

### **1. 24 Hour Summary Report**

- Select a specific 'Unit' to narrow down by Household (optional)
- Choose the Date (ending) – do not include the current day (always retrospective)
- There are 3 shifts in PCC for each Home (Day 0700-1500; Eve 1500-2300; Ngt 2300-700)
- Choose the Summary Interval (Last 8 hours/24 hours/72 hours)
- Include draft progress notes (yes/no)
- Sort residents by last name or location (if more than one Unit selected)
- Report will display weights, vitals, immunizations, assessments, and progress notes (with author and time stamp)

### **2. Progress Note Report \*NEW\***

- Select a particular resident (optional)
- Select a specific 'Unit' to narrow down by Household (optional)
- Sort by resident name or location; dates ascending or descending
- All progress note types will appear by default – recommend to run ALL initially and determine filter requirements as category types are occasionally chosen incorrectly
- Select a date range (cannot be greater than one month when running for more than one resident; can be up to 12 months if filtered to a particular resident)
- Add a time range (only if required)
- Choose an 'Author' if verifying documentation performed by a particular staff member
- Include options such as drafts and struck-out notes
- Report will display progress notes only

### **3. Point Of Care Audit Report (For Tasks)**

- Select a particular resident (optional)
- Select a specific 'Unit' to narrow down by Household (optional)
- The Scheduled Date Range cannot exceed 7 days and should NOT include current date
- Choose from the following Documentation Types:

Missing – Report will display all Tasks that did not get documented in POC

Late (specify number of minutes past due) – Report will filter only tasks that were late

Documented Time – Report will display list of Tasks, scheduled time, documented time

Note: Effective Time=when documentation commenced vs. Documented Time=when it was saved/submitted

QShift Tasks will appear due at the end of each shift (06:59; 14:59; 22:59)

#### **4. Medication Admin Audit Report (For Treatments)**

- Select a particular resident (optional)
- Select a specific 'Unit' to narrow down by Household (optional)
- The Scheduled Date Range should NOT include current date
- Filter for a particular staff member by selecting 'Doc'd By' (optional)
- Choose Documentation Type:

All

All Documented

Late (specify number of hours past due)

Missed

Note: Administration Time=when documentation commenced vs. Doc'd Time=when it was saved/submitted

#### **5. Assessment Scheduling Report**

- Select a particular resident (optional)
- Select a specific 'Unit' to narrow down by Household (optional)
- Must choose one Assessment if multiple residents are included
- Report will display Assessment due date, days past due, and when the last one was completed

Note: Use the UDA portal tabs to view/sort/filter Assessments scheduled/in progress/completed

The upper right corner under the 'Scheduled' tab has a link called 'Print Schedule' that displays the same information

#### **6. Assessment History Report**

- Select a particular resident (optional)
- Select a specific 'Unit' to narrow down by Household (optional)
- Specify a date range (optional) – exact time does not appear on the report (date only)
- Choose from the list of Assessments (one or more can be selected)

Note: the Canadian CCRS MDS 2.0 is selected by default (not applicable to the PEI context)

Keep Assessment Status set to 'All' to view complete, in progress, and struck-out assessments

Some of the terminology applies to the InterRAI LTCF only (e.g., export ready; accepted; modified)