

# Welcome!

- Welcome to the Illinois Guardianship and Advocacy's Office of State Guardian's (OSG) volunteer program!
- We look forward to working with you as you generously volunteer to spend time with the adult wards of the State of Illinois.
- In the following slides, you will find all the basic information you will need as a volunteer visitor.
- Press the space bar on your keyboard to go to the next slide.
- Use the arrow keys to jump a slide forward or backward.

# Welcome!

- You are important to us!
- Our guardian representatives (OSG caseworkers) work hard to ensure that our wards are receiving the best housing, personal care, and medical treatment they deserve.
- However, our guardian representatives are responsible for many wards and have only so much time to spend with each of them.
- Despite their best efforts, they are often unable to form close personal relationships with every ward in their care.

# Welcome!

- As a volunteer visitor, you can form these close relationships with our wards.
- You can be the friend and companion some of our wards would love to have.
- You can be the person with whom they can share stories, laugh, take walks, and just spend time together.
- On behalf of the Office of State Guardian, the guardian representatives, and the wards across the state – we thank you for volunteering with us!

# Getting Started

- ***Training Modules:***

- This is the first of several modules in our volunteer visitor training program. We ask that you become familiar with this information.
- Having a training program in place is important because it can help you – as a volunteer – be more confident about the job you are doing.
- Additionally, it is important for the OSG to know that the volunteers have an understanding of their duties and rights as well as the rights of the wards.

# Getting Started



You may view the training modules in any order, but it is suggested that you view this module first – which you are – so good start!

However, reading *all* of the modules indicated by the volunteer coordinator are required prior to visiting wards.

# Getting Started

- ***Quizzes:***

- Every so often during the training, there will be small quizzes for you to complete. The purpose of these quizzes is to show us that you have done the reading and understand what you have read.
- The quizzes are pass/fail and your answers will be recorded. Don't worry – it's not as bad as you think!
- If you have read the sections, you will should be able to answer the questions fairly well.
- If you have any questions or concerns about the quizzes, please contact the volunteer coordinator.

# Getting Started

We understand that reading slides off of your computer screen may not be the most engaging process, but we found that many volunteers liked the idea of being able to do the training during their own time and in the comfort of their own home.

If you do not feel that the slides are an effective way for you to learn about the program, or you are having difficulty with any portion of the training, please contact us.

We can discuss alternative ways to perform the training for you.



# Contact Information

- Below you will find a list of people & places whose information you should have at your disposal and why you may need to contact them.
- Note that this information can change through time, so specific names or numbers are not given in some cases. If you do not have this contact

Contact	Reason to have Contact information
Volunteer Coordinator	All questions regarding volunteer program – your <i>primary contact</i> at the OSG
Your ward’s guardian representative	Questions or concerns that are specific to the ward(s) that you visit.
The facility in which the ward resides (if applicable)	To arrange visits or special accommodations while visiting ward.
OSG office number (M-F 9:00-5:00) 312-793-5900	If you are having trouble reaching other contacts at the OSG.
The Illinois Department of Public Health Office of Inspector General or the Department of Human Services Office of Inspector General	To report abuse or neglect. This will be discussed in greater detail later in this presentation.



# Visiting Facilities

- Most of our wards live in assisted living facilities - places for people to live who are unable to live independently for any number of reasons.
- These facilities can have a variety of different names, depending on the type of clients they serve, the staff they employ, and the size of the facility.
- Below is a list of *some* of the more common facilities you may visit:

Type of Facility	Defining Characteristics
<b>Intermediate Care Facilities (ICFs)</b>	A facility which provides basic nursing care and other restorative services under periodic medical direction, these facilities are for residents who have long-term illnesses or disabilities, which may have reached a relatively stable plateau.
<b>Community Integrated Living Arrangement (CILAs)</b>	A living arrangement in which 8 or fewer people with a mental illness or a developmental disability reside together in a supervised home environment.
<b>Skilled Nursing Facilities (SNFs)</b>	A facility which provides around-the-clock nursing supervision and care for residents who need help with dressing, eating, bowel and bladder care, and taking prescription medications.
<b>Assisted Living Residencies (ALRs)</b>	A facility which provides sheltered living to individuals capable of "functional independence." The residential care facility stresses the social needs of the "resident" rather than the medical needs of the "patient."

# Visiting Facilities



Prior to visiting, you will want to contact the facility in which your ward resides.

The OSG will have already contacted the agency informing them that you will be visiting the ward, but will not typically tell them when you will visit.

Calling the facility beforehand and telling them when you will be visiting will help them know who you are when you arrive and why you are there.

After all, they are just protecting their residents and do not want to allow any stranger into their facility.

Another reason for calling ahead is to make sure that the ward will not be engaged in another activity, such as a work program or on a field trip,  
● when you arrive.

# Visiting Facilities

When you arrive at a facility, there will usually be a front door person that will ask who you are and ask that you sign in.

Simply tell them your name, that you are a volunteer for the Office of State Guardian, and who you are there to visit.

If a facility or staff ever deny you entry, please contact the volunteer coordinator and they will clear up the misunderstanding.

# Going on Field Trips

- **Leaving the facility grounds**

- Many volunteers will be initially satisfied with their first several visits being at the ward's place of residence – in their room or in the public areas of the facility.
- As wards and volunteers begin to get more comfortable with one another, they may feel like they want to do something outside of the facility.
- Taking walks, going out to lunch, having coffee at a local café – these are all things you may wish to do with a ward once you have built up a good rapport with them.
- We at the OSG encourage these kind of activities, but some considerations must be mentioned before you travel with a ward outside of their home.

# Going on Field Trips

- **Leaving the facility grounds (continued....)**
- If your ward lives in any type of licensed facility (i.e. there are paid staff caring for them on any level) you will need to first consult the facility staff.
- You will want to speak with a facility director, social worker, or administrator regarding their rules about taking residents off-grounds.
- If you are uncomfortable talking to staff about this, please feel free to contact the OSG volunteer coordinator and they can assist you with this – that’s why they are there!
- In fact, we would ask that you contact the volunteer coordinator if you want to begin taking wards “off-grounds” – at least initially.

# Going on Field Trips

- **Transporting wards in your automobile**
- Before transporting wards in your personal vehicle, we ask that you first contact the volunteer coordinator.
- We will need to know that you have adequate insurance before allowing a ward to ride with you.
- Assuming that you have spoken to the ward's facility about leaving the grounds and that you have the state-required insurance (which you should have regardless), the volunteer coordinator will likely approve this request.

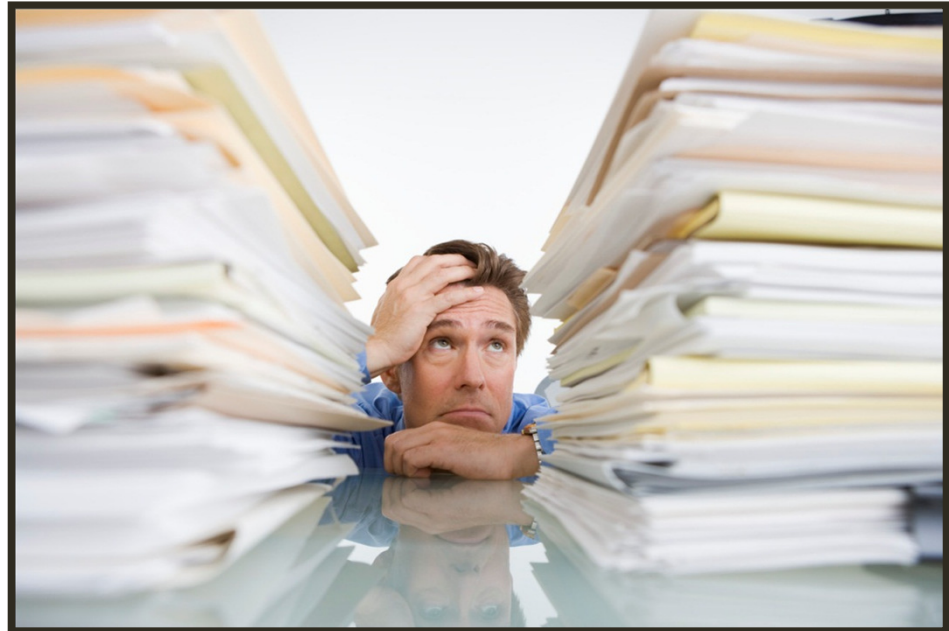


# Documenting Visits

## Documentation

Even when you are volunteering out of the goodness of your heart, you are still asked to do paperwork!

Is there any escape?!?



Well, in the case of documenting your visits with wards, paperwork is actually a very important thing.

It is easy to discount the value of documenting your visits, but let us show you a few reasons why it is so essential.

# Documenting Visits

- **Helping the guardian representatives**
- As we stated earlier, the guardian representatives work hard to ensure that our wards are receiving the best care possible.
- Due to the fact that the guardian representatives have several dozen wards in their care, however, means that they are only able to personally visit each ward every few months.
- As a volunteer visitor, documenting your visits helps the guardian representatives by acting almost as an extra set of ears and eyes.
- Through the close relationships you will form with a ward, you may be able to note things about them that their guardian representative may not know otherwise.



# Documenting Visits

- **Helping the Office of State Guardian**
- The Guardianship and Advocacy Commission is accountable to the legislature, the Governor's office and the citizen's of Illinois. The agency documents its activities through its annual report.
- The record of your volunteer hours captured on your monthly visit report is an important part of the agency's documentation.

# Documenting Visits

- **Helping future volunteers & representatives**
- Prior to working with a ward, new volunteers or representatives can learn a great deal about them beforehand by reading past documentation.
- This is more than just knowing a person's medical diagnosis or that they have two siblings – it's knowing that they love to write or that they really enjoy root beer.
- It makes getting to know someone a lot easier when you are already familiar with a little of their personality – showing up with that root beer already in hand can be a heck of an icebreaker!

# Documenting Visits

- ***What do I document?***
- Documentation forms may change in the questions they ask and how they ask them, but they are all looking for the same basic information.
- The next few slides present a list of some of the things you will want to take note of during a visit.
- It may help to bring a notebook with you on visits so you can write down some of this information while it is still fresh in your memory.

# Documenting Visits

- ***What do I document? (continued....)***

- *Length of visit*

To keep record keeping simpler, you can round up to the nearest 15 minute interval (a visit that lasted from 1:00 – 1:35 can be documented as 45 minutes).

- *Environmental observations*

Is the ward's living area clean? Are the staff members helpful? No need to document every detail of what you see – if everything seems fine, just write “facility appeared clean, staff was helpful”.

Of course, be sure to note in greater detail anything that really stands out. This information can be used to spot trends in the care that facility is providing – both good and bad.

# Documenting Visits

- ***What do I document?*** (continued....)
- *Observations about the ward* – We are not asking you to do a full physical and psychological exam of the ward!

Just note how they look (well-dressed, visibly dirty, etc.), how they are acting (nervous, talkative, etc.), and what they were doing when you came in (eating, sleeping, etc.).

This information can be used to identify trends in the ward's behavior or health.

For example, if every time you visit a ward they are increasingly more agitated, it may be a result of a recent medication change and something that needs to be monitored more closely.

# Documenting Visits

- ***What do I document? (continued....)***
- *What did you do on the visit?*

This will be the bulk of your documentation. Did you go anywhere? Where did you go? Did you watch T.V. together? What did you talk about?

There is no need to be “super-detailed”, you can write as much or as little as it takes to describe the visit.

For example, a very short note might look like this:

*“Tom and I went across the street from the nursing home to get ice cream. Tom got chocolate –he says it’s his favorite. We talked about his daughter who now lives in Alaska – he seems to really miss her. We walked back to Tom’s room and said ‘good-bye’ as it was time for Tom to go see the physical therapist”.*

# Documenting Visits

- ***Where do I fill out & send my documentation?***
- The preferred method of documenting your visits is through the OSG website's online form located at: <http://gac.state.il.us/osg/vgap.htm>
- If, for some reason, it is difficult for you to do your documentation this way, please contact the volunteer coordinator and alternative methods can be discussed.
- ***When do I need to turn in the documentation?***
- We ask that you document your visits in the same month as the visit.

# Access to Ward Information

- ***Ward information located at the Office of State Guardian***
- All visit notes written by volunteers, guardian representatives, and other OSG workers are recorded in the ward's electronic case file.
- This electronic file is located on the OSG's *intranet* – meaning records can only be accessed directly from the office or by staff who have special access privileges.
- A ward's records can contain information regarding their medical history, financial information, and family history.
- This is obviously very personal information and because of its very personal nature, the reason for the limited access to their records.



# Access to Ward Information

- *Ward information located at the Office of State*
- *Guardian, (continued)*

If you wish to see past documentation regarding a ward, please contact the volunteer coordinator.

When requesting information, please specify what type of information you would like to see.

For example: "I would like to see the visit notes for 'Bob' for the last 12 months".

Please be patient while your request is being processed as it takes some time to locate the appropriate records and protected information is removed.

# Abuse & Neglect

- Unfortunately, people with disabilities are especially vulnerable to abuse and neglect because they are either unable to express that it is happening to them or because they are not believed when they do report such occurrences.
- For this reason, it is important that we act on their behalf when abuse and/or neglect is occurring.
- "*Abuse*" means any physical abuse, sexual abuse, mental abuse, or financial exploitation.

# Abuse & Neglect

- "*Neglect*" means an employee's, agency's, or facility's failure to provide adequate medical care, personal care, or maintenance causes an individual pain, injury, or emotional distress, results in either:
  - an individual's maladaptive behavior or
  - the deterioration of an individual's physical condition or
  - mental condition, or
  - places an individual's health or safety at substantial risk of
  - possible injury, harm, or death.
- Where abuse is inappropriate contact or interaction, neglect is a lack of contact or interaction.

# Abuse & Neglect

- As a volunteer guardian, you are also a “mandated reporter”.
- Being a mandated reporter means that if you witness or suspect abuse and/or neglect, you are required by law to report it.
- Sometimes, people do not want to “make the call” because they are unsure of what they saw or they do not want to cause trouble.
- Best practice is to err on the side of the ward’s best interests and report it!
- Worse case scenario is that there is no abuse found to be happening.

# Abuse & Neglect

- If you see something – say something!
- After you do so, the situation will be investigated by professionals who will determine what happens next.
- It is up to them to determine whether or not abuse or neglect is occurring and what the next course of action should be.
- Note that you will probably not hear the results of the investigation.
- This can be frustrating, but know that you have done all that you could in this situation and that you have acted as a true advocate in protecting the rights of the ward that you visit!

# Abuse & Neglect

- If you suspect or witness an act of abuse or neglect, call
  - **The Illinois Department of Public Health**
    - **1-800-252-4343**
    - **Or**
  - **The Illinois Office of Inspector General at:**
    - **1-800-368-1463 (within Illinois)**
- You should have the following information ready:
  - the abused/neglected person's name or description,
  - the nature of the suspected abuse or neglect and when and where it occurred,
  - the names or descriptions of suspected perpetrators,
  - any other information you think may help, including the names of witnesses and how to contact them, and
  - the name, address and phone number of the facility.

# Abuse & Neglect

- And remember, if you do have to report abuse and/or neglect, please follow up with us AFTER you call the Office of Inspector General at:
  - **312-793-5900**
  - (state that you are a volunteer who has reported abuse)
- If you have any further questions about reporting abuse and/or neglect, please visit:
  - [The Illinois Department of Human Services](#)
  - [Illinois Department of Public Health – Nursing Homes In Illinois](#)

# Confidentiality

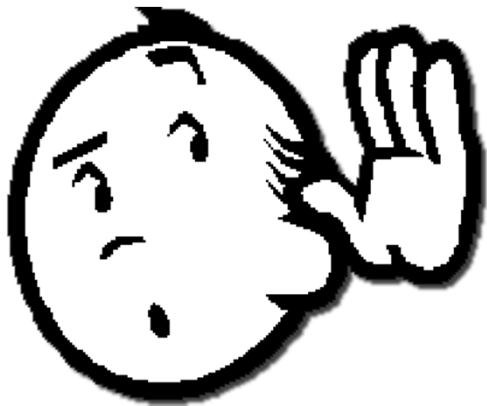
- Maintaining confidentiality is one of the most important responsibilities we have when working with our wards.
- Confidentiality protects one's dignity and their personal rights.
- As a volunteer visitor, you may find yourself exchanging information regarding a ward with a lot of different people (medical staff, OSG staff, caseworkers, etc.).
- A question that commonly arises is: "how do I know who I can talk to and about what?"
- In most cases, the answer to this dilemma can be answered by asking yourself a simple little question:

**"Does this person need to know?"**



# Confidentiality

- Maintaining confidentiality has more to it than just what you talk about to whom; there is also the matter of *where* you talk about someone's personal information.

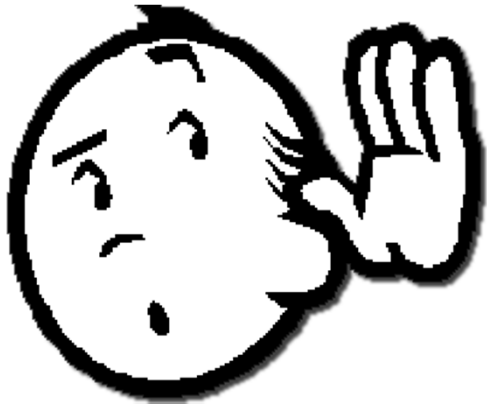


Discussing a ward's medical chart with a nurse in the ward's bedroom is completely acceptable.

But how about if that same conversation is occurring in the lunchroom in front of other residents?

- What if you run into that same nurse at a coffee shop and you begin to discuss the ward's case?

# Confidentiality



In these situations, just apply the same rule, “does this person need to know?”, to all those within ear-shot.

If they do not need to know, ask the nurse (or whomever) if you can discuss the matter elsewhere.

- Another tip is to avoid using the ward’s name or any other identifying information whenever possible.
- Be as general as you can be while discussing a ward’s case and only use their personal information if it is vital to the conversation.

# Ending Volunteer Status

- We at the Office of State Guardian understand that people have busy lives and are not expected to volunteer their time with us indefinitely.
- However, we do ask that if that day comes, you take the following into consideration:
  - We ask that you sign a document stating that you are terminating your volunteer status for the Office of State Guardian.
  - Upon terminating your volunteer status, you may certainly visit the ward again if you wish, but you will no longer be visiting as a representative of the OSG.
  - Remember: just because you have to leave us does not mean you are not welcome back.
  - We have had several volunteers who have left for a few years and

# Quick Quiz

- **1) True or False:** Viewing all of the training modules is optional, as long as you read at least one.
- **2) True or False:** The volunteer coordinator is the primary contact person for all volunteers.
- **3) True or False:** OSG & Facility staff should be informed if you plan on taking a ward off-grounds.
- **4) True or False:** Documentation should be done during the same month as the visit.
- **5) True or False:** Volunteer visitors should adhere to the agency's confidentiality policy..
- **6) Choose one answer:** Which of the following is NOT true about abuse & neglect:
  - a) Suspected abuse & neglect should always be reported.
  - b) It is up to the volunteer guardian to decide if it is actually abuse or neglect.
  - c) The results of an abuse or neglect investigation may not be made available.
  - d) After calling the abuse & neglect hotline, a volunteer should also contact the OSG.
- **7) Choose the best answer to finish the sentence:** "Documenting visits..."
  - a) ...is a waste of time because no one ever reads them anyway.
  - b) ...is a way for the Office of State Guardian to keep track of my every move.
  - c) ...helps guardian representatives by letting them know what's going on with a ward in between their own visits with them.
  - d) ...should be handwritten and mailed to the OSG.