Aging and Disability Resource Center Documentation Guide

Notation	Content	Questions To Ask	Core Competencies/Standard
ASSESSMENT OF NEED/SITUATION Objective ***data*** about consumers current presenting problems and needs Subjective impression of needs not spoken and/ or I & A workers feelings on priority needs backed up by the objective data. ***Descriptive***	***Assess*** the ***needs, skills, abilities*** of the individual thoroughly Assess ***why are they calling today*** ***Primary diagnosis*** Explore ***formal and informal supports*** already in place or needed. ***Financial status*** ***Could another reader get a good picture of what is***	What brought you here today? What physical problems have you been having? Other types of problems? What led you to calling today? What are your main concerns or questions? Do you take lots of mediation? Do you see the doctor often? For what reasons? Are you able to get around in your home easily? Taking a bath? Meals?	• Determine the Needs • Assess Values and Preference • Be sure to note if a functional screen has been done • Be sure to document if a psycho-social has been done and its location • Be sure to note if release's have been completed • Be sure to note if a hard file was created

Notation	Content	Questions To Ask	Core Competencies/Standard
	going on in order to back you up?	Have you noticed any memory problems? When do you feel the best? Do you like your caregivers? Feel like you need more help? With what types of things? Are you having trouble keeping up your home? Do you feel lonely? Do you like to be around people? Do you see your family as often as you would like? Who is most helpful to you? Where do you see yourself 1 year from now? Where would you like to be? What steps would help you get there?	

Notation	Content	Questions To Ask	Core Competencies/Standard
RESOURCES/OPTIONS Education –subjective and individualized information regarding the available resources that meet a ***Particular*** individuals needs ***Individualization***	***Weigh Pro/Cons*** ***Decision support*** ***Individualized-the resources discussed will only make sense for this individual person-you could not use the same script for everyone***	Lets discuss the resource choices you have-what would you like to start with first? Lets compare the different options regarding the same type of service Lets talk about what this might cost you in the short term and in the long term Which choice makes the most sense to you or which do you prefer? Why would you prefer that? From 1-10 what services would you want most? What sorts of services have worked best for you in the past?	• Educate about public and private resources • Demonstrate respect for Self-Determination

Notation	Content	Questions To Ask	Core Competencies/Standard
ACTION STEPS What are the ***1st steps*** the consumers will take and who will do them ***Summarize and reflect***	***Bullets format of the next several steps and who is going to assist with them.***	Where would you like to start? What are your priorities to handle first? Who can help with these steps? What other assistance might you need to get these done? Can I call you back to follow up on whether these worked? Can I leave a message with someone at your home to have you call me?	• Encourage future orientation • Follow up Action steps must always be documented anytime Short Term Case Management is used as an activity