APS-19-02

April 17, 2019

**MEMORANDUM FOR DIVISION OF SENIOR & DISABILITY SERVICES**

**ADULT PROTECTIVE SERVICES STAFF**

From: Kathryn Sharp Sapp, Bureau Chief 

 Division of Senior and Disability Services

 Adult Protective Services Policy and Staff Development

Subject: Case Record Documentation

Enhancements to the Adult Protective Services (APS) Policy has been updated to reflect several areas of needed clarification brought forth by field staff. As a reminder, the official case record is maintained in Case Compass. It is necessary that actions taken and information gathered during the course of responding to a hotline is documented within the official case record. The following areas highlight the changes made in APS Policy 1706.20: Case Record Documentation:

**Supervisor Consult:**

After discussions with Protective Service (PS) staff and supervisors the information entered into the recording section regarding the supervisory consult can simply state, “Conferenced with Supervisor.” Examples have been provided within the policy.

**Attachments:**

Field staff discovered that the title fields for attachments in Case Compass has a limited number of characters; therefore the “Examples of Labeling Attachments” instructions have been modified to only include the name of the document. All of the other information is to be entered into the “Description” field.

**Risk Assessment:**

Field staff are required to complete the risk assessment with the Eligible Adult during the first face-to-face visit. If PS staff are unable to complete the risk assessment, they must notify their supervisor and document the reason in the recording section. Field staff shall complete additional risk assessment(s) if there are changes with circumstances.

**Statement of Evidence and Investigative Summary:**

Following discussions with PS staff, as well as the specialized APS Implementation team, the PS staff shall document the findings within the Statement of Evidence. Examples have been provided within this policy. The Investigative Summary will be documented by PS staff in a brief summary of reported concerns, all interventions offered or accepted to address the allegations, and any unmet needs.

**NECESSARY ACTION:**

1. Review this memorandum with all APS staff.
2. Review APS Policy 1706.20: Case Record Documentation.
3. All questions should be cleared through normal supervisory channels and directed to:

Michelle Humphrey at APSPolicy@health.mo.gov or by calling 573-526-8502.

**APS Manual Revisions:**

APS Policy [1706.20](https://health.mo.gov/seniors/apsmanual/doc/1706.20.doc): Case Record Documentation – Revisions made to policy