

## Bedfast Residents: Facility Assessment Checklists

Following are a series of facility assessment checklists for nursing home staff to use to assess processes related to the management of bedfast residents in order to identify areas that need improvement. Use these checklists to look at your current practices more critically.

It may also be helpful to view your facility's nationally reported Quality Measure scores to help you identify areas for quality improvement and see how your nursing home compares with others in your state and across the country: <http://www.medicare.gov/NHCompare>

### Directions:

- These checklists are designed for completion by a Director of Nursing (DON) or other team leader who knows the current facility practices well.
- The person completing the checklist should consult with appropriate staff and review residents' medical records to ensure the most accurate information is captured.

Use these checklists as the starting point for a quality improvement project guided by the Quality Improvement Worksheets. When answering questions on the checklists, if you are not sure or answer "no" to one of the questions, utilize Quality Improvement Worksheet A: Identifying Areas for Improvement in order to collect additional data and investigate further.

### Included:

Checklists on the following bedfast-related topics:

- Screening and Ongoing Monitoring
- Evaluation
- Developing Care Plans
- Assessing Facility Policies
- Staff Education and Training

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## Checklist: Screening and Ongoing Monitoring for Bedfast Residents

**Does your facility have a process to screen residents for risk factors that may lead to the bedfast condition, or that identifies residents who are bedfast?**

*[A screening assessment is a brief assessment or question that determines if the resident is at risk, or is bedfast. It does not include a comprehensive evaluation (about the potential causes or reversible factors) that need to be completed if the resident is found to be at risk, or bedfast, upon screening.]*

\_\_\_\_\_ **No.** If no, this is an area for improvement. Use this checklist and the Quality Improvement Worksheets to guide your team in implementing a process for screening for risk or bedfast.

\_\_\_\_\_ **This is an area we are working on.** Our target date for implementing a process for screening is: \_\_\_\_\_.

\_\_\_\_\_ **Yes.** Please continue to the questions below.

**Does your facility have a process for screening that addresses all the areas listed below?**

	Yes	No	Person Responsible:	Comment:
1. Does your facility have a policy and procedure for determining bedfast risk?	Γ	Γ		
2. Does your facility have a policy and procedure that identifies residents who are bedfast?	Γ	Γ		
3. Do you routinely check all residents for increased risk for becoming bedfast at the following times: - At admission - At readmission - At each MDS assessment - With each change in condition - When it is noted that the resident is spending more time in a bed/recliner in their room than usual	Γ Γ Γ Γ Γ	Γ Γ Γ Γ Γ		
4. If risk factors or actual bedfast condition are identified during screening, does your facility have a process that will lead to a comprehensive evaluation?	Γ	Γ		
5. If screening is negative for risk factors or actual bedfast condition, does your policy and procedure provide for the regular monitoring and periodic re-screening of residents (especially with a change in condition such as deterioration in mobility or socialization is noted)?	Γ	Γ		

## **Checklist: Screening and Ongoing Monitoring for Bedfast Residents (cont.)**

If any of the above elements in your process for screening and ongoing monitoring of bedfast residents are missing (answered “No” to any of the questions):

- Use Quality Improvement Worksheet A: Identifying Areas for Improvement to collect data to investigate further.
- Follow the Quality Improvement Worksheets to implement missing element(s) and monitor regularly to determine whether or not implementation is successful.

If none of the above elements are missing from your facility’s process (answered “Yes” to each question), you may either continue on to another checklist, or end here.

## Checklist: Evaluation of Bedfast Residents

**Does your facility staff complete a comprehensive evaluation of residents who are found to be bedfast upon screening?**

*(A comprehensive evaluation of bedfast residents is often done when someone is noted to remain in a bed or recliner in their room for more than 22 hours each day for four out of the past seven days, is noted to be bedfast on admission, or has several risk factors that may lead to the need for a more thorough evaluation of their condition.)*

\_\_\_\_\_ **No.** If no, this is an area for improvement. Use this checklist and the Quality Improvement Worksheets to guide your team in implementing a process for completing a comprehensive evaluation of bedfast residents.

\_\_\_\_\_ **This is an area we are working on.** Our target date for implementing a process for completing a comprehensive evaluation of bedfast residents is: \_\_\_\_\_. If needed, use the Quality Improvement Worksheets to guide your improvement process.

\_\_\_\_\_ **Yes.** Please continue to the questions below.

**Does your comprehensive evaluation of bedfast residents include all of the elements below?**

	Yes	No	Person Responsible:	Comment:
1. Does your policy and procedure state that residents should have a comprehensive evaluation when the resident screens positive for risk factors that may lead to the bedfast condition?	Γ	Γ		
2. Does your policy and procedure state that residents should have a comprehensive evaluation when the resident is identified as bedfast at the following times: - At admission? - At readmission? - At each MDS assessment? - With each change in condition?	Γ Γ Γ Γ	Γ Γ Γ Γ		
3. Does your comprehensive evaluation of bedfast residents include the following elements: a. Major medical and psychiatric diagnoses? b. Current medications? c. History of recent acute episode or hospitalization? d. Prior mobility status? e. Current neurological status? f. Current musculoskeletal condition? g. Current sensory status (visual, auditory, tactile)? h. Current psychological/mental status? i. Laboratory screening? j. Participation in activity programs/social interaction?	Γ Γ Γ Γ Γ Γ Γ Γ Γ Γ	Γ Γ Γ Γ Γ Γ Γ Γ Γ Γ		
4. When a comprehensive evaluation is completed, is the form placed in the resident's medical record?	Γ	Γ		

## **Checklist: Evaluation of Bedfast Residents (cont.)**

If any of the above elements in your process for screening and ongoing monitoring of bedfast residents are missing (answered “No” to any of the questions):

- Use Quality Improvement Worksheet A: Identifying Areas for Improvement to collect data to investigate further.
- Follow the Quality Improvement Worksheets to implement missing element(s) and monitor regularly to determine whether or not implementation is successful.

If none of the above elements are missing from your facility’s process (answered “Yes” to each question), you may either continue on to another checklist, or end here.

## Checklist: Developing Care Plans for Bedfast Residents

**Does your facility have a process for developing and implementing care plans for bedfast residents?**

\_\_\_\_\_ **No.** If no, this is an area for improvement. Use this checklist and the Quality Improvement Worksheets to guide your team in implementing a process for developing care plans for bedfast residents.

\_\_\_\_\_ **This is an area we are working on.** Our target date for implementing a process for developing care plans for bedfast residents is: \_\_\_\_\_. If needed, use the Quality Improvement Worksheets to guide your improvement process.

\_\_\_\_\_ **Yes.** Please continue to the questions below.

**Does the care plan for bedfast residents address all the areas below?**

	Yes	No	Person Responsible:	Comment:
1. Is the resident's consistent caregiver, who is familiar with the resident's usual routine, involved in the care planning process?	Γ	Γ		
2. Does the care plan include goals identified during interview with the resident, consistent caregiver, or family member?	Γ	Γ		
3. Does the care plan include education of the resident and family related to the complications associated with the bedfast condition?	Γ	Γ		
4. Does the care plan incorporate information identified on the comprehensive evaluation? (See the Evaluation of Bedfast Residents Checklist.)	Γ	Γ		
5. Does the care plan identify potential barriers to treatment of the bedfast condition?	Γ	Γ		
6. Does the care plan address treatment of reversible conditions that may be contributing to the bedfast condition (e.g., metabolic dysfunction)?	Γ	Γ		
7. Does the care plan provide for the incorporation of care practices that help to mitigate or prevent bedfast complications (e.g., daily skin assessment)?	Γ	Γ		
8. Does the care plan provide for a regular reevaluation (e.g., monitoring) of the resident's response to treatment or interventions?	Γ	Γ		
9. Does your care plan policy outline procedures to follow when a modification or adjustment needs to be made to the resident's care plan depending on whether or not a resident is responding to current interventions?	Γ	Γ		

## **Checklist: Developing Care Plans for Bedfast Residents (cont.)**

If any of the above elements in your process for screening and ongoing monitoring of bedfast residents are missing (answered “No” to any of the questions):

- Use Quality Improvement Worksheet A: Identifying Areas for Improvement to collect data to investigate further.
- Follow the Quality Improvement Worksheets to implement missing element(s) and monitor regularly to determine whether or not implementation is successful.

If none of the above elements are missing from your facility’s process (answered “Yes” to each question), you may either continue on to another checklist, or end here.

# Checklist: Assessing Facility Policies Related to Bedfast Residents

**Does your facility have a policy for caring for bedfast residents?**

\_\_\_\_\_ **No.** If no, this is an area for improvement. Use this checklist and current accepted clinical guidelines to create your facility's policy.

\_\_\_\_\_ **This is an area we are working on.** Our target date for developing our policy is: \_\_\_\_\_. If needed, use this checklist, current accepted clinical guidelines and the Quality Improvement Worksheets to guide your revision and implementation of your facility's policy.

\_\_\_\_\_ **Yes.** Please continue to the questions below.

**Does your facility's policy for caring for bedfast residents include the following components?**

	Yes	No	Person Responsible:	Comment:
1. Does your facility policy include a statement regarding your facility's commitment to care for the bedfast resident and prevent those at risk from becoming bedfast?	Γ	Γ		
2. Does your facility policy include screening, evaluation and ongoing monitoring of residents who are bedfast or at risk for becoming bedfast?	Γ	Γ		
3. Does your facility policy include the goals of care of the bedfast resident, such as: a. Identify residents at-risk for becoming bedfast? b. Prompt screening and identification of bedfast residents? c. Identify reversible conditions? d. Prevent complications? e. Provide guidelines for when and if referral will be made to (OT, PT)? f. Identify steps to be taken in order to monitor treatment effectiveness? g. Improve the resident's well being by taking the resident out of their room, or increasing socialization if the resident refuses to leave room? h. Optimize the resident's ability to perform ADLs and participate in activities?	Γ Γ Γ Γ Γ Γ Γ Γ	Γ Γ Γ Γ Γ Γ Γ Γ		
4. Does your facility policy address who, how and when the monitoring of the effectiveness of the care of bedfast residents should be accomplished?	Γ	Γ		
5. Does your facility policy address a protocol for ongoing monitoring of bedfast residents?	Γ	Γ		
6. Does your facility policy address a protocol for communication and reporting of bedfast residents to the designated MDS personnel to ensure correct coding?	Γ	Γ		

## **Checklist: Assessing Facility Policies Related to Bedfast Residents (Cont.)**

If any of the above elements in your process for screening and ongoing monitoring of bedfast residents are missing (answered “No” to any of the questions):

- Use Quality Improvement Worksheet A: Identifying Areas for Improvement to collect data to investigate further.
- Follow the Quality Improvement Worksheets to implement missing element(s) and monitor regularly to determine whether or not implementation is successful.

If none of the above elements are missing from your facility’s process (answered “Yes” to each question), you may either continue on to another checklist, or end here.

## Checklist: Assessing Staff Education and Training Regarding Bedfast Residents

**Does your facility have initial and ongoing education on bedfast resident screening, ongoing monitoring and evaluation for both nursing and non-nursing staff?**

\_\_\_\_\_ **No.** If no, this is an area for improvement. Use this checklist and the Quality Improvement Worksheets to improve your processes related to staff education on bedfast resident screening, ongoing monitoring and evaluation.

\_\_\_\_\_ **This is an area we are working on.** Our target date for implementing an initial and ongoing education program on bedfast resident screening, ongoing monitoring and evaluation is: \_\_\_\_\_. If needed, use this checklist, current accepted clinical guidelines and the Quality Improvement Worksheets to guide your facility's education program.

\_\_\_\_\_ **Yes.** Please continue to the questions below.

**Does your facility's education program for bedfast resident screening, ongoing monitoring and evaluation include the following components?**

	Yes	No	Person Responsible	Comments
1. Are all new staff oriented in bedfast resident screening, ongoing monitoring and evaluation?	Γ	Γ		
2. Are current staff provided with ongoing education on the principles of bedfast resident care?	Γ	Γ		
3. Is discipline-specific (Activities, Dietary, Rehab, Social Services, etc.) education provided for bedfast resident screening, ongoing monitoring, and evaluation?	Γ	Γ		
4. Is there a designated clinical "expert" available at the facility to answer questions from all staff about the care of bedfast residents?	Γ	Γ		
5. Does education take into consideration the personal, ethnic, cultural, and religious beliefs surrounding bedfast management?	Γ	Γ		
6. Is the education provided at the appropriate level for the learner (e.g., CNA vs. RN)?	Γ	Γ		
7. Does the education include staff training on documentation related to care of the bedfast resident (pain and skin assessment, ADL ability, socialization skills/needs, cognitive deficits, nutritional status, etc.)?	Γ	Γ		
8. Does your facility's education program include resident education?	Γ	Γ		
9. Does your facility's education program include family education?	Γ	Γ		

## Checklist: Assessing Staff Education and Training Regarding Bedfast Residents (Cont.)

If any of the above elements in your process for screening and ongoing monitoring of bedfast residents are missing (answered “No” to any of the questions):

- Use Quality Improvement Worksheet A: Identifying Areas for Improvement to collect data to investigate further.
- Follow the Quality Improvement Worksheets to implement missing element(s) and monitor regularly to determine whether or not implementation is successful.

If none of the above elements are missing from your facility’s process (answered “Yes” to each question), you may either continue on to another checklist, or end here.

