

In-Home Supportive Services Case Documentation - An Overview

Introduction Case documentation should accurately and objectively reflect the In-Home Supportive Services (IHSS) client's condition (environmental, physical, mental,) and all activities (including contacts and attempted contacts), assessments and referrals associated with a particular case.

The IHSS case file should provide anyone without prior knowledge of the case with a clear and complete picture of the actions taken. Thorough, well-documented IHSS case records are essential.

Narrative documentation Social Workers are required to include narratives regarding the following topics in each case:

- Consumer's:
 - Age.
 - Physical condition (i.e. unsteady gait, frail).
 - Mental condition (i.e. oriented to persons, place and things).
- Services the consumer is requesting or needs.
- Reason the consumer needs each authorized service.
- Assessment was done on the consumer's *good or bad* day (according to him/her).
- Reasons for increase or decrease in hours (i.e. specific observations, client statements, medical verifications).
- Interpreter offered, if applicable.

Others topics to address in narratives are:

- Functional limitations, including:
 - General observations.
 - Observations specific to authorized tasks.
- Reason for services outside of Hourly Task Guidelines (HTGs), if any.
- Date the Paramedical Services form (SOC 321) was sent and received, if applicable.
- Services for which no need was identified (for approved cases only).
- Social supports, including who was present during the interview.
- Environmental conditions (including safety hazards, if any).
- History of attempted contacts or phone calls to arrange appointment.
- Referrals and collateral contacts, if any.
- Controversial issues in the household – how are they mediated/resolved.

Social Workers are required to include notes stating that:

- Client was assessed for Protective Supervision.
- The Notice of Action (NOA) 350 was sent (for Share of Cost (SOC) cases).
- Adult Protective Services (APS) or Children and Family Service (CFS) referral was done, if applicable.

Additional topics Additional topics covered in IHSS case documentation include:

- Protective supervision.
- Hospital stay.
- Client whereabouts.
