

QRG – HCW Narration and Documentation

Purpose:

Provide staff with consistent guidance regarding the information being narrated and documented in Oregon Provider Time Capture Direct Care Innovations (OR PTC DCI) notes section. OR PTC DCI has a notes feature that allows staff to put a note on the providers record or on specific punch entries.

UPDATE: See the last section for instructions on creating different types of notes in OR PTC DCI.

Who is the target audience?

The primary users of this tool will be HCW support staff and their supervisors. Supervisors may determine case managers (CM) also use the tool based on the volume and type of interactions they have with HCWs. Supervisors may also determine a protocol by which information is passed from CM to HCW support staff and only necessary information is narrated.

What is being narrated or documented?

Staff are encouraged to use the tool as much as possible to capture information specific to an individual HCW. The expectation is that this includes at a minimum;

Corrective actions:

- ❖ *HCW exceeded the 40-hour cap for work weeks 11/3/19 – 11/9/19 and 11/10/19 – 11/16/19. Contacted HCW and explained rule and CBA. Sent HCW letter, scanned into EDMS this date. Advised HCW that if there are additional violations, they may lose their provider number.*
- ❖ *HCW was referred to CO for termination due to violating HIPPA requirements. After completing an administrative review and discussing concerns with HCW this violation was limited in nature and was not intentional. HCWs provider number will not be terminated at this time and has been sent back to orientation for updated training and expectations to be completed by date.*

Work related issues:

- ❖ *Consumer, Prime #, called to report that HCW, number, failed to show for their scheduled shift on 9/12/2019 without reporting.*
- ❖ *Consumer, Prime #, called to report that HCW stole money and pills on 11/11/2019.*
- ❖ *HCW, provider #, reported that she is looking for work. HCW reported that she is available M/W/F from 8:30 am to 3:30 pm. HCW indicated that she is skilled with complex medication management, bed baths, meal preparation, and housekeeping.*

Documentation audit trails:

- ❖ *HCW hard files scanned into EDMS included: HCW Application dated 06/05/2019, 736, I-9, 9046B and a copy of current DL and insurance*

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- ❖ *HCW has been inactive since 05/31/2019. Hard file included applications dated 4/15/2017 and 03/04/2015, copies of DL, and HCW acknowledgement forms back to 03/2015. Files scanned into EDMS*
- ❖ *HCW came into office today dropped off completed renewal application and provided current copy of insurance. Scanned into EDMS.*

Some information is not appropriate for narration:

- ❖ Specific APS information regarding who is an alleged perpetrator or victim, or other details about the APS case.

NOTE: The facts that led to the referral and the corresponding case number may be narrated when applicable.

Example: Received phone call from client reporting HCW arrived at work smelling of alcohol and was sent home. Referred to APS and HCW Terminations

- ❖ Information regarding an individual's HIV/AIDS status
- ❖ Opinions, biases, or anything that is not a fact.
- ❖ Information related to an individual's DV status

Notes functionality in OR PTC DCI

Staff can use the Notes tool within the **Provider's profile** to leave notes the provider **cannot** see.

Staff can use the Notes tool within a **time entry or mileage** to leave notes that the provider **can** see.

Steps to use profile Notes:

1. Navigate to the provider's Employee Details Page
2. Click the Actions button in the upper right corner
3. Click on New Note
4. Enter a note type, subject, and fill out the body of the note. Click Save.

QRG - [How to Add a Note to Providers Profile](#)

Staff can view notes by scrolling down and clicking on the Notes tab.

Time/Mileage Entry Notes functionality:

There are several ways to add a Note to a time or mileage entry.

- Staff can add notes the Provider can see when rejecting or editing a time or mileage entry.
- The system **requires** a note when using the Reason Code "Staff- Other."

Please be aware that Providers can see any notes you make on an entry.