DOCUMENTATION
245D

This training is intended to show you how to complete required 245D documentation.

245D DOCUMENTATION

Who is responsible?

- Direct Support Professional (DSP)
- Designated Coordinator (DC)
- Designated Manager (DM)

Where is it documented?

- Sandata
- Cara Solva
- Paper Form

DOCUMENTATION SYSTEMS & METHODS

SANDATA

- Service Plan & Authorizations
- Daily Log Notes (DLN)
- Health Progress Notes (HPN)
- Outcomes (Goals)
- COVID-19 Symptom Tracker

CARA SOLVA

- Medication Administration Record (MAR)
- Health Progress Notes (HPN)

***Medication administration HPN entry only; complete all other types of HPN entries in Sandata*

PAPER FORMS

- Incidents/Emergencies
- Medication or Treatment Error/Refusal
- EUMR Incident Report
- PRN Actual Use Incident Report
- Seizure Report

ELECTRONIC HEALTH RECORD

SANDATA

- Sandata is a platform that provides DHHC with an online electronic health record.

- All individuals receiving services at DHHC will have a profile in Sandata.

- Except for a few forms/reports that must be handwritten on paper, staff will complete required 245D documentation electronically in Sandata.

CARA SOLVA

- Cara Solva is a platform that provides DHHC with an online electronic health record.

- Only the individuals at DHHC who receive services that include authorization for medication administration (administration, assistance or set-up) will have a profile in Cara Solva.

- Staff will complete documentation on the Medication Administration Record (MAR) electronically in Cara Solva.

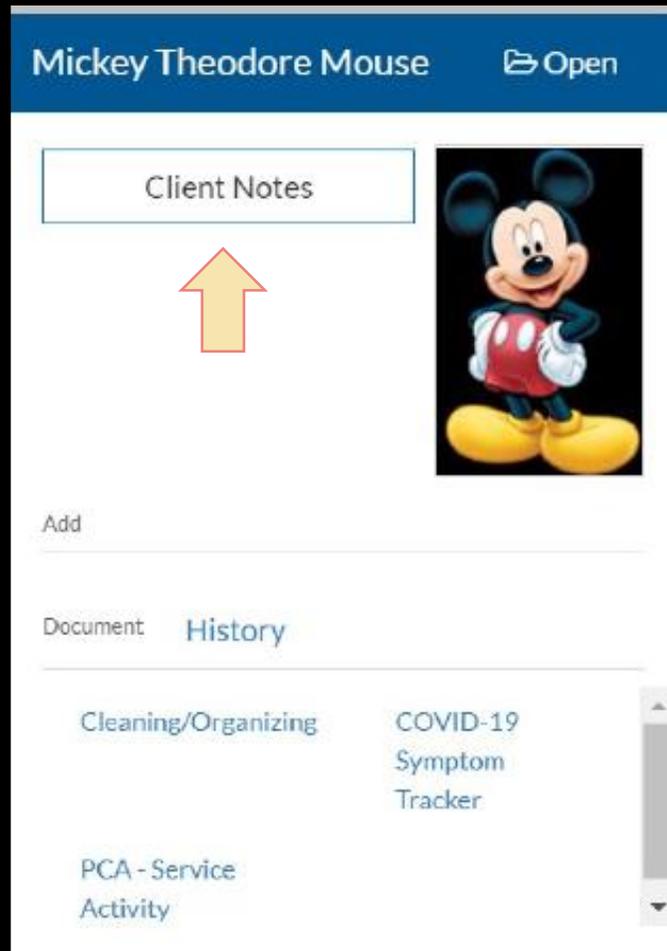- Additional training on Cara Solva will be provided if it is applicable to your position.

Staff are required to review service plan information as needed/updated.

- Go to Sandata (https://dataplus.solanapro.com/) and login.
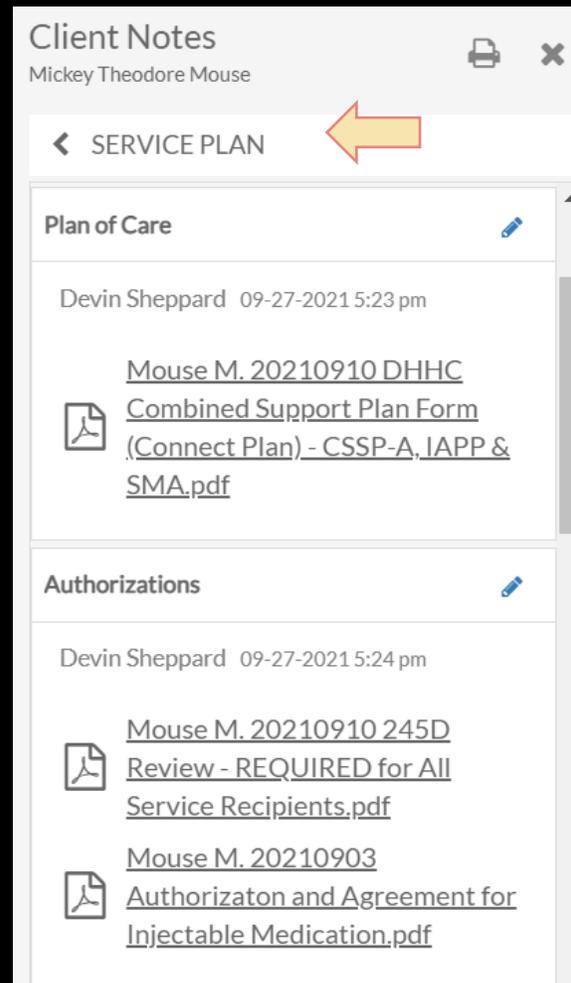- Select **Tasks** from the toolbar that is located on the left side of the webpage.
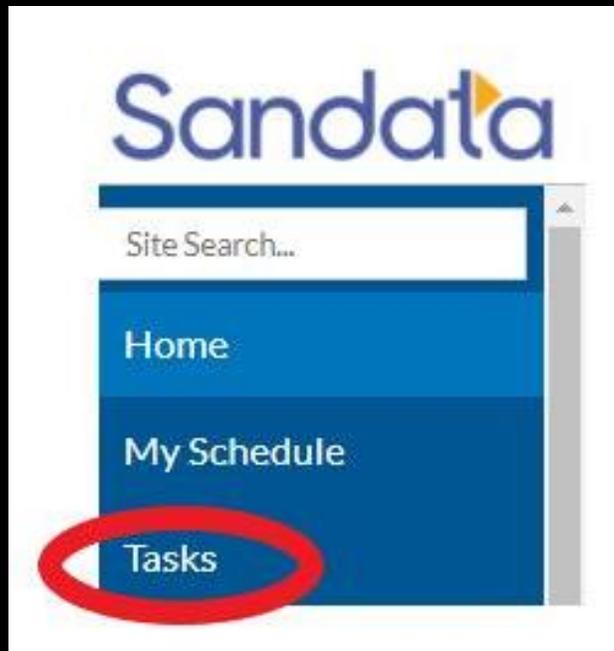
SERVICE PLAN

- Select **Client Notes**
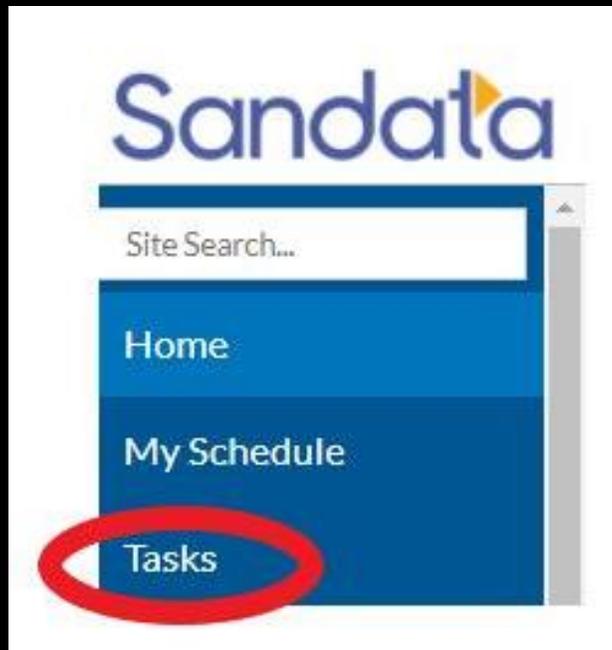
- Select **SERVICE PLAN and contents.**

SERVICE PLAN NOTEBOOK CONTENTS:

- Service & Support Plan (CSSP-A, SMA, IAPP)
- Service & Support Authorizations
- My Life Plan
- Specific Release of Information
- Healthcare Directive (DNR)
- Protocols (Seizure, Diabetic, PRN Psychotropic, etc.)
- Standing Order Medication List
- Healthcare Appointment Schedule
- Specialized Medical Equipment Instructions
- Other Important Support Information
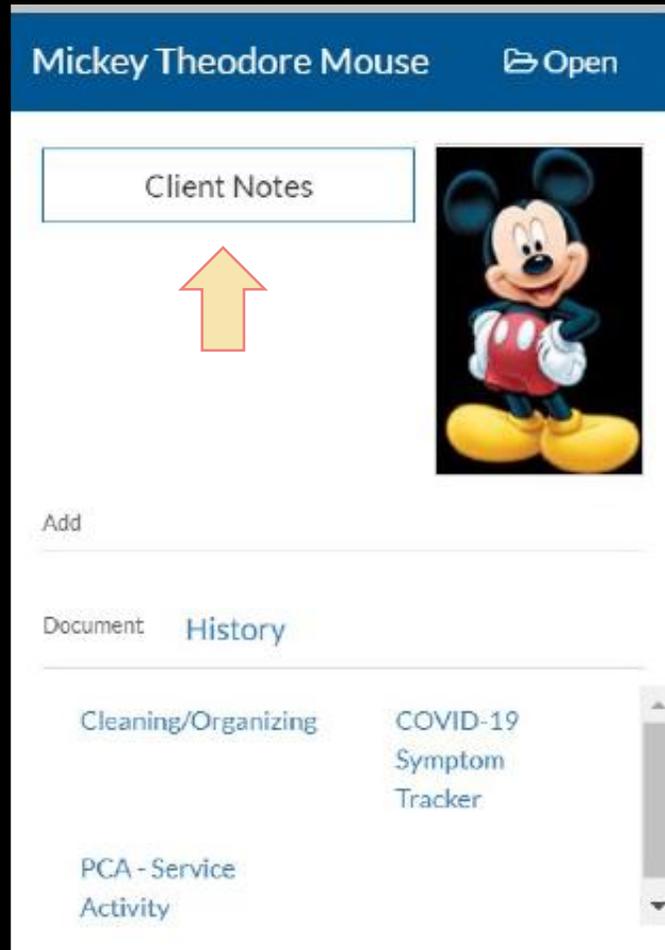
DAILY LOG NOTES (DLN)

Staff are required to complete a Daily Log Note (DLN) each shift.

- Go to Sandata (https://dataplus.solanapro.com/) and login.
- Select **Tasks** from the toolbar that is located on the left side of the webpage.

DAILY LOG NOTES (DLN)

- Select **Client Notes**

Mickey Theodore Mouse   ▷ Open

Client Notes

Add

Document   History

Cleaning/Organizing   COVID-19 Symptom Tracker

PCA - Service Activity

- Select **Daily Log Notes (DLN)**

Client Notes
Mickey Theodore Mouse

< Daily Log Notes (DLN)

20211110 9:00AM-1:30PM

Daffy Duck 11-10-2021 1:30 pm

Mickey was awake and socializing with his father in the living room when staff arrived for their shift. Staff confirmed with Mickey's father that he had taken his AM medication and completed all AM treatments (blood glucose) as needed. No concerns were communicated by Mickey's father. Mickey was in a good mood most of the shift and achieved his Cleaning/Organizing outcome independently. Mickey spent time in his bedroom organizing his clothing for the upcoming winter weather
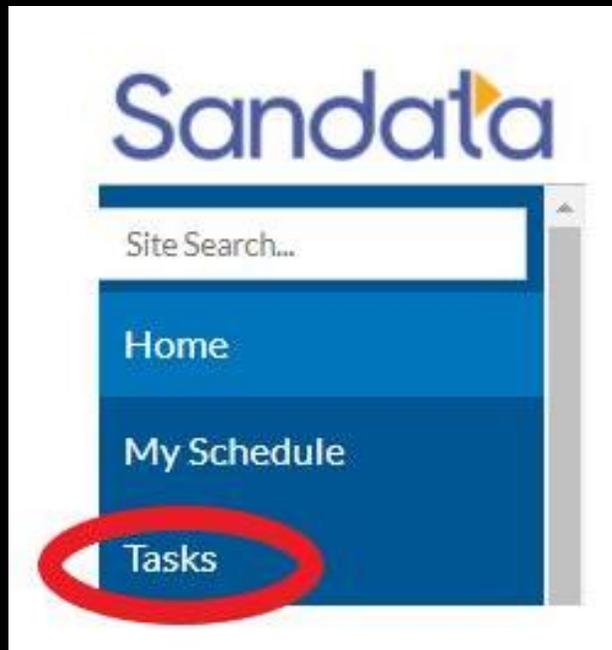
Subject

Message

DPN FORMAT

SUBJECT = **YYYYMMDD Start Time-End Time**

For example, if on 11/10/21 you worked 9am to 1:30pm, your subject for the DPN entry would be **20211110 9:00AM-1:30PM.**
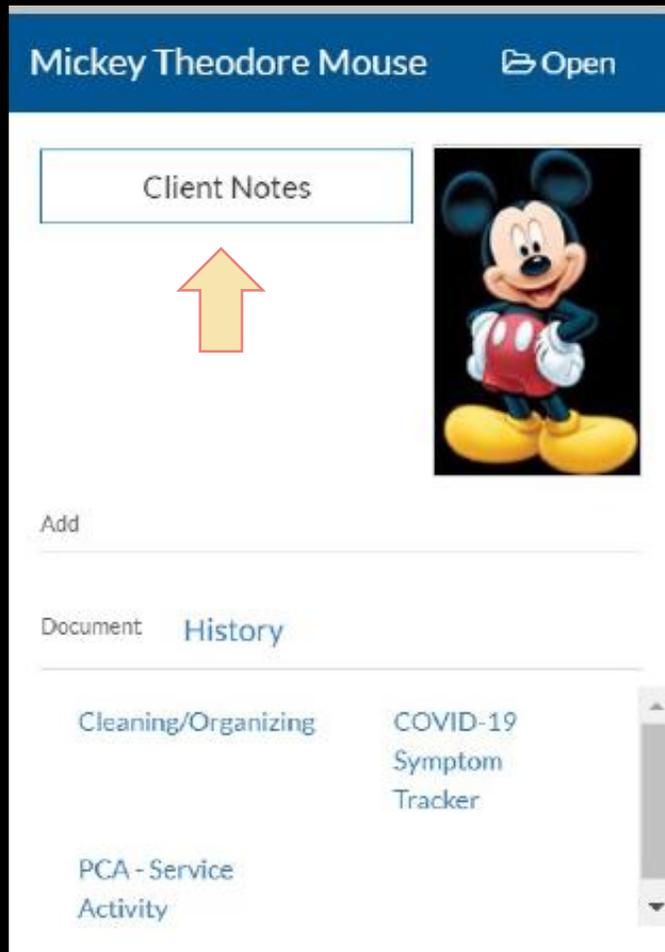
HEALTH PROGRESS NOTES (HPN)

Staff are required to complete a Health Progress Note (HPN) as needed.

- Go to Sandata (https://dataplus.solanapro.com/) and login.
- Select **Tasks** from the toolbar that is located on the left side of the webpage.

HEALTH PROGRESS NOTES (HPN)

- Select **Client Notes**

Mickey Theodore Mouse 📂 Open

Client Notes

Add

Document   History

Cleaning/Organizing   COVID-19 Symptom Tracker

PCA - Service Activity

- Select **Health Progress Notes (HPN)**

Client Notes ▭ ▼ 🖨 ✖
Mickey Theodore Mouse

‹ Health Progress Notes (HPN)

20211110 1:15PM Daffy Duck ✏
11-10-2021 1:35 pm

Mickey approached staff at approximately 12:45pm to report that his head was "hurting." Staff suggested Mickey spend time resting in his bedroom and he agreed. Mickey asked staff to read to him while in bed resting his eyes. Mickey continued to report symptoms consistent with a headache. Staff notified the DC and spoke to Mickey's father who agreed that a PRN medication could be administered. Staff administered two 500mg tablets of Acetaminophen/Tylenol as ordered on Mickey's

Subject 📎
Message 💾

HPN FORMAT

SUBJECT = **YYYYMMDD Time of Entry**

For example, if on 11/10/21 at 1:15pm a health-related concern is addressed (i.e. illness), the subject of your HPN would be **20211110 1:15PM.**

REMINDER = Review all prior HPN entries at the start of your shift. Complete follow up entries to the HPN section as needed. A follow up HPN entry is required each day and each shift until it is resolved.
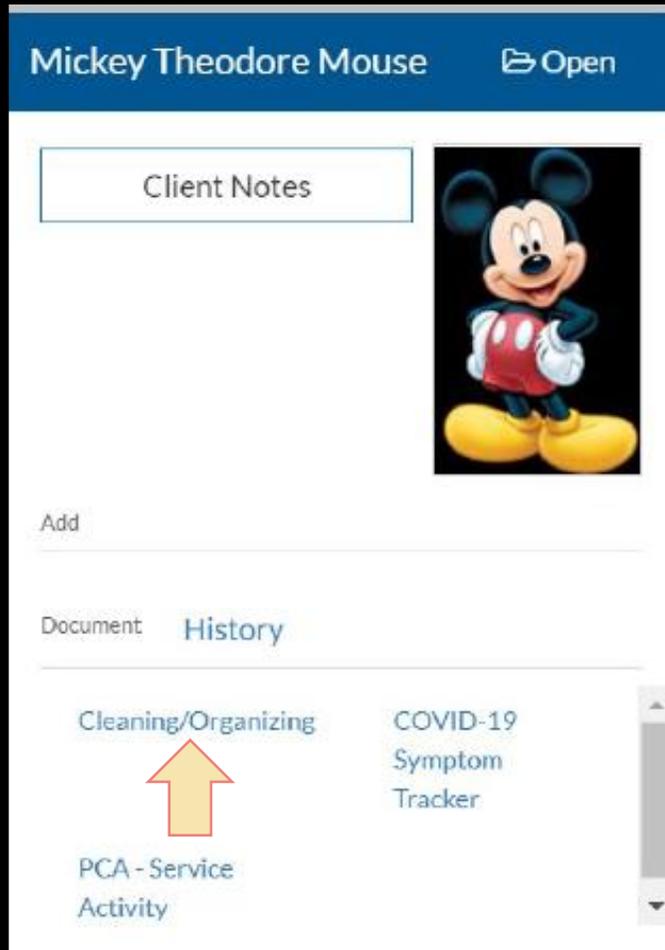
OUTCOMES (GOALS)

Staff are required to complete data collection documentation for outcomes (goals) each shift.

- Go to Sandata (https://dataplus.solanapro.com/) and login.
- Select **Tasks** from the toolbar that is located on the left side of the webpage.
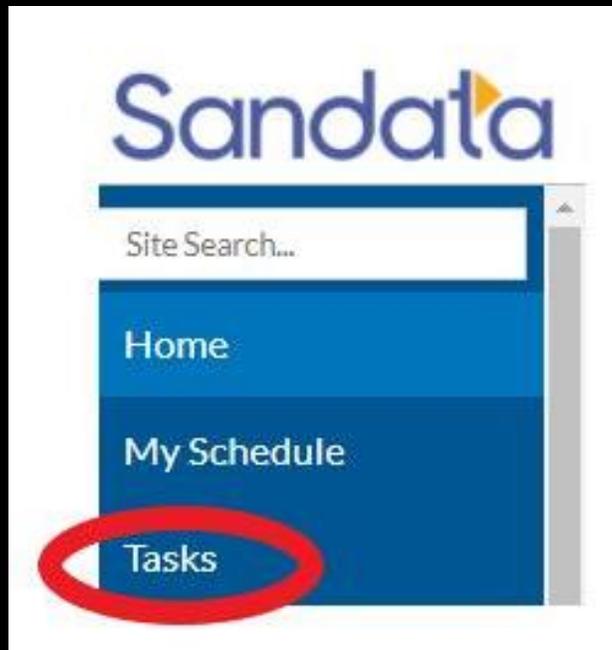
OUTCOMES (GOALS)

- Select the **LINK** to the Outcome

- Complete **ALL** items that are listed for that Outcome.
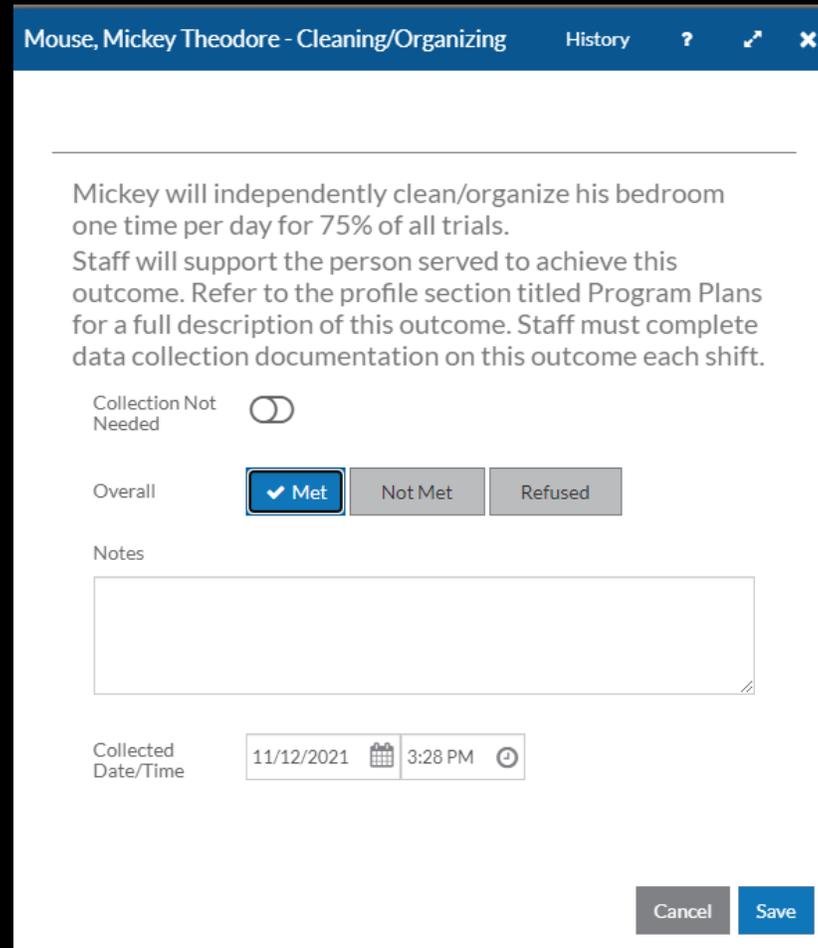
Mickey Theodore Mouse 📂 Open

Client Notes

Add

Document History

Cleaning/Organizing

COVID-19 Symptom Tracker

PCA - Service Activity

Mouse, Mickey Theodore - Cleaning/Organizing History ? ⤢ ✕

Mickey will independently clean/organize his bedroom one time per day for 75% of all trials.
Staff will support the person served to achieve this outcome. Refer to the profile section titled Program Plans for a full description of this outcome. Staff must complete data collection documentation on this outcome each shift.

Collection Not Needed ⬤

Overall ✔ Met   Not Met   Refused

Notes

Collected Date/Time 11/12/2021 📅 3:28 PM ⏱

Cancel   Save

COVID-19 SYMPTOM TRACKER

Staff are required to complete COVID-19 Symptom Tracker one time per day.

- Go to Sandata (https://dataplus.solanapro.com/) and login.
- Select **Tasks** from the toolbar that is located on the left side of the webpage.
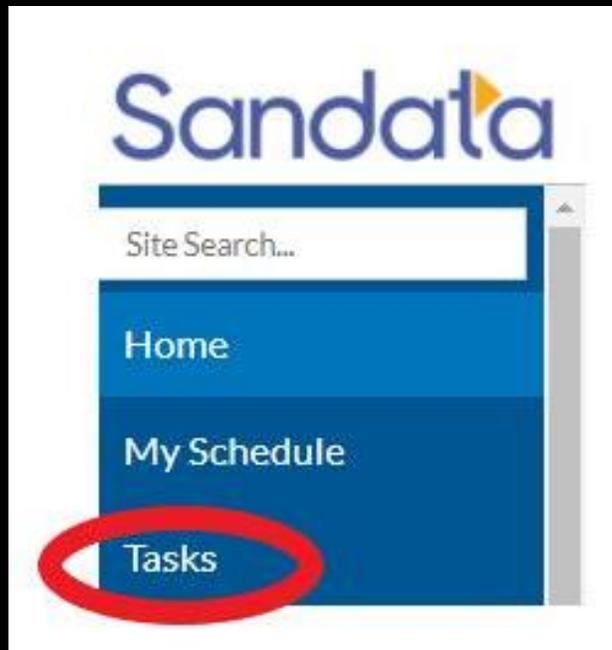
COVID-19 SYMPTOM TRACKER

- Select the **LINK** to the Tracker

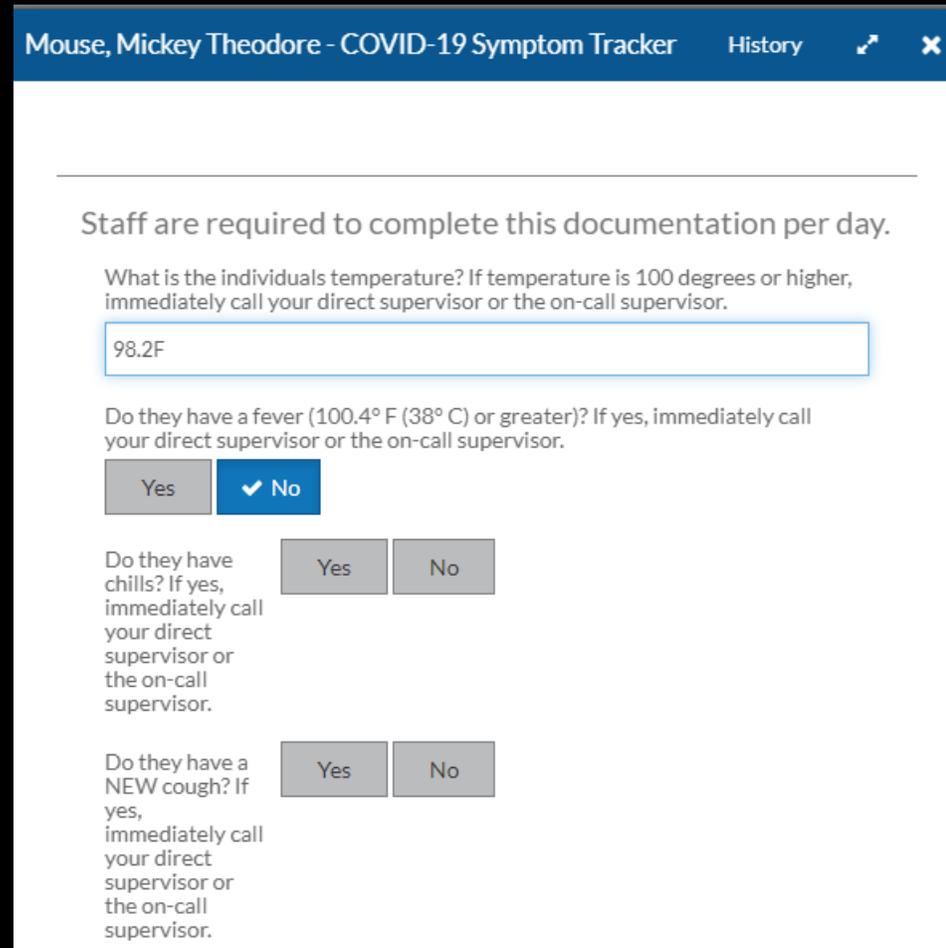- Complete **ALL** items that are listed for that Tracker.

REPORTABLE EVENTS

Staff are required to complete a specific type of report if there is a qualifying event.

All reports listed below are completed in **PAPER FORM** (vs. in Sandata or Cara Solva):

- Incident and Emergency Report
- Emergency Use of Manual Restraint Incident Report
- Medication or Treatment Error or Refusal Report
- PRN Actual Use Incident Report
- Seizure Report

Staff must contact (by telephone) their supervisor/on-call supervisor immediately to notify them of the event and to request the appropriate report form.

QUESTIONS???

If you ever have questions about documentation (who, what, where, when or how) contact your supervisor/on-call supervisor.