

Technical Assistance
Example Format to Arrange Resident Records

I. PURCHASE ITEMS

- a) 3-Ring binder for each Resident
- b) 3-Ring binder dividers for each resident binder
- c) 3-Ring plastic zip lock pencil containers
- d) 3-Hole paper punch
- e) One additional 3-ring binder to create a *Medication/Weight Log Binder*
- f) 3-Ring binder dividers for *Medication/Weight Log Binder*

II. RESIDENT RECORD FORMAT

Using one 3-ring binder for each resident, complete the following:

- A. Plastic Ziplock Containers- Used to hold the residents' picture, State of Michigan ID, birth certificate, SS card, Medicaid care, etc.

INSERT DIVIDER HERE

- B. Guardianship papers/Power of Attorney (if applicable), Do Not Resuscitate Order, Hospice information (if applicable), resident identification information.

INSERT DIVIDER HERE

- C. In accordance with rule 400.1407 [.1507] (2a-c)

Prescreening/pre-admission written assessment, all corresponding documents used to determine the resident's compatibility with current resident population as well as your ability to provide the resident with the required level of care to meet his/her needs.

INSERT DIVIDER HERE

- D. In accordance with Rule 400.1407 [.1507] (5)(6)

Resident Care Agreement- place the most current agreement on top and previous agreements underneath, going back to the date of admission.

INSERT DIVIDER HERE

- E. In accordance with Rule 400.1407 [.1507] (11 a-c)

Statement of the facility's fee policy for AFC services provided, additional cost above basic fee, and transportation services at basic rate and transportation services provided at an extra cost.

INSERT DIVIDER HERE

- F. In accordance with Rule 400.1408 [1508] (1), Rule 400.1411 [1511] (2) and Rule 400.1413 [1513] (1)

Written assessment plan. Keep the current assessment plan on top and place the resident's case manager's IPS (if applicable) between the previous annual assessment plan. Repeat this method going back to the date of admission.

INSERT DIVIDER HERE

- G. In accordance with Rule 400.1407 [1507] (7-9)

Health Care Appraisal and Physician Log. Place Physician Log on top with the current *Health Care Appraisal* placed directly behind. Place previous form underneath going back to the date of the resident's admission.

- H. Documentation of programming, day treatment, and the in-home-habilitative treatment plan developed for the resident. Running narratives of resident's participation and performance.

INSERT DIVIDER HERE

- I. In accordance with Rule 400.1421 [15421] (1-3)

Resident Funds Part I

INSERT DIVIDER HERE

- J. In accordance with Rule 400.1421 [1521] (3)(4)(6)(9)

Resident Funds Part II, a plastic zip lock container used to hold the resident's monies. Only the current Funds Part II form is placed in this section with the plastic zip lock container ***The plastic zip lock container used to hold the resident's monies may be safeguarded in another locked area in the facility if you desire***

INSERT DIVIDER HERE

- K. In accordance with Rule 400.1416 [1516] (4-5) and Rule 400.1417[1517] (1-3)

Incident/Accident, Illness, Death or Fire Report. Place the current forms on the top and place previous forms underneath going back to the date of admission.

INSERT DIVIDER HERE

- L. In accordance with Rule 400.1409 [1509] (1)(f)

Resident's written grievance forms and facility's written resolution. Place the most current on top and the previous underneath, going back to the date of admission.

INSERT DIVIDER HERE

- M. Old Resident Funds II. Place previous forms underneath, going back to the date of admission.

INSERT DIVIDER HERE

- N. Old monthly medication and weight records. Place previous month's medication log and weight record on top and the month's before that underneath and repeat process going back to the date of admission.

INSERT DIVIDER HERE

- O. Discharge notice and Funds and Valuables receipt. Upon discharge, a copy of the full accounting of these shall be placed in the resident's record.

Recommendation: Take a picture of each resident and place it in their resident record. This will help staff to accurately identify residents when working with the residents' records. In addition, in case of emergencies, pictures can be used to assist the police for the purposes of identifying residents.

III. Medication and Weight Record Format

Using one 3 ring binder, complete the following:

- A. Place all Resident Medication Records for the month in this binder.

INSERT DIVIDER HERE

- B. Place all Resident Weight Records in this binder.