



NATIONAL ADULT PROTECTIVE
SERVICES ASSOCIATION

THE NATIONAL APS RESOURCE CENTER

Building your Case to Stand the Test of Time

Demonstrating Highlights from

NAPSA's Core Competency
Documentation Training



NATIONAL ADULT PROTECTIVE
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Presenters

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Disclaimers:

- Nothing we do or say here today represents in any fashion or form the opinion or position of the State of Tennessee Department of Human Services Adult Protective Services or the Oklahoma Department of Human Services Adult Protective Services.

Core APS Competencies Training

Training resources for the
Nation and your State.





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NAPSA and the 23 Core Competencies

- Through research and surveys NAPSA identified 23 Core Competencies that every new APS Worker should have some knowledge of.
- In 2006 training started to be developed by San Diego State University MASTER'S Program
- They are accessible to any State to be adapted to their Policy and Law
- Today we will present part of one of those Competencies - Documentation

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- Today we will demonstrate part of the Documentation Module developed by NAPSA. Our presentation looks nothing like the power point that you will find at the NAPSA website. The design has been changed, information added and deleted for our purpose today. The basic information was adapted for this presentation but could be done for any State's Law and Policy.

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- The test of a Vocation
is a love of the drudgery
it involves.
- Anonymous

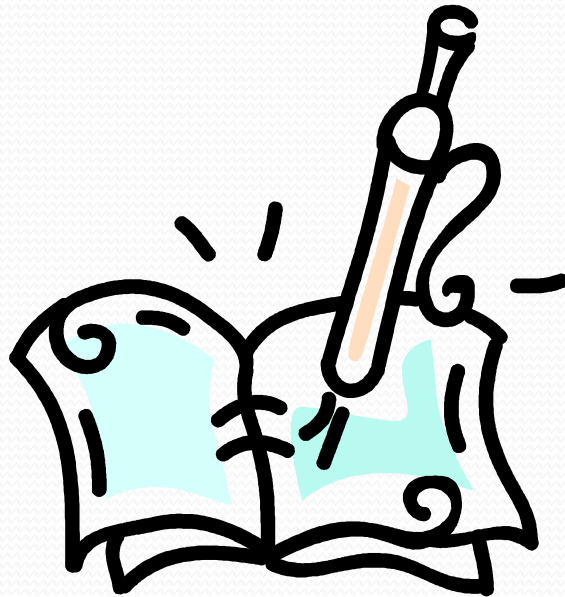
Learning Objectives

By the end of this training, you will be able to:

- Participants will learn the adaptability and availability of this and other APS Core Competency Training Modules.
- Participants will be able to
 - Describe the purpose of accurate, complete and timely documentation
 - Demonstrate the use of clear, concise, and objective language
 - Identify 4 types of equipment and their uses Discuss the importance of accurate recall
 - Discuss confidentiality as it relates to documentation
 - Discuss documentation needed for court including statements, evidence, and language
 - Analyze and rewrite APS report

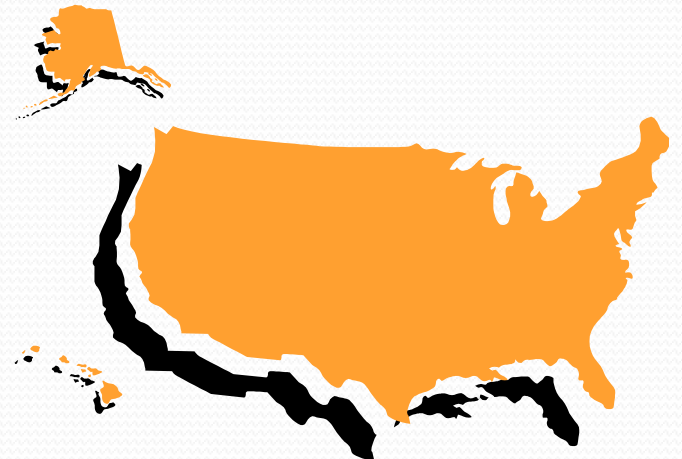
Question #1

- What I like or dislike about writing



Policy and practice

- APS legal mandate
- How we do it across the Country?
- Challenges



Question #2

- What is the purpose of documentation?



- Plain Old Documentation?

Purpose of Documentation



❑ Detailed and reliable case history, baseline data

❑ Evidence for legal involvement

❑ Accountability and liability

❑ Professionalism

❑ Consistency

❑ Justification for staff and funding for program

❑ Other

The Bottom Line

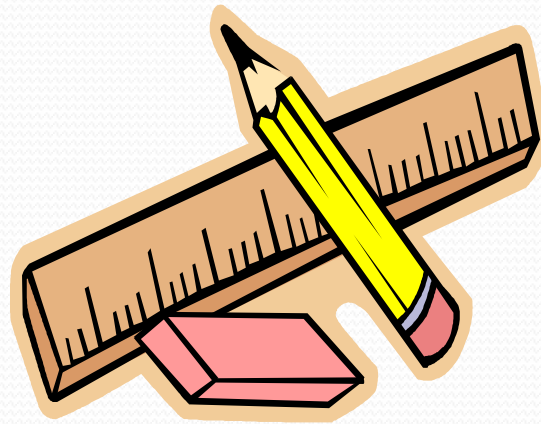
- You are in this “business” to help and protect vulnerable people
- To do this, you must build relationships AND build a case
- To build an effective case, you must DOCUMENT
- Documentation is an integral part of the helping relationship

Things to Consider:

- Who will read it?
- Where will it end up?
- How long will it take?
- Who benefits?

Standards for Documentation

- Accurate
- Complete
- Timely



Accurate

- Date, visit, phone call, contact, referrals
- Names , relationships, titles, ranks
 - Family, significant others, medical, law enforcement
- Language
 - Word usage
- Spelling
 - Issues with “spell check”



Case Documentation Sample

5/15/08 – Initial Assessment/Home Visit

Conducted visit at hospital. Client's daughter, M, was with client when SW arrived. Client is being treated for a heel ulcer and she reportedly had an operation yesterday. SW attempted to speak with client but she did not respond. Client was curled-up in the fetal position. She reportedly has pulled out her IV, so something is wrapped on both her hands to keep this from happening. Daughter also reported brother medicated client's sores with over the counter medication after consulting with her primary physician. Primary physician reportedly told brother that he can't treat something he hasn't seen. Daughter indicated that son was being stubborn and insisted on treating sores himself.

Complete: What should be included

- Required forms
- Progress notes
- Medical information
- Legal information
- Financial information

What should not be included

- Personal notes
- Scraps of paper
- Alterations
- Irrelevant information/ judgmental statements
- Should not be in the record – paper or computer



Timely

- Date and time all entries as soon as possible
 - Home visits
 - Visits to other locations
 - Office visits
 - Phone calls
 - Emails
 - Photos
 - Audiotapes
- Add all entries/case activities as soon as possible
- Identify where photos and audiotapes were recorded



Essential Components for Effective Documentation

- Clear and Factual
- Objective
- Concise

Just the Facts

- Direct and systematic observations
 - What you saw, heard, smelled
- Information obtained by other professionals
 - Medical diagnosis and prognosis
 - Bank statements
 - Legal documents
- Direct quotes
- Clear language
 - Understood by any reader
 - Acronyms and lingo beware

Activity – Handout



Rat Feces



Activity – Handout



Read the following narrative information carefully:

The worker walked into the kitchen and observed rats scurrying under the cabinets when the light was turned on. Feces were all over the floor. The client's daughter said her mother liked rats but she didn't like people. Mrs. Jones said she was surprised that the rats stayed around with so little food in the house, then she walked out of the room.

- *Now read the following statements about the narrative. Circle "T" if*
- *the statement is true, "F" if the statement is false,*
- *and "Q" if you do not know if its true or false.*

Activity – Handout



- T F Q 1. Rat feces covered the kitchen floor.
- T F Q 2. The client's daughter didn't provide her mother with enough food.
- T F Q 3. It was reported that the client liked people.
- T F Q 4. The worker turned on the kitchen light.
- T F Q 5. Mrs. Jones liked rats.
- T F Q 6. Someone turned on a light.
- T F Q 7. Mrs. Jones doesn't like people.
- T F Q 8. There was not very much food in the kitchen.
- T F Q 9. The client is ambulatory.
- T F Q 10. Mrs. Jones went to another room after she talked to the worker.
- T F Q 11. Rats went under the cabinets when the light was turned on.
- T F Q 12. The worker interviewed the client and her daughter.
- T F Q 13. The client's house was not very clean.
- T F Q 14. The worker walked into the kitchen.
- T F Q 15. The age of the client was not revealed in this part of the narrative.
- T F Q 16. Mrs. Jones was hungry.
- T F Q 17. The narrative mentions three people: the worker, the client, and the client's daughter.



OBSERVATION ACTIVITY

- Mr. Nobody Video Clip



A film by Lyn Wright for the National Film Board of Canada
Filmmakers Library 1989

Subjective vs Objective Descriptions

- Subjective : gives an interpretation of an observation. Two people seeing the same event might be likely to give different *subjective descriptions*.
- Objective: tells what was observed. Two people observing the same thing would probably give very similar *objective descriptions*.

Objective

- Be aware of your own values
 - What pushes your buttons?
- Watch your language
 - No judgmental, inflammatory, loaded words
- Use words like “seems” and “appears”
 - describe what led you to that conclusion

Objective Writing Activity – Handout

It's time to practice objective writing!

This activity has two parts:

- First identify why the statement given is NOT objective (is it judgmental or inflammatory?).
- Then rewrite the description using clear, objective, and descriptive language.

Concise

- Get to the point
- Answer: who, what, where, why, and how
- Avoid unnecessary and extraneous words
- Make sure info is relevant to the case



Case Record Diet Activity– Handout

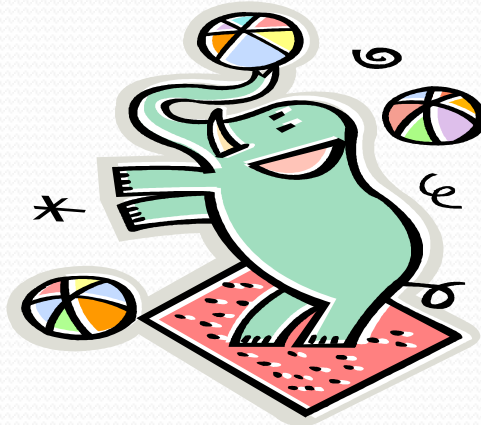


Cut out excess! Leave in essential nutrients.

- Reduce/edit the following case documentation entry making sure it is clear, objective and complete.
- Cross-out non-relevant information and make additions (if necessary) making sure only the most pertinent information is included.

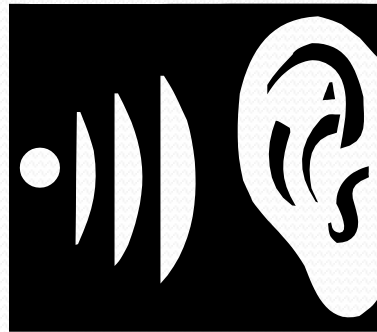
Memory Exercise

- Step 1 – Take one minute to view items under the blanket – you may not use paper or pencil.
- Step 2 – Return to your seats and list everything you saw.



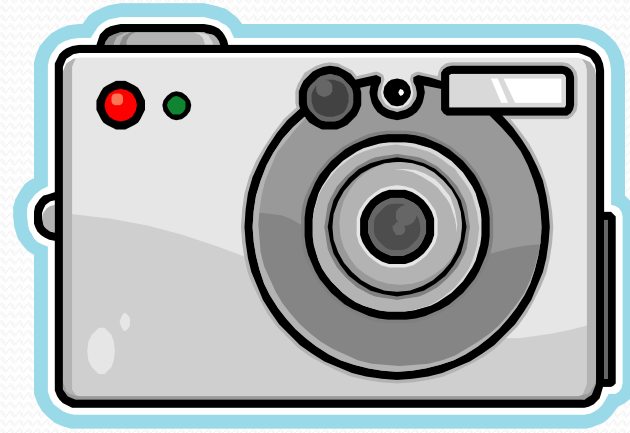
- A good listener is not only popular everywhere, but after a while, he knows something.

Wilson Mizner



Documentation equipment

- Camera (handout)
- Computer
- Body maps (handout)
- Field book
- Video
- Tape recorder



*Remember to obtain permission from client/victim
before photographing, audio/videotaping*



This gentleman was transferred to the hospital and received 2 pints of blood.



Everything in his room is covered in duct tape,
including the door, the table and the headboard.

Rule of Thirds (Demonstration)



Ethical issues – Handout

- Liability and immunity: myths and realities
 - Secrets and Lies
 - Inflation
 - Deflation
-
- Whose life is it anyway?

Top secret: when and where to share

- Confidentiality in the law
- With whom can you share documentation?
- Who needs to have what?
- Special concerns



Language for court reports

- Do
 - Use “victim states” rather than “victim alleges”
 - Build case on fact not opinion
 - Write in a way that can refresh your memory and bring you back to the situation
- Avoid
 - The word “story”
 - Labeling : no opinions or biased language

APS Documentation: Instructions for Activity

- Handout
- Read and analyze documentation samples
- Identify unclear and subjective items – feel free to circle and cross-out items
- Rewrite narratives, recording facts and observations to support the case and revising documentation to make it clear, objective, and concise.

In Closing....Remember no job is finished until the documentation is done – and done well!

- Thank you for your hard work!
 - Your questions?
 - Your impressions?
 - Enjoy the Conference!
- **Evaluations**



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