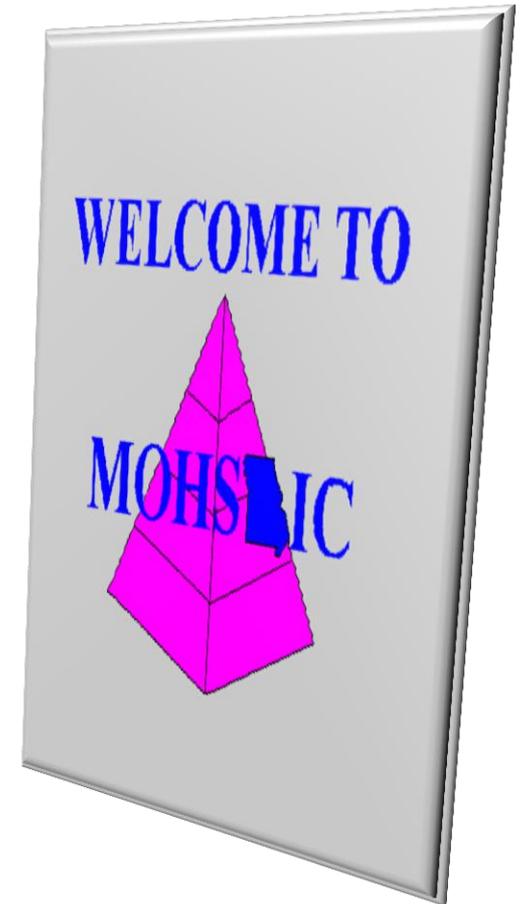


# Information Management



# Information Management

consists of:

- documentation,
- participant records, and
- proficiency with the SHS Information System (MOHSAIC).



# Contacts

All contacts are documented and are defined as any significant interaction on behalf of the participant/family and would include any contact with:

- The participant/family
- The participant's record
- An agency, facility, etc.



# Documentation answers the:



# Who?



- When stating a person's name also give their relationship to the participant or their title, i.e.
  - Susie Smith (mother).
  - Mary Jones (Home Health Aide with Integrity Home Care).

# What?

- All entries must contain factual and understandable statements.
- Documentation must be inclusive of all the components of the activity or contact.



# Where?



- If the event is not documented, it did not occur.
- The documentation is done in the SHS Information System (MOHSAIC).

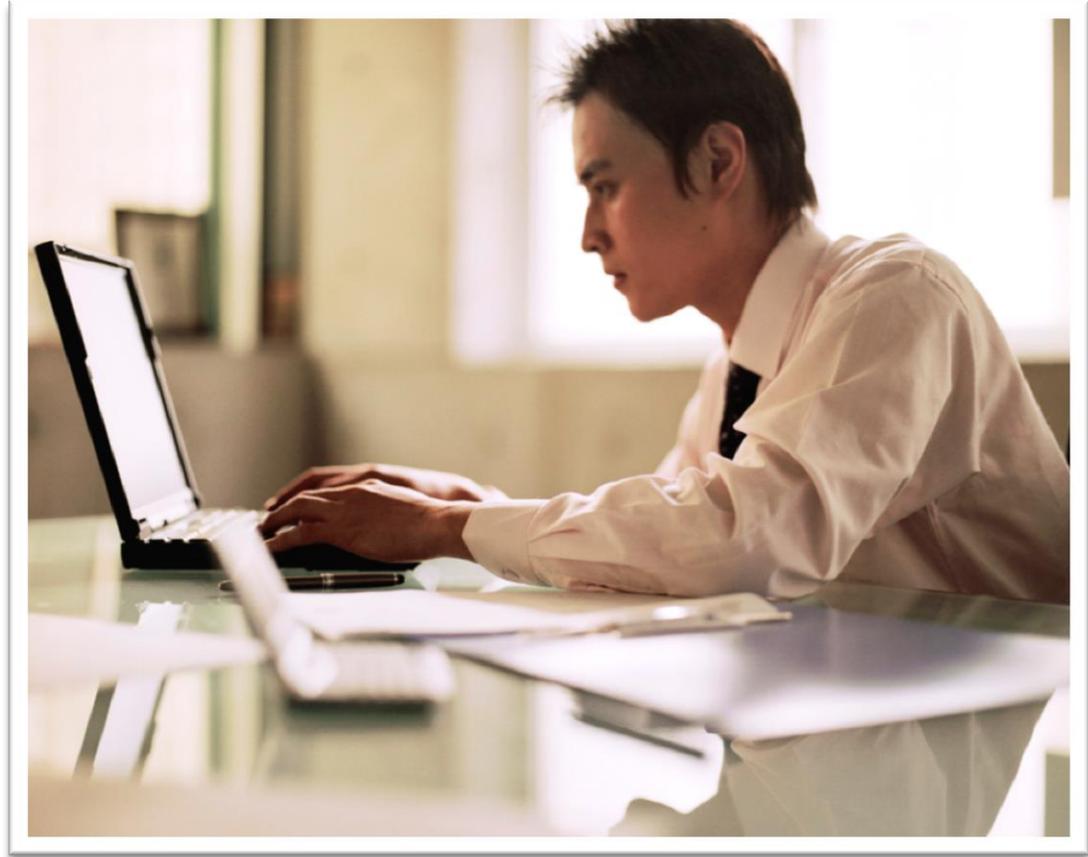
# When?



- Complete all documentation as soon after the event as possible.
- No later than ten (10) business days from date of contact.

# Why?

- Comprehensive enough to support staff actions.
- It is proof of the case activity and provides continuity.
- It helps others know “where you are” with a case.
- It helps evaluate your work.
- Documentation can become the focus of your testimony if you must testify in court.



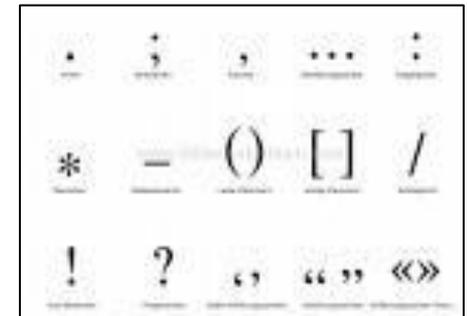
# How?



- Written in first person.
- Complete thoughts/sentences.
- Bullet format may be used to clarify long segments of action.
- Include a plan of action allowing others to intervene in your absence.
- Do not ‘copy and paste’ email or correspondence into a Progress Note. Instead summarize the main issues of the email or correspondence in a Progress Note entry.

# Five Basic Skills

- Grammar
- Spelling
- Punctuation
- Factual Statements
- Organization of Thoughts



# Grammar

- **Use the first person singular when reporting your actions.**

Use “I” instead of your name or the phrase “this service coordinator”.

Using “I” is professional, natural, and clear.

**Example:** I made a home visit on September 1, 2009.

- **Use names rather than abbreviations.** Spell out the complete name of the person, agency, etc. the first time it is used in EACH entry. Follow the complete spelling with the abbreviation/acronym in parentheses. Thereafter, you may use the abbreviation or acronym in the same entry.

**Example:**

I met Mary Smith (guardian) at the Family Support Division Office.

The meeting will be held at the Alternative Opportunities (AO) office.



# Grammar (continued)

- **Use the past tense of the verb as the main verb in most of your sentences.** Write in the past tense. Using the past tense makes sense because you write your documentation in chronological order. By the time you do the documentation the event happened in the past.

**Example:** I went to the home on August 15, 2009.



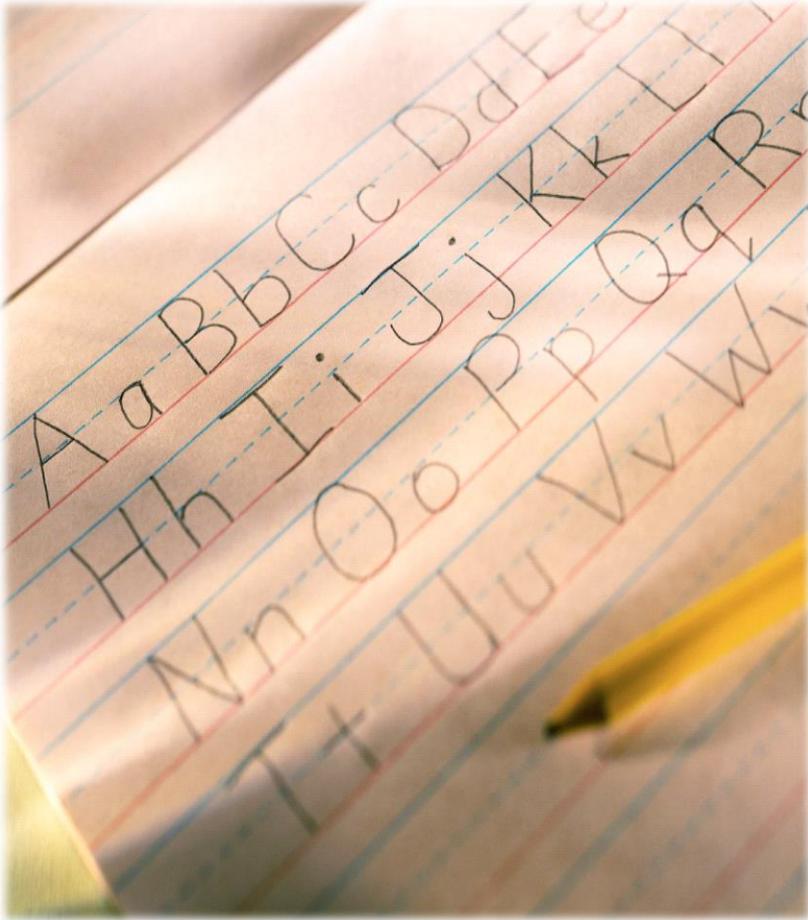
- **Make sure the pronoun reference is clear.** The pronoun should refer to a specific noun.

**Example:** I called Mrs. Jones to tell her the date of the Physical Therapy (PT) evaluation.

- **Use gender specific language in your documentation.** When you are writing about one person and the sex is unknown, use he/she.

**Example:** The director of the Brain Injury Association should bring his/her staff to the meeting.

# Spelling



Helpful tips to avoid misspellings:

- Use the words you know
- Be careful of words that sound alike
- Use the spell check on your computer/MOHSIAIC and then review the documentation again

# Punctuation

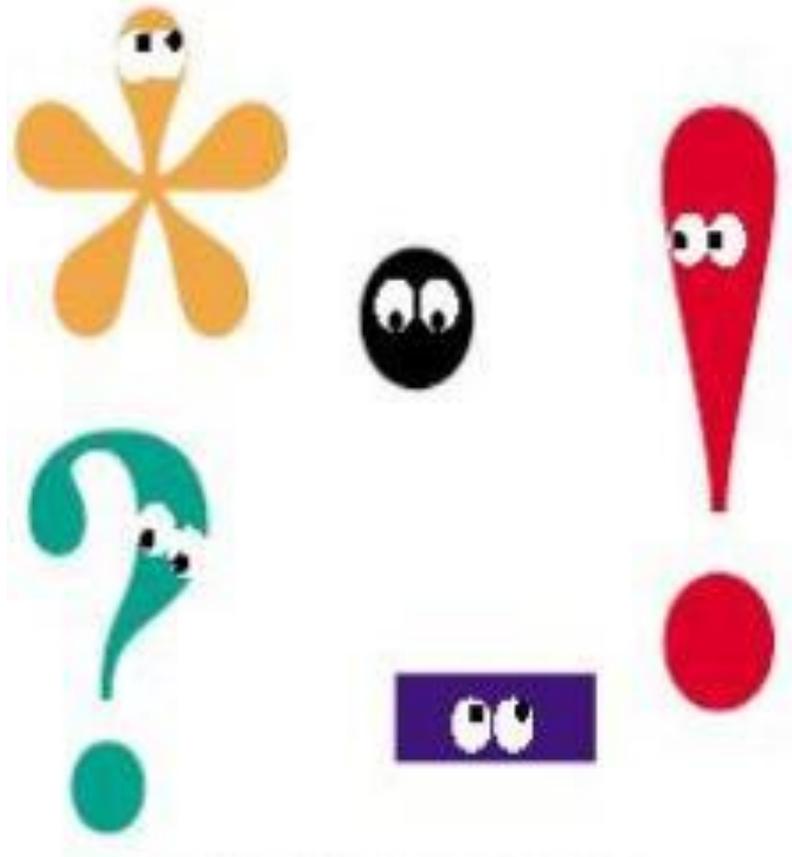
- Is the use of standard marks and signs in writing to separate words into sentences, clauses, and phrases to clarify meaning.
- Punctuation used incorrectly can change the meaning of a sentence.

Examples:

- Let's eat Mommy.
- Giant moving, sale Friday.

Correct punctuation would be:

- Let's eat, Mommy.
- Giant moving sale Friday.



# Factual Statements vs. Opinion



- Nothing discredits documentation more than the presence of conjecture, opinions, and unsubstantiated conclusions.
- Concrete language is preferred to abstract language.
- Concrete language is factual. It paints a specific picture for the reader (supervisor, attorney, etc.) as to exactly what the writer saw, heard, and did.
- Drawing conclusions is something you should not do in your writing.
- Facts speak for themselves.
- Statements of opinion or conclusion are open to different interpretations and can always be challenged.

# Organization of Thought

- Write to express, not impress.
- Limit paragraphs to one idea because paragraphs divide your documentation into segments of related facts.
- Write short sentences because they are the easiest to read.
- Use simple words when appropriate.
- Headings can be helpful to sort ideas.
- Use bullets when appropriate.
  - Indent the bullets under the sentence containing the idea that the bullets support or explain.



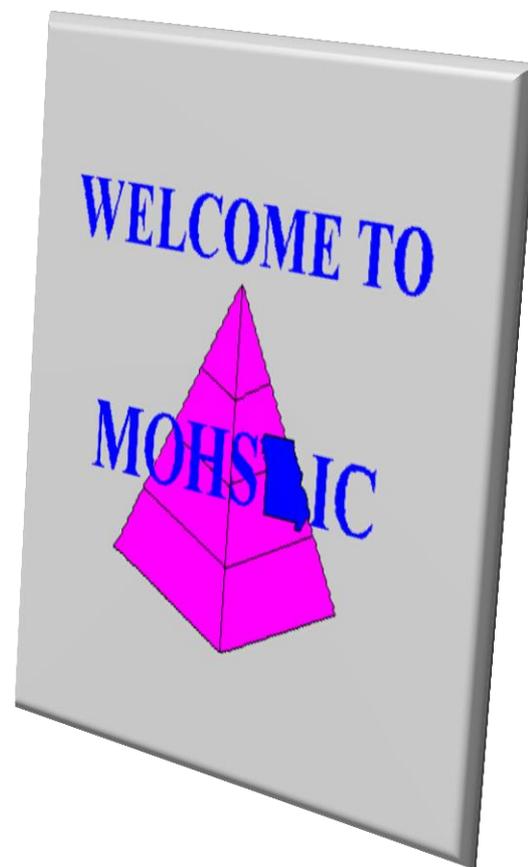
# Participant Records



- Individuals who are referred to SHS are to have a participant file created.
- All participant files shall be secured in a locked unit when they are not in use.
- All requests (subpoena or affidavit) for participant's information will be processed according to the Program Guidebook.

# SHS Information System

- The Missouri Health Strategic Architecture Information Cooperative (MOHSAIC) is the electronic data system that records pertinent participant information and captures needed data for statistical purposes.
- All entry is to be done in a timely manner, accurately, and completely.
- Refer to the MOHSAIC Training Guide for more information.



# Record Reviews

- To insure high quality individual and programmatic performance, randomly chosen participant records are routinely reviewed for adherence to SHS policies.
- The results of these reviews are discussed with the Service Coordinator by the appropriate Program Manager and/or Regional Coordinator.



- Questions?
- Comments?

Jennifer Braun, Training Coordinator  
Missouri Department of Health and Senior Services  
Division of Community and Public Health  
Section for Special Health Services  
920 Wildwood, Jefferson City, MO 65102  
573/751-6246  
[jennifer.braun@health.mo.gov](mailto:jennifer.braun@health.mo.gov)