**Documentation Records and Flow Sheets**

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**Plan your Residents’ Flowsheets**

Choose what you want printed on your residents’ flow sheets. You have three choices:

<table>
<thead>
<tr>
<th>Print only:</th>
<th>Print only:</th>
<th>Print both:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Care Plan approaches coded with NA or RA.</td>
<td>The flow sheet records built through <strong>Edit Flow Sheet Detail</strong>.</td>
<td>Care Plan approaches coded with NA or RA and</td>
</tr>
<tr>
<td>Call HTS to have the program switch set to print the Care Plan approaches.</td>
<td>Ask Hi-Tech to verify the program switch is set to exclude Care Plan approaches.</td>
<td>Flow sheet records entered through <strong>Edit Flow Sheet Detail</strong>.</td>
</tr>
<tr>
<td>Do not enter any flow sheet records through the program, <strong>Edit Flow Sheet Detail</strong>.</td>
<td>Print the flow sheets through <strong>Print Flow Sheets</strong>.</td>
<td>Care Plan approaches will be printed first, followed by the flow sheet records.</td>
</tr>
<tr>
<td>Print the flow sheets through <strong>Print Flow Sheets</strong>.</td>
<td>Review the instructions provided in the following pages to learn how to build a flow sheet record.</td>
<td>Print the flow sheets through <strong>Print Flow Sheets</strong>.</td>
</tr>
<tr>
<td>Call HTS to have the program switch set to print the Care Plan approaches. Review the instructions provided in the following pages to learn how to build a flow sheet record.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Create Flow Sheets

If you want your residents’ flow sheets to include care plan approaches you will use:
Clinical: Nursing Care MDS / Care Plans > Care Plans > Edit Care Plan

or

Clinical: Res Care/ Asstd. Living > RCA / Care Plans > Edit Care Plan

Code approaches with discipline codes of NA or RA. When you print the flow sheets, those approach records will be printed on the flow sheets.

Create additional flow sheet records through Edit Flow Sheet Detail. Use the process described below.

Create a standardized flow sheet form for the facility. Take sufficient time to designing and testing this standardized form to make sure it works for your residents. Hi-Tech can provide you with samples of libraries used by other facilities. If you like one of these libraries we can give you an electronic copy of this file so that you don’t have to enter all the records.

1. Decide which items will be printed on many or all resident’s flow sheets. Group these logically and then add them to your Flow Sheet Library through Libraries > Order / Flow Sheet / Kardex > Flow Sheet. As you enter these records you will number them by 2s, 5s, or 10s, leaving space in between to insert records that you think of later.

2. Create a test flow sheet record through Edit Flow Sheet Detail. Copy the flow sheet library into that record, and print it. Make necessary changes to the library.

3. Create flow sheets for a few residents who have different needs. Copy the flow sheet library into each resident’s flow sheet, and then edit each flow sheet to suit the resident. Edit the library as needed.

4. Create flow sheets for each of your residents.

5. Print the flow sheets for the next month that you want to use them.
How to Set Up and Use Flowsheet Form Types

This process is very similar to that used to print MARs and TARs on different types of forms such as Routine Meds, Licensed Meds, PRNs. This allows you to pay closer attention to the specific requirements of a certain type of documentation. Suggestions for Flow Sheet form types include:

- ADLs
- Behavior Monitoring
- Restorative Care

First, define the form types you want to use for Flow Sheets.

**Libraries > Orders/Flow Sheet/Kardex**

**Form Types**

**NRD9**

**Form Code**: click the binocular to display existing Form Codes.

**Order Type**
Select "Flowsheet".
Libraries > Orders / Flow Sheets / Kardex >

Flow Sheet Library

NR26 (Flowsheets)

If you are not yet using Hi-Tech Flow Sheets, we recommend that you click **Print Report** to review the Flow Sheet Library. You can edit or delete existing library items.

If you have already created your Flow Sheet library, you can **skip this part** and go to **Edit Flow Sheet Detail** on page 6.

**Reference ID:** Assign a unique ID number to each library item.

Start with 2 or 5 and number the items in increments of 2 or 5 (i.e. 2, 4, 6, 8 or 5, 10, 15, 20). This leaves space between the items so you can insert related items between existing items.

Click the binoculars to display existing flow sheet library items.

You can select items from that list, and then edit or delete them.

**Text:** Enter the text as you would like to see it printed on the flow sheet. This sample item shows the codes to be used as responses, i.e. S for Sad.

If you want to respond to each of several items every day, put the items on separate lines. See example below.

<table>
<thead>
<tr>
<th>DIRECTIVES</th>
<th>CODE/TIME</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARRANGED SHOPPING SHOPPED</td>
<td></td>
<td>Th</td>
<td>Fr</td>
<td>Sa</td>
<td>Su</td>
<td>Mo</td>
<td>Tu</td>
<td>We</td>
<td>Th</td>
<td>Fr</td>
<td>Sa</td>
</tr>
<tr>
<td>ARRANGED TRANSPORTATION</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Frequency Code indicates when an item should be performed. Click the binoculars to select a code from the Standard Frequency Code Inquiry screen. This pulls in the standard times recorded for that code in Libraries > Orders / Flow Sheet > Frequency Codes. Two samples on the right show how you can format the times in the library.

<table>
<thead>
<tr>
<th>DIRECTIVES</th>
<th>CODE/TIME</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11</th>
<th>12</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOILET USE</td>
<td>DAY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>EVEN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>NIGHT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tips for Creating your Flow Sheet Library

1. Create a standardized flow sheet form for the facility. Take sufficient time to design and test this standardized form to make sure it works for your residents.

2. Decide which items will be printed on most or all resident’s flow sheets. Group these logically and then add them to your Flow Sheet Library. Number the items by 2s, 5s, or 10s, leaving space in between to insert items later.

3. Create a test flow sheet record through Edit Flow Sheet Detail. Copy a group of items from the flow sheet library into that record, print and review it for usability. Make necessary changes to the library.

4. Create flow sheets for a few residents who have different needs. Copy the flow sheet library into each resident’s flow sheet, and then edit each flow sheet to suit the resident. Edit the library as needed.

5. Create flow sheets for each of your residents.

6. Print the flow sheets for the next month that you want to use them.

Print Flow Sheet Library

NR27 (Flowsheets)

On the Edit screen, click Print Report.

Use the current date for the Report Date. It will be printed at the top of the list.

Print the entire library or specify a range of items.
After you have created a good Flow Sheet library, create a flow sheet for each of your residents.

Enter the Resident ID. The program will default to Type: Other Orders. Click Continue.

If you have created a Flow Sheet for this resident, the items will be displayed as shown below.

Type: If you have defined other Flow Sheet Form Types (see Page 3) click the drop-down box to display that list (sample on right). Any items assigned to that Form Type will be displayed.

To reassign an item to another Form Type, select the item and click Edit.
To add a new item, click New.

See the next page.
Reassign Form Type: The selected item will be displayed under Text. Click the Type drop-down arrow to display and select another Form Type.

Add a New Item: You can key in the new item under Text, or click From Library to pull text from the Flow Sheet Library (see library screen below).

- Click the View column to display the entire text of an item on the right side of the screen.
- To choose items, check the Select column, or specify a range at Ref# From / Ref# Thru. Note the Form displayed at Type. Your selections will be assigned to that form.
- Click Ok to copy the order into this resident’s order file.

On the Edit Flow Sheet Detail screen, verify the Type, edit the Text and Frequency Codes. Click Ok to record the changes.
Admission Procedures > Flow Sheets and Kardex

**Print Flow Sheets**

CP43

NOTE: Order 3-hole, stock paper from Hi-Tech. The program will print the monthly grid and the flow sheet items on the blank side of the form. On the other side is a pre-printed Nurses’ Signature and Notes area.

Print Flow Sheets from the Menu or click the Print button on the Edit Screen and then select Forms from the Print Options window (above right). These program will print the following:
1. Flow sheet records entered through the Edit Flow Sheet Detail program (page 6).
2. Care Plan approaches coded with discipline of NA or RA through Edit Care Plan.

![Image of Print Resident Flowsheets]

**Report Date**: Enter the first day of the month for which the flow sheets forms will be used. The date will be printed at the lower right of each form. The days of the week for that month will be printed at the top of the day columns.

☑ **Skip Zero Admit Dates**: If printing for all residents, leave this checked to skip residents who have not yet been admitted through the census program and who do not yet have Admit Dates in their face sheets. They probably do not have a flow sheet record built yet.

☑ **Print Blank Forms** prints a blank monthly grid form for hand-writing flow sheet records. Specify number of copies and if you want the days of the week printed at the top of the columns. The days/dates will coincide with the Report Date month.

☑ **Include Care Plan Approaches on 1st Form Selected** to include care plan approaches coded with NA or RA discipline codes in the residents’ care plans. If you select multiple forms, these will print on the first form only. (If you want this box to be checked automatically, call Hi-Tech to have that program switch turned on.) You can include approaches based on your choice of Levels. Example, include NA approaches for ☑ NNF; do not include RA approaches for ☐ RCF.
Types to Include: If you have defined Form Types other than **Flow Sheet** and you assigned flow sheet items to them, you can print all of them at once or print them individually.

You can also select **Levels of Care**, and ○All or ○Individual residents.

Sample

### HI-TECH NURSING & REHAB

#### Flow Sheet

| Code/Time | Fr | Sa | Su | Mo | Tu | We | Th | Fr | Sa | Su | Mo | Tu | We | Th | Fr | Sa | Su |
|-----------|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
| DIRECTIVES |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |
| BED MOBILITY |                    |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |
| ANY MOBILITY |                    |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |
| OSTEOPOROSIS |                    |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |
| OSTEOMALACIA |                    |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |
| DIABETES |                    |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |
| Atherosclerosis |                    |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |
| CHRONIC OBSTRUCTION |                    |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |

#### Form Type Title

<table>
<thead>
<tr>
<th>Resident</th>
<th>HANNAH ADAMS</th>
<th>Resident No.</th>
<th>Unit</th>
<th>Room</th>
<th>Bed</th>
<th>Physician</th>
<th>MOX</th>
<th>RAN</th>
<th>All.</th>
<th>Phone</th>
<th>474-1546</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>12345</td>
<td>123</td>
<td>456</td>
<td>789</td>
<td>KNOX</td>
<td></td>
<td>RAND</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>