

# PACLogic National User Group Conference

Care Planning

08/17/2022



# Agenda

Elements of the Care Plan

Using the Care Plan

Updating the Care Plan

What Happens Next

# Elements of the Care Plan



# Building the Care Plan

- Participant overarching goal
- **Problems:** What issues might get in the way of accomplishing the big goal?
- **Measurable Outcome:** What is the participant's goal related to this specific problem?
- **Intervention:** What are we as a PACE team going to do to help the participant meet their measurable outcome?



# Problem Types

## Episodic

Something happened that we didn't plan, and we need to adjust temporarily (may result in a change of condition).

## Interval

Regular (6-month) assessment:  
Documenting this is still a problem for which we should care plan.

## Reassessment

To determine if we still need to care plan (Interval vs. reassessment may be interchangeable)

See CMS care planning guidance.

# Goal Status



## Active

Continuing to work on this Goal (white letters)



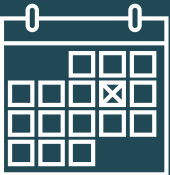
## Met

Goal has been achieved (blue letters)



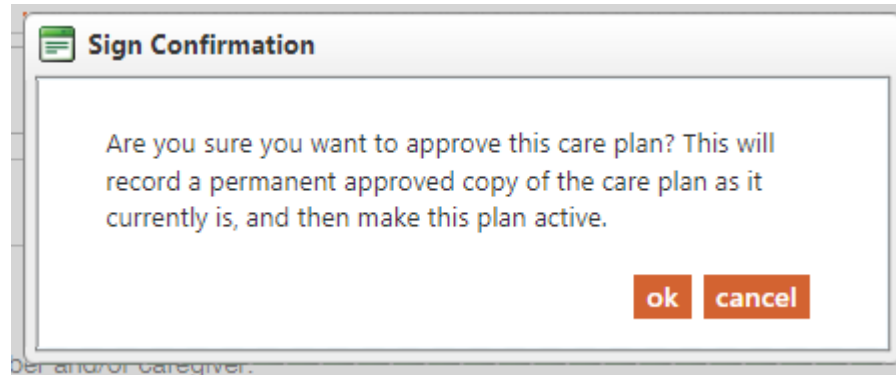
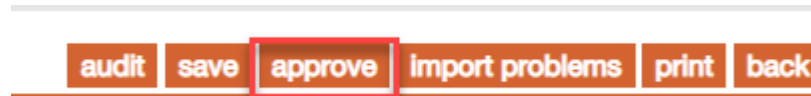
## Not Met

Goal not achieved (yellow letters)



**Target Date:** Allows the ability to enter a target date for accomplishing this goal

# Approving the Care Plan



# Signing the Care Plan

## care plan

	Date	Type	Status
▼ Current			
<a href="#">edit</a> <a href="#">print</a> <a href="#">evaluation</a>	6/6/2022	6th Month	Active
▼ Historical			
<a href="#">view</a> <a href="#">print</a> <a href="#">evaluation</a>	6/6/2022	6th Month	Approved by CC\ihohmann <a href="#">care plan signatures</a>

## care plan signatures

[back](#)

status: Approved    status date: 10/15/2021    assessment type: Change in Condition

staff signature document: [select staff signature document...](#)

## staff signatures

[e-sign...](#)

Signer	Role	Date
--------	------	------

No records to display.

## care plan participant signature attempts

Date/Time	Status	Notes	Staff
-----------	--------	-------	-------

No records to display.

## record attempt

[save](#)

date/time:   

status: Unsuccessful

notes:



# Important Reminders

## The care plan has two stages

- 1. Draft**  
Gathering information and building the care plan
- 2. Active**  
Live document that we are monitoring our progress toward the participants goals



Once the care plan is activated a “snapshot” is taken of the care plan for the team to electronically sign

# Updating the Care Plan



# Updating the Care Plan

care plan

	Date	Type	Status	Roles with Incomplete Interventions
▼ <b>Current</b> <a href="#">edit</a> <a href="#">print</a> <a href="#">evaluation</a>	6/15/2022	Semi-Annual	Active	HCC, PCP, PT, RD, RN, SW

intervention evaluation

▼ **Problem/Outcome:** Participant has CHF and reports shortness of breath and no stamina to participate in activities she enjoys /Participant will have no hospitalizations related to CHF during the next six months

▼ **Intervention:** Education participant about signs and symptoms of CHF and selfcare within the next 3 months (RN) intervention status:

Linked Documents	Date	Description	Author
<a href="#">view</a> <a href="#">unlink</a>	4/26/2022	Nursing Misc Note	jhohmann
<a href="#">view</a> <a href="#">unlink</a>	4/22/2022	Nursing Misc Note	jhohmann

[new linked document\(s\)](#)

Evaluation Text
<a href="#">edit</a>
Participant expressed understanding of the educational materials provided - Joy Hohmann on 4/26/2022 2:05:24 PM

[new evaluation text](#)

# Goal Status

▼	<b>Measurable Outcome #1: Mike's wound will be healed within 8 weeks. Created: 1/24/2022 By: cc\apressley</b> <b>Status: Not Met Reason: Mike's wound has continued to increase in size and depth and will need a wound consult</b>	<a href="#">edit</a>
	<p><a href="#">edit</a></p> <p><b>Intervention #1:</b> weekly wound care by clinic staff. <b>Roles:</b> RN <b>Status:</b> Incomplete <b>Evaluation:</b> Mike wounds is worse. - Ayanna Pressley on 1/24/2022 2:26:24 PM <b>Linked Notes:</b> Wound Care Note</p> <p><a href="#">new intervention</a></p>	
▼	<b>Measurable Outcome #2: Wound will be healed in 30 days Created: 1/24/2022 By: cc\apressley</b> <b>Status: Met Reason: Wound care clinic was able to heal wound.</b>	<a href="#">edit</a>
	<p><a href="#">edit</a></p> <p><b>Intervention #1:</b> Wound care Clinic <b>Roles:</b> RN <b>Status:</b> Incomplete <b>Evaluation:</b> <b>Linked Notes:</b></p> <p><a href="#">new intervention</a></p>	
▼	<b>Measurable Outcome #3: Mike will have no new wounds to right ankle within the next 4 months. Created: 1/24/2022 By: cc\apressley</b> <b>Status: Active</b>	<a href="#">edit</a>
	<p><a href="#">new intervention</a></p>	

[7.9.0.1 \(1/4/2022\)](#)



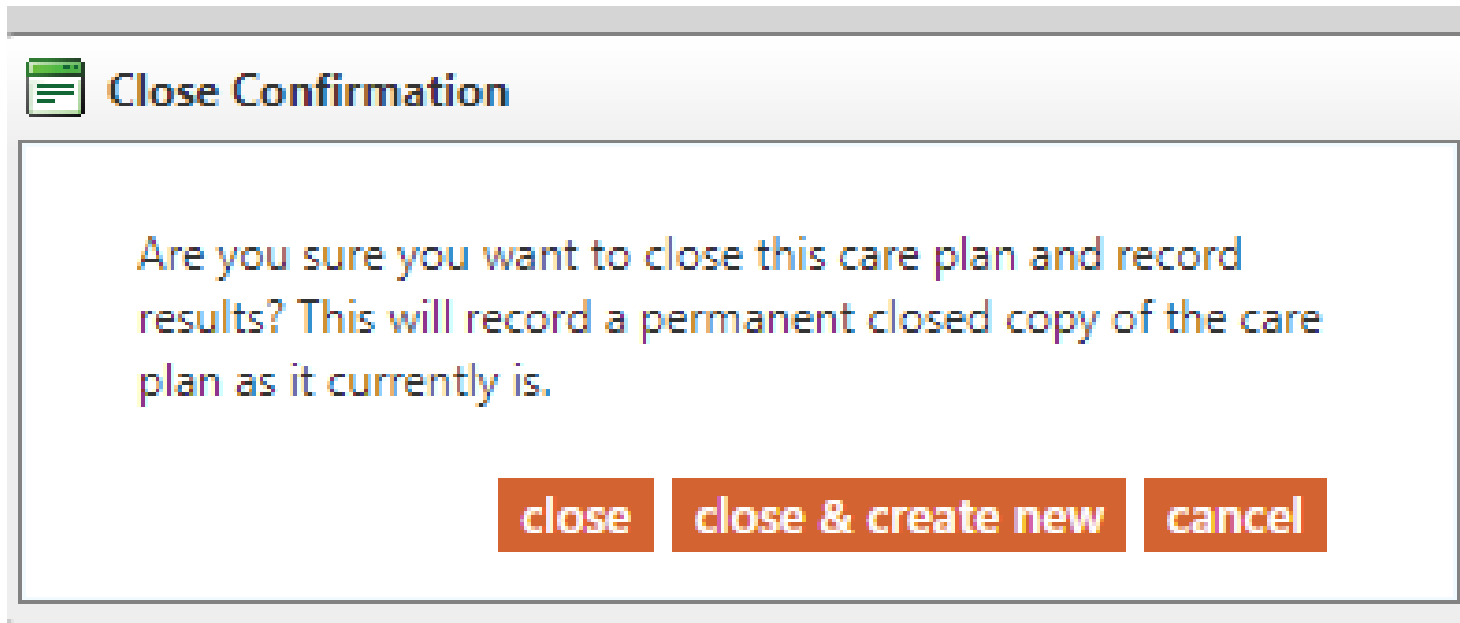
# Important Reminder


The active care plan is a **living document**;  
notes should be linked and interventions  
completed throughout the assessment period

# Closing the Care Plan



# Closing the Care Plan



 **Close Confirmation**

Are you sure you want to close this care plan and record results? This will record a permanent closed copy of the care plan as it currently is.

**close** **close & create new** **cancel**



# Important Reminder

Once the care plan is closed it can not be modified or re-opened



# Care Plan Dashboard

care plan

	Date	Type	Status	Roles with Incomplete Interventions
▼ Current				
<a href="#">edit</a> <a href="#">print</a> <a href="#">evaluation</a>	4/26/2022	6th Month	Active	PCP
▼ Historical				
<a href="#">view</a> <a href="#">print</a> <a href="#">evaluation</a>	4/26/2022	6th Month	Approved by CC\jhohmann <a href="#">care plan signatures</a>	RN
<a href="#">view</a> <a href="#">print</a> <a href="#">evaluation</a>	4/26/2022	Initial	Closed by CC\jhohmann	
<a href="#">view</a> <a href="#">print</a> <a href="#">evaluation</a>	1/24/2022	Initial	Approved by CC\apressley <a href="#">care plan signatures</a>	CNA, PT, RN, SW

# Updating the Problem

detail

save delete new outcome cancel

problem:  ▼

statement:

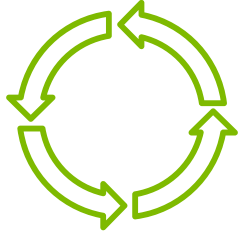
[spell check](#)

onset date:

type:  ▼

status:  ▼

# Problem Status



## Ongoing

Continued to next care plan



## Resolved

No longer a problem



## Stable

Still a problem but may be in a monitoring phase

See CMS care planning guidance.

# Thank You

