

How to Give an Accurate Verbal Report and Documentation of Caregiving Visits

Every client home should have a **client binder**. Within the binder is a visit log where you, as the caregiver, will document each visit.

Here are tips for documenting your visits, whether you are giving an oral report to your Care Manager, writing in the client binder, or filling out an incident report:

1) Stick to the facts and only the facts. Avoid putting in opinions, assumptions, or biases.

-Bad example: Mable seems upset and as a result wasn't very hungry this morning.

-Good example: Mable had a poor appetite this morning. She ate a slice of toast instead of her usual breakfast of 2 eggs and a slice of toast. Mable talked about a recent phone call from a family member and she told me she is worried about her granddaughter's grades in school.

2) Be as specific about what you did during the shift. Document what you did to follow the care plan.

-For example: Mable had 2 eggs and a slice of toast for breakfast. She drank 1 cup of coffee and took her meds. I helped her to the bathroom after breakfast. She had a BM. One load of laundry was completed. Dishes were also completed. We had good conversations about her family and about her life growing up in north Omaha.

3) Remember, these logs are legal documents.

4) The visit logs in the client binders are an additional tool to communicate with other caregivers and family members. Unprofessional or passive-aggressive communication will not be tolerated. If you experience any frustrations that you want to communicate, please take this to your Care Manager.

Incident reports will need to be filled out for more serious concerns. If you don't know if you need to fill out an incident report, please ask your Care Manager. Examples of situations that occur that need an incident report may include:

- Falls or near falls
- A potentially serious change in physical or mental status (ex. seizures, increased confusion, etc.)
- Damage to client's personal property
- Conflict with either client or client's family member
- Significant or sudden change in client's condition
- Anything that makes you suspicious of physical, mental, or financial abuse of client
- If you or the client is injured on the job
- Any situation that you feel uncomfortable or unsafe