



Montgomery County **Health** Department

Your partner for a healthy community

Documentation Matters  
KYACHW Conference  
September 28, 2017

# Why CHW's?

- Bridge the gap between communities and the health and social service systems
- Navigate the health and human services system
- Advocate for individual and community needs
- Provide direct services
- Build individual and community capacity



# Documentation

- What is it?
  - Reflects the feelings, actions and behaviors of the individual in your care
  - Should reflect back to the services you are offering your client and other goals
  - Should be a description of your intervention
  - Emails, phone conversations, notes etc..



# Documentation

- Why is it important?
  - “Bad” documentation can result in reduced services
  - Specific, thorough clear quality documentation can provide justification for services you believe your client needs
  - Provide accountability for services



# Documentation

- Why is it important?
  - Provide protection for you in terms of liability
  - Your documentation assists the Providers you contact for your client in determining and justifying what is needed for the individual (i.e. what is working and what needs to be changed)
  - Should be reflective of treatment and other goals that have been set for the individual



# Documentation

- Why is it important?
  - Impacts the level of care for the individual
  - Helps track individual's progress by showing which techniques are working and which are not working
  - Can illustrate your unique role in the individual's treatment services
  - Your response skills are important to the therapeutic process, therefore it is important to appropriately reflect what you are doing and saying



# Documentation

- What should be documented in the file?
  - What was the behavior and health status of the adult?
  - What did the adult say?
  - Where did it occur?
  - When did it occur?
  - How did it occur? Face to Face or Phone



# Documentation

- Are there any new concerns?
- Were there any referrals made or follow up from previous visit?
- Do you have specific measures to report?
- Don't assume answers or skip questions
- Information that is stated clearly, specifically and in easy to understand terms





# Documentation Final Tips

- Know what your agency expects from you regarding documentation.
- Don't be afraid to ask questions if you don't understand something
- Remember....if you don't document it, it didn't happen
- Always keep in mind how your interventions relate to the goals of the individual being served
- Quality of documentation affects the services provided and the individual's success
- Individuals can request their documentation (what is being written about them) at any time, so never write anything you would not want an individual to read about themselves...always be professional.



# Forms

- Dates - all forms and be specific
- Signed Informed Consent
- Release of Information
- HIPAA Notice of Privacy Practice
- HIPAA Signature of Receipt
- Agreements for additional services



# Forms

- Discharge Form - Reason
- Exit Letter
- Client/CHW signature following all assessments
- Client/CHW Signature on Care Plan – Reviewed and Updated



# Optional Forms

- Chart Checklist
- Education Record
- Referral Options
- Measuring Tools – *PHQ-9*
- Determined by Impact and Implementation questions of evaluation plan



# Why Evaluation

- In this case a systematic method to answer questions regarding CHW projects, programs and policies by:
  - Collecting Data
  - Analyzing Data
  - Utilizing Data
- Purpose: To determine efficiency and effectiveness of the above.....



# Evaluation Data/Results...

- Can reflect accurately what is going on within the program
- Can validate theories and suppositions
- Can provide facts and reflect necessity of program continuity
- Can reflect to stakeholders and funders the need for continued funding
- Can provide foundation and basis for funding requests



# Impact of Evaluation

- Important questions can be answered such as:
  - How the CHW program can be improved?
  - Whether the CHW program is cost effective?
  - Whether there are better alternatives to this program?
  - Are there are *unintended* outcomes of the program?
  - Are the program goals appropriate and useful?
  - Stakeholders who want to know if the programs they are funding, implementing, voting for, receiving or objecting to are actually are having the intended effect.



# Impact for KY

- Developed the Appalachian Kentucky Health Care Access Network (AKHCAN)
- Partnership with the State CHW Workgroup
- Supported the development of the Kentucky Association of Community Health Workers (KYACHW)
- Supported the First Annual KYACHW Conference
- Incentivized 3 organizations to begin CHW programming – Shawnee Christian, Family Health Center, Bon Secours Hospital
- Created a model for the state of consistency for CHWs





# As a Result....

- The MCHD CHW program has been spotlighted at the following conferences:
  - 2013 & 2016 Community Development Society Conference Poster Presentations, Charleston, SC & Lexington, KY
  - 2016 National Association for Social Workers National Conference , Washington D.C.
  - 2017 American Public Health Association Conference Atlanta, Ga.
  - Rural Health Information Hub [www.ruralhealthinfo.org](http://www.ruralhealthinfo.org)
  - Rural Health Innovations [www.ruralcenter.org](http://www.ruralcenter.org)



# Contact Information

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