

Enrollee/Caregiver Training Checklist

Include this completed and signed form with each prior authorization requests for initial, revised, or subsequent new requests for additional service requests for PDN and/or home health services until successful completion. Form is then to be updated/reviewed at least annually once all training has been successfully completed.

The below training checklist is used to document the training provided by agency staff to the enrollee/enrollee’s primary caregiver and the primary caregiver’s designated backup plan caregivers.

The purpose of this training is to provide support to the primary caregiver and backup caregivers to foster independence and confidence in caring for the enrollee and/or support enrollee self-care.

The checklist can be used to monitor progress towards identified short term and long term goals and to identify any barriers that require intervention.

Agency staff is to date and initial the applicable care task(s) with the following codes to monitor progress towards successful completion indicated by enrollee/caregiver successful demonstration:

- Enrollee/Caregiver observes caregiving task(s): **O**
- Enrollee/Caregiver discusses and explains caregiving task(s): **E**
- Enrollee/Caregiver successfully provides (demonstrates) caregiving task(s): **D**

Vital Signs

Skill	Date	Code	Comments	Initials
Temperature				
Axillary				
Oral				
Rectal				
Tympanic				
Pulse				
Radial				
Pedal				
Blood Pressure				
Manual				
Electronic Device				
Respiration				
Pulse oximetry				

Hygiene

Skill	Date	Code	Comments	Initials
Bed Bath				
Complete				
Partial				
Assisted				

Perineal Care				
Male				
Female				
Catheter Care				
Indwelling				
Condom				

Oral Hygiene

Skill	Date	Code	Comments	Initials
Oral Care				
Routine oral care				
Dentures				

Bed Making

Skill	Date	Code	Comments	Initials
Occupied				

Transfers

Skill	Date	Code	Comments	Initials
Stand/Pivot				
Bed to Chair				
Chair to Bed				
Lift				
Hoyer				
Ceiling				
Other				
Slide/transfer Board				
Bed to Chair				
Chair to Bed				
Chair to toilet/tub				

Elimination

Skill	Date	Code	Comments	Initials
Bedpan				
Urinal				
Rectal Tube				
Adult Brief/diaper				
Bedside Commode				

Bowel				
Cleansing Enema				
Fleets Enema				
Fecal Incontinence Pouch				
Ostomy Appliance				
Stoma Site Care				
Emptying				
Applying/Changing				
Irrigating a Colostomy				
Urinary				
Straight Catheter (intermittent)				
Male				
Female				
Indwelling Catheter				
Male				
Female				
Removal of Catheter				
Ileal Conduit				
Site Care				
Emptying				
Applying/Changing				
Suprapubic Catheter Care				

Ambulation

Skill	Date	Code	Comments	Initials
Gait Belt				
Cane				
Walker				
Crutches				
Stander				
Wheelchair				
Assisting a Fall				

ROM Exercises

Skill	Date	Code	Comments	Initials
Passive				
Active				

Positioning

Skill	Date	Code	Comments	Initials
Lateral				
Prone				
Supine				
Fowlers				
Dorsal recumbent				
Logrolling				

Safety Measures

Skill	Date	Code	Comments	Initials
Risk Factors				
Causes of Falls				
Prevention Measures				

Infection Control

Skill	Date	Code	Comments	Initials
Hand Washing				
Gloves				
Biohazard waste				
Sharps safety				

Wound Care

Skill	Date	Code	Comments	Initials
Cleaning				
Dry Sterile Dressing				
Irrigating				
Wet to Dry				
Hydrocolloid Dressing				
Montgomery Straps				
Abdominal Binder				
Negative Pressure Wound Therapy				
Drains				
Penrose				
Jackson Pratt				
Hemovac				

T-tube				
Other				

Pressure Ulcer

Skill	Date	Code	Comments	Initials
Risk factors				
Prevention measures				

Oxygen Therapy

Skill	Date	Code	Comments	Initials
Nasal Cannula				
Mask				
Regular				
Non-rebreather				
Venti-Mask				
Incentive Spirometer				
Chest physiotherapy				
Handheld Resuscitation (ambu bag)				
Tracheostomy care				
Disposable inner cannula				
Non-disposable inner cannula				
Tracheotomy Care				
Tying Methods				
Two tie				
Posey				
Ventilator Care				
Settings				
Alarm management				

Suctioning

Skill	Date	Code	Comments	Initials
Oropharyngeal				
Nasopharyngeal				
Tracheostomy				
Open system				
Closed system				

Endotracheal Tube				
Open system				
Closed system				

Enteral Tubes

Skill	Date	Code	Comments	Initials
Irrigating an NGT				
NG Feeding				
Continuous				
Intermittent (Syringe & Bag)				
GT Site Care/ Dressing				
GT Feeding				
Continuous				
Bolus/Intermittent				
Jejunostomy Tube Care				
JT Feeding				
Male				
Female				
Removal of Catheter				
Ileal Conduit				

Diabetes Monitoring

Skill	Date	Code	Comments	Initials
Capillary Blood Sugar Test				
Sliding Scale Insulin				
Hypoglycemic				
Signs/Symptoms				
Interventions				
Hyperglycemic				
Signs/Symptoms				
Interventions				

Medication Preparation and Administration

Skill	Date	Code	Comments	Initials
Reading Medication Orders				

Documenting Medication Administration				
Preparing Unit-Dose Packaged Medications				
Splitting a Tablet				
Preparing liquid medicine				
Administering Oral Medications				
Applying a Transdermal Patch				
Administering Eye Drops				
Administering Ear Drops				
Administering a Rectal Suppository				
Administering Dry Powder Inhaler				
Injectable Medications				
Preparing Medications from				
Ampule				
Vial				
Insulin				
Mixing two insulins in one syringe				
Administering insulin				
Intradermal injections				
Subcutaneous injections				
Intramuscular injection				
Intravenous				
IV Medication by gravity				
IV Medication by pump				
Changing IV Solution container				
Changing IV Administration Set				
Monitoring an IV site				
Capping an IV line for intermittent use				

Central Venous Access Device				
Types of CVAD				
Changing a CVAD Dressing				
CVADS Care				
Flushing Guidelines				

Other

Skill	Date	Code	Comments	Initials

Enrollee/Primary Caregiver Signature: _____
 Date: _____

Backup Caregiver Signature: _____
 Date: _____

Backup Caregiver Signature: _____
 Date: _____

Agency Staff Signature: _____
 Date: _____

