

**REPORTING
&
RECORD KEEPING**

**Handling Money and
Valuables**

WORK MANUAL

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Record keeping

Make a list of all the records you need to keep - and check this with your supervisor.

Why do we record and what is the importance of recording?

- They provide a permanent record.
- Information that is stored in your head disappears if you forget it.
- Can be dangerous if remembered wrongly
e.g. did I give the medication?
- Accountability - protect you and your employer from later complaints that something improper happened.
example:-
- They can be consulted if there is a problem - information that is written down in records (as long as they are accessible, legible) are available no matter where the person who wrote the records is i.e. off sick, changed jobs etc.
- They provide information that can be used by several people - can be shared by people who never actually meet each other - particularly important in care in the community when one client may have several carers but they very rarely meet.
- Better care for clients - The information you have about your clients is very valuable and can help other people to care better for your clients. Also the information other people have about your clients is very valuable to you and can help you provide the best possible care

Records are of no use if no one reads them and can actually be worse than useless if no one keeps them up to date

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You should look at any daily records at the beginning of the shift and see how they affect your plan for the day. These may include your own personal notes from the day before.

You confirm currency by checking dates and times on records and accuracy is checked by confirming with the individuals involved.

Objective and Subjective reporting

Objective reporting - means to report precisely what you saw, smelled, felt or heard. If a person complains of symptoms that you cannot observe or (e.g. dizziness or pain) report exactly what the person told you. This is the better and safer way of reporting and should be used when writing care plans

Subjective reporting is used to report when you cannot sense or measure - and when possible should be avoided but if you think something is wrong you should report it to your supervisor.

Activity - Records and Record keeping

Read through the case studies below and select the factual entry from 3 examples given.

Decide which is the right answer and why?

Be prepared to give your reasons in discussion with your supervisor.

Case 1

i) Mr W. says he hasn't eaten anything today. I made him sandwiches and coffee but he hadn't eaten them when I left

ii) Mr W. hasn't eaten anything all day

iii) Mr W. says he says he hasn't eaten anything today but he's probably had tea and biscuits he always does. He didn't seem hungry to me

Answer Case 1

Case 2

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i) Mrs S. says that someone knocked on the window last night. I told her she had imagined it she's probably read the story in the paper and got frightened.

ii) Mrs S. says that someone has knocked on the window last night. I thought she had imagined it.

iii) Mrs S says that someone knocked on the window last night. She went to look but didn't see anyone. She said she was very frightened. I suggested that I phone the office to ask for advice and she agreed. She said she would phone the police if it happened again. I reminded her not to answer the door at night and to lock the front and back doors before it got dark and to check all the windows were closed

Answer Case 2

Case 3

i) Mrs T would like to see the optician. I asked permission to make an appointment for her and she agreed. She would like me to go with her so I explained I would need to check this with the office first I have told her I will let her know tomorrow

ii) Mrs T wants to see the optician. She is always worried about her eyesight she doesn't realise sight goes as you get older. I have told her I will ring tomorrow

iii) Mrs T wants to see the optician. She is always wanting to see someone I reminded her to use her glasses and check they are clean. She sees well enough to read so I don't think there is much of a problem really.

Answer Case 3

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Monitoring & Obtaining Information

Talking and listening effectively will enable us to find out our clients needs

What other way will you be aware of your clients needs?

Through Observation

Why is it important to be a skilled observer?

Observe and record

- Being a skilled observer detects problems in their early stages and helps prevent serious problems.
- Being alert to people and their environment whether it be a worn rug or a change in a clients condition, helps to reduce accidents and maintain the well being of the people in your care.
- Careful observation also increases your awareness of an individuals physical, emotional and social needs.
- As a carer you will be observing clients and communicating with them on and off all shift. It is better not to leave all the recording until the end of the shift when you will have forgotten things and will be tired and inclined to skimp on record-making.
- Records should not be made until after the event
- Many things may happen which you will need to report immediately to a superior; accidents, incidents, changes in a clients medical or psychological conditions, serious hazards, clients complaints. If there is no formal way of recording such matters you should still make your own records

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Activity

Messages

(a) An elderly lady who lives alone in her house in the community, phones to inform the community nurse that she has run out of tranquilliser tablets. The nurse is out on her rounds and will be returning at lunchtime.

What would you do?

(b) A person in your care is a little confused. She is to be discharged this afternoon. She needs to know about the place that has been organised for her at the day centre

What would you do?

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Guidelines for receiving and transmitting messages

- Write down messages clearly and legibly
- Listen carefully and check for accuracy with the person transmitting the message
- Work out a scale of urgency for transmitting messages
- If you leave a message with someone else to pass on be sure that the person it is intended for actually gets it
- When writing down messages include:-
 - Name of the person sending the message
 - Name of the person who is to receive the message
 - Date and time the message received and given
 - Clear details of the communicated message
 - Indication of the urgency
 - Whether it was a verbal message or telephone message

Observe and record?

Being a skilled observer detects problems in their early stages and helps prevent serious problems. Being alert to people and their environment whether it be a worn rug or a change in a clients condition, helps to reduce accidents and maintain the well being of the people in your care. Careful observation also increases your awareness of an individuals physical, emotional and social needs.

As a carer you will be observing clients and communicating with them on and off all shift. It is better not to leave all the recording until the end of the shift when you will have forgotten things and will be tired and inclined to skimp on record-making but records should not be made until after the event. Many things may happen which you will need to report immediately to a superior; accidents, incidents, changes in a clients medical or psychological conditions, serious hazards, clients complaints. If there is no formal way of recording such matters you should still make your own records.

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Handling money and valuables

The term 'valuable' means when something is precious or important to someone whether it be sentiment or cost.

*Think of the things that you have that are valuable to you?
How would you feel if someone showed no respect for them or for example perhaps discarded them as some old bits of paper that in fact were precious newspaper cuttings about your deceased husband you had treasured for 50 years*

The carer should respect all the clients things and never assume what doesn't appear valuable to you may be valuable to the client.

If your client had large amounts of cash lying around explain to them the security risks and what other options are available for keeping it safe and report/record as appropriate

Take a very professional approach when handling client's money to avoid and ensure there are no misunderstandings
accurate reporting/recording and behaving in a professional manner will protect you and your employer from unjust accusations

When shopping for a client, ask the client to sign a receipt for the money given to you. You need to keep receipts for any goods bought and when you give the clients the goods and change you would then need to get the client to sign that she/he has received the change.

You never know what is around the corner and accurate reporting and recording, behaving in a professional manner will protect you and your employer from unjust accusations and ensure you give the best possible care to your clients

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Questions

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1. What may follow if the care plan
 - (a) included personal opinions
 - (b) was illegible or incomplete

2. You are writing in a care plan when you notice you have made a mistake. What would you do?

3. You notice that John, a person in your care has severe abrasions to the outside of his left arm. He refuses to tell you how it happened. John has a history of self-injury including scraping his arms against a wall while walking down the street
How should this be recorded?
 - (a) 'John has been scraping his arm along the wall again, resulting in some severe abrasions to his left arm'
 - (b) 'John has severe abrasions on his left arm. It looks as though he has started injuring himself again'
 - (c) 'John has severe abrasions to his left arm He refuses to say how this happened'
 - (d) 'John has hurt his left arm. It is not known how this happened'

4. How do records help you care for your client?

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Record keeping

Answers to Activity - Messages

(a) Pass the message on to one of the nurse colleagues so that she can deliver it

(b) Inform both the lady and relative and provide them with the sheet of paper with all the details

Answers to Activity - Record keeping

Case 1 - (I) is correct because it is factual - objective recording

(ii) misses out the full picture

(iii) is subjective it is more your opinions with no supportive reasons for those opinions

Case 2 - (iii) a good full factual account with sufficient detail

(ii) (I) incomplete and with opinions that belittle the client and show lack of respect for them as an individual

Case 3 - (I) clear factual account showing a professional approach

(ii) (iii) subjective - opinionated and makes assumptions and does not uphold clients rights

Answers to Activity - Handling Money

Get the client to sign a receipt for money given to you. You need to keep the receipts for any goods bought. When you give the client the goods and change you would then need to get the client to sign that she/he has received the change

Answers to Questions - Record keeping

1. What may follow if the care plan

(a) included personal opinions

(b) was illegible or incomplete

A. A. (a) Personal opinions can easily be misinterpreted, are unclear, and lead away from important facts, and could be upsetting to the client or relatives

(b) It can affect the delivery of care because inaccurate information can lead to inaccurate decisions and can be dangerous and illegal

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2. You are writing in a care plan when you notice you have made a mistake. What would you do?

A. *Put a single line through and initial the side and then write in the correct way*

3. You notice that John a person in your care has severe abrasions to the outside of his left arm. He refuses to tell you how it happened. John has a history of self-injury including scraping his arms against a wall while walking down the street

How should this be recorded?

A. *(c) this is an accurate and objective report*

4. How do records help you care for your client?

A. *Gives you a basic picture of the clients needs, preferences; background etc for when you first meet*

Can be consulted if there is a problem and remind and assist the carer in the care required

Helps the care team to work together and provide continuing care to the client- to be aware of any changes etc