OpenDoors

Writing Notes

Tips for the Transition Specialist

We Will Review

- When are notes needed
- Tips on writing accurate notes
- Review the Contact Note tab in the data base
- Questions and Answers

When Are Notes Needed?

- All Transition Specialists are required to keep running contact notes on all participants.
- You must document **ALL** contacts, and attempted contacts, with and about, the participants you are working with.
- This includes everything you do, every call you make, every call you receive, every meeting or discussion you have with, or pertaining to, the individuals you are working with.
- It includes calls and discussions you have about setting up meetings and QOL Surveys,
- This includes all contacts with the participant, family members, advocates, facility staff, community agency staff, all face to face visits, phone calls, emails, discussions with other professionals, all referrals you make, discussions with family members, when you are opening a case and closing it, etc.
- Anyone involved can write a note, TS, Peers, NYAIL Admin, NYAIL Nurse, Housing Specialist

Some examples of instances when you need to write a note

- **When ever you do anything for, with, or about the individual**
- Whenever you contact anyone, the participant, family, NHDP, Waiver staff, MLTC etc.
- When you set up a meeting
- When you meet with someone
- When you talk with a NHDP about a participant
- Whenever you make a referral of any kind
- When you talk to a family member
- When you complete a form
- When you call to set up a QOL
- When you do a QOL
- When you send an email to the service provider, NHDP, the participant, family etc.
- All attempted phone calls
- **When you close a case you must have a corresponding note.**
- ETC., ETC. ETC.

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Types of Notes

There are only two types of notes you will be writing.

1. Transition Notes – all notes completed PRIOR to the individual transitioning to community living.
2. Transition Discharge Follow-up – All notes completed AFTER the individual transitions to community living.

Note Date

- The date of the note is the date of the actual contact
- You have 5 days to put the note into the database. Regardless of when you actually write the note, the date should reflect when the contact occurred.

Tips on Writing Notes

- Contact Notes should be a chronological record of EVERYTHING that has occurred regarding the participant.
- By reviewing the notes, anyone should be able to have a clear understanding of
  - everything you have done for or with the participant.
  - exactly where the participant is in the transition or post transition process.

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Notes Need to be Specific

Notes Need to Include

- **Who:** Who was involved in the contact or attempted contact. Include the Name and Title of the person/people involved.
- **What** – What was the purpose of the contact. What did you do? What did you discuss, arrange, email, send, etc.?
- **What** was the outcome?
- **What is next**?- Include what the next step is and who is going to do it

Example

Too Vague

- Reached out to Susan Taylor

Specific

- Spoke with Susan Taylor, Medicaid worker at DSS regarding Jane Smith's Medicaid status. Susan reports that Jane's Medicaid is still pending but should be approved by the end of the month.

Examples

Too Vague

- Spoke to Tara and discussed options.

Specific

- Spoke with Mary's daughter Tara. We discussed NHTD, MLTC, Consumer Direct services, and housing options. Tara feels the NHTD Waiver would best meet her mother's needs. I will meet with Mary next week to discuss this and the process of moving forward with a waiver referral.

Stick to the Facts

- Document the facts of the situation.
- Try to avoid documenting your opinions.
- If you are documenting your opinion make sure to document the facts that back up your opinion

Example

Opinion based

- I think Mr. Jones should stay in the nursing home due to safety issues.

Fact based:

- At this time Mr. Jones' needs cannot be met in the community. Due to his very high medical needs including daily insulin injections and wound care, the denial for service from the NHTD Waiver, the current lack of other community based services and his lack of community/family support, a transition back to the community is not possible at this time.

Notes should be Non-judgmental

- Contact notes should be constructed in a professional factual manner.
- Notes should never be judgmental
- Notes should never contain derogatory language
- A good way to ensure that the case note is not judgmental or derogatory is to ask yourself "would the individual, or any individual I have mentioned in this case note, be offended by what I wrote?"

Example

Judgmental/derogatory :

- Met with Mary for our post discharge follow-up meeting. She had a disgusting odor, was filthy, and her house was a disaster.

Non-judgmental version:

- Met with Mary at her home for our post discharge follow up meeting. Upon arrival TS noticed that Mary seemed to be having difficulty with personal hygiene as well as maintaining her home. We discussed this and Mary reports that her aide service has not been showing up. We called the SC who will look into this immediately.

Example

Judgmental

- Mary has been stuck in this place for 10 years which is not right. She has complained to everyone but no one will listen. She is just being ignored.

Non-judgmental

- Mary has been a resident of Oak Tree Nursing Home for 10 years. She reports that she has “complained to everyone”, but she feels that no one has been responsive. We discussed having a team meeting to discuss Mary’s desire to transition to the community. TS will contact the NHDP and Mary’s family to make arrangements for a team meeting.

Initial Meeting Notes

What should be included in an initial meeting note:

- Who you met with
- That you reviewed the Open Doors program,
- Whether they accepted or declined
- If you signed the consent form or not
- Where the participant would like to live
- If you reviewed TBI or NHTD Waivers, MLTC, Consumer Directed Aide Service
- If you reviewed community resources they will need
- Any information about the person's needs, (will need aides, emods, meals on wheels, etc.)
- If they have housing or will need housing
- Any medial/physical issues you talk about (diabetic, wheel chair user)

Example

Met with Eve Black, her daughter Marg Wilson, and the NHDP Sam Smith for the initial meeting . We reviewed the Open Doors program. Eve signed the IC. Eve was admitted to the NH after having had a stroke approximately 1 year ago. Eve uses a wheel chair but can transfer independently. She and the NHDP report that Eve is fairly independent with ADLs but does need minimal assistance. She is interested in aide service several times a week and will need housing. We reviewed the NHTD waiver, MLTC, and CDPAS for possible service options. Eve and her daughter will discuss her options and contact this TS regarding her decision. TS will also follow up with Eve within the next two weeks.

Don't Forget Attempted Contact Notes

- All attempted contacts must be noted.
- Be specific.
  - Did you call, stop by, text, email,
  - If you left a message make sure to say this in your note.
  - If you've requested they call back, or contact you, make sure to note this as well.
- Indicate that you have attempted to make a contact under "Form of Contact" tab in the database.

Example

Too Vague:

- Called Sam again
- Reached out to Sam Smith

Specific:

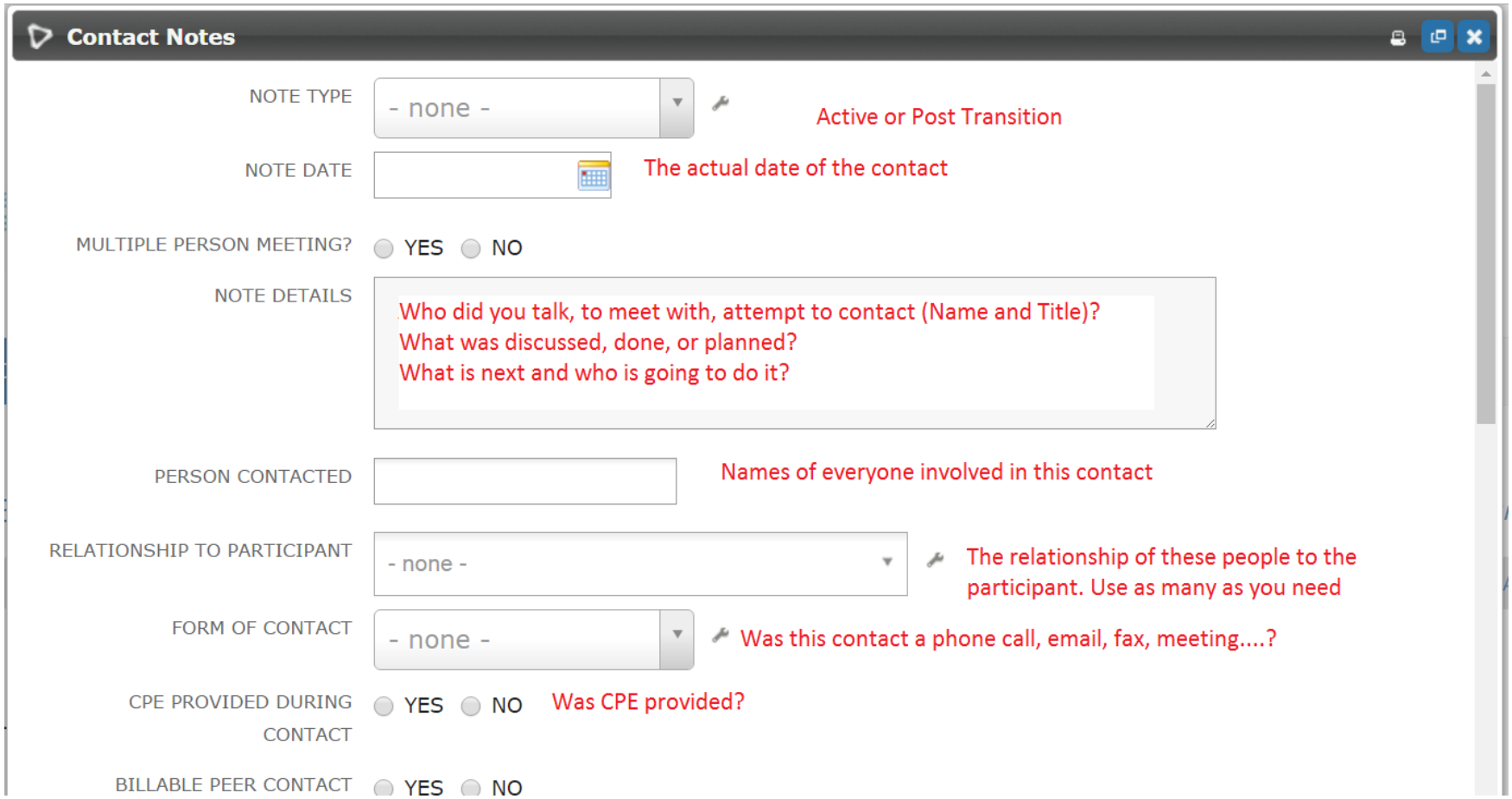
- Called Sam Smith (son). Left a message requesting a call back.
- Stopped by Kelly Bordens (NHDP) office while at the nursing home. Left a message with another SW in the office, requesting he contact me.

Putting Notes Into the Database

Remember, all notes must be kept in the Contact note section of the Open Doors Database.

- You can keep a paper file, or keep notes in your ILC database, as required by your agency, in addition to the Open doors database, but never instead of those in the Open Doors data base.

Database Contact Note Tab



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BILLABLE PEER CONTACT ○ YES ○ NO

FACE TO FACE HOURS

Round to quarter hour.

TRAVEL HOURS

Round to quarter hour.

MILEAGE

Round trip mileage to nearest whole number.

TOLLS/PARKING/PUBLIC TRANSPORT AMOUNT

Enter the total amount spent on parking, tolls, and public transport.

TOLLS/PARKING/PUBLIC TRANSPORT

Choose File No file chosen

Upload receipts.

NUMBER OF ADDITIONAL HOURS REQUESTED (INCLUDING ROUND TRIP TRAVEL TIME)

APPROVED PEER HOURS

Transition Specialists do not fill this section out. This is for Peers only

Follow-up

Contact Notes

FOLLOW-UP ◉ YES ○ NO ✖

FOLLOW-UP NOTE

RL will contact [redacted] on Wednesday, Oct 26th to make sure that the VNA Options Evaluation has been scheduled... and schedule to be available to attend the evaluation.

FOLLOW-UP TO BE COMPLETED BY Name of person following up

FOLLOW-UP DATE 10/26/2016 TIME ✖

FOLLOW-UP COMPLETED ○ YES ○ NO

MATERIALS GIVEN ○ YES ○ NO

MATERIALS

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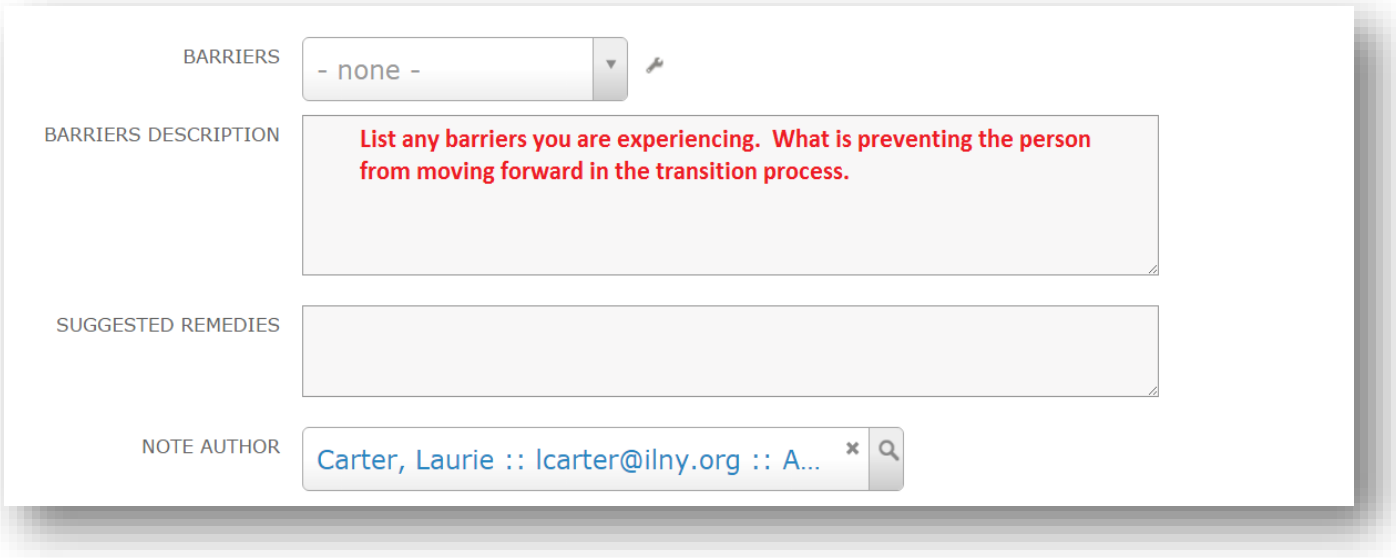
Barriers Section of the Note



- By using the barriers section, you are letting OPWDD and DOH know about the barriers you are experiencing. This is very important. Both DOH and OPWDD want to know this information.

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Follow-Up Report

- Go to the Reports tab.
- Go to Regional Lead & Transition Specialist Reports
- Select your reporting period, region etc.
- Go to Report # 12 Follow-up Report

12: Follow-up Report

Juanita Clark-Abolafia

Name	Current Phone	Follow-up to be Completed by	Follow-up Date	Follow-up Note
[redacted]			10/13/2016	Emailed Lisa to get the contact information for the assigned NHDP -- once receive I will schedule a meeting with Cynthia
[redacted]			10/26/2016	Eileen called to cancel the intake for Tuesday @ 10:30... becaused that this resident will be going through the county-- A Protective services to be evaluated on if she is safe to return to the community -- and may not require Open Doors servic Call on Wed, Oct 26th to check on the status of scheduling an intake for resident
[redacted]	315-224-3360 (Mary Jo - mother)		10/26/2016	Will conduct home visit with Brendan on Wed, Oct 26 @ 3:00 pm and will Update the ARISE ILP Goals
[redacted]	315-449-6123		10/26/2016	On Wed, Oct 26th will contact Michelle and Brandi (daughter) to re-schedule intake for Mr. [redacted] or November 1st
[redacted]	315-777-7484 (cell)		10/26/2016	RL will contact LeiLoni on Wednesday, Oct 26th to make sure that the VNA Options Evaluation has been scheduled... ar schedule to be available to attend the evaluation.

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Summary

Everything you do, or try to do, for or with the participant must be documented in a Contact Note.

NOTES Must be:

- kept in the Open Doors database.
- In the database within 5 days of the actual contact
- List everyone involved in the contact and their title/role.
- Include what happened during the contact. What was discussed, decided, explained
- Notes should be factual, specific, detailed, and non-judgmental.
- Your notes are a clear record of everything that has been done for or with the individual, everyone who is involved, and should indicate exactly where the individual is in the transition process.
- Call NYAIL for assistance as needed.

REMEMBER

As far as an auditor is concerned

"if you didn't document it,
it wasn't done"

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