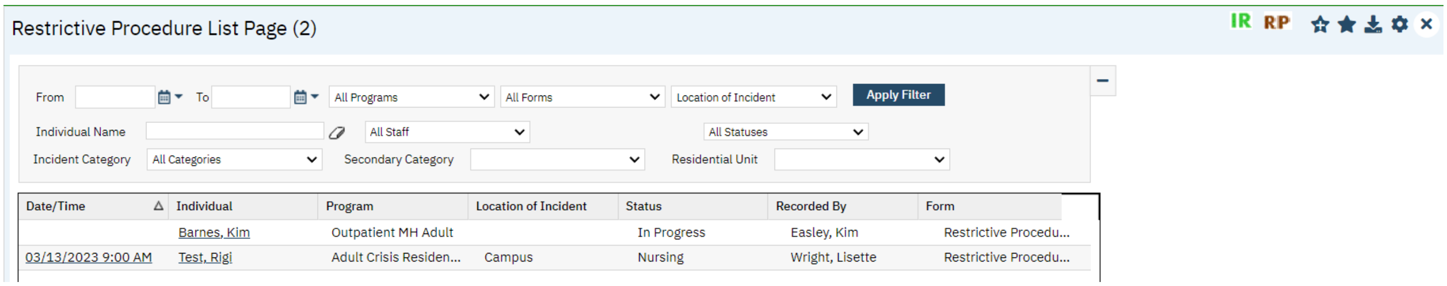
Restrictive Procedure Forms

Contents

Restrictive Procedures List Page

The list page in My Office tab tracks all Incident Reports and Restrictive Procedure forms entered for all clients. This is also where a new form can be initiated from. It is associated to the Incidents/Restrictions banner in the My Office tab. We have a new CORE Incident Report that should be used in lieu of the IR icon here, but this form can be used for Restrictive Procedures.



Filters of the List Page

- From and To Filters – Allows filtering of the list based on the Date/Time of the incident.
- All Programs – Filter displays all active programs. Staff will narrow the results based on the program selected. Note that if staff do not have permissions to view the clients associated to that program, then records will not be seen.
- All Forms – Filters for Incident Report versus a Restrictive Procedure Form.
- Location of Incident – Filters for the location selected in the Location of Incident field on the forms.
- Individual Name – Allows searching for a client by name. Name is typed in and the system will match to the name entered. First or Last Name or both can be entered.
- All Staff – Filters for name of the staff the report was Recorded By.
- All Statuses – Filter for Form Status
- Incident Category – Filters for primary category of Incident Reports (not applicable for Restrictive Procedures)
- Incident Category 2 - Filters for secondary category of Incident Reports (not applicable for Restrictive Procedures)
- Residential Unit filters for the Unit where restrictive procedure is filed under.

Columns of the List Page

- Date/Time – Date and Time of the Incident or Restrictive Procedure. Clicking on Date/Time will reopen the form.
- Individual – Name of the individual the form is reported for. Click the individual name will open the Individual’s record.
- Program – The program associated to the form on the Program field
- Location of Incident – The location chosen in the Location of Incident field
- Status – The status of the form Recorded By – The staff who created the form and was responsible for completing the General and Details sections.
- Recorded By – Who initially recorded the form.
- From – Whether the form is an Incident Report or a Restrictive Procedure Form.

Tools of the List Page

- **IR** = Creates a new Incident Report form. (DO NOT USE)

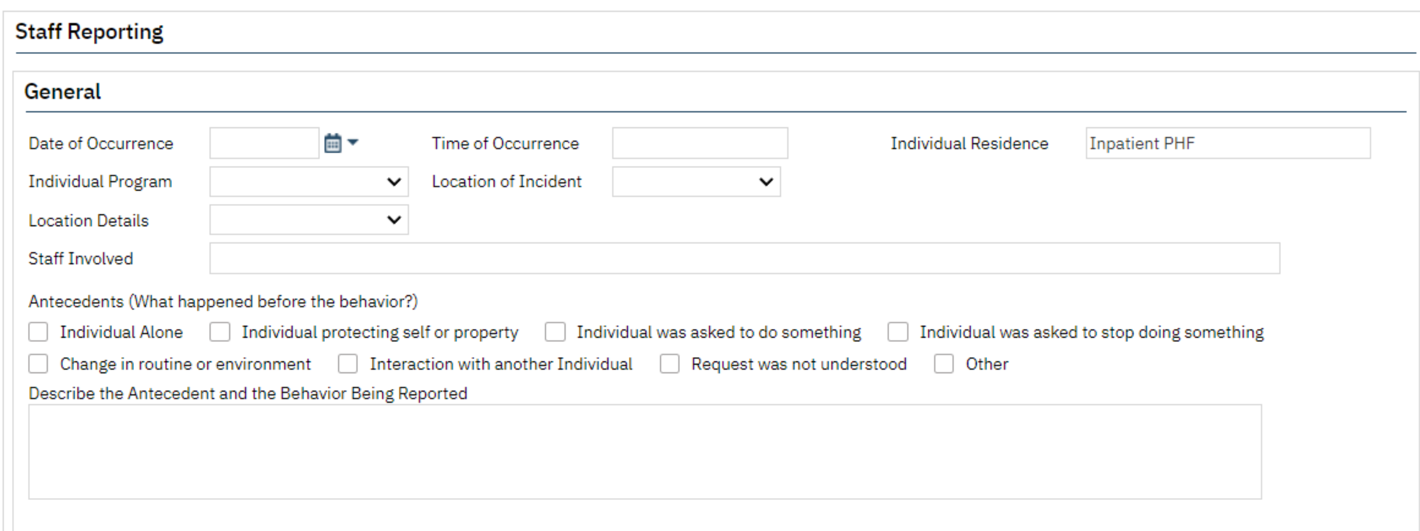
-  = Creates a new Restrictive Procedure Form
-  = Exports the information on the list page to Excel.
-  = Closes the page and takes you to the last page you were on.

Restrictive Procedure Form

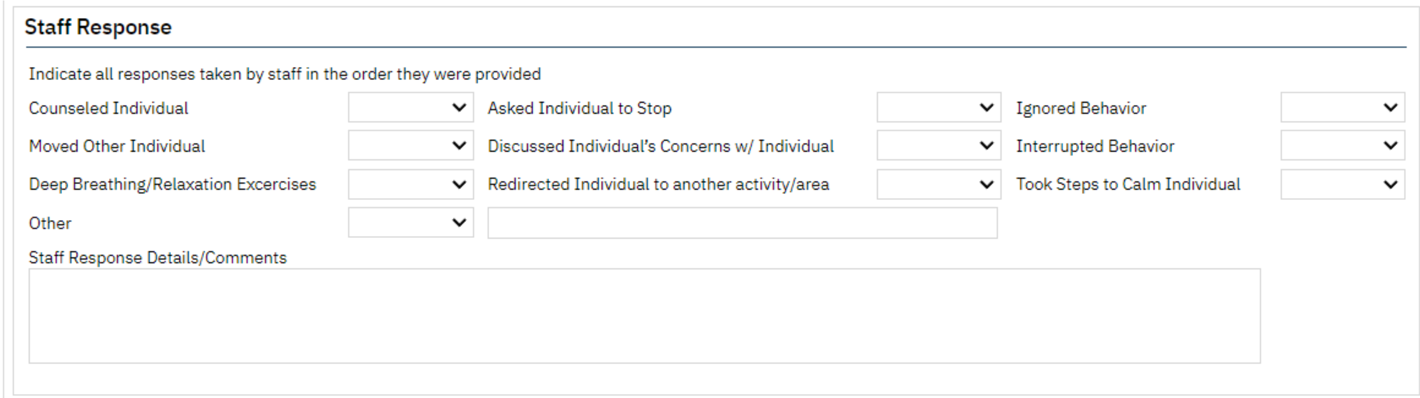
Documenting of the Restrictive Procedures

1. Open the Incidents/Restrictions banner in the My Office tab.
2. Click the RP tool in the tool bar to create a new Restrictive Procedure Form. If a record is open on your screen, the form will be created for that individual. If a record is not open, the Client Search pop up will open for you to search for the individual you are reporting Restrictive Procedure for.

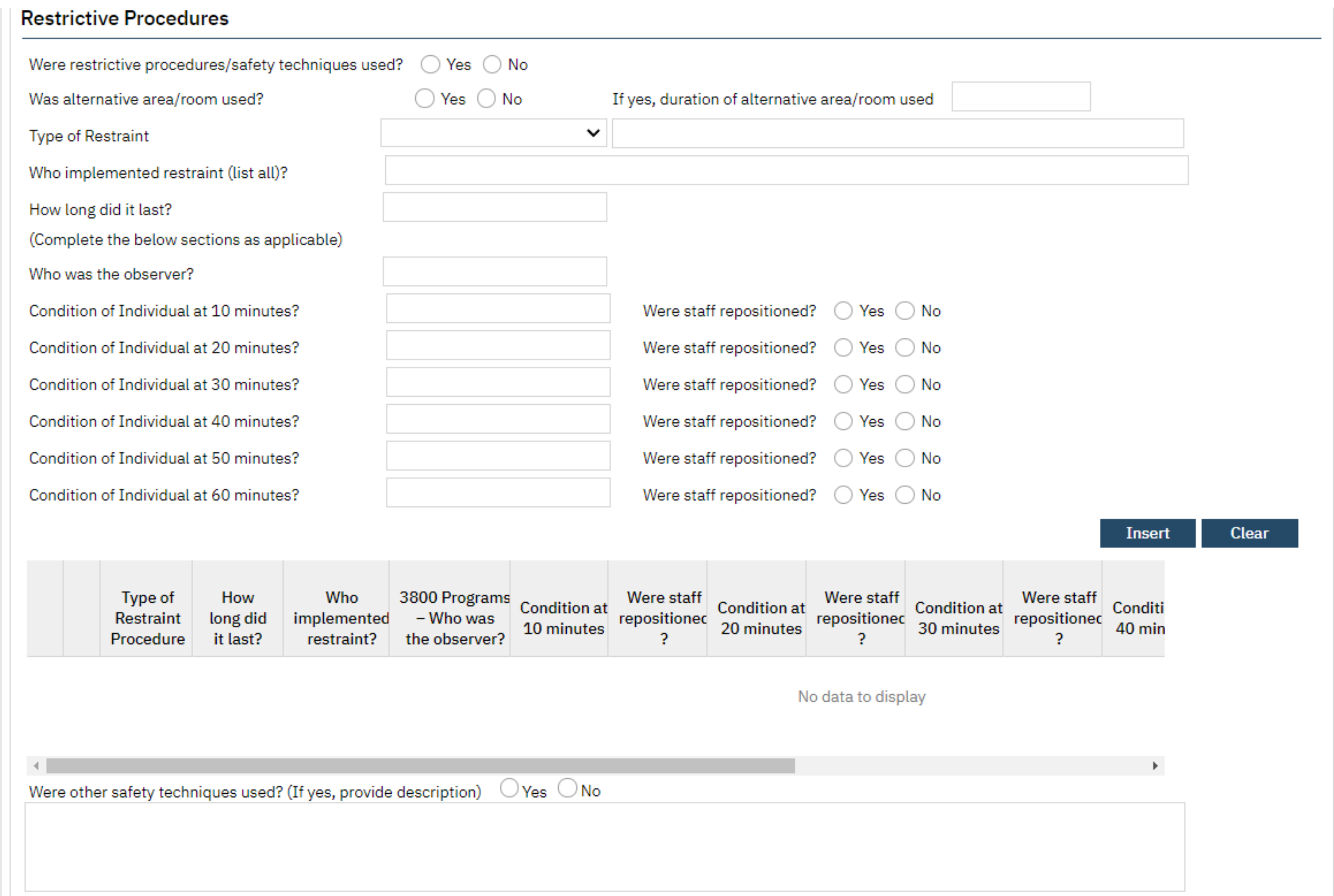
3. Complete the General tab of the Staff Reporting section.
   a. Note that in this form, the Individual Program field is the 5 organization programs.



4. Indicate the staff responses in the Staff Response fields. Rank the order in which different responses were provided.

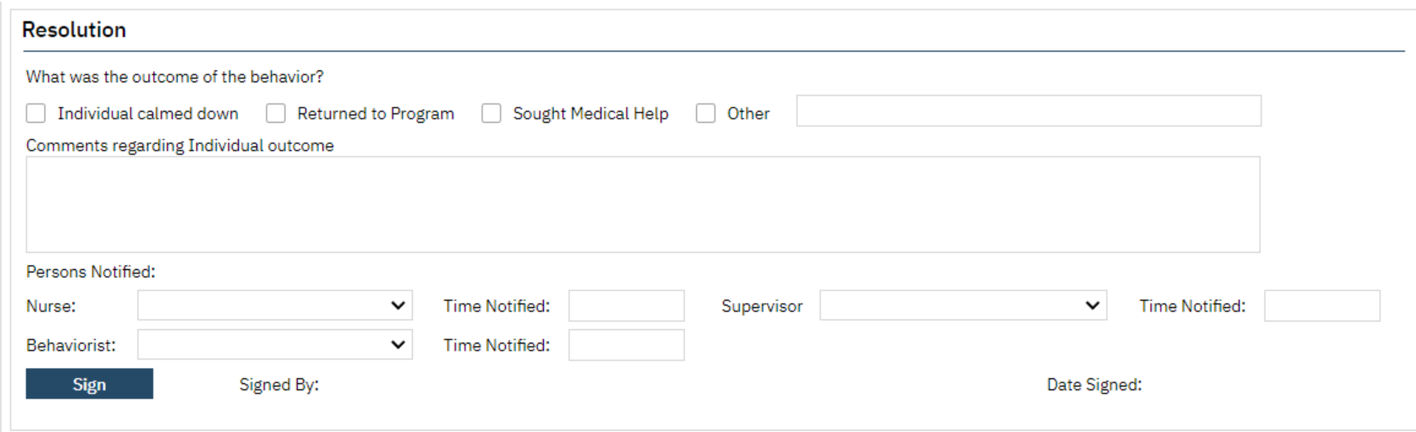


5. In the Restrictive Procedures section, indicate each procedure used Note that the fields for the 3800 program only are listed below the heading. Click Insert for each restrictive procedure you are documenting on so that it is in the list below the fields. Do not click Save until the procedure is in the list.
    a. Use the text box below the list for any other procedures used.



6. Complete the Resolution section. When all of these sections are completed, click the Sign button to finalize the fields. Enter your password in the pop up that opens.

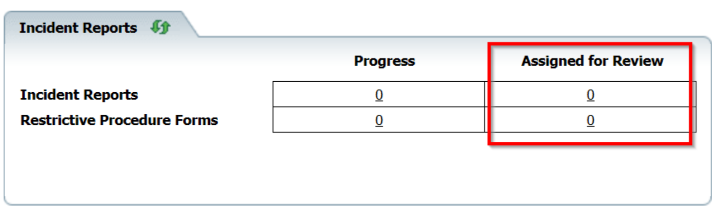
a. Note that Persons Notified fields all pull a list of all active staff.



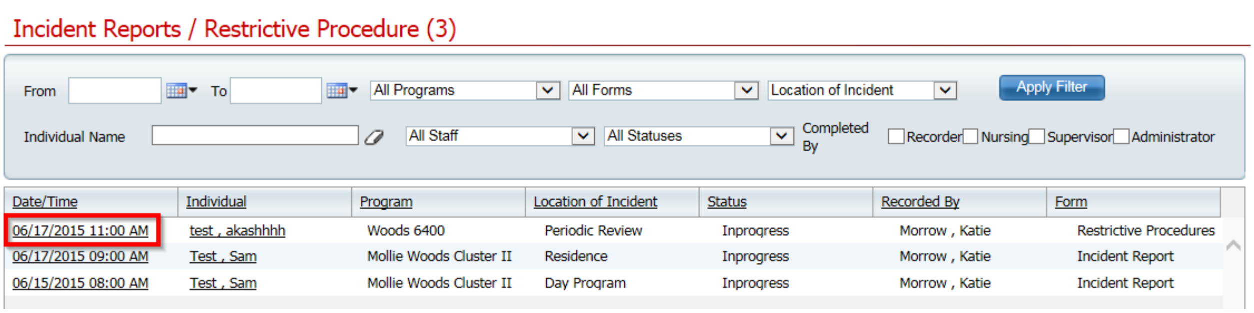
Staff Follow Up

The staff who are notified for follow up will follow the below steps to complete the follow up:

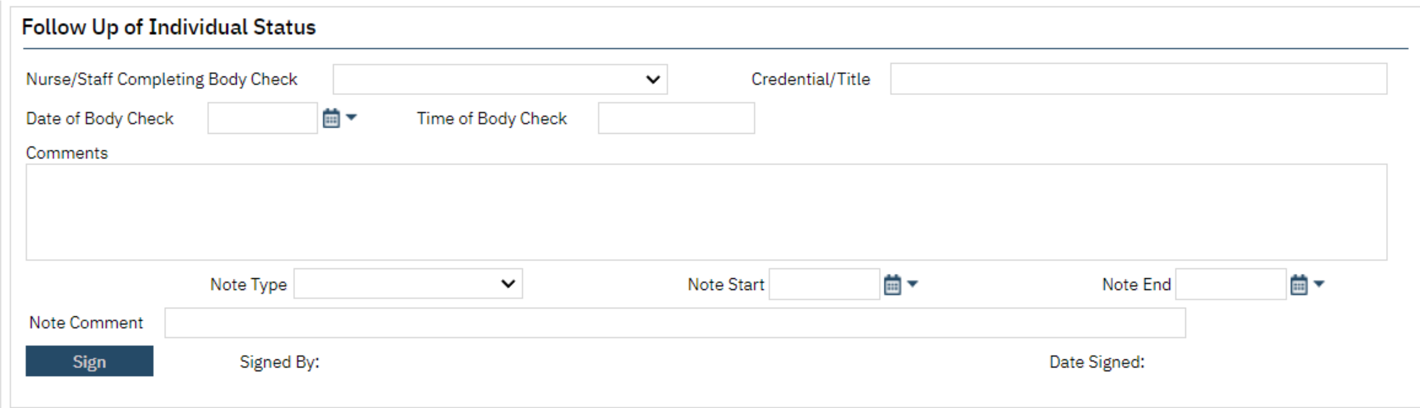
1. In the Dashboard, use the Incident Reports widget to know whether you are assigned to review an Incident Report or Restrictive Procedure Form. There will be a number in the 'Assigned for Review' column. Clicking on it will open the list page with the forms you need to review.



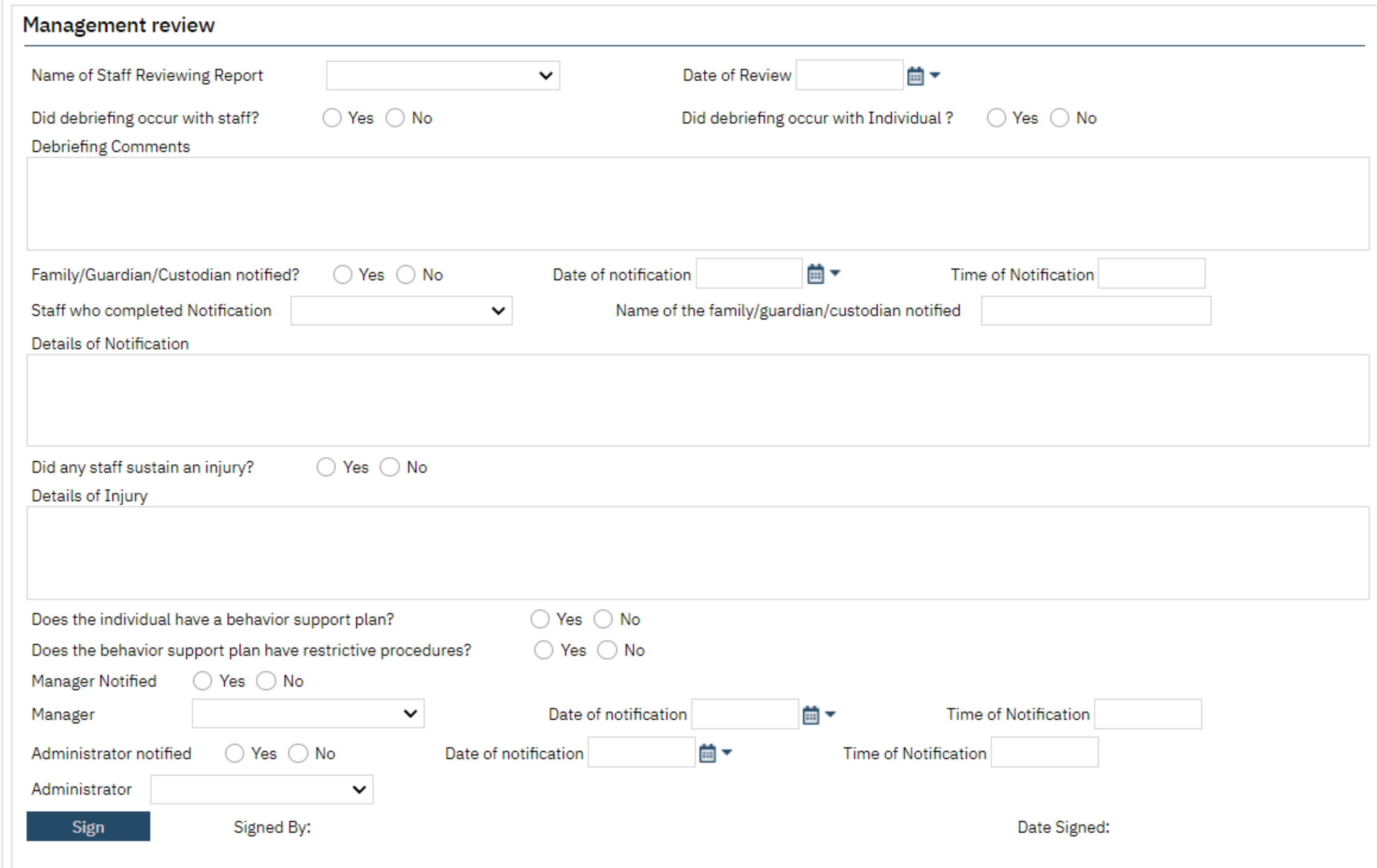
2. In the list page, click on the Date/Time of the form you will review.



3. Complete the section you are assigned to review
   a. Follow Up of Individual Status is completed by the staff assigned to review the status of the individual after the restrictive procedures have occurred. Complete the fields in the section and click the 'Sign' button to sign the section as complete.
      i. If you are completing this section but your name is not listed as the 'Name/Staff Completing Body Check' modify this field to list your name. Then the Sign button will be enabled.



b. Management Review Section is completed by staff with permissions as a Supervisor or "Clinical Supervisor" in the Staff Role permissions. Fill out the information regarding the review and contact made with the family/guardian/custodian and staff injuries. Click the 'Sign' button to sign the section as complete.
   i. The 'Does the individual have a behavior support plan?' and 'Does the behavior support plan have restrictive procedures?' questions will be answered automatically as Yes if there is a Behavior Support Plan document in the system with an effective date within the past 365 days. The question is marked yes if within the last Behavior Support Plan document, the check box, 'Emergency Response/Restrictive Procedures are a part of this plan' is checked.
   ii. 'Administrator Notified' field will cause the Administrator fields to display when answered Yes.



Management review

Name of Staff Reviewing Report | Date of Review

Did debriefing occur with staff? Yes No | Did debriefing occur with Individual ? Yes No

Debriefing Comments

Family/Guardian/Custodian notified? Yes No | Date of notification | Time of Notification

Staff who completed Notification | Name of the family/guardian/custodian notified

Details of Notification

Did any staff sustain an injury? Yes No

Details of Injury

Does the individual have a behavior support plan? Yes No

Does the behavior support plan have restrictive procedures? Yes No

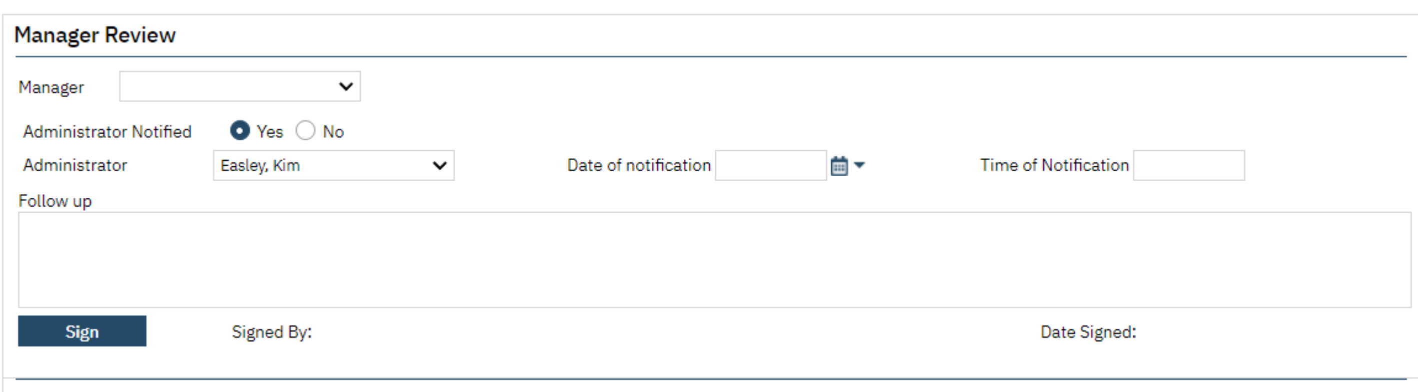
Manager Notified Yes No

Manager | Date of notification | Time of Notification

Administrator notified Yes No | Date of notification | Time of Notification

Administrator

Sign | Signed By: | Date Signed:



Manager Review

Manager

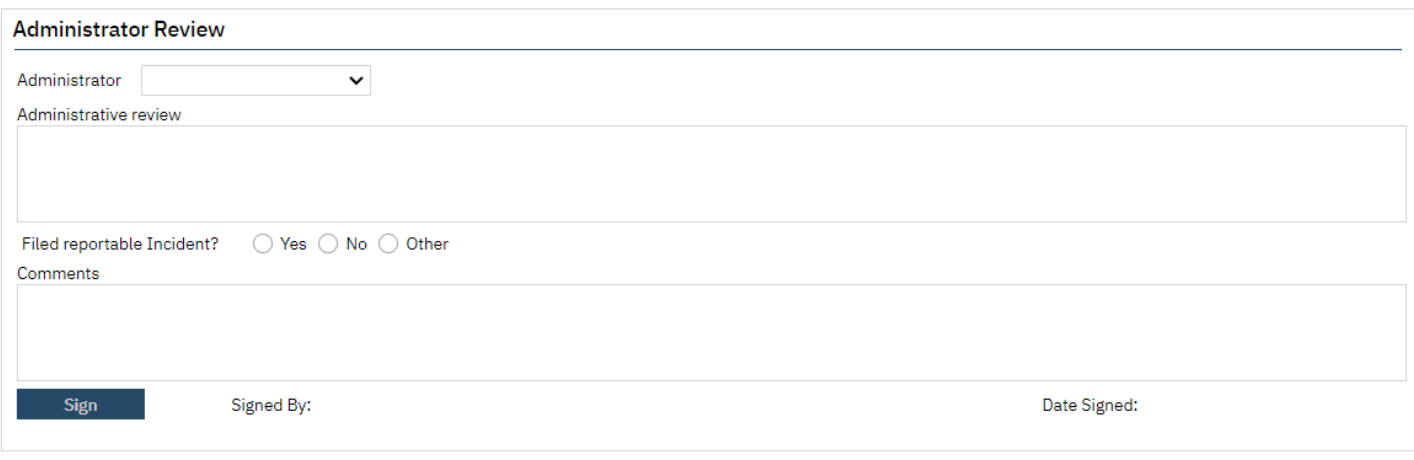
Administrator Notified Yes No

Administrator Easley, Kim | Date of notification | Time of Notification

Follow up

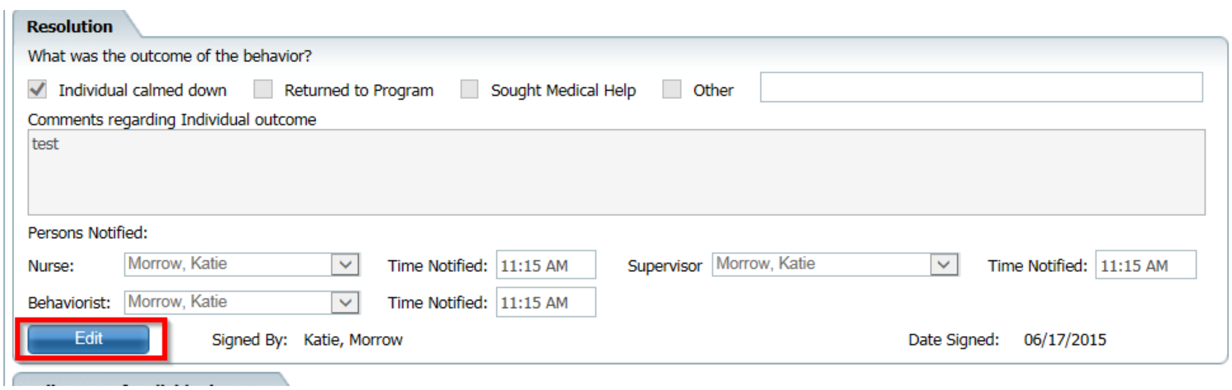
Sign | Signed By: | Date Signed:

c. Administrator Review section is completed by staff with permissions as 'Admin' in the Staff List permissions. Fill out the information regarding the review and click the Sign button to complete the fields of this section.



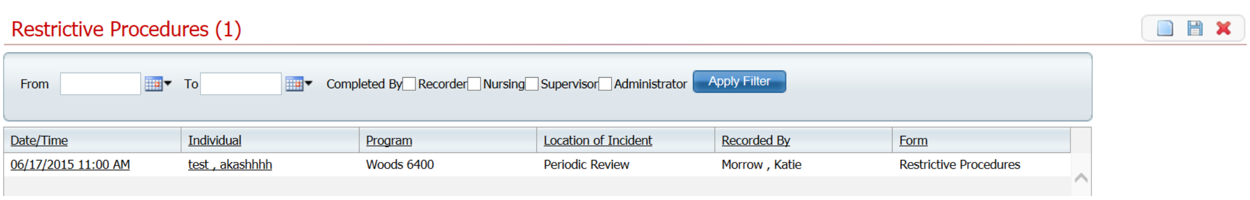
Editing the Restrictive Procedure Form

Once a section of the form is Signed, only the person who signed the section can make modifications. To make modifications, the staff will click the 'Edit' button (replaces the Sign button). Then the fields of the section will again become enabled. Then after changes are made, staff again click the Sign button. This will update the Date Signed field to the new date the form was signed.



Restrictive Procedures List Page – Individual Record

Within the individual record, there is a list page to display all Restrictive Procedure forms completed for the individual.



Filters of the List Page

- From and To Filters – Allows filtering of the list based on the Date/Time of the Restrictive Procedure.
- Completed By – The checkboxes will only show forms that are completed by the following sections:
    - Recorder – Signed the General and Details section.

- Nursing – Follow Up of Individual Status section is complete
- Supervisor – Supervisor Follow Up section is complete
- Administrator – Administrator Follow Up section is complete

Columns of the List Page

- Date/Time – Date and Time of the Incident or Restrictive Procedure. Clicking on Date/Time will reopen the form.
- Individual – Name of the individual the form is reported for. Click the individual name will open the Individual's Summary page.
- Program – The program associated to the form on the Program field
- Location of Incident – The location chosen in the Location of Incident field
- Recorded By – The staff who created the form and was responsible for completing the First section of the form down to the Resolution section.
- From – Whether the form is a Restrictive Procedure Form. They will all list as Restrictive Procedure Forms on this page.

Tools of the List Page

-  = Creates a new Restrictive Procedure Form
-  = Exports the information on the list page to Excel.
-  = Closes the page and takes you to the last page you were on.

Appendix A: Logic of Staff Drop Downs

The below grid explains the logic and setup for each staff drop down in the forms.

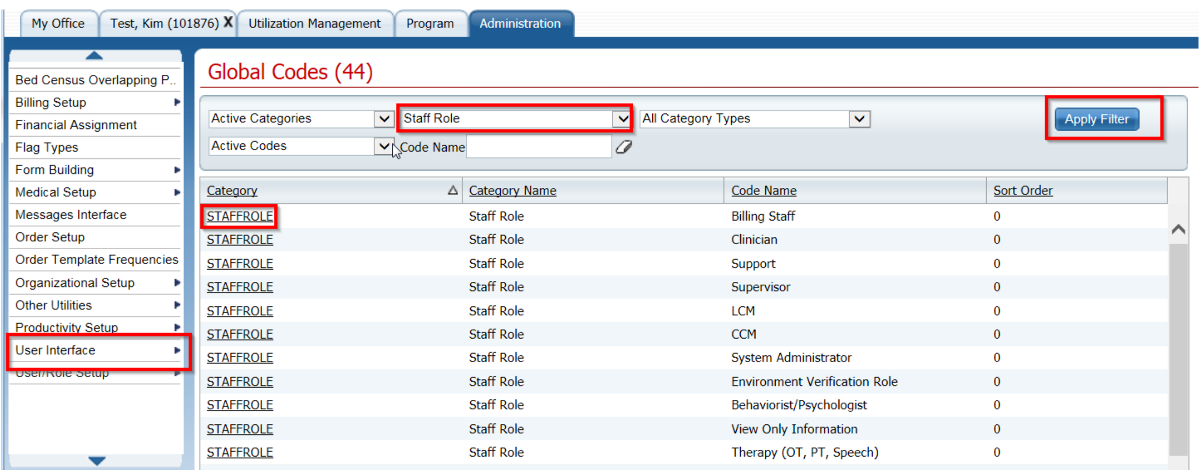
Form	Section	Field Name	Logic	Required Setup
Restrictive Procedure Form	**Resolution**	Nurse	Displays the names of staff assigned to the role of 'Nurse' and the staff is assigned to the program chosen at the top of the form.	Staff must be assigned to the program selected on the IR and the assigned a role in the Staff Details page that is setup to the recode category 'XNurseStaff'.
		Behaviorist	Displays the names of staff assigned to the Behaviorist role.	Staff must be assigned to a role in the Staff Details page that is setup to the recode category XBEHAVIORISTSTAFF
		Supervisor	Displays the names of staff assigned to the role of Supervisor or Clinical Supervisor and are assigned to the program chosen at the top of the form.	Staff must be assigned to the program selected on the IR and a role in the Staff Details page that is setup to the recode category 'XSupervisorFlagged'.
	Follow Up of Individual Status	Nurse/Staff Completing Body Check	Displays the names of staff assigned to the role of 'Nurse' and the staff is assigned to the program chosen at the top of the form.	Staff must be assigned to the program selected on the IR and the assigned a role in the Staff Details page that is setup to the recode category 'XNurseStaff'.
	Management Review	Name of Staff Reviewing Report	Displays the names of staff assigned to the role of Supervisor and are assigned to the program chosen at the top of the form.	Staff must be assigned to the program selected on the IR and a role in the Staff Details page that is setup to the recode category 'XSupervisorFlagged'.
		Staff who completed notification	Displays the names of all staff assigned to the program chosen at the top of the form.	Staff must be assigned (in the Staff Details page) to the program chosen at the top of the form.
		Administrator	Displays the names of staff assigned to the role of 'Administrator'	Staff must be assigned to a role in the Staff Details page that is setup to the recode category of 'XAdministratorNotified'.

	Administrator Review	Administrator	Displays the names of staff assigned to the role of 'Administrator'	Staff must be assigned to a role in the Staff Details page that is setup to the recode category of 'XAdministratorNotified'.

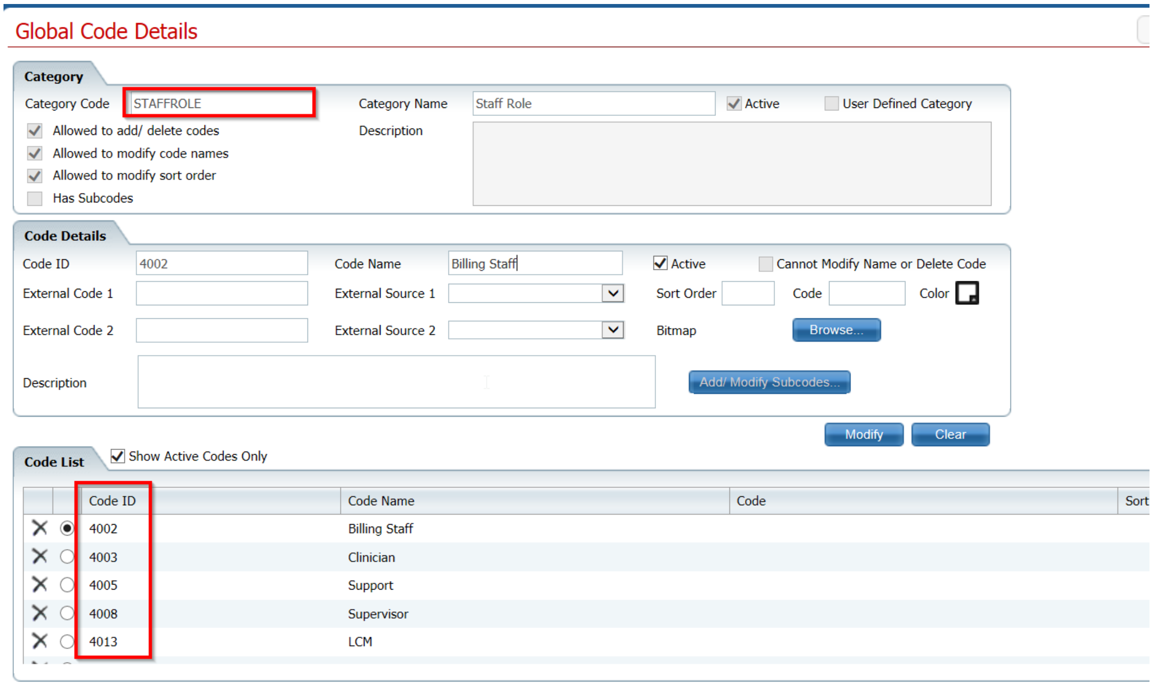
Appendix B: Setting Up Recodes

To setup the roles noted in Appendix A to a recode category, the following steps are followed:

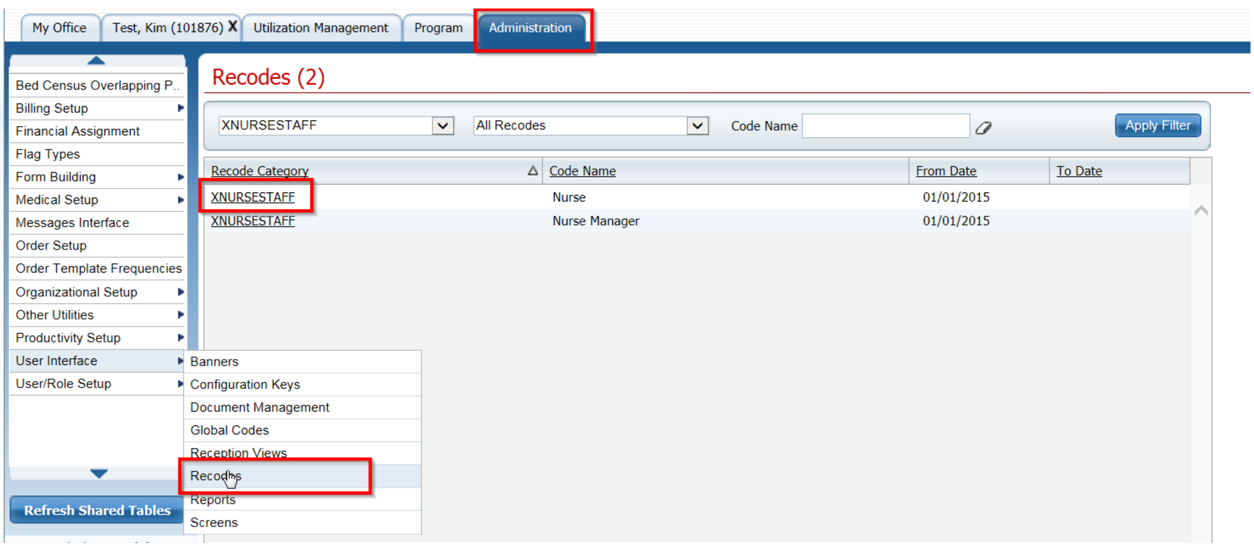
1. To add roles, you will need the Global Code Id for the role you want to enter. To get this, open the Global Codes banner under the User Interface banner in the Administration tab. Look for the Global Code Category of 'StaffRole' and click Apply Filter. In the list, click on the words StaffRole.



2. In the Global Code Details page, the category with all global codes is now shown. In the Code List, use the Code ID column to get the ID number for each role that you want to setup. Note these ID's and which roles they associate with.



3. Open the Recodes banner in the User Interface banner of the administration tab.
4. In the List page, filter for the Recode Category you want to setup/modify and you will see any existing entries. Click on the Recode Category to open the page with the entries for this category.



5. In the page with the details of the recodes:
    a. Add a new code by entering in the Code Name and Character Code ID (use the Role Name), Start Date, and Integer Code ID. Click Insert. Integer Code ID is the ID number from Global Codes.
    b. To modify an existing recode, select the recode using the circle next to it in the Recode List. Make the changes in the Recode Details section and click 'Insert'.
    c. Delete one of the recodes in the Recode List section by clicking on the 'X' next to the recode you want to delete.
    d. Click Save in the tool bar to save any changes made.

e. Click the Trash Can in the tool bar to delete the Recode Category (not recommended you do this).