WEB: CARE PLAN 2.0

CREATING CLIENT CARE PLANS

Client Profile > Care Documentation > Care Plan
NOTE: You can only have one active Care Plan at a time

CARE PLAN 2.0

In 2.0, clients can have care plans in draft, completed, or archived status in addition to their current active care plan.

From the Care Plan tab, click View on the care plan you wish to review or select +Add Care Plan to create a new one.

Overview	Demographics	Events	Care Documentation	Visit Reports	Accounting	Scheduling	Coordination	Services	Tasks

Medical History							
Care Plan						+ Add Care Plan	
Progress Notes	**Name**	**Author**	**Start Date**	**End Date**	**Last Updated**	**Status**	
Document Approval	Therapy Care Plan	Admin User	22-10-2019	--	22-10-2019 11:31	Active	View
Assessments	Occupational Therapy - Copy - Copy	Admin User	11-09-2019	21-10-2019	22-10-2019 11:31	Completed	View
Medication	Care Plan	Admin User	12-09-2019	27-09-2019	04-09-2019 14:09	Completed	View
Client Forms	Walkme test plan - Copy	Admin User	28-08-2019	--	04-09-2019 14:08	Archived	View
	Walkme test plan	Admin User	16-08-2019	--	04-09-2019 14:08	Archived	View
	Mobility Support	Admin User	19-07-2019	19-09-2019	04-09-2019 11:01	Completed	View

ADDING CARE PLAN ITEMS

NOTE: You must publish a Care Plan for it to become active and for interventions and goals to flow through the service tasks for a scheduled visit

CARE PLAN 1.0

As interventions are the equivalent of Daily Activities in 2.0, the Daily Activities tab under Care Documentation has been removed.

CARE PLAN 2.0

Care Plan 2.0 allows you to add more details about diagnoses, goals and interventions - i.e., progress tracking method for goals, frequencies for interventions
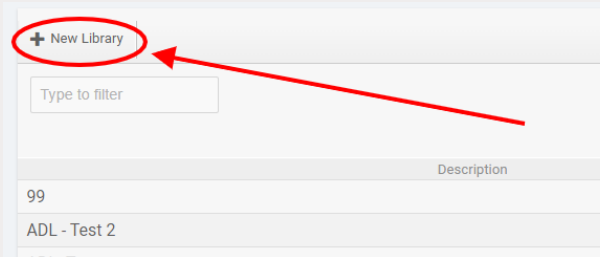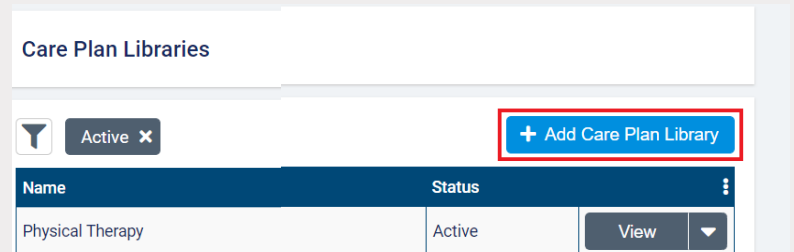
WEB: CARE PLAN 2.0

CREATING CARE PLAN LIBRARIES

Settings > Care Plan Libraries
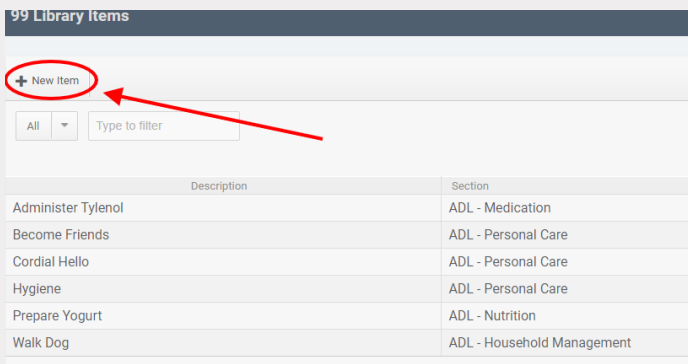
CARE PLAN 1.0

CARE PLAN 2.0

Once you have created a new care plan library, you can add diagnoses, goals, and interventions in the same way you add items to a client care plan.
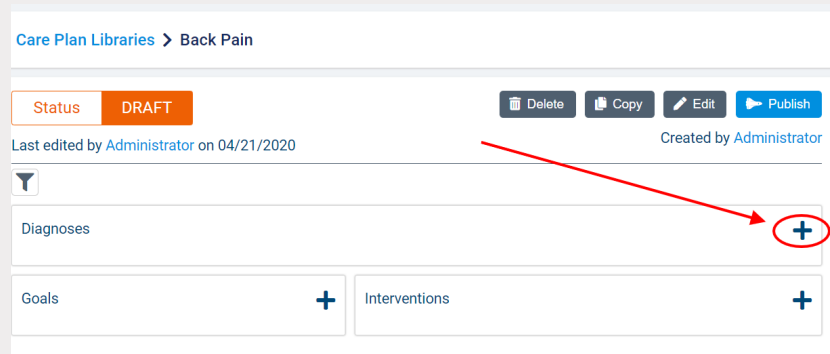
ADDING CARE PLAN LIBRARY ITEMS

NOTE: You must publish a care plan library before it will become available to select from when building client care plans

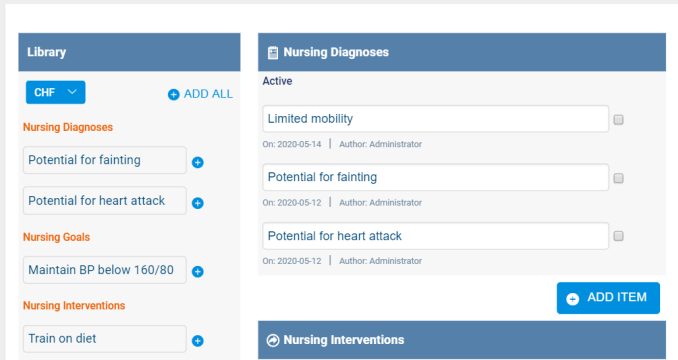### CARE PLAN 1.0

CARE PLAN 2.0
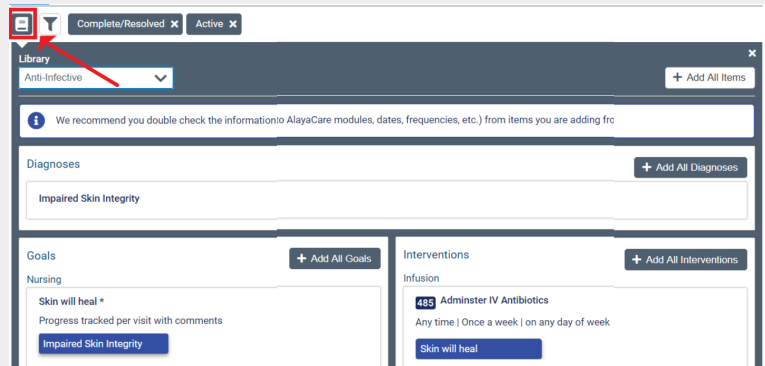
WEB: CARE PLAN 2.0

ADDING CARE PLAN ITEMS FROM A LIBRARY
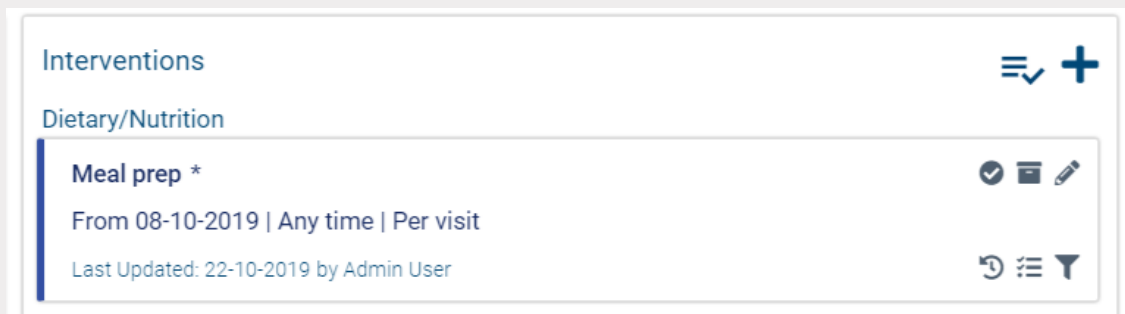
CARE PLAN 1.0

CARE PLAN 2.0

When adding items from a library, you can add all library items, all library items of one type (diagnoses, goals or interventions), or individual items from the library (with or without any items that may be linked to them).

MAKING CHANGES TO A CARE PLAN ITEM

NOTE: You must publish a care plan library before it will become available to select from when building client care plans

CARE PLAN 2.0

➕ **Add an item**	🗄 **Archive an item**	🔽 **Filter the care plan**
✏️ **Edit an item**	✅ **Resolve an item**	☰✓ **View Completion History**
🗑 **Delete an item**	🕘 **View Revision History**	☰✓ **Bulk edit care plan items**

WEB: CARE PLAN 2.0

REVIEWING AND ADDING SERVICE TASKS ON WEB
NOTE: You cannot edit interventions when creating recurrences

CARE PLAN 1.0

CARE PLAN 2.0

Service Tasks consist of Interventions and Goals from a Care Plan and Forms attached to the visit or Service

COMPLETING SERVICE TASKS ON WEB
NOTE: You can add additional forms or interventions from the client's care plan to the service tasks of a visit

CARE PLAN 1.0

CARE PLAN 2.0

Since interventions are replacing daily activities, there is no longer a Daily Activities tab in the visit dialogue in 2.0. Instead, there is a Service Tasks tab.

Once you clock in to a visit, you can mark interventions and goals as complete or leave a comment if they cannot be completed. You can also complete any forms that appear in service tasks.