SOP for Activity Notes

Caregivers

Caregivers are required to document the tasks completed during the shift before clocking out. Most of the tasks will be on the Activity Sheet, however there are times when events cannot be described completely by checking off the activities on the list. It’s important to communicate with your co-workers and Case Managers, so leave notes for everyone to see so everyone knows what is going on. Here are some tips to help you know when to leave a note.

Leave a note in the app when….

1. There is no activity on the list that fits the important detail you want everyone else to know.
2. When there is an incident report requested of you, put the event that led to the incident report (Fall, skin tear, etc)
3. Any time you notify a case manager of a client symptom, complaint, concern, or request.

Leave a note in the communication book in the client’s house if desired by the family. Put a snapshot of the communication book into the messaging system in the client’s group. It’s not necessary to duplicate everything from the communication book into the app. The communication book helps with notes from shift to shift. The app holds notes that we send to insurance companies, or notes that may need reviewed months from now. For example, the grocery list is in the communication book but is not required for the app.