESTIGATIONS TRAINING-
Victor Stoddard
- ✗ CODE OF STATE REGULATIONS
- ✗ DDD MEDICAID WAIVER MANUAL
- ✗ DIVISION MEDICAID SERVICES
- ✗ DOCUMENTATION ISSUES - Lorman Education Services
- ✗ LEVEL ONE MEDICATION AIDE GUIDE-INSTRUCTIONAL MATERIAL LAB-UMC
- ✗ MEDI-SMART NURSING EDUCATION RESOURCES
- ✗ TABER'S CYCLOPEDIA MEDICAL DICTIONARY
- ✗ WEB MD

REVIEW OF BODY SYSTEM-Slide 3
Match the system to the descriptor

MUSCULOSKELETAL (1) _____

HEART AND BLOOD VESSELS (a)

NERVOUS (2) _____

BREAKDOWN OF FOODS (b)

SENSORY (3) _____

GLANDS THAT SECRETE (c)

CARDIOVASCULAR (4) _____

UTERUS, VAGINA, PENIS (d)

RESPIRATORY (5) _____

IMMUNE SYSTEM (e)

DIGESTIVE (6) _____

VOIDING, URINATION (f)

URINARY (7) _____

SKIN AND NAILS (g)

REPRODUCTIVE (8) _____

FIVE SENSES (h)

ENDOCRINE (9) _____

BREATHING (i)

INTEGUMENTARY (10) _____

MUSCLES AND BONES (j)

LYMPHATIC (11) _____

BRAIN AND SPINAL CHORD (k)

REVIEW OF THE SYSTEMS
(Complete after slide 15)

1. Thomas is 73 years old and is complaining of nausea, vomiting, and abdominal pain. He has a low grade temperature and was transported to the Emergency Room where he was treated and sent home with diagnosis of Aortic Aneurism. What systems are affected in this scenario_____?
2. Craig is 37 years old with scoliosis. He was recently diagnosed with degenerative lung disease. When you come on shift, Craig is restless in bed and his oxygen saturation levels are being maintained by use of prn oxygen. His skin is cool and clammy and he is sweating. Identify the system we are concerned about with Craig._____
3. Marsha is a 57 year old who has cold feet and edema in her lower extremities. She has Diabetes. She asks you to heat up a towel for her to put on her feet to keep them warm. Identify the system affected_____.
4. Beverly is 33 years old. She has a seizure disorder which is not very well controlled. She has identified in her personal plan to notify 911 for any seizure lasting over 5 minutes. You are making morning rounds and find her in the middle of seizure like activity. You do not know the time the seizure started, but within 10 minutes after the seizure activity stopped, she began having another seizure. What is the system affected_____
5. Tonya has Down Syndrome and is still her own guardian. She has a very good understanding of her environment. She is verbal and able to communicate to staff quite well. Her Personal Plan includes an objective for her to have supports in shopping for her own groceries. She is on a low fat and low sodium diet. Today at Gerbes, Tonya loaded her cart with a box of Saltine crackers, high sodium canned soup, and a pack of Oreo cookies. Tonya is not easily redirected and she refused to put these items back on the shelves, even though you reminded her of the diet order and of how the salt was not good for her. You offered suggestion of alternative soup and crackers, still she refused. What is the system affected_____?

6. Sonny has an objective in his Individual Plan to keep his skin in good health. He is immobile and is dependent on staff for transfers and positioning. His physician has an order for active range of motion four times per day. What system is affected_____?
7. Lorene was in a car accident when she was 16 years old. She is only able to use her upper extremities. She has an objective to make choices using her "electronic talker". Lorene prefers to whine and point when she wants things. The "electronic talker" is set up for clothing, food, and activity choices. Lorene needs to use a button system to indicate her choice. It is time for her to select what clothing she wants to wear. She points to the blue dress. You ask her to use the talker and she touches the button for blue dress. She smiles and claps her hands. What system is affected_____?
8. Yankee has Muscular Dystrophy. His favorite sport is baseball. He went out to play catch and when you followed to join him, you found him sitting in his wheel chair with a lump on his head. Yankee said he threw the ball in the air and missed it. The ball hit his head and now he has a headache. He is not concerned about his head. All he wants to do is play catch with you. What is the system affected_____?
9. Kyle has an Individual Plan that has objectives to keep him safe from choking. His diet order is mechanical soft. He requires verbal prompts to take small bites when eating. The physician has also recommended that Kyle take sips of fluids between bites. Today Kyle had roast beef, mashed potatoes, green beans and apples slices prepared for him by the new staff member. What system is affected_____?
10. Cynthia just moved into your ISL. She is unable to sleep at night and complains constantly of a headache. She has a prn for pain but it does not really make her headaches go away. What system is affected_____?

REPORTING-Slide 16

Relate findings or given an account of what you witness. Reporting can be verbal and it can be written. With consumer health, the verbal report must be followed by the written statements, referred to as documentation. To whom to report may be an agency policy, typically a supervisor is the first contact for reporting.

Read these situations and indicate which ones need to be reported verbally to supervisor as a change or concern. Indicate with a "V"

1. Zxavian complained of a headache. _____
2. Iva is sitting in her bedroom crying. _____
3. Oscar fell off the trash can and his leg is bleeding. _____
4. August came home from work with a bump on his head. _____
5. Oliver did not like supper and threw his plate across the room. _____

REPORTING EXERCISES-Slide 16

The next important thing to consider is WHEN to report. Immediate reporting would be indicated for a crisis or something very unusual. Of the statements below, decide which ones need to be reported immediately and mark it with an "I".

1. Frankie did her evening routine of pacing and shouting out bad words at HS. _____
2. Smitty would not take his 7am medications before going to work. _____
3. Travis complained of a sore throat and is not able to swallow his pills. _____
4. Monty was not able to hold his food down at suppertime. _____
5. Teri said she did not feel like taking her water pill this afternoon. _____

INFORMATION SHARING
(Complete after viewing slides 17-18)

Objective Information

Factual: what you see, what you hear, what you can touch, what you smell. Measureable: blood pressure, pulse, weight, temperature

Subjective Information

This is information that is related by a person's experience or knowledge or something descriptive shared by another.

Determine what is Objective "O" or Subjective "S"

1. I think Betsy was having a seizure. _____
2. Genny bumped her head on the door. _____
3. Stefanie had a bump on her forehead the size of a quarter. _____
4. Grace's rash on her arms was not infected. _____
5. Jordan cut his finger slicing tomatoes. _____
6. Hope was in a lot of pain. _____
7. Susan was screaming and there were tears in her eyes. _____
8. Andy told me his head was hurting. _____
9. Eric had a Temperature that was 102. _____

Which of the above statements should you report immediately?

Indicate with an "I"

WORKSHEET-Slide 19

Jacob and Katelyn

With the picture of what you see and the information provided on the slide, please complete this assignment:

Write an objective statement about Jacob:

Write an objective statement about Katelyn:

Write a subjective statement about Jacob:

Write a subjective statement about Katelyn:

DOCUMENTATION ISSUE

(Complete after viewing slides 20-22)

The word documentation holds many avenues for the DCS. It is the writing up of what you report and what you did about the issue reported. It is the charting of medications you have given, results of prn medications, and any communication you put in writing.

Choose the best response for the following statements.

1. Contracted agencies through CMRO are governed by the following:
 - a. 13CSR 70-3.030
 - b. Medicaid Waiver standards
 - c. Certifying bodies such as Licensure, Certification, or CARF.
 - d. All of the above.

2. An adequate medical record contains:
 - a. Information about the services being provided
 - b. Information about how the individual is being supported
 - c. Information about the goals and objectives for the consumer
 - d. All of the above.

3. The medical record is:
 - a. A legal document
 - b. A recipe
 - c. A summary of information about the consumer
 - d. A and c.

4. There are many parts to the consumer medical records, list at least three of the portions you share responsibility for.

1) _____ 2) _____ 3) _____

DOCUMENTATION EXERCISES-Slide 23

Be aware of the source of your documentation- chart according to the use of objective information as opposed to subjective information with your documentation.

1. Morris returned from the hospital after having a colon resection. He had three normal bowel movements during the next 48 hours. Today he is vomiting and has a stool that is watery. He has a temperature of 99.0.

Document your findings today:

Who do you notify?

What will you do next?

2. Jessica was complaining of neck pain and received her prn medication of Demerol, but she still was uncomfortable. There was an order that a bed buddy could be warmed and applied to her neck for discomfort. The bed buddy was placed in the microwave and applied to her neck. When you checked on it 30 minutes later, her neck has watery blisters forming.

Document this incident:

Who do you notify?

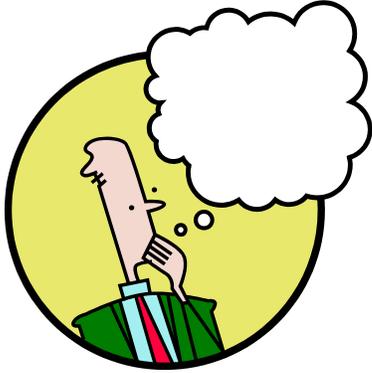
What other action do you need to take?

3. Christy fell as she was getting out of the van. She hit her head on the door and it was swollen and red immediately. Christy was taken to the hospital Emergency Room and was admitted for further evaluation. Saturday she was discharged home with no discharge instructions other than the physician saying there was nothing wrong and she should feel better in a day or two. Sunday morning Christy was nauseated and did not feel up to going to church. She began vomiting blood and also had blood in her urine.

Document this situation:

Who do you notify?

What action do you need to take now?



THINK TANK EXERCISES-Slide 24

Zachary threw a fit today. He made a fool of himself in front of everyone at Pizza Hut.

- After reading this statement, what do you know about Zach's outing today?
- What does this statement tell you about Zach?
- What does this statement tell you about the writer?
- What does it mean to "throw a fit"
- What does it mean to "make a fool of himself"

Keeping in mind 'FACTUAL and PERTINENT'-Write a statement that could be meaningful in Zach's consumer medical record about today's outing at Pizza Hut. Use your imagination about what might have happened.

SLIDE 25 Write the factual statements about what you can see.

SLIDE 26 ACCURATE vs OPINION

What is the difference in the two statements-which one would be factual and pertinent to enter into the medical record?

State the observed symptoms: _____

REVIEW EXERCISES
(Complete after viewing slides 27-31)

Please respond to these questions. T=true and F=false

1. Your attitude has nothing to do with how you document. _____
2. When you complete a daily note, you only need to use your initials to sign. _____
3. If the charting you completed cannot be read, that is not your problem. _____
4. You should always document what you did about a complaint or symptom that you have already charted about. _____
5. Anne has a seizure disorder. She receives medication that helps to control the frequency of her seizures. Which of the following observations need to be reported immediately?
 - a. Anne was sitting at the table and began to stare out of the window.
 - b. Anne was eating her food when she suddenly began to thrust about in her chair.
 - c. Anne fell forward hitting her head on the dinner table, causing a break in the skin with a lot of bleeding.
6. Richie has Cerebral Palsy and has been able to ambulate with the help of a walker. Today as he is getting ready for work, you notice he is leaning to the right. You are concerned that he is losing his balance and may fall. He denies that there is anything wrong, but even as he is walking down the hall, he continues to lean to the right. (You have never seen him do this before.) Do you report this? _____
7. You have just checked the monthly weights for everyone in the ISL. As you record the weights, you notice that Elliot has gained 6 pounds since last month. What action do you take?
8. Kim returns home from work today complaining of a headache behind her eyes. You can see drainage from both eyes and her nose. What will you do?
9. When you get ready to chart about Jackson today, you notice that the day shift forgot to chart. Do you:
 - a. Leave a blank space for them to complete it tomorrow.
 - b. Date and time today's entry and chart as usual.