



Monthly Care Statements – implementation

This webinar gives providers and workers information about how to provide Monthly Care Statements. This includes how to register for the voluntary start and how they can count towards care minutes. It also covers the benefits for older people, their representatives and providers.

Acknowledgement of Country

We'd like to acknowledge the Traditional Owners of Country throughout Australia and recognise the continuing connection to lands, waters and communities. We pay our respect to Aboriginal and Torres Strait Islander cultures and to Elders past and present.

Introductions

Chair:

- Ingrid Leonard, Assistant Secretary, Choice and Transparency Branch

Presenters:

- Katy Roberts, Director, Resident Experience and Food Policy section
- Anne Muldowney, Senior Policy Officer, Older Persons Advocacy Network (OPAN)
- Corey Irlam, Deputy Chief Executive Officer, Council of the Ageing (COTA)

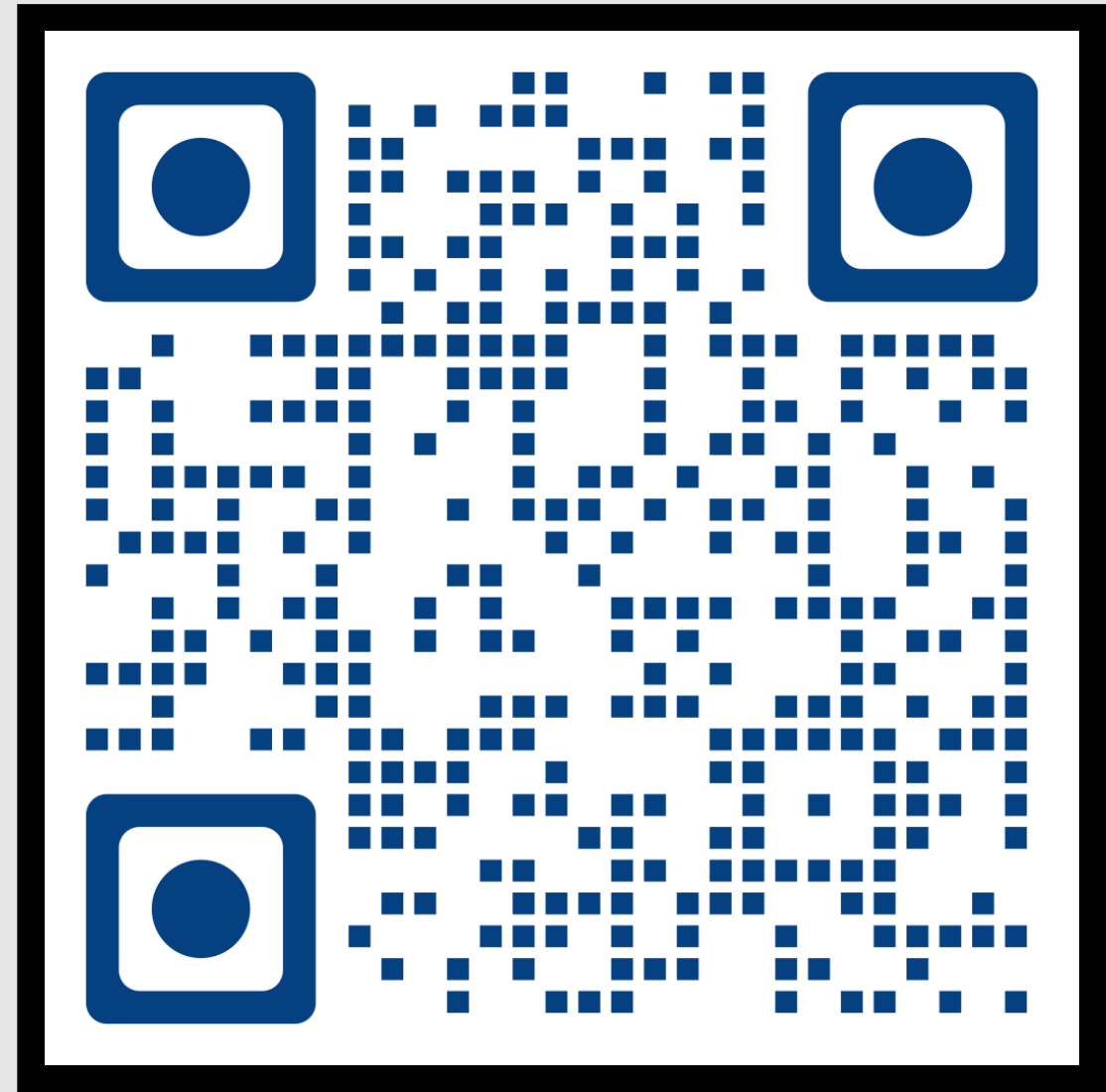
This webinar will cover:

- What are Monthly Care Statements?
- Voluntary implementation
- Benefits for providers and residents
- Preparation and key steps
- Contribution to care minutes
- Privacy considerations
- OPAN's perspective
- COTA's perspective
- Question and answer session



Scan or click the code to register your interest in starting Monthly Care Statements from 1 October 2024.

We'll send you additional information and support.

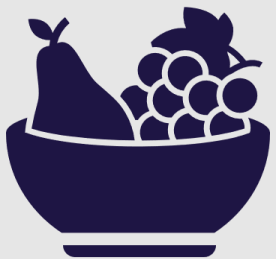




What are Monthly Care Statements?



A way to improve communication between aged care providers and residents and their representatives.



Overview of wellbeing, nutrition, weight, medication, including changes since the previous statement.

A monthly snapshot that covers:

- wellbeing activities
- nutrition and weight
- medication
- appointments

When relevant:

- summary information (diagnoses)
- wound management
- mobility
- falls



Benefits for residents

- Visibility of care and confidence in the provider.
- One easy-to-read snapshot of wellbeing activities, nutrition, weight and medication changes.
- Prompts further conversations about care needs.



Resident case study

Female aged care resident Janice expressed her appreciation for receiving the Monthly Care Statement, as it played a crucial role in helping her recollect events from the previous month.

Janice noted the distinction between the Monthly Care Statements and the care plan review. While both reporting mechanisms revolved around her care, the Monthly Care Statement was particularly valuable as it was a physical document that was handed to her.

"I am getting very forgetful, so I liked that the Monthly Care Statement helped me remember what has happened."

Benefits for providers

- Opportunity to review and adjust care plans.
- Improved communication with aged care residents about their care needs.
- Address ongoing concerns or feedback on time.



Residential aged care home case study

“One positive is that Monthly Care Statements highlighted the residents that participated in few or no health and wellbeing activities. This was great because even though we suspected this was happening we now know and had to rethink our approach for these residents”.

Rethinking resulted in one lifestyle staffer bringing in her 18-month-old granddaughter as one resident loved little children but didn't have anyone small in his family.

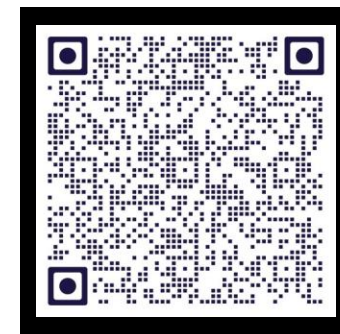
It was as simple as this little girl handing him the ball to play skittles for him to participate. He now asks, *‘Has she been too naughty to bring in?’* if she doesn't come with her grandmother”.

Monthly Care Statements – staged implementation

- Give verbal or written Monthly Care Statements voluntarily from 1 October.
- They will become mandatory in the future.
- We will advise when they will become mandatory.
- We are developing a digital solution.
- We will pilot digital Monthly Care Statements in 2025.



**Scan or click here to
sign up to the digital
solutions pilot**



How to prepare for voluntary Monthly Care Statements

- Check our guide and templates.
- Assess the information you currently report on.
- Create internal processes for sharing statements.
- Train and support your staff.
- Arrange quality assurance.



Contribution to care minutes

✓ What counts

If conducted by a registered nurse, enrolled nurse or personal care worker:

- Clinical reviews of the Monthly Care Statements if completed on-site
- Verbal delivery of the statements
- Follow up conversations and activities.

✗ What does not count

- Collating information for the statements
- Staff developing and quality checking the statements
- Distributing written Monthly Care Statements.



Privacy

- You have an obligation to protect residents' personal information.
- If giving hard copies, support residents to securely store the statements.
- If giving electronic statements, consider electronic protections.





Monthly Care Statements are referenced in the strengthened quality standards

Outcome 3.3: Communicating for safety and quality

‘Critical information relevant to the older person’s care and services is communicated effectively with the older person, between workers and with family, carers and health professionals involved in the older person’s care. Risks, changes and deterioration in an older person’s condition are escalated and communicated as appropriate.’...

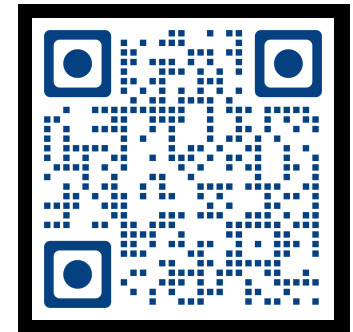
Action 3.3.4: The provider implements processes to:

- a) correctly identify and match older people to their care and services
- b) *provide Care Statements to older people in residential aged care.***

Audience Poll

“How likely is your service to start giving Monthly Care Statements before they become mandatory?”

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up for voluntary
Monthly Care Statements**



Resources to help

- Our website is regularly updated.
- We have developed a template that includes:
 - template instructions
 - cover sheet for residents
 - a Monthly Care Statement for you to fill out or adapt.
- Our guide contains everything you need to know for the 1 October start.

How to complete Monthly Care Statements

Monthly Care Statements give an overview of wellbeing activities, nutrition and weight, medication changes and appointments. Read about how to complete each section of the Monthly Care Statements template. You do not need to provide these 2 pages to residents.

Information for all residents receiving Monthly Care Statements

The sections below should be included on every Monthly Care Statement you provide.

Name/initials and birth year

To protect the resident's privacy, identify the resident without including all their details. For example, you might use a combination of their birth year and initials to create a unique ID (JS45 for John Smith born in 1945). This can also make filling out the statement faster. You can choose what identifiers you use.

Wellbeing activities

Include activities from the five recreation domains (physical, social, emotional, cognitive and spiritual). The table below provides some examples. You can add any activity.

Table 1: examples of wellbeing activities and frequencies

| Activity | Frequency |
|-----------------|--------------------------------|
| Arts and crafts | Every available day |
| Excursions | Most days since last statement |
| Games | Twice/week |
| Movement | Weekly |
| Music | Fortnightly |
| Social events | Once since last statement |
| Other | Other |

1

Monthly Care Statement

Resident information

This statement may cover one calendar month (e.g. 1 May to 31 May) or overlapping calendar months (e.g. 20 April to 19 May).

Resident's name/initials: Reporting period starts:
Resident's birth year: Reporting period ends:
Resident's gender:

Wellbeing activities

Physical, social, emotional, cognitive and spiritual activities you did since your last statement, and how often.

Activity 1: Frequency:
Activity 2: Frequency:
Activity 3: Frequency:
Activity 4: Frequency:
Activity 5: Frequency:
Activity 6: Frequency:

Additional information about wellbeing activities:

2



Anne Muldowney Senior Policy Officer, OPAN

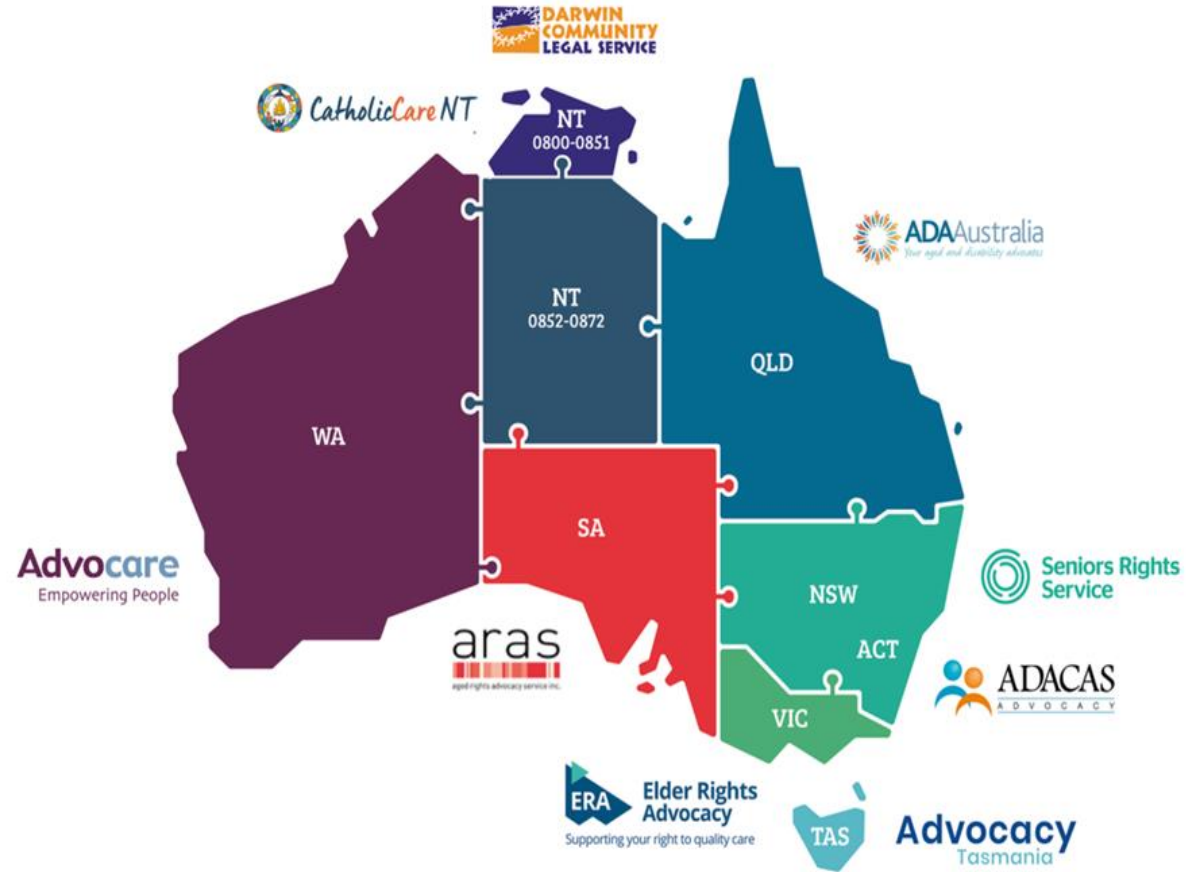
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Monthly Care Statements

Anne Muldowney, Senior Policy Officer



More than 44,000 cases of individual information and advocacy in the 2023-2024 financial year.

Communication is a consistent key issue raised by older people.



Presenting Issues Initial Findings 2023-2024

CHSP

- **Communication**
- Home maintenance and modifications
- Domestic assistance
- Fees and charges
- Complaints

Home Care Packages

- **Communication**
- Equipment, goods, assistive technology
- Fees and charges
- **Choice and decision making**
- Care planning

Residential Care

- Fees and charges
- **Communication**
- **Choice and decision making**
- Complaints support
- Quality of care

Flexible Care

- Fees and charges
- **Choice and decision making**
- Coordination/management
- Respite care
- Complaints support

Case Study #1

An older person sought aged care advocacy support because they were frustrated and upset about their poor communication experience at their residential aged care home. They explained that they had moved into the residential aged care home three months ago and felt that no one was listening to them. They described frequent staff changes and were now unsure who the manager was. They had not been invited to participate in their care planning and when they had communicated care needs and preferences with staff members, nothing was followed through.

They had requested assistance to shower between 7:00 AM and 9:00 AM so they could participate in the morning exercise class. Although they had asked several staff members, they never received assistance, and felt their entire morning was wasted waiting to be showered. The older person said they felt they were having to 'conform' to the routine and functions of their residential aged care home instead of being able to live their life the way they wished.



Case Study #2

An older person sought aged care advocacy support to address communication issues with staff at their residential aged care home. They requested assistance from staff members who frequently did not speak in a manner they understood. They felt as though each time they raised concerns they were minimised or 'swept under the rug' and this made them become extremely anxious.

They noted there were many people living with dementia in their residential aged care home and there was a 'one size fits all' approach to communicating with residents. They felt that staff treated every resident as if they had dementia rather than treating each person individually. An advocate supported the older person to discuss concerns about the communication breakdown in a meeting with management at their residential aged care home.

Monthly Care Statements – make sure:

- The older person gives **consent** before information (especially personal/private details) is shared with family, carers, partners in care or representatives
- The older person is **included** in discussions with their carer, partner in care, family member or representatives
- They are an **opportunity** to sit down with the older person, talk about the previous month and plans for the next month (not rushed or just handed over with no communication)
- There is clear **responsibility** and staffing continuity to communicate care statements and monitor changes over time
- They are in **language** or in an appropriate form of communication for the person – plain English, pictures, audio etc, and your discussion is in the older person's language
- Discussions that lead to changes in care plans are communicated with frontline staff delivering services. Sometimes this **communication loop** isn't closed and changes are documented but not delivered
- Provide information to the older person on the availability of **advocacy** if there is anything they would like to discuss with an independent person or require support to understand rights and address concerns.

Monthly Care Statements are an opportunity to:

- Sit down and communicate with the older person and/or their representative
- Discuss what happened over the last month
- Check how the older person is going and if they have any concerns
- Respond to questions and address issues
- Ensure a person's wishes and preferences are reflected in the care plan and their rights are being upheld
- Find out if the care plan is still appropriate and what changes need to be made or if there are things the older person would like reflected in their care plan
- Highlight good care experiences and better manage expectations through good communication (e.g. what can and can't be done)
- Get feedback on staff, food, quality of care and other important aspects of care and supports
- Discuss other activities the older person is engaged in or would like to engage in, especially outside the residential aged care home



Corey Irlam Deputy Chief Executive Officer, COTA

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Monthly Care Statements - Webinar

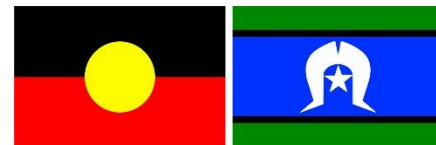
Corey Irlam, Deputy CEO

29 August 2024



Acknowledgement of country

COTA Australia acknowledges the Traditional Owners and Custodians of the land and pays its respects to their Elders past and present.



Why participating in the voluntary stage of Monthly Care Statements is a good for providers

- ✓ Addresses issues raised to Royal Commission about people feeling they didn't know what care was actually delivered
- ✓ Early implementation of 1 July 2025's new standards requirements to deliver care statements (Action 3.3.4)
 - Contribute to your IT designs to streamline process
- ✓ Opportunity to inform/influence the final design before they become mandatory
 - What does and doesn't work?
 - Is it too 'care' and not enough 'services'?



Why are Monthly Care Statements good for residents and their families?

- ✓ Residents (and families) receive an improved understanding of the care being delivered
 - Care Statement should be designed for older person.
 - Ancillary benefit is improving 'representatives' understanding of care delivered.
 - Supported Decision Making principles empowers older person to choose who to receive 'their' care statement.
- ✓ Creates a semi-regular reflection point / conversation about care & services
 - Informal discussion about care plan / services can result in feedback that people are concerned about raising as a 'complaint'
 - Result: increased resident participation in their care



Things to consider in voluntary stage

- How are you capturing feedback from residents and families about MCS?
- How do Care Statements make clear who to talk to in a multi-disciplinary model of care?
 - e.g. when to go to GP, Pharmacist, Allied Health professional vs Nurse in Charge
- Notify Department you're participating
 - so you can provide feedback on your experiences during the voluntary stage





Thank you for your time

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Questions and answers

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Webinar survey

Thank you for attending today's webinar.

Please provide your feedback by answering 3 short questions.

**Scan or click here to
take the quick survey**

