Activities Notes

Document Activity Assessment

1. From the Activities Access menu, click **Activity Assessment**, select name(s) (hold down the **CTRL** key on the computer keyboard if needing to select more than one name).
2. A two-way split screen will appear. The top half of the screen is a Write screen and the bottom half is a View screen. The view screen will display previous notes and other pertinent information.
3. Document the assessment by working from left to right.
4. When finished documenting on this screen, click the **Sign** button.
5. The next topic will load. Once completed with the assessment, the user will be brought back to the Activities Access menu.

Activities Access	Charting	Chart Review	Reports		MDS/CAAs/ Care Plans	Schedule	Internal Memo
Main Menu	Progress Notes	Notes	Notes	Birthday List	Continue Assessment	Activities - Schedule	Write Internal Memo
Activity Assistant Access	Activity Assessment	Risk Review	Attendance (Events)	Allergy List	View/Print Assessment	Activities - View	
	Activity Attendance	View Chart	Individual Attendance (Graph)	Diet List	Work CAAs	MDS	
	DC Arrangements / Summary		Individual Attendance Logs	Veteran List	Print CAAs	Care Conference	
				More Reports	Care Plans	Resident	

Activity Assessment includes: Activity Progress Notes, Activity Assessment, Resident Interview (F), Activity Interests (F), and Activities Care Plan.

Other Charting Topics

1. From the Activities Access menu, click onto a button, select name(s) (hold down the **CTRL** key on the computer keyboard if needing to select more than one name).
2. A two-way split screen will appear. The top half of the screen is a Write screen and the bottom half is a View screen. The view screen will display previous notes and other pertinent information.
3. Document the assessment by working from left to right.
4. When finished documenting on this screen, click the **Sign** button.

Progress Notes: Document any activity progress notes in this topic. There are options for visit types as well as the source of the information.

Activity Attendance: Where any activities attended/not attended by residents can be documented. To document on several residents at a time, hold down the **CTRL** key on the computer keyboard while selecting the names. Chart the activity, date, and participation level.

- **Note:** If choosing more than one resident, all entries documented will get saved in all the records selected. This also includes participation. If anything about an entry differs between residents, the user needs to document those entries separately.

DC Arrangements/Summary: Can be used to document a resident's discharge summary and/or any of their discharge arrangements to be aware of. There are a couple reports including: Discharge – Plan of Care and Discharge Summary, which can be viewed from this screen as well.

View Activity Documentation

1. From the Activities Access menu, click onto a button underneath the Chart Review column.
2. Select name(s) and click **OK**.
3. Select more than one resident by holding the **CTRL** key on the computer keyboard.
    a. If a Control screen appears, put in a start and end date and click **OK**.
        i. Click **Go** at the top of the view screen to retrieve the notes in the specified date range.
4. When finished viewing, click **Exit**, which will take the user back to the Activities Access menu.

Notes: Allows the user to select a date range and view all dietary notes completed in the specified date range. The date/time/initials of who completed the entry will all display to the left of each entry. To view discontinued entries, click Control and place a check mark in D/C'd Entries, click OK and Go.

Risk Review: Allows the user to select a date range and view all activity "risk" notes completed within the specified date range. This includes residents who have declined in their activity participation level and/or have been unable to attend activities for any reason.

View Chart: Allows a user to select any documentation within the records granted rights to view. Click **Topic** or **Task** to choose the area of the chart to be viewed. Click **Control** to select a start and end date. Click the **Look** tab to select other options to view (*i.e.,* show names of initials, topic name, cosign, or free text highlighter). Once all options have been selected, click **OK** and then **Go** to retrieve the requested information.

- Adjust the font size by clicking **More…** and clicking on the big or little "A."
- Search for words within the view screen by clicking **More…** and onto the magnifying glass symbol. Type in the text to be searched and click OK. This feature will search both words that were clicked on within a topic as well as free text.
    - Click the arrow to the right of the search feature to have it bring you to the next found word.

- Control button > Filter Tab
  - *D/C'd Entries* – Displays all discontinued entries.
  - *Users* – Use this to narrow down the charting being viewed based on the user(s) who entered it in. This is a great tool for auditing specific user(s) charting.
  - *Free Text* – Allows the user to search within the charting on the view screen for a specific free typed word. If wanting to search through all the fall notes for a specific caregiver's name, simply enter the name in the Free Text box, click OK and Go.
- Control button > Look Tab
  - *Separator* – For ease of viewing, the user may choose to add lines/spaces between entries or topics.
  - *Order* – Allows the user to determine the order in which the entries display on the screen.
  - *Show Name of Initials* – Displays the full name and title of the person who entered/discontinued each entry.
  - *Free Text Highlighter* – Used frequently in troubleshooting as it will turn all free text on the view screen blue.
  - *Show Topic Name* – Displays the topic that the entry was documented in.

Edit Assessments/Notes

1. Click the Notes button under the Chart Review column.
2. Select name(s) and click OK.
3. Select a date range and click OK.
4. Click Go.
5. Click the entry that needs to be edited. The entry will turn red. This is called 'tagging' the entry.
6. Click Edit.
7. Click the desired editing feature.
8. When using Append, DC and Explain, or DC and Copy, make the desired change and then click Next.
9. Click Go to see your changes.

Editing features which are bolded are utilized most often in Social Services Documentation.

Editing Feature	Function	Example
Append / Append All	Information is permanently attached to the entry; further editing will not be able to be done to the entry except to discontinue	Cosigning a student's documentation
New	A new, separate entry made in the same topic area	Can be used to add a new discipline approach to a care plan for example

Copy	An exact copy of the entry is made	An entry was accidentally discontinued and needs to be made active again
Copy One (All) to Other Client[s]	An exact copy of the entry is made and placed in another resident's chart	An entry was accidentally made in the wrong resident's chart. Use ALL if more than one entry was selected
Discontinue and Append	Entry is discontinued and user is taken to a Write screen to document additional notes	An error was made in documenting the entry and the user would like to explain why the entry is being discontinued
Discontinue and New	Entry is discontinued, a new entry is made in its place	Not typically used when editing department notes
Discontinue and Copy	Entry is discontinued, copy of entry is displayed allowing user to make changes to the original entry	User forgot to use a button word when documenting and would like to 'insert' the word into the entry
Discontinue	Entry is discontinued	Not typically used when editing department notes
Discontinue All	All highlighted entries are discontinued for one client	Not typically used when editing department notes
Discontinue Multiple Client Entries	All highlighted entries are discontinued for multiple clients	Not typically used when editing department notes
Skip	Allows user to skip a highlighted entry	Highlighted an entry that does not need editing

View/Print Reports

1. From the Activities Access menu, click the desired report button under the **Reports** column.
2. From the Name Selection screen, select the desired name(s) and click **OK**.
3. Select more than one resident by holding the **CTRL** key on the computer keyboard.
4. Choose the appropriate date range if prompted to do so.
5. The report preview appears.
6. Click the printer icon in the upper left corner to print.
7. Click **Close** to return to the Activities Access menu.

Notes: Prompts the user to select a date range. It then displays all dietary notes documented within that specific date range.

Attendance (Calendar): Displays a calendar report for the current month of all activities attended by each resident. The user will easily be able to identify any groupings on specific dates to assist in determining popular or unpopular activities.

Individual Attendance (Graph): Displays a graph with the total number of attended activities from the past three months. It displays an individual graph for each selected name.

Individual Attendance Logs: Displays all activities attended vs. not attended, the resident's participation level, as well as an overall percentage of activities attended.

More Reports: Displays all reports available within the system that the user has rights to. The user may select any report to view and click **OK.**

Write an Internal Memo

1. From the Activities Access menu, click the **Write Internal Memo** button.
2. Once in the Internal Memo topic, the user will be presented with a pop-up that states, "This task has clients associated with it. Do you want to override your currently selected clients?" Always click **Yes**. (Messages written in this topic most likely will *not* have anything that belongs in their medical record, which is why a fake client is created to attach to this Internal Memo task so that all the messages written are on the fake client's record.)
3. Document the message to be sent.
4. Select a user group(s) to send the message to or click **pick user on Save** to select the person(s) from a user list once the entry is saved.