



Writing Narrative Statements in the ULTC Assessment

WHY NARRATIVES ARE IMPORTANT?

- To explain in writing **why** a “due to” checkbox was selected.
- To help others who are reading documentation in the ULTC assessment have a **better understanding** of the person’s needs.
- To **provide consistent** explanations to help with:
 - Appeals
 - QIS responses
 - Inter-rater reliability
 - Transferred cases to other case managers or agencies

NARRATIVE BEST PRACTICES

Good narrative statements include the following information:

- **Person-centered language**
 - Use names – *John reports rather than client reports, John’s mom reports, his caregiver Susan indicated*
 - Person first – *Jane is diagnosed with diabetes rather than Jane is a diabetic*
 - Include information about what individual can do instead of only what assistance or services are needed
 - *Eugene is able to move from the bed to the nearby bathroom, but uses walker for balance when moving throughout rest of home or outdoors*
- **How information was obtained:** individual/caregiver, Case Manager observation, collateral resource, chart/notes/documentation
- **Who is providing assistance**
- **Frequency, scope and duration** of assistance needed
- **Assistive devices** or Durable Medical Equipment (DME) used
- **AVOID vague words** – here are a **few** examples:
 - Frequently
 - History of
 - Often
 - Recently
 - Regularly/regular basis
 - Several

**Don’t leave it open to
interpretation – be specific!**

Use names, dates, time frames,
quantities, frequency

COMPARISON CHART

Examples of how to address “due to” checkboxes in narrative form

Note: These are examples of statements within a narrative and do not reflect the entire narrative or information gathered or documented from an assessment interview.

Limited Narrative	Preferred Narrative
Client does not have a history of falls.	Roberta reports she has not fallen within the past year.
Client has a history of psychiatric hospitalization.	Samuel’s caregiver, Ann, reports that Samuel was hospitalized for two days due to hallucinations in June 2012. Medical records indicated hospitalization allowed medication regimen to be re-established.
Client needs assistance with feeding due to decreased endurance.	Janet reports she able to feed herself daily during breakfast and lunch but is dependent on others for assistance with eating dinner because she is exhausted by the end of the day.
Client needs assistance with toileting due to limited range of motion, muscle tone, neurological impairment and weakness.	Danny’s mom reports that he needs assistance with toileting every time, which is 4-5 times a day. Due to limited range of motion and muscle tone related to Danny’s diagnosis of Cerebral Palsy, Danny needs assistance getting on and off the toilet, with wiping and hand washing after using the bathroom. His mom explained that after Danny’s hip surgery in July 2013, Danny needs even more hands on assistance particularly as it relates to weight bearing, which Danny is unable to do successfully since surgery.
Client reports independent with mobility.	Alisha reports she is capable of getting from room to room in her home as well as outside her home without assistance. Alisha reports she does use handrails when using stairs. Alisha reports she does not require use of a cane or walker at this time.
Client has a history of seizures.	Medical records indicate that Nathaniel experienced two seizures in May 2013. He began taking Depakote in June 2013, and has not experienced another seizure in the last six months.
Child is better at dressing now.	Since last assessment in September 2013, Sophia’s mom reports Sophia has shown improvement with dressing. Her mom reports Sophia is capable of putting on pants properly but needs assistance with buttons or zippers. Her mom reports Sophia can put shirts on that button and do not go over her head. Her mom assists with shirts that go over her head and with buttons or zippers.

ADL/IADL EXAMPLE

Note: This is a fictional example intended to show how to apply best practices of writing a narrative, and should not be used as a template. Every person and situation is different, and therefore every assessment should reflect the individual.

Each of the narrative statements below reflects the “due to” checkboxes identified, however, the second narrative incorporates the best practices and elaborates and or qualifies why a “due to” checkbox was chosen. Colors indicate references to each checkbox.

Mobility:

Physical Impairment:

- Amputation
- Balance Problems
- Decreased Endurance
- Fine Motor Impairment
- Gross Motor Impairment
- Limited Range of Motion
- Muscle Tone
- Neurological Impairment
- Oxygen Use
- Pain
- Paralysis
- Sensory Impairment
- Shortness of Breath
- Weakness

Supervision Needs

- Behavior Issues
- Cognitive Impairment
- Difficulty Learning
- History of Falls
- Lack of Awareness
- Memory Impairment
- Seizures

Mental Health

- Delusional
- Hallucinations
- Lack of Motivation/Apathy
- Paranoia

Note: Check **only** the boxes that correspond to the **specific ADL/IADL**

Comments Example A: Not enough explanation to understand individual situation and needs

Client has **history of falls** due to **balance problems**, **decreased endurance** and **limited range of motion**. Client requires **oxygen** due to **shortness of breath issues**. Client recently **fell** and **broke hip** and requires a **walker and stand-by assistance** while ambulating inside/outside home. Client is unable to use stairs.

Comments Example B: Follows best practices and provides explanation of “due to” checkboxes

Daughter reports Anna has diagnoses of diabetes and osteoporosis. Anna is full weight bearing and is able to ambulate 500 feet with use of front-wheel walker. Anna uses **front-wheel walker for all mobility to help with balance problems**, **decreased endurance** and **limited range of motion**. Anna has **fallen three times** in the last year. Her most recent **fall occurred at home on 2/8/14** in which she **fractured her left hip** and required hospitalization and short rehab stay. Anna is now at home and requires **front-wheel walker and stand-by assistance** while ambulating inside/outside home. Anna is unable to use stairs due to above reasons, however daughter reports there are no stairs in Anna’s home. Anna requires **2L of continuous oxygen** due to **shortness of breath**.