Service Plans

Service Planning	Chart	Review/ Update	Reports	Internal Memo
Main Menu	New Problem	View/ Edit Service Plan	Full Service Plan	Write Internal Memo
		View Service Plan History	Acute Service Plan	
		Target Dates (Calendar)	RA Kardex	

New Service Plan

1. To access this screen from your *Access* screen, click onto the **Service Plans** button. The **Service Planning** Access screen will then load.
2. Click onto **New Problem** under the Chart column. Select client name and click **OK**.
3. This will take you to the AL Service Plans section where you can select from a list of pre-defined topics.

4. Select any of the topic folders you need to develop a plan in and click OK. Or to select multiple topics, click the Multi button and then click onto all topics needed. Click OK once all choices are selected.
5. The Service Plan documenting screen will load. This screen is broken out into three sections. The top is where there are suggested button words you may select from. The middle is where the Service Plan will be developed. The bottom portion is the

defined review screen where any service plans already saved in this topic will be displayed.

6. Work from left to right and click onto all appropriate options (NEED, DUE TO, DESIRED OUTCOME, etc.). Add in free texted information as needed. If you make a mistake, utilize the middle portion of the screen to adjust your note and delete any words clicked onto in error.

7. Once completed with developing the service plan, click Sign. This will save the service plan and exit you back to the Service Planning Access menu.

Edit an Existing Service Plan

Example 1: Changing part of an existing entry

(e.g., updating the Outcome Target date or updating a line to add additional information)

1. Click onto the **View/Edit Service Plan** button.
2. Select name(s) and click **OK** to load the existing Service Plans.
3. Click onto the entry to turn it red. This is called 'tagging' the entry.
4. Click onto **Edit** and select **Discontinue and Copy**. A box will popup: *Are you sure you want to DC selected entry?* Click **Yes**.
5. The middle portion of the screen will show an exact copy of the entry where you can make the appropriate changes.
6. When finished, click the **Next** button to save the information. Click the **Go** button if you would like to refresh the screen to see your updated changes.

Example 2: Removing a service plan

(e.g., service plan was charted on the incorrect client)

1. Click onto the **View/Edit Service Plan** button.
2. Select name(s) and click **OK** to load the existing Service Plans.
3. Click onto the entry to turn it red. This is called 'tagging' the entry.
4. Click onto **Edit** and select **Discontinue and Append**. A box will popup: *Are you sure you want to DC selected entry?* Click **Yes**.
5. The entry will appear in gray indicating it has been discontinued. Click the **^Discontinued** button in the beginning of the screen. Select the appropriate reason as to why the service plan is being removed. Click **Next** to save the information.
6. Click the **Go** button if you would like to refresh the screen to see your updated changes.

Example 3: Resolving a Service Plan

(e.g., when a goal is met, and the service plan is no longer needed)

1. Click onto the **View/Edit Service Plan** button.
2. Select name(s) and click **OK** to load the existing Service Plans.
3. Click onto the entry to turn it red. This is called 'tagging' the entry.

4. Select **Edit** and **Discontinue and Copy**. A box will popup: *Are you sure you want to DC selected entry?* Click **Yes**. A Write screen will load. Document all evaluation information.
5. When finished, click the **Next** button to save the information. Click the **Go** button if you would like to refresh the screen to see your updated changes.

Example 4: Evaluating and Revising a Service Plan
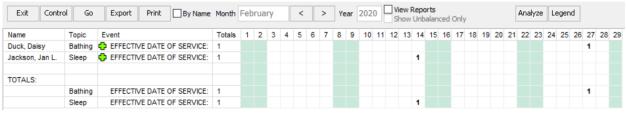(e.g., when a goal is not met, and the service plan needs to be modified)
6. Click onto the **View/Edit Service Plan** button.
7. Select name(s) and click **OK** to load the existing Service Plans.
8. Click onto the entry to turn it red. This is called 'tagging' the entry.
9. Click onto **Edit** and select **Append**.
10. This will load the Write screen so you may add on the notes regarding the review. The words to the right are available for use in all Service Plan screens. Click onto the appropriate words.
11. When finished, click the **Next** button to save the information. Click the **Go** button if you would like to refresh the screen to see your updated changes.
12. Once again click onto the service plan with the evaluation that was just appended to tag the entry.
13. Select **Edit** and **Discontinue and Copy**. A box will popup: *Are you sure you want to DC selected entry?* Click **Yes**. The service plan will copy itself back into the Write screen. Remove the Evaluation portion and modify all other items that need to be changed.
14. When finished, click the **Next** button to save the information. Click the **Go** button if you would like to refresh the screen to see your updated changes.

View Service Plan History
This button will display not only the current service plans, but also all service plans that have been discontinued due to an error or because they have been reviewed.

Target Dates (Calendar)
This button will load a calendar task which looks at all service plans that have desired outcome dates within the current month. To adjust the date range, click onto **Control**. Select a new start/end date, click **OK** to update the calendar task. Double click onto a **1** to view the specific service plan that is coming due. You may also update the service plan from within this view as well.

Service Plan Reports

Under the Reports column, click onto a report you are interested in viewing. Select name(s) and click OK to load the report. Each report can be printed or saved. Click Exit to close out of the report.

- **Full Service Plan** – Will display the entire service plan, including the needs, services to be provided and the person(s) to provide those services, as well as the desired outcomes. This report also includes a signature sheet.
- **Acute Service Plan** – This report will only display acute service plans.
- **RA Kardex** – This report will provide Guidelines for Daily Care for the resident assistants, so they know how to appropriately provide care to each client based on the client's needs. The items on this report are mostly generated via the service plan topics. An excerpt from this report is below.

GUIDELINES FOR DAILY CARE

Johnson, Renee T
APT. #106
ALLERGIES/FOOD SENSITIVITIES: No Known Drug Allergy ,

BATH	MOBILITY	EATING
My Bathing Routine Is: Monday day shift, and Thursday evening shift, Monday day shift, Thursday evening shift, Sunday day shift, **For Bathing I Need:**	**To Transfer I Need:** **For Bed Mobility I Need:** Please provide physicial assistance for the resident. am shift, pm shift, night shift, daily	**DIET:** Soft and Bite-Sized **For Meal Time I Need:** I need assist with eating, assist with food preparation,