



## **Visit Notes Standard Operating Procedure**

### **What is a Visit Note?**

A Visit Note is a legal document for the State of Colorado, PPRS, and for the Parents or Guardians to reflect activities and goal tracking during any shift or service.

**Visit Notes must be complete for every visit. Failure to produce a complete visit note will result in the shift needing to be deleted and re-entered. This also means that the Parent/Guardian will need to sign again and could result in your shift not being approved on time for that pay period for payroll. PPRS admin staff will be following up on Visit Note requirements effective immediately 02-2022.**

### **Visit notes must be complete with the following standards:**

A Visit Note should be reflective of the service plans and goals for each Person Supported.

A Visit Note should not be the same day after day

A Visit Note should detail steps for goals and how the people you are supporting are being taught

A Visit should always highlight learning moments

CYM Visit Notes must include implementation of goals

Visit Notes must be very specific

Visit Notes must reflect all the above requirements and be inclusive of time. A two-hour shift will need the same requirements as a ten-hour shift; however, you must show that in a 10 hour shift more work was completed towards goals and more learning moments.

## What Should a Visit Note include?

All Visit notes should have the 5 W's



**Who** – Is the Person you are Supporting? Johnny

**What** – Is the Service you are Providing? Community Connector

**When** – Even though you have logged your time if it is relevant, you may say something like “Johnny and I went for a Morning Walk”

**Why** – Johnny and I went for a morning walk because one of his goals is to become more comfortable with leaving the house.

**Where** – Johnny and I went for our morning walk to the neighborhood park to help with his goal of leaving the house.

## Examples of Correct/ Incorrect Visit Notes

**Community Connector Incorrect Example** – for shift: Lunch, dinner, and movie (This is example is for a 5 hours shift, not enough information or 5 W's)

**Community Connector Correct Example** - Goals for shift include: easier transitions, money exchange.

Provided community connections for Johnny. Johnny was in a good mood when I arrived and excited to go out. I suggested that we grab a bite to eat, do some walking, and then I had a surprise for him since it was a holiday and he was excited. We went to Raising Canes and ate and Johnny paid for his lunch with a \$10 bill and received change back. Afterwards we went to do some walking and to show Johnny a place I told him about in a previous visit since it was on our way to Johnny's surprise. Johnny really likes history and science topics so I hoped this would be something that really interested him. He ended up really enjoying learning about the history of mining in the Springs. The places we went today helped with Johnny's goal of easier transitioning and taught him about money exchange by paying for his lunch and receiving change back.

**CYM Incorrect Example** - Play play play

**CYM Correct Example** -

**Goals:** Organization Skills, Complete Assessments for School on time.

**Learning Component:** Separated Supplies and labeled boxes for organization, created a calendar and talked about time for logging into Johnny's school assessments.

Completed Day 3 and FINAL online schooling assessment!!! Set up his "Learning Lab", too! We re-vamped the study area (added second computer screen, a new wireless keyboard and mouse), put up a 4.5' x 4.5' United States map on the wall, and picked out/organizes his school binders and folders together! Johnny absolutely blew us away - and himself - with his scores - ALL within the Goal Score ranges! We are so excited to start his specialized/tailored coursework next week!

**Supported Community Connector Incorrect Example:** Went to the Store and had ice cream

**Supported Community Connector Correct Example:**

**Goals:** Making lists, Budgeting, Money Identification

**Learning Moments:** Helped make a grocery list, let Angel use the calculator in the store to know if she was in budget or not.

Angel and I went to Walmart and got a bunch of things and looked around and then we went to Safeway to get some things she wanted, and we picked up some food she wanted to make for dinner. Angel used the calculator in the store to stay in her \$40.00 budget and paid the cashier with two \$20.00 bills and received coins back. I helped her identify and count the coins.

**Personal Care Incorrect Notes:** Gave Shower, got dressed

**Personal Care Correct Notes:**

**Goals:** Establish Morning Routine

**Learning Component:** Laying out her toothbrush, face wash, and clean clothes, and brush prior to getting in shower to remember the steps of her morning routine.

Angel was up early this morning and she had her coffee, so she was in a good mood. We did a bunch of laundry and washed all the bedding and the comforter. Then she got her shower and did her morning routine, changed clothes and then we cleaned the bathroom. We played with the kids for a while, then we made lunch and cleaned up the kitchen. We sat downstairs with the kids while they played video games, and her daughter wanted to watch cartoons.

**Mentorship Incorrect Notes:** wrote letters and read a book

**Mentorship Correct Notes:**

**Goals:** Letter Recognition, Reading Comprehension

**Learning Component:** We only worked on 4 letters today so he did not go into information overload, and read short paragraphs with one question about each, we will progress in future visits.

Johnny worked on his letter recognition and writing 4 letters today. We talked about words that start with A, B, C, and D today. We went for a short walk out on the back porch, and then we came in and worked more on reading comprehension, I read him short paragraphs then asked him question relevant to those paragraphs. He was in a great mood today and he listened really well.

**Homemaker Enhanced Incorrect Notes:** cleaned the bedroom and kitchen

**Homemaker Enhanced Correct Notes:**

**Goal:** Establishing routine cleaning and chores list

**Learning Component:** Making a list and checking chores off as we went so we were not forgetting any and helping to solidify more of a routine.

Johnny had a good morning with staff, we got a bunch of chores done today. We swept and vacuumed, organized and sorted clothes for the laundry, waited on the dishwasher for a bit, and we straightened his bed and his guest bedroom. As we did all of his chores we checked them off the chores list on the dry erase board in the kitchen.

**Incorrect Respite Visit Note:** We watched a movie and talked

**Correct Respite Visit Note:**

6:30pm- eating dinner at home that was prepared for us. Angel ate well tonight

7:30pm- watched her favorite show for about 45 minutes and then got her PJ's on and got ready for bed according to her nighttime routine established by parent.

8:00 pm- read a book to settle her in, and turned on her music in her room, she went to sleep easily.

10pm- Parent came home and Angel was asleep upon departure

**Incorrect Homemaker Visit Note:** cleaned

**Correct Homemaker Visit Note:**

Upon arriving at Johnny's home started his laundry so it could be done before I left. Cleaned his bathroom and picked the toys up and put them away in his room. Switched laundry into the dryer before I left. 1.5 hour shift and followed the list his parent left for me.

**Things to Remember:**

- Visit Notes are legal documents
- Goals and Steps taken to teach Person Supported must be included
- A learning component for goal-based services must be in each Visit Note
- Be Consistent and Transparent
- Minimize Jargons and Abbreviations
- Highlight patients' strengths and achievements
- Describe Behaviors rather than labeling the patient or making judgments
- Please log Visit Notes at Time of Service
- Steps for goals and how persons supported are being taught and must have a learning component for goal based services.