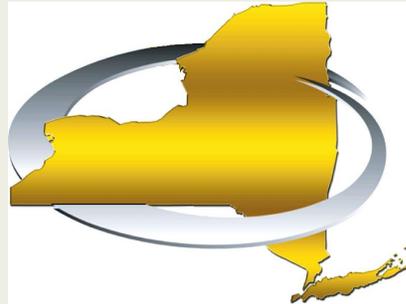


Catching All The Data 201



Monthly Activity Form

The case study and corresponding exercise used for this presentation was written by Local Ombudsman Coordinators Chris Reitler and Melanie Keem

Objectives

- To accurately collect all relevant data.
- To accurately record all relevant data.
- To have your data create a picture.
- To take credit for all the work you do.

You will need:

Two blank Monthly Activity Reporting Forms,
LTCOP Program Activity Definitions, a pad and
something to write with.

Instructions

Together, we will read each day's Ombudsmen activities and record the corresponding activities on the Monthly Activity Reporting Form.

Compare your individual record with the sample Monthly Activity Reporting Form presented in this presentation.

January 3, 2013

On January 3, 2013 Olivia Benson, volunteer Ombudsman at the Queen City Adult Home in Buffalo received a phone call from Christian Reitler, Ombudsman Program Coordinator asking her if she would be available to do an in-service at the Queen City Adult Home for new resident care aides on January 10, 2013. Olivia was more than happy to participate in the in-service. Olivia was on the phone with Christian for approximately 15 minutes.

The time Olivia spent on the phone with the Program Coordinator Equates to Activity I. Additional Volunteer Hours

Activity I – Additional Volunteer Hours

Use this category for time spent:

- Participating in discussion groups
- Filling out Ombudsman paperwork
- Making and receiving Ombudsman phone calls
- Helping out in the office
- Attending training or presentations at an alternate site

(See Activity Definitions for more information)

Now fill in your activity form then go to the next slide.

January 10, 2013

On January 10th, Olivia drove 15 minutes to her facility and arrived at approximately 2:30pm. Her in-service training wasn't until 3:30pm, so Olivia decided to go walk through the facility to see if any residents wanted or needed to meet with her. As Olivia walked by the dining area, she saw one of the residents wave her over. Casey Novak, resident was sitting at a table with two younger women. Olivia walked over and introduced herself to the ladies. As it turns out, Casey has twin daughters who live in Florida. Olivia took this opportunity to explain to the ladies her role as an Ombudsman. She let Casey and her daughters know that they could always contact her through the local Ombudsman program if they ever have any questions or concerns about their mother's care. Olivia strolled through the hallways, and observed many of the residents to be resting comfortably in their rooms or enjoying the therapy dog, Max who comes to visit on Thursday afternoons. At 3:30pm, Olivia made her way to the staff training room, and gave her presentation to the six new employees about the Ombudsman program. Her presentation, including Q&A lasted 1 hour. After the training, Olivia stayed to answer any questions that the staff may have had. She also sat down in the lobby to fill-out her Monthly Activity Reporting Form; this only took 10 minutes.

The time Olivia spent in the facility on January 10th included four program activities. Can you list those activities?

Activities

- A. Resident Visitation/Complaint Investigations
- B. Individual Information & Consultation
- H. Facility Staff Training by Ombudsman
- I. Additional Volunteer Hours

(See Activity Definitions for more information.)

Now fill in your activity form.

January 10th included Activity A.
Resident Visitation/Complaint Investigations

Activity A. - Resident Visitation/Complaint Investigations

Use this category for time spent:

- in the facility
- working to investigate and resolve complaints
- visiting residents
- making general observations at the facility

(See Activity Definitions for more information)

January 10th included Activity B.
Individual Information & Consultation

Activity B - Individual Information & Consultation

Use this category for:

- Providing information and consultation to individuals when a complaint **HAS NOT** been opened.
- Counseling an individual on how to resolve their own complaint **(EMPOWERMENT)** including whom in the LTC facility to speak with regarding their issue
- Providing information on:
 - Residents Rights
 - Regulations
 - Choices for LTC
 - Ombudsman Services
 - Other topics listed on Activity Form

(See Activity Definitions for more information)

January 10th included Activity H.
Facility Staff Training by Ombudsman

Activity H – Facility Staff Training by Ombudsman

Use this category for:

- Any presentations or instruction provided to facility staff by the Ombudsmen. Formal in-services are generally scheduled in advance, on a defined topic, with more than one staff person present.

(See Activity Definitions for more information)

January 10th included Activity I.
Additional Volunteer Hours

Activity I - Additional volunteer hours

Use this category for time spent:

- Participating in discussion groups
- Filling out Ombudsman paperwork
- Making and receiving Ombudsman phone calls
- Helping out in the office
- Attending training or presentations at an alternate site

(See Activity Definitions for more information)



**New York State Ombudsman Monthly Activity Reporting Form
VOLUNTEER**

Ombudsman: Olivia Benson **Facility:** Queen City Adult Home **Month/Year:** 1/1/2013

| Date | Activity | Topic | Activity Time | Travel Time | Notes: contact person etc. |
|-----------|----------|-------|---------------|-------------|---------------------------------------|
| 1/3/13 | I | | 15 min | 0 | Phone call with C. Reitler |
| 1/10/2013 | A | | 2 hr | 30 min | |
| 1/10/2013 | B | 20 | 0 | 0 | 1 instance, new resident, 2 daughters |
| 1/10/2013 | H | 20 | 1 hr | 0 | 6 new employees |
| 1/10/2013 | I | | 10 min | 0 | Paperwork |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

| | | |
|---|---|------------------------|
| <p>Program Activities * This activity requires a Topic</p> <p>A. Resident Visitation/Complaint Investigation B. *Individual Information & Consultation C. *Community Education D. *Facility/Provider Consultation E. Facility Survey Participation F. Residents Council Participation G. Family Council Participation H. *Facility Staff Training by Ombudsman I. Additional Volunteer Hours</p> | <p>Topics</p> <ol style="list-style-type: none"> 1 Abuse, Neglect, and Exploitation. 2 Access to Information by Resident or Resident's Representative 3 Activities / Social Services 4 Admission, Transfer, Discharge 5 Adult Protective 6 Advance Directives 7 Behavioral Issues 8 Communications 9 Complaint Process / Grievance 10 Dietary 11 DOH 12 Facility Policies/Procedures, Attitudes, Resources 13 Family 14 Financial, Property 15 Home and Community Services 16 Legal 17 Long Term Care Options / How to choose a facility 18 Medicaid / Medicare 19 Mental Health 20 Ombudsman Services 21 Other 22 Physicians 23 Rehabilitation 24 Regulations 25 Resident Care 26 Resident's Rights 27 Restraints 28 Safety 29 Social Services /Activities 30 Staffing 31 Survey | <p>NYS LTCOP 03/11</p> |
|---|---|------------------------|

Clarification

- Often when we visit a facility we do more as ombudsmen than we give ourselves credit.
- Not only are we simply visiting, we are also potentially investigating complaints (Activity A) and answering questions of residents, family members, and staff members.
- Remember, if we are providing Information and Consultation to residents or family members, it is Program Activity B Information and Consultation. This activity will **require you to choose a topic.**

Clarification

- If we are providing consultation to a facility staff person we would document this as Program Activity D. Facility/Provider Consultation which also requires a topic.
- Through data analysis we have determined that ombudsmen are not effectively capturing the time spent doing Program Activity A and D. This is time spent on the program where we are not giving ourselves proper credit.

Suggested Solution

- Capture the time spent providing Program Activity B or D under Program Activity A, Resident Visitation/Complaint Investigation.
- Then simply record the instances of Program Activity B or D with appropriate topics on the following lines with **NO** time since it has already been accounted for under Program Activity A.
- ****NOTE**** When Program Activity B and D occur **OUTSIDE of** the facility, time will need to be assigned to each of the these program activities

January 12, 2013

On January 12, 2013 Olivia attended an open house at Hospice Buffalo to learn about their services so that she could be better informed as a Long-Term Care Ombudsman. The open house was for 2 hours. Her round trip travel time was 1 hour.

The time Olivia spent at the Hospice Buffalo Open House on January 12th is Activity I. – Additional Volunteer Hours

Activity I – Additional Volunteer Hours

Use this category for time spent:

- Participating in discussion groups
- Filling out Ombudsman paperwork
- Making and receiving Ombudsman phone calls
- Helping out in the office
- **Attending training or presentations at an alternate site**

(See Activity Definitions for more information)

Now fill in your activity form then go to the next slide.



**New York State Ombudsman Monthly Activity Reporting Form
VOLUNTEER**

Ombudsman: Olivia Benson Facility: Queen City Adult Home Month/Year: 1/1/2013

| Date | Activity | Topic | Activity Time | Travel Time | Notes: contact person etc. |
|-----------|----------|-------|---------------|-------------|---------------------------------------|
| 1/3/13 | I | | 15 min | 0 | Phone call with C. Reitler |
| 1/10/2013 | A | | 2 hr | 30 min | |
| 1/10/2013 | B | 20 | 0 | 0 | 1 instance, new resident, 2 daughters |
| 1/10/2013 | H | 20 | 1 hr | 0 | 6 new employees |
| 1/10/2013 | I | | 10 min | 0 | Paperwork |
| 1/12/2013 | I | | 2 hr | 1 hr | Hospice Buffalo, Open House |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

| | | |
|---|---|--|
| <p>Program Activities * This activity requires a Topic</p> <p>A. Resident Visitation/Complaint Investigation B. *Individual Information & Consultation C. *Community Education D. *Facility/Provider Consultation E. Facility Survey Participation F. Residents Council Participation G. Family Council Participation H. *Facility Staff Training by Ombudsman I. Additional Volunteer Hours</p> | <p>Topics</p> <p>1 Abuse, Neglect, and Exploitation. 2 Access to Information by Resident or Resident's Representative 3 Activities / Social Services 4 Admission, Transfer, Discharge 5 Adult Protective 6 Advance Directives 7 Behavioral Issues 8 Communications 9 Complaint Process / Grievance 10 Dietary 11 DOH 12 Facility Policies/Procedures, Attitudes, Resources 13 Family 14 Financial, Property 15 Home and Community Services</p> | <p>16 Legal 17 Long Term Care Options / How to choose a facility 18 Medicaid / Medicare 19 Mental Health 20 Ombudsman Services 21 Other 22 Physicians 23 Rehabilitation 24 Regulations 25 Resident Care 26 Resident's Rights 27 Restraints 28 Safety 29 Social Services /Activities 30 Staffing 31 Survey</p> <p>NYS LTCOP 03/11</p> |
|---|---|--|

January 14, 2013

On January 14th Olivia arrived at her facility at 9am. She was stopped on the 3rd floor by the new Maintenance Manager, Manny Delgado. Manny had never seen Olivia before, and wondered who she was. Olivia introduced herself to Manny and gave him a brochure about the Ombudsman Program.

While on the 4th floor, Olivia ran into the Case Manager, Gloria Prichett. Gloria told Olivia that one of her residents, Cameron Tucker wanted to speak with her soon; she didn't know why. So, Olivia went to visit Mr. Tucker's room. Mr. Tucker was happy to see Olivia because he had a concern that he wanted to address with her. Mr. Tucker was concerned that another resident, Sheldon Cooper was taking the petty cash from his room.

[Continued on the Next Slide](#)

January 14, 2013 Continued

Mr. Tucker asked Olivia for help with his problem. Olivia had Mr. Tucker sign the Ombudsman Authorization Form so that she could work to resolve his problem. Olivia had a hunch that this might take some time to resolve. Olivia suggested that perhaps she and Mr. Tucker should meet with the Administrator, Howard Wolowitz to discuss this particular problem. Mr. Tucker agreed that this was a good idea. So, Olivia went down to the Administrator's office to schedule a meeting for the three of them to discuss the problem. Mr. Wolowitz said that he could meet with Mr. Cooper and Olivia on January 18th at 3pm.

At 11:00am, Olivia made her way to the Resident Council meeting. She was asked to attend by the Council President. The meeting finished around noon, and Olivia sat down in the dining room to complete her Monthly Activity Reporting Form; this took 10 minutes.

The New Activity on October 14th is
Activity F.
Residents Council Participation

Activity F - Residents Council Participation

Use this category for:

- Participation in a resident council meeting by the designated ombudsman representative.

NOTE: Remember that in this program activity we are counting **ONLY** the “event” itself. Volunteer’s time spent at resident council meetings should be recorded as program Activity I. - Additional Volunteer Hours.

(See Activity Definitions for more information)

Now fill in your activity form then go to the next slide.



**New York State Ombudsman Monthly Activity Reporting Form
VOLUNTEER**

Ombudsman: Olivia Benson Facility: Queen City Adult Home Month/Year: 1/1/2013

| Date | Activity | Topic | Activity Time | Travel Time | Notes: contact person etc. |
|-----------|----------|-------|---------------|-------------|---------------------------------------|
| 1/3/13 | I | | 15 min | 0 | Phone call with C. Reitler |
| 1/10/2013 | A | | 2 hr | 30 min | |
| 1/10/2013 | B | 20 | 0 | 0 | 1 instance, new resident, 2 daughters |
| 1/10/2013 | H | 20 | 1 hr | 0 | 6 new employees |
| 1/10/2013 | I | | 10 min | 0 | Paperwork |
| 1/12/2013 | I | | 2 hr | 1 hr | Hospice Buffalo Open House |
| 1/14/2013 | A | | 3 hr | 30 min | |
| 1/14/2013 | D | 20 | 0 | 0 | 1 instance, Marry Delgado |
| 1/14/2013 | F | | 0 | 0 | |
| 1/14/2013 | I | | 10 | 0 | Paperwork |
| | | | | | |
| | | | | | |

| | | |
|---|---|---|
| <p>Program Activities * This activity requires a Topic</p> <p>A. Resident Visitation/Complaint Investigation B. *Individual Information & Consultation C. *Community Education D. *Facility/Provider Consultation E. Facility Survey Participation F. Residents Council Participation G. Family Council Participation H. *Facility Staff Training by Ombudsman I. Additional Volunteer Hours</p> | <p>Topics</p> <p>1 Abuse, Neglect, and Exploitation. 2 Access to Information by Resident or Resident's Representative 3 Activities / Social Services 4 Admission, Transfer, Discharge 5 Adult Protective 6 Advance Directives 7 Behavioral Issues 8 Communications 9 Complaint Process / Grievance 10 Dietary 11 DOH 12 Facility Policies/Procedures, Attitudes, Resources 13 Family 14 Financial, Property 15 Home and Community Services</p> | <p>16 Legal 17 Long Term Care Options / How to choose a facility 18 Medicaid / Medicare 19 Mental Health 20 Ombudsman Services 21 Other 22 Physicians 23 Rehabilitation 24 Regulations 25 Resident Care 26 Resident's Rights 27 Restraints 28 Safety 29 Social Services /Activities 30 Staffing 31 Survey</p> <p>NYS LTCOP 03/11</p> |
|---|---|---|

Clarification

- Since activity F is in combination with a visit, all the time is recorded in Activity A and no time is recorded in Activity F.
- However, if you attend a residents council meeting as a single activity, you will need to include both time for the event and travel time.
- Your coordinator may want to know the time spent in a residents council meeting. In this case, you will need to separate the time out for Activity F from Activity A and record it in Activity F.

January 18, 2013

On January 18th, Olivia arrived at the facility at 2pm. Olivia knew that a new resident, Leonard Hofstadter just moved in yesterday, so she wanted to introduce herself to him. Olivia explained to him her role. Leonard wanted to know some information; he wasn't clear about when meals were served in the dining room or what kind of outings the facility offered. So, Olivia wrote down the times of the congregate meals; 12pm for lunch and 5pm for supper. She explained that he could come to the dining room for breakfast or eat in his suite if he preferred. She also showed him where the large activity calendar was in the hallway, and how it listed the scheduled outings. Mr. Hofstadter was grateful for the information!

As Olivia headed to the Administrative conference room to meet Mr. Tucker and Mr. Wolowitz, she was stopped by Penny, a resident. Penny wanted to know if the activities department was offering a "Saturday Night Movie" tomorrow. So, Olivia showed Penny her copy of the activities calendar for January. According to the calendar, the movie, *Breakfast at Tiffany's* was showing at 6pm.

Continued on the Next Slide

January 18, 2013

(Continued)

When Olivia got to the meeting, she was greeted by the case manager, Gloria. Gloria said that Mr. Wolowitz had a family emergency with his mother, and needed to reschedule their meeting. Mr. Tucker agreed to meet another day. Olivia decided to interview a few other residents today on Mr. Tucker's floor to see if they had lost any money, or feel that money has been stolen from their rooms.

Olivia was walking through the building when she was stopped by another resident, Amy Farrah Fowler. Amy wanted to know if she had the right to give the activities department some ideas about activities that she would like to do; particularly nature walks in the springtime. Olivia informed Amy that she does have the right to suggest activities, because this is her home. She told Amy that the activities department should be open to her ideas, and work to include them. Amy thanked Olivia for the great information. It was 5pm, and Olivia was getting hungry for dinner, so she decided to call it quits for the day. Olivia took 10 minutes in her car to jot-down her activities before heading home.

Clarification on Consultations

On January 18 Olivia had 6 consultations.

- Each topic is entered on one line. Since there are 4 different topics, you will use 4 lines of the Monthly Activity Reporting Form.
- One topic has 3 instances, Three residents ask questions on the same topic. In the notes section, for topic 3, we record “3 instances” and the names of the residents.

Now fill in your activity form then go to the next slide



**New York State Ombudsman Monthly Activity Reporting Form
VOLUNTEER**

Ombudsman:Olivia Benson **Facility:** Queen City Adult Home **Month/Year:** 1/1/2013

| Date | Activity | Topic | Activity Time | Travel Time | Notes: contact person etc. |
|-----------|----------|-------|---------------|-------------|---------------------------------|
| 1/18/2013 | A | | 3 hr | 30 min | |
| 1/18/2013 | B | 20 | 0 | | 1 instance, Leonard |
| 1/18/2013 | B | 10 | 0 | | 1 instance, Leonard |
| 1/18/2013 | B | 3 | 0 | | 3 instance Leonard, Penny & Amy |
| 1/18/2013 | B | 26 | 0 | | 1 instance, Amy |
| 1/18/2013 | I | | 10 min | | Paperwork |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Program Activities

*** This activity requires a Topic**

- A. Resident Visitation/Complaint Investigation
- B. *Individual Information & Consultation
- C. *Community Education
- D. *Facility/Provider Consultation
- E. Facility Survey Participation
- F. Residents Council Participation
- G. Family Council Participation
- H. *Facility Staff Training by Ombudsman
- I. Additional Volunteer Hours

Topics

- | | |
|---|---|
| <ul style="list-style-type: none"> 1 Abuse, Neglect, and Exploitation. 2 Access to Information by Resident or Resident's Representative 3 Activities / Social Services 4 Admission, Transfer, Discharge 5 Adult Protective 6 Advance Directives 7 Behavioral Issues 8 Communications 9 Complaint Process / Grievance 10 Dietary 11 DOH 12 Facility Policies/Procedures, Attitudes, Resources 13 Family 14 Financial, Property 15 Home and Community Services | <ul style="list-style-type: none"> 16 Legal 17 Long Term Care Options / How to choose a facility 18 Medicaid / Medicare 19 Mental Health 20 Ombudsman Services 21 Other 22 Physicians 23 Rehabilitation 24 Regulations 25 Resident Care 26 Resident's Rights 27 Restraints 28 Safety 29 Social Services /Activities 30 Staffing 31 Survey |
|---|---|

NYS LTCOP 03/11

January 28, 2013

On January 28th, Olivia arrived at the facility at 10am. She was greeted by Gloria, the case manager. Gloria wanted to touch base with Olivia because she was working with a resident who wants to modify her Power of Attorney. The resident has limited financial resources to obtain an attorney, and Gloria wanted to know if there were any options in the community for free or low cost services. Olivia recalled from a previous Ombudsman in-service at the Red Cross, that Legal Services for the Elderly in Buffalo often assists in this capacity. Olivia wrote down the telephone number and gave it to Gloria.

Olivia had a busy day; she introduced herself to 3 new residents. Mr. Wolowitz informed Olivia that Mr. Tucker scheduled a meeting with him about the missing money on February 1st at 8:30am.

Olivia had to leave the facility at 12pm, to make her haircut appointment in time. After her haircut, Olivia sat down at home to do her Ombudsman paperwork for January; she knew that her next visit would be February 1st. It took her 20 minutes to do her paperwork.



**New York State Ombudsman Monthly Activity Reporting Form
VOLUNTEER**

Ombudsman: Olivia Benson Facility: Queen City Adult Home Month/Year: 1/1/2013

| Date | Activity | Topic | Activity Time | Travel Time | Notes: contact person etc. |
|-----------|----------|-------|---------------|-------------|---------------------------------|
| 1/18/2013 | A | | 3 hr | 30 min | |
| 1/18/2013 | B | 20 | 0 | | 1 instance, Leonard |
| 1/18/2013 | B | 10 | 0 | | 1 instance, Leonard |
| 1/18/2013 | B | 3 | 0 | | 3 instance Leonard, Penny & Amy |
| 1/18/2013 | B | 26 | 0 | | 1 instance, Amy |
| 1/18/2013 | I | | 10 min | | Paperwork |
| 1/28/2013 | A | | 2 hr | 30 min | |
| 1/28/2013 | D | 16 | | | 1 instance, Gloria Case Manager |
| 1/28/2013 | B | 20 | | | 3 instancesr |
| 1/28/2013 | I | | 20 min | | Paperwork |
| | | | | | |
| | | | | | |

| | | |
|--|--|--|
| <p>Program Activities * This activity requires a Topic</p> <p>A. Resident Visitation/Complaint Investigation B. *Individual Information & Consultation C. *Community Education D. *Facility/Provider Consultation E. Facility Survey Participation F. Residents Council Participation G. Family Council Participation H. *Facility Staff Training by Ombudsman I. Additional Volunteer Hours</p> | <p>Topics</p> <ol style="list-style-type: none"> 1 Abuse, Neglect, and Exploitation. 2 Access to Information by Resident or Resident's Representative 3 Activities / Social Services 4 Admission, Transfer, Discharge 5 Adult Protective 6 Advance Directives 7 Behavioral Issues 8 Communications 9 Complaint Process / Grievance 10 Dietary 11 DOH 12 Facility Policies/Procedures, Attitudes, Resources 13 Family 14 Financial, Property 15 Home and Community Services | <ol style="list-style-type: none"> 16 Legal 17 Long Term Care Options / How to choose a facility 18 Medicaid / Medicare 19 Mental Health 20 Ombudsman Services 21 Other 22 Physicians 23 Rehabilitation 24 Regulations 25 Resident Care 26 Resident's Rights 27 Restraints 28 Safety 29 Social Services /Activities 30 Staffing 31 Survey <p>NYS LTCOP 03/11</p> |
|--|--|--|

Thank you
From your
LTCOP
Coordinator

