

DOCUMENTATION POLICY

Documentation is required to be completed by administrative and supported living staff for various purposes and at various times. It consists of the administrative information required by APD and data collected by staff in the course of working with individuals. Administrative information includes but is not limited to hiring information, forms, management plan, and policies. Data collected by staff includes but is not limited to service logs, notes, other information as it pertains to an individual. All information is subject to review by APD, Delmarva, and AHCA and is ultimately used to assist in providing quality services.

Documentation must be completed promptly, accurately, and turned in on time. Documentation may NOT contain scratch outs, scribbles, doodles, white-out, erasures. Documentation must contain language that is objective, clear, concise, and accurate. It should not contain personal opinions.

Documentation begins before a new client starts services. **The Reference Guide** contains 1 copy of all the required materials staff need to work with any client. Blank forms are also included. Staff make copies of all the required paperwork as needed and in some cases 2 copies of completed paperwork are needed, 1 for filing and 1 to give to the WSC.

Reviews are done quarterly and annually to update information about the client. During the Intake, Annual, and Quarterly reviews, **The Intake - Annual - Quarterly Checklist** is used to ensure all areas are covered.

During **Intake**, forms are used to assist staff in pinpointing the clients needs, wishes, and goals and also his health history, strengths, and weaknesses. Interviews with the client may occur prior to the client starting to ensure there is a good match between the client and the services provided. Client demographics, medical information, and a variety of topics are covered during intake and then annually and/or quarterly thereafter.

The **Annual Review** covers the previous 9 months of the client's current support plan year and the last 3 months of the previous support plan year and provides a comprehensive overview of the client's goal progress as well as other information about the client. This Annual Report is due each year during the 3rd Quarter. The Annual Report consists of all of the items shown on the checklist.

The **Quarterly Review** covers 3 months prior to the actual meeting with the client and WSC. Each quarter review is based on the individual client's Support Plan Effective Date (the month the support plan begins). The Quarterly Review includes a summary of activities and progress the client has made on his goals.

Person-Centered Planning is an approach used to assist the client with using his own capacity and potential for constructive action to realize his goals. Staff act as facilitators rather than directors, offering respect, acceptance, and understanding to the client to help empower him to realize his own potential. This approach is used when working with any client, particularly when planning for annual goals and working on goals from the individual's Support Plan.

Staff plan with the client what he wants his goals to be, how he will work on the goals, which staff and how staff will help, time limits and frequency for each goal, how progress will be assessed, and how the client will know he has accomplished his goal. For each goal, a plan of action is developed:

- * **Performance** - what the client will do (activities, tasks, etc) to work on the goal
- * **Strategies/Assistance** - what staff will do to help the client to achieve the goal
- * **Training Method(s)** - most appropriate for the client and the goal (demonstrate, verbal prompts, physical prompts, repetition, explanation, pictures)
- * **Frequency** - how often staff will provide help/support the client
- * **Time Limit** - how long the client wants to work on the goal/when he should be finished
- * **Assessment** - how progress will be measured, including how the client will know he is making progress on the goal, his satisfaction with the goal, and the projected results of the training

When the person-centered planning is complete, the goals are written on the Annual Summary and provided to the support coordinator to use when writing the Support Plan. The Person-Centered Planning may then be used to develop the Implementation Plan once the Support Plan is received. If the goals on the Support Plan are not the same as the goals the client decided on during his person-centered planning, a **Support Plan Update** is provided to the WSC to ensure the Support Plan reflects a person-centered approach, driven by the client. This Support Plan Update is also used throughout the individual's support plan year to track goal additions, deletions, and completion.

5- The End of Monthly Summary is a summary of the month's non-goal related activities, meetings, appointments, problems, decisions/choices made, new things learned, talk/action about rights/responsibilities, etc. A summary of the month's goal related activities and client's progress toward completing each goal (a summary of the weekly goal progress section). This summary can be used when writing the Quarterly/Annual Report.

Other items filed in the client's casebook annually or if the client's situation changes include:

* Lease/Deed

* Guardianship Papers/Living Will/Health Care Surrogate Papers

* Medicaid/FS/SS/Rep-Payee

The SLC is responsible for ensuring copies are provided to the office for filing. Medicaid, Foodstamp, Social Security, and Representative Payee reports and updates must be done on a timely basis, when required.

The **Spa Form** provides authorization for each service provided to the client.

The **Support Plan** is written by the WSC after a meeting with the client and after having received the Annual Report. It identifies personal information about the client and also specifies the goals he will work on for his support plan year.

I have read and fully understand the Documentation Policy and agree to follow its dictates.

Staff Signature

Date