

# CareCertify LLC

## Hospice & End-of-Life Training Series

HOS-10

# Boundaries, Documentation & Reporting

## *Participant Guide*

Hospice & End-of-Life Training Series · Audience: Hospice Aides · Nurses · Volunteers · Social Workers · Chaplains · CE  
Hours: 1.0

## Standards That Protect Everyone

Hospice work is intimate and emotional — you're with people and families at the most tender time of life, often forming deep bonds. That closeness makes professional standards especially important: clear boundaries, honest documentation, and faithful reporting protect patients and families, and protect and sustain you.

This guide covers boundaries, documentation, confidentiality, and your reporting duties as a mandated reporter. These standards aren't cold — they're part of caring well and lasting in this meaningful work.

### Learning Objectives — by the end of this module you will be able to:

- Maintain professional boundaries in hospice
- Apply rules on gifts, money, and confidentiality
- Document accurately and objectively
- Protect confidentiality and follow HIPAA
- Report suspected vulnerable adult maltreatment

## Section 1: Professional Boundaries in Hospice

Hospice work is deeply intimate — you care for people at the most vulnerable time, and genuine bonds form with patients and families. That closeness is part of the beauty of the work, and exactly why boundaries matter. Keep relationships warm but professional and focused on care. Don't form personal, business, or romantic relationships, and follow agency policy on contact after a death. Boundaries protect vulnerable patients and families, and protect you.

## Section 2: Gifts, Money, and Confidentiality

Don't accept money, valuable gifts, tips, or loans from patients or families, and don't handle a patient's finances — financial exploitation of a vulnerable adult is reportable maltreatment. Keep patient information confidential, sharing only with the team as needed for care, and never discuss patients in public or on social media. Follow agency policy on small, token gifts. These boundaries protect vulnerable patients and the trust families place in you.

## Section 3: Support vs. Overstepping

There's a balance between genuine support and overstepping. You can care deeply while staying within your role: don't take on tasks beyond your scope, make clinical decisions, or give medical or prognosis information that isn't yours to give — route those to the nurse. Don't make promises you can't keep. Caring within your role and the plan of care is what keeps your support safe and effective.

## Section 4: Documentation and Why It Matters

Documentation records the care you provide, the symptoms and changes you observe, and the patient's and family's needs. It keeps the interdisciplinary team coordinated, demonstrates that care met standards, and is a legal record. Because you see the patient at the bedside, your documentation and reports are vital to keeping the patient comfortable. For practical and legal purposes, undocumented care didn't happen.

## Section 5: Objective Record-Keeping and HIPAA

Keep records objective and accurate: describe what you observed rather than opinions or labels, attribute the patient's statements, document promptly, and correct errors the proper way — never erase, backdate, or falsify. Protect records under HIPAA and confidentiality law, sharing patient information only with those who need it for care and as the law allows. Good, honest, protected documentation supports the patient and the whole team.

## Section 6: Mandated Reporting of Vulnerable Adult Maltreatment

Hospice patients are vulnerable adults under Minn. Stat. 626.557, and hospice staff are mandated reporters. If you have reason to believe a patient is being abused, neglected, or financially exploited — by anyone — report it immediately to the Minnesota Adult Abuse Reporting Center (MAARC) at 1-844-880-1574; call 911 first for immediate danger. You don't need proof, just reason to believe. Notify your supervisor and document. Good-faith reporters are protected; reporting internally does not replace your duty to MAARC.

### When in doubt, report

If you have reason to believe a hospice patient is being maltreated, call MAARC at 1-844-880-1574. You're protected, and the patient depends on you.

## Section 7: Self-Care and Sustaining Yourself

Hospice work is some of the most meaningful work there is, and it's emotionally demanding. You witness suffering, form bonds, and grieve losses repeatedly. Watch for accumulated grief, compassion fatigue, and burnout, and use debriefing, peer support, team rituals, and your hospice's support resources. Caring for yourself isn't a luxury — it's what lets you keep showing up with compassion for patients and families over time.

### Sustaining yourself is part of the work

You can't accompany others through death and grief without tending your own heart. Use support — it's how you last in this sacred work.

## Section 8: Standards That Let You Care Well

The standards in this lesson — boundaries, documentation, confidentiality, and reporting — aren't cold or separate from compassionate care. They protect patients and families from harm, keep care coordinated and accountable, and protect and sustain you in demanding work. Being professional and being compassionate go together: the standards are part of how you care well for vulnerable people at the end of life, and keep doing it.

### Key Terms

Term	What it means
Professional boundary	The limit that keeps the relationship safe and care-focused.
Confidentiality	Keeping patient information private and shared only as needed.
HIPAA	Federal law protecting health-information privacy.
Mandated reporter	A person legally required to report suspected maltreatment.
MAARC	Minnesota Adult Abuse Reporting Center (1-844-880-1574).
Compassion fatigue	Emotional exhaustion from caring for those who suffer.

### Check Your Understanding

1. Why are boundaries especially important in hospice?
2. What are the rules on gifts and a patient's money?
3. What makes documentation objective, and why does it matter?
4. Who do you report suspected maltreatment to, and what's the standard?
5. Why is self-care part of hospice work?

### What's Next

#### Looking ahead

This completes the Hospice & End-of-Life course. Keep each lesson's completion record on file, and pair these with your hospice's required training and competency checks.