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Plan of Care Configuration

Terminology Update:
"Care Plan" is now referred to as **Plan of Care** throughout the system.

Configuration Card for Clinical Managers:
A new **Plan of Care** configuration card is now visible to Clinical Managers and above. In future enhancements, this will provide quick access to manage:
- Areas of Focus Listings
- Expected Outcomes Listing

Plan of Care Detail Page:
A new detail page is now available in the Clinical Configuration section. From here, Clinical Managers can:
- Enable or disable the Plan of Care feature via a settings toggle.
- Manage access and visibility across resident records.

Coming Soon:
Upcoming updates will include additional tabs within the Plan of Care detail page, further expanding configuration options and control.

Resident Profile Enhancements

We've expanded the **Plan of Care** feature to provide clinical teams with more planning capability and control over resident care directly within the resident record.

Plan of Care Menu Option:
A new Plan of Care item has been added to the Services tab within a resident's record. This is available to Clinical Providers when the feature is enabled through configuration settings.
- Visibility is dependent on your organization's feature configuration and access permissions.

Detailed Plan of Care Listing Page:
- View comprehensive details including Areas of Focus, associated Services, and Interventions.
- Easily sort and filter content for quick navigation and clarity.
- Availability is dependent on your organization's configuration of the Plan of Care feature.

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Advanced Filtering Capabilities:
A new filter menu allows users to narrow down Plans of Care based on:
- Area of Focus
- Expected Outcomes
- Effective Date & Next Review Date
- Overdue Items
- Status

Filters persist across sessions, so your preferences remain even when navigating away and returning to the page.

Plan of Care Listing Page:
- Clinical Providers can view all relevant Plan of Care details in a single location, including Areas of Focus, Services, and Interventions.
- The page includes sorting and filtering tools to help prioritize and organize information effectively.

Quick Add Modal:
Clinical Providers can now use a streamlined **quick add** modal to efficiently create an Area of Focus within a resident's Plan of Care.
- Fields include:
  - Description
  - Effective Date
  - Next Review Date
- The modal includes both a **Save** button for quick entry and an **Open** button to view or edit full details.
- Data from the modal automatically populates the Plan of Care detail page.

Coming Soon:
A searchable library and open-text entry field to improve usability and record-keeping.

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Area of Focus

Area of Focus Details:
- The former *Care Plan Problem* is now called **Area of Focus**, reflecting updated clinical terminology.
- Clinical Providers can view and modify a resident's Area of Focus through a newly designed interface, which includes:
  - Description
  - Effective Date
  - Resolved Date
  - Next Review Date (defaults to 90 days, but editable)
  - Additional Details
- When marked as resolved, associated **Expected Outcomes** and **Interventions** will have their resolution dates auto-populated for consistency.

Expected Outcomes

We've added the capability to include an **Expected Outcomes** section of the Plan of Care, helping clinical teams set clear goals and track progress with greater flexibility.

Add & Manage Expected Outcomes:
Clinical Providers can now add, view, edit, and remove **Expected Outcomes** within a resident's Plan of Care.
- Key fields include:
  - Description
  - Effective Date
  - Resolved Date
  - Next Review Date (defaults to 90 days, editable)
  - Additional Details
- All fields are open text, allowing flexibility in documentation.
- A **"New"** button allows quick entry of multiple outcomes.

Expandable Interface:
- The Expected Outcomes section is fully collapsible, helping reduce on-screen clutter while still providing access to relevant details.
- Multiple Expected Outcomes can be added under the same Area of Focus, supporting comprehensive care planning.

Activity Tracking:
- Changes—such as creation, review, and resolution of outcomes—are recorded in the **Activity tab** to provide clear tracking.

Coming Soon:
Future enhancements will introduce a searchable library and open-text field for faster entry and improved consistency across records. Additionally, customization of the default review interval will be available.

Services and Interventions

We've added the **Services and Interventions** section within the Plan of Care to give clinical teams flexibility and clarity when managing resident care plans and interventions.

Manage Services with Ease:
Clinical Providers can now view, add, and modify services directly within a resident's Plan of Care using:

- A **"New"** button to create services
- An **edit pencil** for updating service details
- A **delete "X"** for removing services from the Area of Focus

Attach New or Existing Services:

- Easily search and select services from the **Community Service Catalog** to add to the Plan of Care and Service Plan.
- Choose to **attach an existing service** from the resident's current Service Plan, or create a **new service** as needed.
- Service details such as **effective dates, scheduling** and **instructions** are fully editable.

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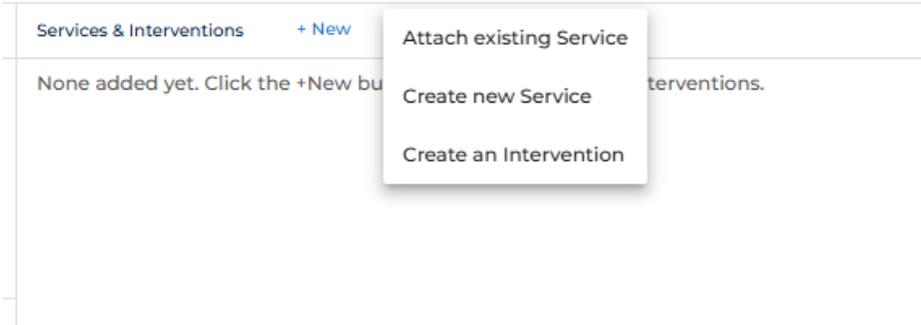
Smart Integration Across Modules:
- Services added through the Plan of Care are reflected in both the **Area of Focus** and the **resident's Service Plan**.
- Removing a service from the Plan of Care does **not** delete it from the Service Plan, maintaining record integrity.
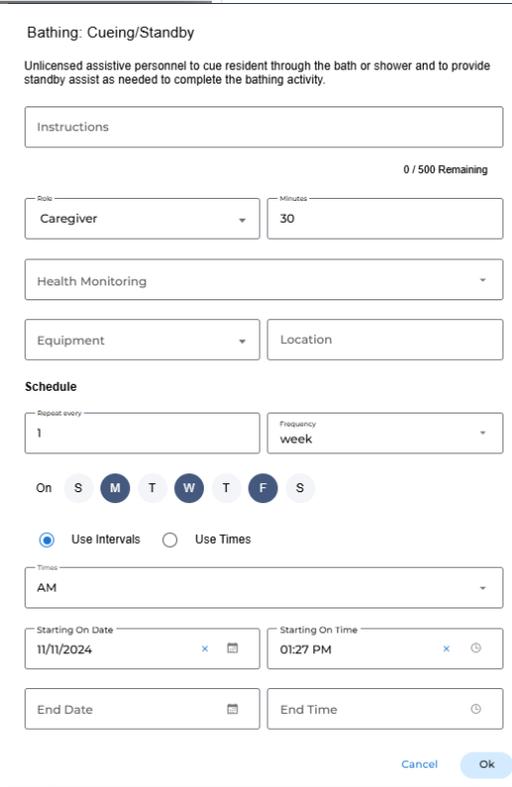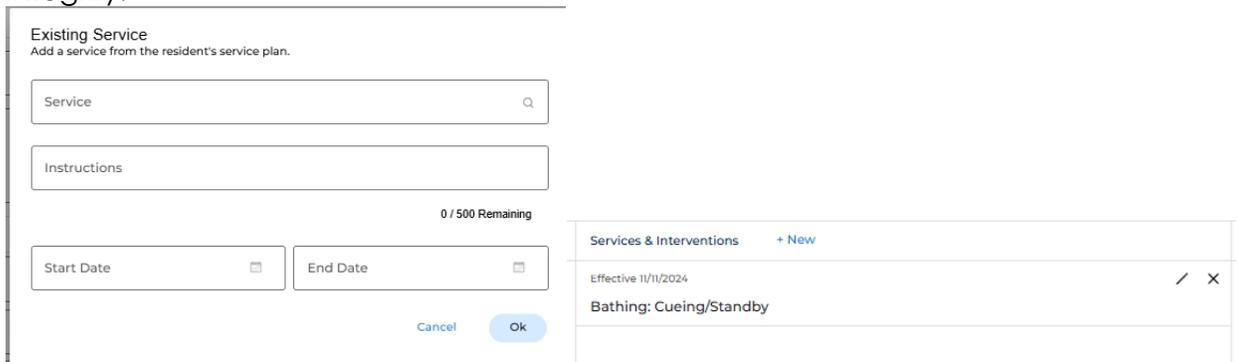
Streamlined Service Modal:
- A user-friendly modal allows quick entry or selection of services, with clear options to **save** or **cancel** changes.

- Note: Removing a service does not trigger an alert; changes must be saved to be applied.

These enhancements improve coordination between care planning and service delivery, supporting accurate, person-centered care documentation.

We've introduced an **Intervention** section in the Plan of Care, giving Clinical Providers a clear way to document supportive actions tied to a resident's care goals.

Add & Manage Interventions:
- Clinical Providers can now add interventions directly from the **Plan of Care** using a **"New"** button.
- The **Intervention modal** includes open-text fields such as:
  - Effective Date
  - Resolved Date
  - Role
  - Description
- Role dropdown menu pulls from the Service Provider configuration.

Plan of Care Only:
- Interventions are **exclusive to the Plan of Care** and do **not** appear in the resident's Service Plan or Service Delivery record.

Automatic Resolution:
- Interventions tied to an **Area of Focus** will automatically resolve when the Area of Focus is marked as resolved.

This functionality helps care teams track actionable steps more effectively without cluttering the service record, ensuring documentation remains focused and clinically meaningful.

Comments

To support better communication and documentation, we've added a Comments section to the Plan of Care, allowing teams to track notes and updates related to a resident's care plan.

Add & Manage Comments:
- Clinical users can now add, edit, and delete comments within a resident's Plan of Care.
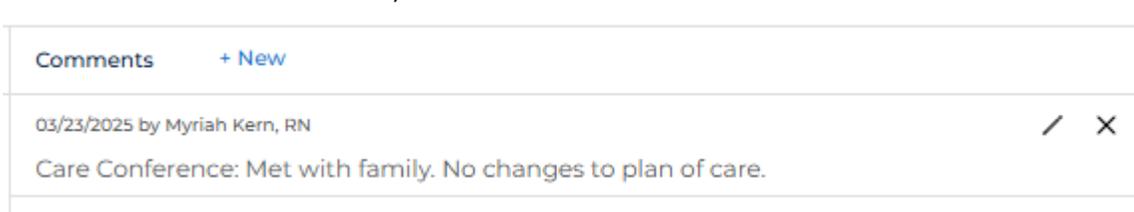
- Each entry can be created using the **"New"** button, making it easy to capture ongoing observations and updates.

Flexible Editing Options:
- Existing comments can be modified directly by clicking the **pencil icon**, and an **"X"** button is available for removing comments when necessary.

This enhancement allows Clinical Providers to maintain clear and consistent documentation, improving coordination and continuity of care within the Plan of Care.

Comments	+ New		
03/23/2025 by Myriah Kern, RN		✎	✕
Care Conference: Met with family. No changes to plan of care.			

Activity Tracking

We've added an Activity tab to the Plan of Care, providing a clear, time-stamped view of key actions for improved transparency and accountability.

Activity Tab Overview:
- Clinical Providers can now view a detailed **Activity log** within each resident's Plan of Care.
- This tab tracks the creation, review, and resolution of key Plan of Care components like Areas of Focus, Expected Outcomes, and Interventions.

Dual-Tab Interface:
- The Plan of Care view now includes two tabs:
  - **Details** (default view)
  - **Activity**
- The Activity tab features a structured grid for easy review of updates and historical changes.

Clear, Auditable Records:
- The Activity grid includes the following columns:
  - **Activity** (e.g., Created, Reviewed, Resolved)
  - **Date/Time**
  - **Person** (who performed the action)
  - **Role** (their user role at the time)

Fall Risk

DETAILS   ACTIVITY

Activity	Date/Time	Person	Role
Created	03/20/2025 11:27 AM	Myriah Kern	RN
Reviewed	03/20/2025 11:50 AM	Myriah Kern	RN
Reviewed Expected Outcome: Test	03/20/2025 11:50 AM	Myriah Kern	RN
Reviewed	03/23/2025 7:16 AM	Myriah Kern	RN
Reviewed Expected Outcome: Exampl of an expected outcome	03/23/2025 7:16 AM	Myriah Kern	RN
Reviewed Expected Outcome: Test	03/23/2025 7:16 AM	Myriah Kern	RN
Resolved Expected Outcome: Test	03/23/2025 7:17 AM	Myriah Kern	RN

Plan of Care: View Only Mode, Reviews & Navigation

We've introduced a **View Only** mode for the Plan of Care detail page, along with new tools to streamline reviews and navigation across Areas of Focus. These workflows are designed to help clinical teams quickly identify, review, and manage care documentation.

View Only Mode:
- Clinical Providers can now view the **Plan of Care detail page** in a read-only format, with access to:
  - Area of Focus
  - Expected Outcomes
  - Services
  - Interventions
  - Comments
- Two tabs are available: **Details** (default view) and **Activity**.
- Sections are expandable/collapsible based on content, and users can toggle between active and resolved items.
  -

Overdue Highlighting:
- Items in the **Area of Focus** and **Expected Outcomes** sections with past-due review dates are now visually highlighted in red.
- These red indicators appear only in View Only mode and are cleared when review dates are updated.

Review Functionality:
- A **Review** button has been added to the Area of Focus and Expected Outcomes sections in View Only mode.
- Users can select checkboxes next to items they wish to review; the Review button becomes active when at least one is selected.
- Clicking Review updates the **Next Review Date** to 90 days from the current date (editable by the user) and logs the review in the **Activity tab** with user details and a timestamp.
- Once reviewed, the Review button is disabled, and a toast notification confirms the number of items reviewed.
- If users attempt to leave the page with selected checkboxes and without completing the review, an alert will prompt them to save or stay on the page.

- o Clicking 'Yes' will direct the user out of the page without reviewing checked items.
- o Clicking 'No' will keep the user on the page to allow the user to complete the review process.
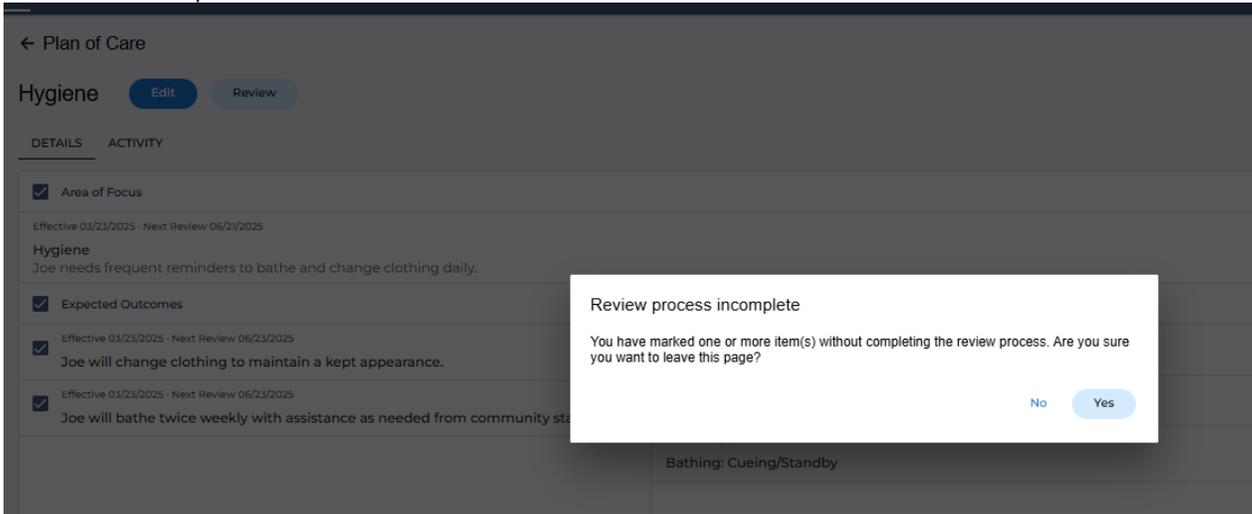
Back & Next Navigation:

- New **Back** and **Next** buttons in View Only mode allow seamless navigation between Area of Focus records.
- Buttons are disabled when at the beginning or end of the list and are not available in Edit mode.

These improvements make it easier for clinical teams to stay on top of reviews, track overdue items, and efficiently navigate between resident care records
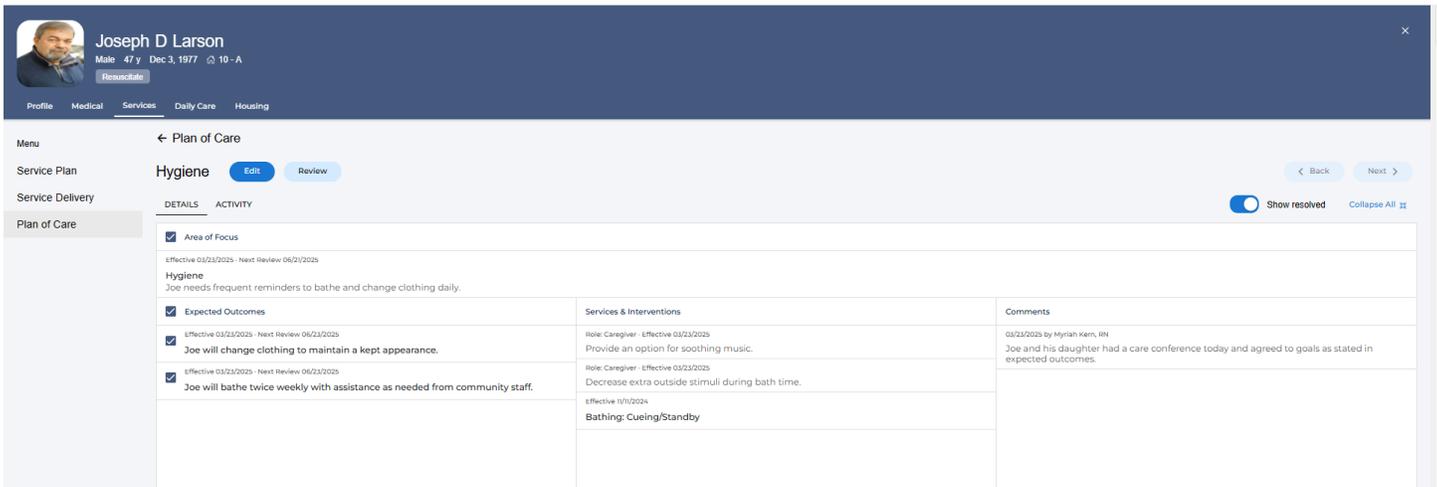
Plan of Care: Edit Mode

To give Clinical Providers more control and flexibility when updating resident care plans, we've added a robust **Edit Mode** to the Plan of Care detail page—along with safeguards for data integrity and user awareness.

Edit Mode Access:

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- Clinical Providers can now edit all key Plan of Care components including:
  - Area of Focus
  - Expected Outcomes
  - Interventions
  - Services
  - Comments
- Keyboard navigation is fully supported, with intuitive transitions between fields and dropdowns for efficient data entry.

Streamlined Editing Experience:
- While in Edit Mode, the **Activity tab** and **Back/Next navigation buttons** are disabled to keep focus on editing tasks.
- The **Save** button is enabled only once a change is made, ensuring that no unintentional edits are saved.

Unsaved Changes Alert:
- If a user attempts to navigate away from the page with unsaved edits, a warning will appear prompting them to **Discard** (leave the page without changes saved) or **Cancel** (stay on the page to save changes).
- No alert is shown if no changes have been made, and the Save button remains inactive.

Delete Area of Focus (with Safeguards):
- A **Trash Can icon** in Edit Mode allows users to delete an Area of Focus entry.
- Deletion prompts a confirmation message, alerting users that **all related data** (such as Expected Outcomes and Interventions) will also be removed.
- If the Area of Focus has review history (shown in the activity tab), deletion is **not allowed**, and a message will inform users that the record cannot be deleted due to past activity.

The new **Plan of Care** experience represents a significant step forward in empowering clinical teams to deliver more personalized, goal-oriented, and accountable resident care. From configurable setup tools and intuitive View Only and Edit modes to seamless tracking of Expected Outcomes,

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Services, Interventions, and Comments, these updates are designed with flexibility, clarity, and clinical accuracy in mind.

Key improvements include:
- Centralized feature enablement for Clinical Managers
- Streamlined workflows for adding and reviewing Areas of Focus, Services, and Outcomes
- Activity tracking and overdue alerts to support timely care plan reviews
- Built-in safeguards to protect critical data during edits and deletions

By providing a more structured and intuitive approach to care planning, Eldermark's new **Plan of Care** feature helps ensure that every resident receives care aligned with their unique needs—and that providers have the tools they need to document, track, and communicate effectively.

We're excited for you to explore these new capabilities and look forward to continuing to enhance the way you deliver care.