



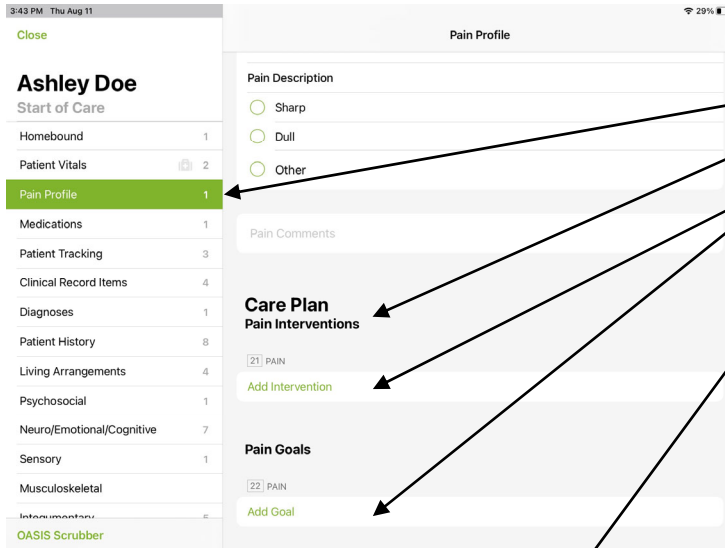
## Session Guide:

# Care Planning in the Clinical Application

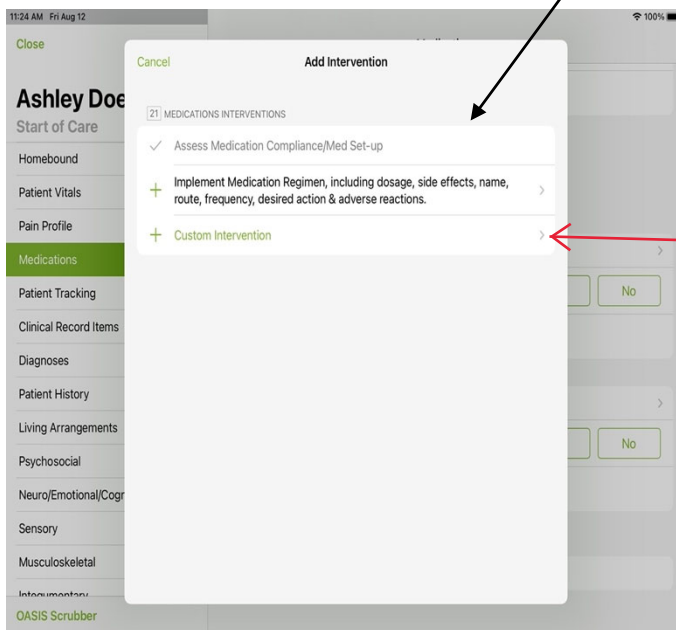
- After reviewing this guide clinicians will understand how to utilize the Care planning section in the Clinical App.

## Care Planning in the Clinical Application

- Care plans should be added during your visits inside your document under each applicable section. (Except HHA, which can only be added to the care plan tab, please see Creating HHA care plan guide)

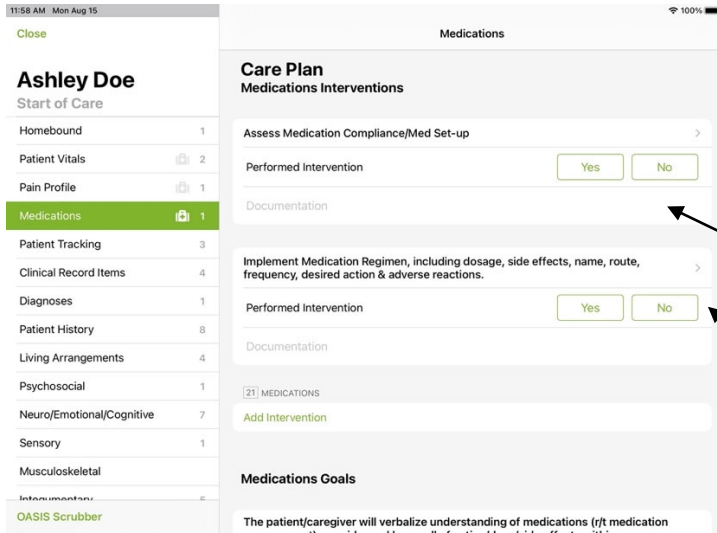


Care planning items are available throughout your visit notes under the tabs categorized by the section headers. Select "add intervention/goal" you will see a list of templated interventions/goals, agency specific ones or you can create custom ones. You can select those that are applicable to your patient and customize/individualize as necessary.



The list of templated interventions/goals and agency specific options will show. You can select those that are applicable to your patient and customize/individualize as necessary. You may also add a custom intervention/goal.

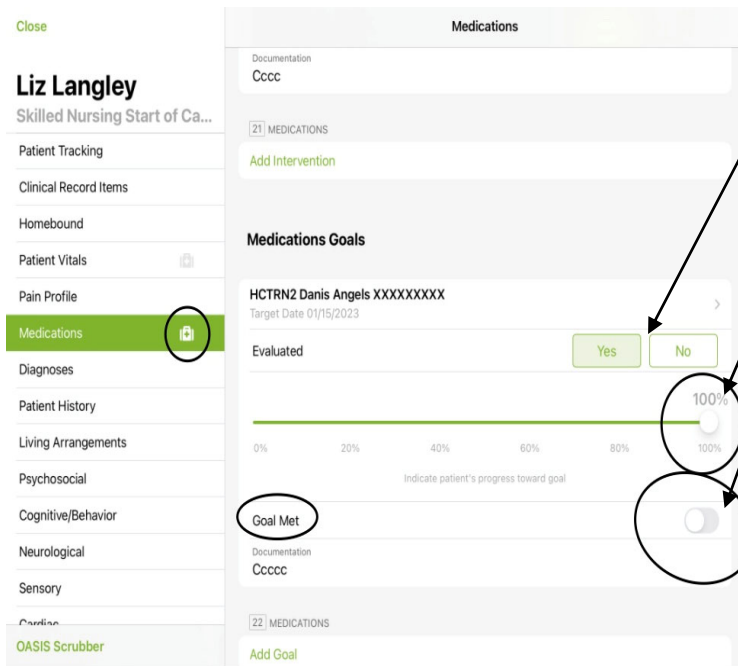
2. Once you add your new care plan items you may also want to document against them.



Enter your documentation details into documentation field on interventions/goals.

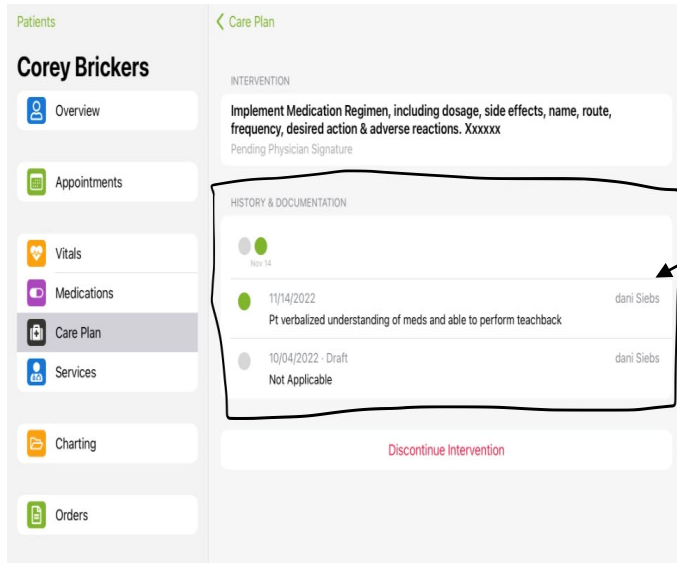
For interventions you may mark {Yes} or {No} if it was performed this visit

For Goals you may mark them as Evaluated {Yes} or {No} and drag the toggle to percentage completion for the goal. If you drag it to 100% you will also have the option to slide the {Met} toggle to show goal as met which would remove it from subsequent visit notes



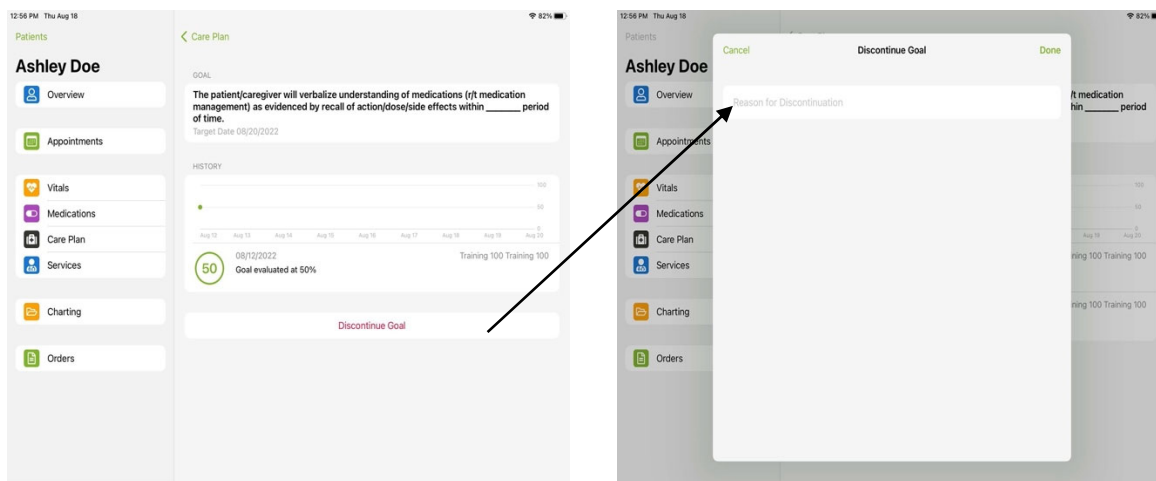
Tip: Care plans can only be documented against during a visit note/charting session in the app.

- You may also review history of documentation against care planning from previous visits by tapping on the arrow of the care plan item to see historical documentation with clinicians and date/time stamping.

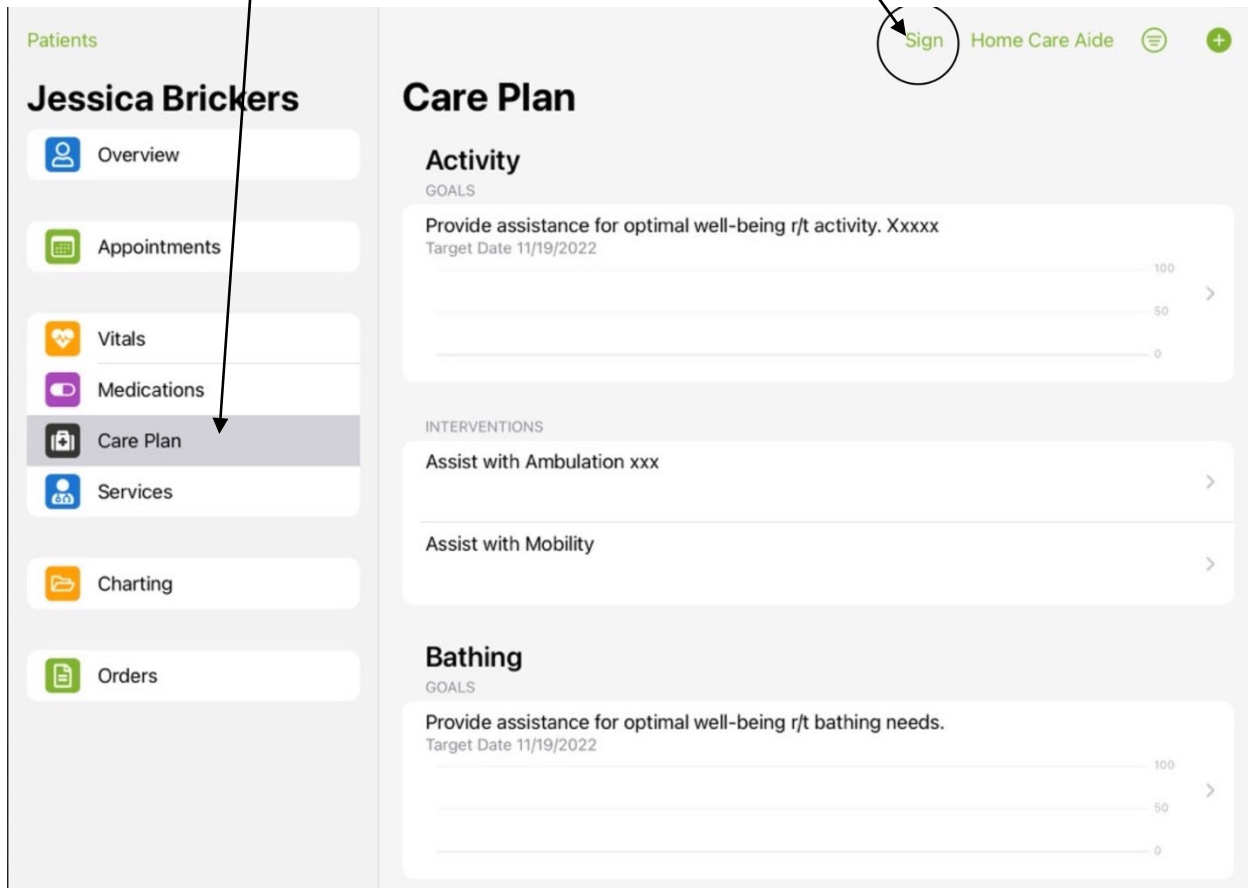


History shows date and clinician stamp, along with the documentation. Newest will be on top of the list.

- Discontinuing Goals/Interventions.  
Push into goal/intervention you wish to discontinue. Tap Discontinue and enter the reason for discontinuation i.e., completed, regressed, new order, etc.



5. Care plans, when added to your visit notes, will push to the care plan tab in the clinical app but will not push to web version care plan tab until your note is signed or you manually sign the care plan items from the care plan tab in the clinical app.
  - a. In the case of SOC/ROC/Recert, these docs typically go through the QA process, and it would be beneficial for the clinician to push the care plan ahead of QA being completed.
    - i. You may do this by navigating to the patient chart in the clinical app on the care plan tab. You will see {Sign} icon at the top of the care plan tab. Tap {Sign} and this will push your care plan to the web version and to orders. This will allow the care plan to show on subsequent visits.



Tip: HHA care plans are the only ones added under the tab in the app. All other care plans should be added during documentation of SOC/ROC/Recert/Routine visits.