Module #15: APS Case Documentation and Report Writing

Intended Audience

This course is designed for new APS social workers as well as Aging & Adult Service partners (e.g. APS/IHSS, IHSS). This training is also appropriate for senior staff that require knowledge and/or skills review.

Learning Objectives

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

1) Describe the purpose of accurate, complete, and timely documentation.
2) Demonstrate the use of clear, concise, and objective language.
3) Identify at least 4 types of documentation equipment and describe their respective uses.
4) Discuss the importance of accurate recall and identify at least 3 memory improvement techniques.
5) Discuss confidentiality as it affects documentation relating to clients, law enforcement, and other professionals.
6) Discuss documentation needed for court including statements, evidence, and language
7) Analyze an APS report, identify poor documentation and rewrite report making sure it is clear, objective, and concise and has the elements which will stand up in court.

Competencies

This training specifically addresses the NAPSA competencies regarding

Importance of Case Documentation

- Proper case documentation for substantiation of ANE
- Identifying data to include in case records

Documentation Overview

- Gathering of facts/chains of evidence
- Clear, concise and objective documentation
- Updating chronological records to monitor client progress
- Required forms and instructions
- Tracking/recording guidelines
- Monitoring services by other agencies
- Best practice tips

Documentation Equipment Skills

- Cameras
- Videos
- Tape recorders
- Computers
- Body maps

**Confidentiality of Records**
- Client permission to share information
- Legal issues (e.g. subpoena of records)

**Report Writing Skills**

**Audio /visual aids**
1. PowerPoint projector and file
2. Small items which can be found in an APS client home and blanket/sheet to wrap them in (for memory exercise)
3. Flip chart and markers
4. Participant and Evaluation manuals
5. Videos clips
6. DVD player and TV/projector hook-up
<table>
<thead>
<tr>
<th>Content</th>
<th>Total Time</th>
<th>Activities</th>
<th>Slides/Handouts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome &amp; Overview</td>
<td>25 min</td>
<td>Introductions, Lecture &amp; Evaluation Activity</td>
<td>Slides 1-6</td>
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<tr>
<td>Icebreaker: What We Like Or Dislike About Writing</td>
<td>10 min</td>
<td>Activity &amp; small/large group discussion</td>
<td>Slide 7</td>
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<tr>
<td>Documentation Overview</td>
<td>45 min</td>
<td>Lecture, handouts, activities, case example &amp; small/large group discussion</td>
<td>Slides 8-18</td>
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<tr>
<td>Break</td>
<td>15 min.</td>
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<td>Handout #1, 2 &amp; 3</td>
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<tr>
<td>Clear, Concise, Objective &amp; Timely Documentation</td>
<td>85 min.</td>
<td>Lecture, handouts, activities, exercises &amp; small/large group discussion</td>
<td>Slides 19-29</td>
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<tr>
<td>Lunch</td>
<td>60 min.</td>
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<td>Handout #4, 5, 7 &amp; 8</td>
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<tr>
<td>Memory Exercise/Memory tips</td>
<td>25 min</td>
<td>Lecture, table top activity, handouts &amp; group discussion</td>
<td>Slide 30-31</td>
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<tr>
<td>Equipment/Visuals Used for Documentation</td>
<td>10 min</td>
<td>Lecture, handouts &amp; group discussion</td>
<td>Slide 32 Handout #11 &amp; 12</td>
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<tr>
<td>Ethical Considerations Related to Documentation</td>
<td>15 min</td>
<td>Lecture, handout &amp; group discussion</td>
<td>Slide 33 Handouts #13</td>
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<tr>
<td>Confidentiality as Related to Documentation</td>
<td>20 min</td>
<td>Lecture, handout &amp; discussion</td>
<td>Slide 34 Handout #14</td>
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<tr>
<td>Report Writing for Court</td>
<td>30 min</td>
<td>Lecture &amp;</td>
<td>Slides 35-38</td>
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<tr>
<td>Activity</td>
<td>Duration</td>
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<tr>
<td><strong>BREAK</strong></td>
<td>15 min</td>
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<tr>
<td><strong>Conservatorship: Documentation</strong></td>
<td>15 min</td>
<td>Lecture &amp; handouts, Slides 39-41, Handout #15, NAPSA Core Competencies resource sheet, and sample conservatorship referral packet</td>
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<tr>
<td><strong>APS Report Activity</strong></td>
<td>35 min</td>
<td>Activity, handout, small/large group discussion, Slide 42, Handout #16</td>
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<tr>
<td><strong>Closing &amp; Evaluations</strong></td>
<td>15 min</td>
<td>Closing, Q &amp; A, &amp; evaluations, Slide 43, Handouts: Evaluations &amp; take-home transfer of learning activity instructions</td>
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<td><strong>TOTAL TIME</strong></td>
<td>7 hrs</td>
<td>7 hrs (including 1 hour lunch)</td>
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**Bibliography**


Memory Skills: [http://www.mindtools.com/memory.html](http://www.mindtools.com/memory.html)

Nation Adult Protective Services Association: [www.apsnetwork.org](http://www.apsnetwork.org)

National Center on Elder Abuse: [http://www.ncea.aoa.gov/ncearoot/Main_Site/index.aspx](http://www.ncea.aoa.gov/ncearoot/Main_Site/index.aspx)