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PI-17-05
RE: PI-99-07

PROGRAM INSTRUCTION

TO: Aging Services Access Points (ASAPs)
Executive Directors
Program Managers

FROM: Alice F. Bonner 

DATE: June 1, 2017

RE: Revision of Documentation Standards and Accepted Abbreviations

I. Purpose:

The purpose of this Program Instruction (PI) is to communicate required standards for record documentation and accepted abbreviations. This PI (PI-17-05) repeals and replaces PI-99-07. The documentation standards below encompass the requirements of the Senior Information Management System (SIMS).

II. Documentation Standards:

1. Use of SIMS shall be in accordance with instructions issued by Elder Affairs and ad hoc communications from SIMS Support.
2. One comprehensive record shall be maintained for each applicant or consumer. SIMS is the primary system of record. The paper record is the supplemental record.
3. The supplemental record may contain various forms of paper documentation, such as signature forms, and other required documentation. Documents in the supplemental paper record shall be in chronological order with the most recent information on top.

4. Copies of all supplemental paper documents (signature forms, appeals notifications, etc.), and correspondence with the consumer and others involved in the consumer's care shall be maintained in the consumer record.
5. All documentation shall comply with Elder Affairs privacy and confidentiality requirements.
6. Documentation in a record shall be presented and organized to support a clear picture of the consumer's overall status.
7. All documentation shall be on forms authorized by Elder Affairs.
8. All documentation shall be grammatically correct and free of spelling errors and all handwritten portions of the supplemental paper record shall be legible, in blue or black ink.
9. Sources of all contacts throughout the record shall be identified by the person's full name, job function or title, affiliation, and/or relationship to consumer.
10. Telephone contacts shall be documented within 24 hours. All other documentation, including but not limited to initial assessments, reassessments, and interdisciplinary conferences, shall be completed within five business days of the activity.
11. Individual records shall be maintained for each consumer regardless of household or marital status.
12. Journal entries (progress notes) shall be chronological, concise, and used for documenting actions taken on behalf of the consumer, including interdisciplinary conferences, and ongoing contact with the consumer, family, providers, and any other persons and/or entities involved with the consumer. Both the type of contact (e.g., telephone call) and the substance of the contact shall be recorded.
13. Records shall indicate any Protective Services (PS) recommended home care services and any outcome such as refusal or implementation of such services.
14. If the ASAP files a PS report, the journals should refer to the reason for the filing and reference any follow-up. The journal entry should not disclose the identity of the reporter.
15. When a home visit is conducted and a consumer is determined to be ineligible for the Home Care Program or denied an increase of services or special program enrollment, the assessment and journal entries must document sufficient information to support the ASAP determination or denial.
16. Abbreviations used in documentation must conform to the attached list; no other abbreviations shall be used in the consumer record.
17. Journal entries regarding home visits and reassessments shall be comprehensive and follow the Elder Affairs Associated Business Rules.

Effective Date:

The effective date of this PI is June 12, 2017.

Contact:

If you have any questions regarding this PI please contact Shannon Philbrick at 617-222-7556 or email Shannon.Philbrick@state.ma.us.

Attachment A
EOEA Case Record Accepted Abbreviations and Acronyms

Abbreviation/Acronym/Symbol	Meaning
A	Before
A&R	Activity & Referral
A&O	Alert and oriented
AA	Administrative Assistant
AA	Alcoholics Anonymous
AAA	Area Agency on Aging
ABD/abd	Abdominal
ABI	Acquired Brain Injury
ABX	Antibiotic
Ac	Before meals
ADA	American Diabetes Association
ADD	Attention Deficit Disorder
ADH	Adult Day Health
ADL	Activities of Daily Living
ADM/adm	Admitted
ADRC	Aging and Disability Resource Consortia
ADRD	Alzheimer's Disease and Related Disorders
AFC	Adult Foster Care
A-FIB/A-Fib	Atrial Fibrillation
AIDS	Acquired Immunodeficiency Syndrome
AIH	Acute Inpatient Hospital Stay
AL	Assisted Living
AM/am	Morning
AMA	Against Medical Advice
AMB/amb	Ambulation
AMT/amt	Amount
APP/app	Application
APPROX/approx	Approximate
APPT/appt	Appointment
APR/apr	April
ASAP	Aging Services Access Point
ASAP-RN	Aging Services Access Point Registered Nurse
ASHD	Arteriosclerotic Heart Disease
ASSOC/assoc	Association
ATC	Anatomical Therapeutic Chemical
ATTY/atty	Attorney
AUG/aug	August
AUTH/auth	Authorize
AVE/ave	Avenue
B/C, b/c	Because

Abbreviation/Acronym/Symbol	Meaning
B&B	Bowel/Bladder
BID	Twice a day
BIP	Balancing Incentive Program
Bi-PAP	Bi-level Positive Airway Pressure
BLVD/Bld	Boulevard
BM	Bowel Movement
BOH	Board of Hearings
BP	Blood Pressure
BPH	Benign Prostatic Hypertrophy
BUN	Blood Urea Nitrogen
C/O, c/o	Complaints of/In Care of
CA	Cancer/Care Advisor
CABG	Coronary Artery Bypass Graft
CAD	Coronary Artery Disease
CAE	Clinical Assessment Eligibility
CAP	Corrective Action Plan
CAT	Computerized Axial Tomography
CC/cc	Cubic Centimeter
CCTF	Case Closure Tracking Form
CCTP	Community Care Transitions Program
CCU	Coronary Care Unit
CDC	Consumer Directed Care
CDS	Comprehensive Data Set
CG	Caregiver
CHA	Community Health Assessment
CHF	Congestive Heart Failure
CHHA	Certified Home Health Agency
CLP	Community Links Portal
CM	Care Manager
CMH	Community Mental Health
COA	Council on Aging
COC	Coordination of Care/ Continuum of Care
COMP/comp	Companion
CONT/cont	Continued
COOR/coor	Coordinator
COPD	Chronic Obstructive Pulmonary Disease
CPAP	Continuous Positive Airway Pressure
CS	Caregiver Specialist
CSF	Cost Sharing Fixed
CSMR	Consumer
CSP	Comprehensive Service Plan
CSSM	Comprehensive Screening and Services Model
CSU	Cost Sharing Utilization

Abbreviation/Acronym/Symbol	Meaning
CVA	Cerebral Vascular Accident
D/C. d/c	Discontinued/Discharged
DCF	Department of Children and Families
DD	Developmental Disabilities
DDS	Massachusetts Department of Developmental Services
DEC/dec	December
DEPT/dept	Department
DHHS	U.S. Department of Health and Human Services
D-I-L	Daughter-in-Law
DJD	Degenerative Joint Disease
DME	Durable Medical Equipment
DMH	Department of Mental Health
DMR	Department of Mental Retardation
DNH	Do Not Hospitalize
DNI	Do Not Intubate
DNR	Do Not Resuscitate
DOB	Date of Birth
DOH	Division of Hearings
DPH	Department of Public Health
DR/dr	Doctor
DRG	Diagnostic Related Groups
DSG/dsg	Dressing
DSS	Department of Social Services
DTR/dtr	Daughter
DX/dx	Diagnosis
EAEDC	Emergency Aide to Elders, Disabled, and Children
EAR	Elder At Risk
ECOP	Enhanced Community Options Program
ED	Executive Director
EEG	Electroencephalogram
EENT	Eyes, Ears, Nose, Throat
EKG	Electrocardiogram
EOEA or EA	Executive Office of Elder Affairs
ELIG/elig	Eligible
EOD	Every Other Day
EOM	Every other Month
EOW	Every other Day
ER	Emergency Room
ESP	Emergency Screener for Psychiatry
ETOH	Ethyl Alcohol /History of Alcohol Abuse
EVAL/eval	Evaluation
F/U, f/u	Follow -up
FBR	Federal Benefit Rate

Abbreviation/Acronym/Symbol	Meaning
FCSP	Family Caregiver Support Program
FDOS	First Day of Service
FEB/feb	February
FEW	Frail Elder Waiver
FIL	Functional Impairment Level
F-I-L	Father-in-law
Fin/fin	Financial
FREQ/Freq	Frequency
FRI/fri	Friday
FX, fx	Fracture
FY	Fiscal Year
GAFC	Group Adult Foster Care
GI	Gastrointestinal
GM/gm	Gram
GRD.DTR/SON, grd.dtr/son	Granddaughter/Son
GSSC	Geriatric Support Services Coordinator
GT	Gastric Tube
gtt/gtts	Drop/Drops
GU	Genitourinary
H/O, h/o	History Of
H2O	Water
HA	Housing Authority
h/a	Headache
HC	Home Care
HCBNW	Home Care Basic Non-Waiver
HCBS	Home & Community Based Services
HCBW	Home Care Basic Waiver
HCH	Heavy Chore
HCP	Health Care Proxy
HDM	Home Delivered Meals
HHA	Home Health Aide
HHI	Home Health Initiative
HHS	Home Health Service
HIPAA	Health Insurance Portability and Accountability Act
HIV	Human Immunodeficiency Virus
HM	Homemaker
HMO	Health Maintenance Organization
HOH	Hard of Hearing
HOSP/hosp	Hospital
HR	Heart Rate/Hour
HS	Hour of Sleep
HT	Height
HTN	Hypertension

Abbreviation/Acronym/Symbol	Meaning
HUSB/husb	Husband
HV	Home Visit
HX/hx	History
I+O	Intake and Output
I+R	Information and Referral
IADL	Instrumental Activities of Daily Living
ICU	Intensive Care Unit
ID	Intellectual Disabilities
IDC	Interdisciplinary Conference
IDDM	Insulin Dependent Diabetes Mellitus
IDPT	Interdisciplinary Planning Team
ILC	Independent Living Center
IM	Intramuscular / Information Memorandum
Inelig.	Ineligible
INC/inc	Including
INCONT/incont	Incontinent
INFO/info	Information
INH	Inhalation
ISP	Initial Service Plan
IV	Intravenous
JAN/jan	January
JN (JE)	Journal Note (journal entry)
KCl	Potassium Chloride
KG/kg	Kilogram
L	Liter
L	Left
LAB/lab	Laboratory
LAU	Laundry
LCH	Light Chore
LCSW	Licensed Certified Social Worker
LDOS	Last Date of Service
LICSW	Licensed Independent Clinical Social Worker
LIQ/liq	Liquid
LIS	Low-income Subsidy
LOC	Level of Care/ Level of Conscientious
LPN	Licensed Practical Nurse
LSW	Licensed Social Worker
LSWA	Licensed Social Worker Associate
LTC	Long Term Care
LTCNA	Long Term Care Needs Assessment
LTCO	Long Term Care Ombudsman
LTCU	Long Term Care Unit
MAR/mar	March/Medication Administration Record

Abbreviation/Acronym/Symbol	Meaning
MAT	Multidisciplinary Assessment Team
MAX/max	Maximum
MCG/mcg	Microgram
MCOB	Massachusetts Commission for the Blind
MD	Medical Doctor
MDS	Minimum Data Set
MDS-HC	Minimum Data Set – Home Care
MEC	MassHealth Enrollment Center
MEDS/meds	Medications
MEQ/meq	Milliequivalent
MFP	Money Follows the Person
MG/mg	Milligram
MGMT/mgmt	Management
MH	Mental Health/MassHealth
MH STD	MassHealth Standard
MI	Myocardial Infarction
M-I-L	Mother-in-law
MIN/min	Minute/Minimum
ML/ml	Milliliter
Mm	Millimeter
MMP	Money Management Program
MO	Month(ly)
MOLST	Medical Orders for Life Sustaining Treatment
MON/mon	Monday
MRC	Massachusetts Rehabilitation Commission
MSAC	Massachusetts Senior Action Council
MSCA	Massachusetts Senior Care Association
MTG/mtg	Meeting
N/A. n/a	Not Applicable
NAS	No Added Salt
NC	Nasal Cannula
Neb	Nebulizer
NEG/neg	Negative
NFLTA	Nursing Facility Long Term Approval
NFP	Nursing Facility Placement
NIDDM	Non-Insulin Dependent Diabetic
NKA	No Known Allergies
NOA	Notice of Action
NOC/noc	Night
NOE	Notice of Eligibility
NOV/nov	November
NP	Nurse Practitioner
NSG/nsg	Nursing

Abbreviation/Acronym/Symbol	Meaning
ø	No, None
O2	Oxygen
OBRA	Omnibus Budget Reconciliation Act
OC	Options Counselor
OI	Over Income
OLTSS	Office of Long Term Services and Supports
OTO	One Time Only
PA	Prescription Advantage
PAC	Post-Acute Care
PACE	Program of All-inclusive Care for the Elderly
PASRR	Preadmission Screening Resident Review
PC/ pc	Personal Care/ after meals
PCA	Personal Care Attendant
PCP	Primary Care Physician
PERS	Personal Emergency Response System
PI	Program Instruction
PM/pm	Afternoon
PMH	Previous Medical History
PN	Progress Note
PO/po	By Mouth
POA	Power of Attorney
POC	Plan of Care
POST-OP/post-op	Post-Operative
PP	Private Pay
PRN	As Needed
PROG/prog	Progress
PS	Protective Services
PSF	Physician Summary Form
PSI	Permission to Share Information (MassHealth)
PSYCH	Psychiatric
PT	Physical Therapy
PVD	Peripheral Vascular Disease
QD/qd	Every day
QID/qid	Four Times a Day
QOL	Quality of Life
R	Right
R/A	Reassessment
R/D	Redetermination
R/O, r/o	Rule Out
R/T, r/t	Related To
RAI	Resident Assessment Instrument
RE/re:	Regarding
REC'D/rec'd	Received

Abbreviation/Acronym/Symbol	Meaning
RCF	Recipient Choice Form
REHAB/rehab	Rehabilitation
RESP/resp	Respite
RFS	Request for Service Form (MassHealth)
RN	Registered Nurse
ROI	Respite over-income
ROM	Range of Motion
RPTD/rptd	Reported
RS	Residential Supports
RUGs	Resource Utilization Groups
RX	Treatment/Prescription
SO	Significant Other
S/P, s/p	Status Post
SAMS	Social Assistance Management System
SAT/sat	Saturday
SA/sa	Service Area
SC/sc	Subcutaneous
SCHED/sched	Scheduled/scheduler
SCO	Senior Care Options
SDC	Supportive Day Care
SEPT/sept	September
SVC	Services
SHCA	Supportive Home Care Aide
SHCP	State Home Care Program
SHINE	Serving the Health Information Needs of Everyone
SHIP	Statewide Head Injury Program
S-I-L	Sister in law/Son in law
SIMS	Senior Information Management System
SL	Sublingual
SLP	Speech Language Pathologist
SN	Skilled Nursing
SNAP	Supplemental Nutritional Assistance Program
SNF	Skilled Nursing Facility
SNP	Special Needs Plan
SOB	Shortness of Breath
SPEC/spec	Specialist
SQ/sq	Subcutaneous
SR.CTR/Sr. Ctr.	Senior Center
SS	Social Security
SSI	Supplemental Social Security
ST	Speech Therapy/Street
STA	Short Term Approval
STAPH/staph	Staphylococcus

Abbreviation/Acronym/Symbol	Meaning
STR	Short Term Review
SUN/sun	Sunday
SUP/sup	Supervisor
SW	Social Worker
SX/sx	Symptoms
TA	Transition Advisor
TAB/tab	Tablet
TBI	Traumatic Brain Injury
TBSP/tbsp	Tablespoon
TC	Telephone Call/Contact
TE	Transition Entity
TEMP/temp	Temporary
TENS	Transcutaneous Electrical Nerve Stimulation
THURS/thurs	Thursday
TIA	Transient Ischemic Attack
TID/tid	Three Times Daily
TPR	Temperature, Pulse, Respirations
TRANS	Transportation
TSP/tsp	Teaspoon
TUES/tues	Tuesday
U	Units
URI	Upper Respiratory Infection
UTI	Urinary Tract Infection
VA	Veteran's Administration
VAF	Voluntary Assent Form
VIP	Veteran's Independence Plus Program
VM/vm	Voice Mail
VMA	Voluntary Medicaid
VNA	Visiting Nurse Association
VNMA	Voluntary non-Medicaid
VS	Vital Signs
VSS	Vital Signs Stable
W/ w	With
W/C, w/c	Wheelchair
W/O, w/o	Without
WED/wed	Wednesday
WK/wk	Week (or Weekly)
WL	Waiting List
WNL/wnl	Within Normal Limits
WQM	Waiver Quality Measure
WT/wt	Weight
X/x	Times (i.e., 2X)
Y.O/y.o	Years Old

Abbreviation/Acronym/Symbol	Meaning
2	Secondary To
#	Number/Pounds
&	And
?	Question
@	At
✓	Check
≤	Less Than
≥	Greater Than
↑	Increase
↓	Decrease