Resident/Care Assist Training (AL)

Care Assist Main Access Screen

| AL Care Assist	AM Shift (7-3)	PM Shift (3-11)	NOC Shift (11-7)	Day Shift (6am - 6pm)	Night Shift (6pm - 6am)
Check Messages	AM Assignment Sheet	PM Assignment Sheet	NOC Assignment Sheet	Day Assignment Sheet	Night Assignment Sheet
Chart Fall Note	AM Charting	PM Charting	NOC Charting	Day Charting (6am-6pm)	Night Charting (6pm-6am)
Chart Incident Note	AM Incompletion Report	PM Incompletion Report	NOC Incompletion Report	Day Incompletion Reports	Night Incompletion Reports
MAR/TAR Menu					

Helpful tip: If you happen to close the Access screen, click onto the Toolbar and onto the the Easy icon to pull the Access screen back up.

The Access screen is segmented into shifts. You should work from the column of the shift you are working. Work from top to bottom within the column of your designated shift.

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 resident(s) can be chosen.
- **Min/Max** – Maximizes and minimizes the size of the buttons that appear on the Access screen.
- **Backward and Forward arrow** – Used to toggle back and forth to different Access screens if multiple Access screens have been used.
- **Hide** – Hides the name selection/control panel. The user can bring the panel up again by hovering the cursor over the left margin of the Access screen.
- **Select All** – Select All will select all the resident's names in the list.
- **Refresh** – Click Refresh to clear all filters and show the entire name list.
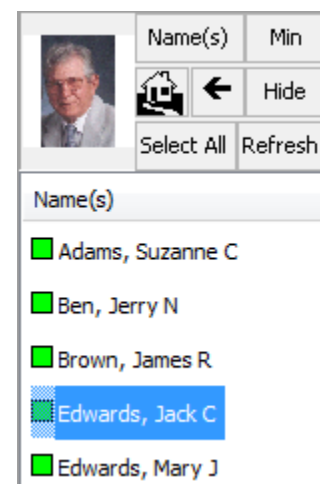
AM/PM/Night Shift Assignment Sheet

1. In the name selection panel, choose the desired resident(s). Or click Select All.
2. Select the **AM Assignment, PM Assignment, or Night Assignment** Sheet button.
3. All items assigned to be completed for each resident, today, on this shift, will have an "X" located in the designated column. Additional resident specific tasks or details can be found in the second report in the screen.
4. To print the report, click the printer icon located in the upper left-hand corner.
5. To close the report preview, click **Exit**.

AM, PM, and Night Charting

1. From the Care Assist Access screen, select the appropriate shift charting button (e.g., AM Charting).
2. In the name selection panel, highlight the desired resident name.
3. The RA Charting Access screen appears (see images below).

The RA Charting Access screen is divided into three sections: **Charting, ADLs/IADLs,** and **Reports**.

RA (AM)	Charting			ADL's / IADL's		Reports
STOP AND WATCH	Vital Signs	Stool Output	Breakfast Intake	Bath/Shower	Personal Hygiene	Care Kardex
Off Unit/Off Site All Shift	Behaviors	Voiding	10am Snack	Bed Mobility	Stairs	Shift Report (days)
	Laundry/Linen	AM Fluid Intake	Lunch Intake	Dressing	Toileting	24 Hr Report
	Skin	AM Fluid Output	2pm Snack	Eating	Transfer	Service Plan
	Pain	Height	15 Minute Resident Checks	Locomotion	Walk in Room	Appointment Paperwork
	Sleep Log	Weight	30 Minute Resident Checks	Locomotion Off Unit	IADLs	Resident Schedule
Green = Required	Repositioning	"Other"	1 Hour Resident Checks			Facility Schedule
Purple = If Needed		Misc. Notes	2 Hour Resident Checks			

Layout of the Screen

There is a Key in the first column of the Access screen that defines the colors of the buttons. These buttons will change colors when you click on the resident names in the names panel to let you know what charting is needed for each resident that shift/day.

Green = Required
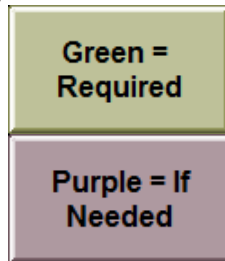
This color means that the charting is required and has <u>not yet been completed</u>.

Purple = If Needed

This color means that the charting is <u>optional.</u> You can use the button at any time; it's just not due/required for that resident for that shift/day or has already been completed.

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.

The **Charting** area of the screen contains topics such as Vital Signs, Safety Checks, Laundry/Linen, Output/Voiding, and Meal Intakes. Work through the charting screen until no longer prompted for additional information. Then click onto **SAVE** which will save the entry and return the user to the RA Access Screen.

The **ADL/IADL** area of the screen contains topics where assistance provided would be addressed. This may include Bathing, Transfers, Toileting, Dressing, or Walking. In these topics, the user will document how the ADL was performed, how much assistance was provided and if extra care was provided or not. Work through the charting screen until no longer prompted for additional information. Then click onto **SAVE** which will save the entry and return the user to the RA Access Screen.

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

Charting and ADL/IADL 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 care assistant 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 care assistant 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 laundry/linen charting
1. Select the resident name on the left.
2. Click into **Laundry/Linen**.
3. Once the topic loads, click onto either Laundry or Linen Change.
4. If Laundry is selected, enter the number of loads completed and click **OK.**
5. Once completed with all charting is completed, click **Save**.

Charting Example #2: Complete resident checks
1. Select the resident name on the left.
2. Click into the **15 min/30 min/1 hr/2 hr safety check** button (the one that lights up will depend upon what is assigned to the resident).
3. Click onto a time (i.e., 0700, 0930, 1100, etc.)
4. Click onto the location the resident was at during that time.
5. Click **Save** if finished or click **Additional Safety Check** to make an additional safety check entry.

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/Shower**.
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 specific resident task items will be listed.

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.

Reports

- **Care Kardex --** This button will direct you to a summary of the patient's care plan and basic information in a quick view format. When finished, click the Exit button to close the viewing screen and return to the Access screen.
- **Shift Report (days), Shift Report (eves), Shift Report (nights) –** These buttons will generate a viewing screen and display any data that was documented for that shift. When finished, click the Exit button to close the viewing screen and return to the Access screen.
- **24 Hr. Report** – This button will generate a report of the charting that took place in the past 24 hours for you to view. Items displayed here include falls/incidents, changes in the census (admissions, discharges, etc.), and stop and watch entries that have been reported.
- **Service Plan** - This will generate a copy of a resident's Service Plan. To print, click the printer icon in the upper left corner of the print preview screen. When finished, click the Exit button to return to the Access screen.
- **Appointment Paperwork -** This will generate the appointment paperwork for a resident. When you click the button, it will ask for a date. Pick the date of the appointment. It will then generate the documentation regarding the appointment for that date for you. Print the data by clicking the printer in the left corner of the print preview screen. When finished, click Exit to close the print preview screen and return to the main Access screen.
- **Resident Schedule**– This will generate a calendar to show you any appointments that have been documented/scheduled. When finished, click the Exit button to close the calendar screen.
- **Facility Schedule –** This button will pull up the schedule for the facility to show you what is going on and who is where at what time. When finished, click the Exit button to close the calendar screen.

Review/Edit My Charting

1. On the left side of the screen, highlight the desired resident(s).
2. Click **Shift Report**.
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. Click the desired editing feature:

To discontinue an entry

1. Click **Discontinue** to discontinue one entry. Click **Discontinue All** to discontinue more than one entry.
2. A message will pop up asking if you are sure you want to DC the selected entry(s). Click **Yes.**
3. The entry will turn to a light gray color. Click **Go** to refresh the view screen.
4. Click **Exit** when finished reviewing/editing the charting.

To discontinue an entry and put a new/corrected entry in its place

1. Choose the editing option **Discontinue and New.**
2. A message will pop up asking "Are you sure you want to DC selected entry?" Click **Yes.**
3. The corresponding CNA Charting screen will appear. Document the corrected entry and click **Save.**
4. To review the change and/or edit more items, click the "Review/Edit My Charting" button again.