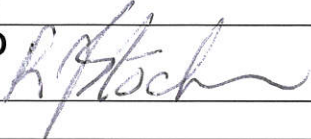




**PERSONAL ATTENDANT CARE INC.**  
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<b>Operational Procedure Number</b>		<b>5:06</b>
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<b>DEPARTMENT</b>		Client Services
<b>SUBJECT</b>		Client Documentation
<b>APPROVED BY (Signature)</b>	<b>CHIEF EXECUTIVE OFFICER</b>	<b>Rick Stockman, CEO</b> 
<b>APPROVED DATE</b>		October 10, 2007
<b>REVIEWED BY (Title &amp; Signature)</b>		Anne Winacott, Client Service Manager
<b>REVIEW DATE</b>		September 2015

**OPERATIONAL PROCEDURES**

The care and tasks completed for the client at each service must be documented, to fulfill legislative requirements, provide communication between staff members, demonstrate accountability, provide quality assurance and facilitate research.

Documentation allows:

- Standardized method of documenting the tasks and the time spent to provide service to all clients on the Client Service Report;
- Reflect any changes in client status/needs on the Client Progress Notes;
- Provides an important communication tool that will ensure continuity and close observation in client care between the Personal Support Worker and the Client Service Supervisor.

It is the shared responsibility of each Personal Support Worker to ensure that sufficient amount of documentation forms is provided in the Personal Attendant Care Inc. client folder. Copies are available at the office.

**Procedures**

**Client Service Report**

- Complete the appropriate Client Service Report at each service. Each Report is colour coded to identify time of service:
  - Pink = AM (06:00hrs – 12:00hrs)
  - Green = NOON (12:00hrs – 16:00hrs)
  - Blue = PM (16:00hrs – 24:00hrs)
- Note: The appropriate form used will reflect when the service time begins. (i.e. If service is scheduled from 11:00hrs – 13:00hrs, then a pink report would apply)
- Form is completed in blue or black ink only. Adhere to the legend provided at the top to ensure that all boxes are filled in with a check mark, a cross or a line where applicable.

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- Verbal Report is only to be checked off when documentation has been completed on the Client Progress Notes. Notification would apply to family member and/or caregiver, Supervisor and/or designate or administrative personnel.
- Each Personal Support Worker providing service to the client over that particular month will provide their initial and signature at the bottom of the form (one time only).
- The Client Service Report is to be signed by the client on the last scheduled service for the month. This can be via client signature, mark or by a family member at the client's request.
- The Personal Support Worker providing the last service to the client for that month is responsible for transporting the forms to the office by the first pay Friday of the following month.
- The Client Services Supervisor will review, sign and forward the completed forms to administrative personnel for input into tracking spreadsheet and filing.
- All clients and the services we provide are unique; if there are any discrepancies; contact the Client Service Supervisor to discuss.

### **Client Progress Notes**

Client Progress Notes are used as a communication tool to assist the Personal Support Worker with the transfer of information pertaining to client status and care provided.

- All documentation should be brief and to the point including only pertinent information beneficial in addressing client needs and condition.
- The attendant will indicate the level of pain indicated by the client in the written and verbal report.
- Personal Support Workers are to complete a verbal report of concerns and/or changes in condition documented on the Client Progress Notes to the office immediately.
- Each Personal Support Worker documenting on the Client Progress Notes will provide their initials and signature at the top of the form (one time only) and on the right side of form when new information is documented.
- Documentation on the Client Progress Notes will communicate to other Personal Support Workers that the concern/issue was reported.
- The Client Service Report will reflect that Client Progress Notes were completed by checking the appropriate box. In some situations, further documentation may be required such as the Client Incident Form or Potential Health and Safety Form.
- All Client Progress Notes will be kept on the left hand side of the Personal Attendant Care Inc. folder in the client's home.
- Completed Client Progress Notes will be transported by the Personal Support Worker to the office.

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- It is the responsibility of the Personal Support Worker removing the completed Client Progress Notes to transfer any information onto the new Client Progress Notes that requires continued communication.
- The Client Services Supervisor will review and file a copy of the returned Client Progress Notes and any other applicable documentation in the client file.

### Equipment Checks

Equipment Checks ensure equipment used at the client's home is in safe working condition. The inspection will ensure both client and staff are safe during client care.

- Complete Equipment Check prior to each service in blue or black pen only. If multiple services provided, additional forms are to be completed.
- The forms are colour coded to identify time of service; see "Client Service Report" above.
- If a potential hazard is identified and/or the equipment is deemed unsafe/inoperable the employee will follow instructions identified in the Health and Safety Incident Investigation and Inspection Operational Procedure 4:02.
- The Personal Support Worker completing the form must initial at the bottom of each column they have completed and provide their initial and signature at the bottom of the form (one time only).
- The Personal Support Worker providing the last service to the client for that month is responsible for transporting the form to the office by the first pay Friday of the following month.
- It is the responsibility of the Client Service Supervisor to review, sign, date and forward to the applicable administrative staff member for tracking.

### Attached Forms

Client Incident Report	4(p)
Potential Health & Safety	4(i)
Client Progress Notes	5(h)
Client Service Report	5(i)
Equipment Checks	4(d)