CNA/Hab Aide Charting

Open the CNA/Hab Aide Access screen

1. Log into ECS as a user with access to the CNA/Hab Aide Access screen.
2. Once your Access screen begins to load, you will either be presented with a list of common tasks (set CNA assignments) or a Name Selection screen.
   a. If you are presented with a common task list:
      i. Select your assignment and click **OK**.
      ii. Your access screen will load with the names of the residents in your assignment listed on the left side of the screen.
   b. If you are presented with a Name Selection screen:
      i. Utilize the Filter button if wanting to narrow down the name(s) by specific floors, units, or wings.
      ii. Click the **Multi** button.
      iii. Choose the name(s) you would like to chart on.
      iv. Click **OK**.
      v. Your access screen will load with the names of the residents that you have chosen listed on the left side of the screen.

Main CNA/Hab Aide Access screen

This screen is divided up into two sections: the name selection panel and the main Access screen. The main Access screen is divided up by shift. Within each shift menu, you will have the option to run an assignment sheet, complete charting, or run an incompletion report.

Hab Aide Main Menu		AM Shift (7-3)		PM Shift (3-11)		Night Shift (11-7)
Check Messages		**AM Assignment Sheet**		**PM Assignment Sheet**		**Night Assignment Sheet**
		AM Charting		**PM Charting**		**Night Charting**
		AM Incompletion Reports		**PM Incompletion Reports**		**Night Incompletion Reports**

Name Selection panel

In the name selection panel, you will see the names you chose when loading the access screen. When a name is highlighted, the resident's picture will be displayed at the top of the screen. Just to the right of the resident's picture is a set of buttons that can assist in controlling what is shown in the Access screen.
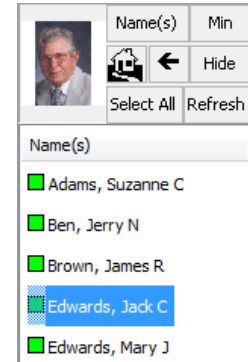
- **Name** – The name button will open the Name Selection screen so new name(s) can be chosen.
- **Min/Max** – Maximizes and minimizes the size of the buttons that appear on the Access screen.
- **Backward arrow** – Used to toggle back a screen if the user has navigated to additional Access screens.
- **Hide** – Hides the name selection panel. The user can bring the panel up again by hovering the cursor over the left margin of the Access screen.
- **Select All** – Will select all the name(s) listed in the name selection panel.
- **Refresh** – Will clear all filters and display all current active name(s) in the name selection panel.

Run an assignment Sheet

1. Select the name(s) from the name selection panel you would like to run the report on.
2. Click the assignment sheet you would like to run.
3. The assignment sheet will load. The name(s) will be listed and will display each charting topic that is assigned to be charted on this shift. Click the buttons at the top of the screen to move forward and backward through the report if it has multiple pages. Click the printer icon to print the report.
4. Click **Exit** when done.

Run an Incompletion Report

1. Select the name(s) from the name selection panel you would like to run the report on.
2. Click the incompletion report you would like to run.
3. The incompletion report will load. The name(s) will be listed and will display each charting topic. Any cell that has an "X" indicates that topic was not charted on that name, and it is incomplete. Click the buttons at the top of the screen to move forward and backward through the report if it has multiple pages. Click the printer icon to print the report.
4. Click **Exit** when done.

CNA/Hab Aide Charting Access screen

After running the Assignment Sheet for the day, the CNA should click into their charting screen.

The CNA Charting Access screen is divided into four sections: **Program**, **Daily**, **Other**, and **Reports**.

The **Stop and Watch** button is used for early detection and reporting of changes observed in a resident. Since the nursing assistant often has the most contact with the resident, they are most likely the caregiver to notice any subtle changes.

Hab Aide (AM)	Program	Daily	Other			Reports
STOP AND WATCH	ADL	Voiding	ADLs	Behavior	Menses Log	Hab Program
Off Unit/Off Site All Shift	Behavior / Mood	Stool Output	Bath	Mood	B & B Record	Review/Edit My Charting
	Cognitive	Breakfast	Intake	Skin	Scheduled Toileting	Resident Schedule
	Commun- ication	Lunch	Urine Output	Positioning	15 Min Safety Checks	Facility Schedule
	Health / Safety	Snack	Weight	Property Inventory	30 Min Safety Checks	AM Assignment Sheet
	Leisure		Height	Sleep Log	Supplement	AM Incompletion Reports
Green = Required	Physical / Mobility		Vital Signs	"Other"	Fall / Incident	
Purple = If Needed	Maintenance Plan					

The **Program** area of the screen contains each of the Habilitation plans. Any plans assigned to the resident will be green and are required to be tracked. The Maintenance Plans should be charted as needed.

The **Daily** area of the screen contains charting elements that must be completed on every name daily.

The **Other** area of the screen contains charting elements that may be assigned to be completed on certain names on certain days if needed.

The **Reports** area of the screen is where the CNA can review the full habilitation plan, view/edit their charting, view the CNA Kardex, and view a resident's appointment schedule.

Daily and/or Other portions of the screen

1. On the left side of the screen, highlight the resident that you would like to chart on.
    a. The items that need to be charted on for that resident will turn green. Items that do not need to be charted on, or have already been completed for that resident, will turn purple to signify that they are completed.
2. Click a button to chart on that item. A write screen will appear.
3. Click the buttons on the screen to complete your charting. Some charting will jump to another section of the screen to chart more.
4. When you are no longer jumped to another area of the screen, click **Save** to save the entry and return to the Access screen.

There are additional buttons across the top to be aware of:
- **Save** – This button will save the entry, close the screen, and bring the user back to the Access screen.

- **Start Over** – This button can be used if the CNA made a mistake in the entry they are currently working on. Click on it to clear the documentation and return to the beginning of the screen.
- **Late Entry** – This can be used if a CNA is charting an entry that they forgot to chart on a previous day. Click the Late Entry button to popup a calendar and select a date. Chart the appropriate entry and click Save.
- **Exit** – This will exit the documentation screen and bring the user back to the Access Screen.

Charting Example #1: Complete transfer charting

1. Select the resident name on the left.
2. Click into **Transfers**.
3. Choose the level of assistance needed for the resident's transfer (e.g., 1 Assist).
4. Choose the support needed for the resident's transfer (e.g., Extensive – 1 Assist).
5. Choose any assistive devices used during the resident's transfer (e.g., Walker). Choose multiple devices, if needed, or click **None** if no devices were used.
6. Click **Save**.

Charting Example #2: Complete voiding charting

1. Select the resident name on the left.
2. Click into **Voiding**.
3. Choose the type of void (e.g., Continent)
4. Choose the number of times the resident voided (e.g., x1)
5. Click the type of incontinence product (if prompted to do so).
6. Click **Save** if finished or click Additional Void to make an additional entry regarding the resident's voiding pattern.

Charting Example #3: Complete breakfast Intake charting

1. Select the resident name on the left.
2. Click into **Breakfast**.
3. Choose the percentage of the meal eaten.
4. A number pad will pop up asking the amount of fluid consumed during the meal. Type in the number and click **OK**.
5. Click **Save**.

Charting Example #4: Chart a bath

1. Select the resident name on the left.
2. Click into **Bath**.
3. Choose the level of assistance needed for the resident's bath (e.g., 1 Assist).
4. Choose the support needed for the resident's bath (e.g., Limited to Transfer Only).
5. Choose the type of bath given (e.g., Shower).
6. Choose any additional care that was provided. Choose multiple additional care, if needed, or click **None** if nothing additional was completed.
7. Click **Save**.

Charting Example #5: Chart that an "other" has been completed

1. Select the resident name on the left.
2. Click into **"Other"**.
3. A screen with numbers will appear, click onto another that is green (signifying it is incomplete). This will then prompt you with details of what task is to be completed.
4. Click **Completed** or **Not Completed** to the right of the task. If selecting Not Completed, a keyboard will prompt the user to enter in a reason as to why the task was not completed. Type the reason and click **OK.**
5. Continue documenting additional "**Other**" items as needed. Once an "**Othe**r" is addressed, the number will turn purple, signifying the charting is complete.
6. Click **Save** when finished addressing all the assigned "**Other**" items.

Charting Example #6: Chart that a program goal was ran

1. Select the resident name on the left.
2. Click into the specific program that was ran.
3. Select the shift.
4. Select the program.
5. Select any tracking information, such as right, left, top, # of minutes, etc. as well as type of prompt(s) given.
6. Click onto **Continue to Outcome >>** specify whether the resident was successful or not.
7. Click **Save**.

Reports portion of the screen

There are several buttons under the Reports portion of the CNA Access screen, which are described in further details below.

Hab Program

This will display the full Habilitation plan which includes the goal, program, objective, training procedure steps, and frequency.

CURRENT HABILITATION PROGRAM

Name:	Depp, Johnny		Room:		Birthdate:	05/08/1956	Age: 65 Yrs	Sex: M
MRN: 2014-134		Admit Date: 08/06/2018	Physician: Dr. Hugh O'Connor			Code Status:		

GOAL	PROGRAM	OBJECTIVE	TRAINING PROCEDURE	FREQUENCY
COMMUNICATION PLAN GOAL: To increase communication skills.	Words	A. Given 5 verbal prompts, Johnny will participate in communication and social interaction with peers for at least 15 minutes between 3-4pm. At least 12 trials per month for 1 month with 50% success.	Weekly trials for this goal should be run between 3-4pm "snack time" and after day programming when Johnny can discuss events that occurred during the day. This goal may also be run on weekends. Remind Johnny that he will have time to enjoy his CDs and DVDs after working on this goal to participate in peer interaction and conversation. If Johnny would like to discuss one of his CDs or DVDs that can be used as a potential topic of conversation. Praise Johnny for his good efforts to work at this goal.	once on PM shift, three times per week - Wednesday Saturday Sunday

Review/Edit My Charting

This button can be used when a CNA would like to review or edit their charting that they have completed that day.
1. On the left side of the screen, highlight the desired resident(s).
2. Click **Review/Edit My Charting**.
3. A view screen will load displaying the resident's charting completed that shift.
4. To edit charting, click on the entry(s). The entry(s) will turn red.
5. Click **Edit**.
6. Select the desired editing feature below:

To remove an entry as it was charted in error:
1. Click **Discontinue** to discontinue one entry or **Discontinue All** to discontinue more than one entry.
2. A message will popup asking if you are sure you want to DC the selected entry(s). Click **Yes**.
3. The entry will turn a light gray color. Click **Go** to refresh the view screen.
4. Click **Exit** when finished viewing/editing the charting.

To remove an entry and put a new/corrected entry in its place:
1. Choose the editing option **Discontinue and New**.
2. A message will popup asking if you are sure you want to DC selected entry. Click **Yes.**
3. The corresponding CNA charting screen will appear, allowing you to document a corrected entry. Click **Save**.
4. To review the change and/or edit more items, click back into the **Review/Edit My charting** button again.

Resident/Facility Schedule

These buttons can be clicked onto to view a specific resident's schedule or the entire facility schedule. By default, appointments for today will appear, but a user may click onto **Week**, **Month**, or **Year** to adjust the time frame displayed. Click **Now** to return to today's date. Use the arrows to the left/right of **Now** to scroll through days in the past or future.