



Create a Client Care Plan



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What is a Care Plan?

A Client's **Care Plan** makes all health information related to a Client easily accessible. This can include information relating to the illness, medication, handling and special needs.

Add hobbies and interests to their **Care Plan** so you can paint a personal picture of the Client.

Assigned Carers and **Family Members** will be able to see the **Care plan** and up to date details ensure your client receives **the best care** across the board.

Note: The Care Plan details are also used in **Carefolk's Optimised Carer**

Matching programme which smartly pairs Carers and Clients based on skills, proximity, duties required.

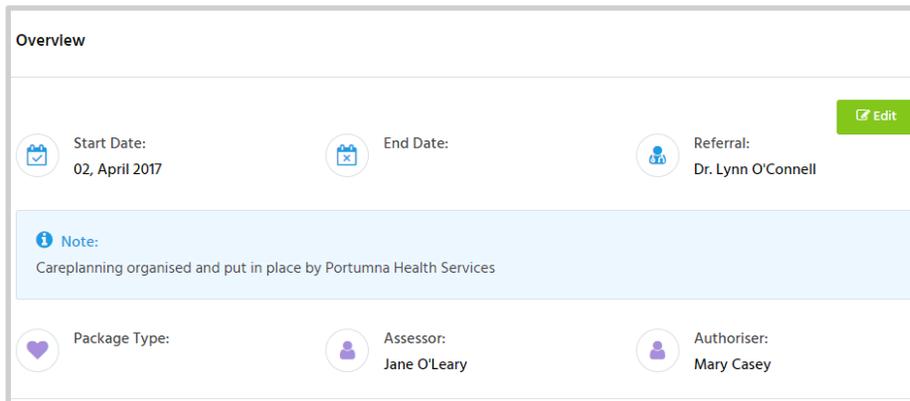
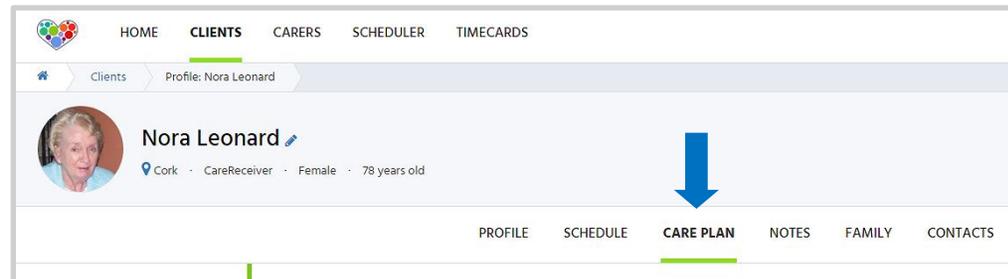
Setting up a Client's Care Plan is easy, so let's get started!

Valuable Features of the Care Plan

- ✓ Comprehensive Planning
- ✓ Attach Documents
- ✓ Care Plan Review Alerts
- ✓ Detailed Medicine Organiser
- ✓ Reduce Paper Work

Overview Section

From the Client's Profile, select **Care Plan**



The **Overview** section contains the details of everyone involved in the Client's **Care Plan**. Select **Edit** to add details for your Client. When finished, select **Save**.

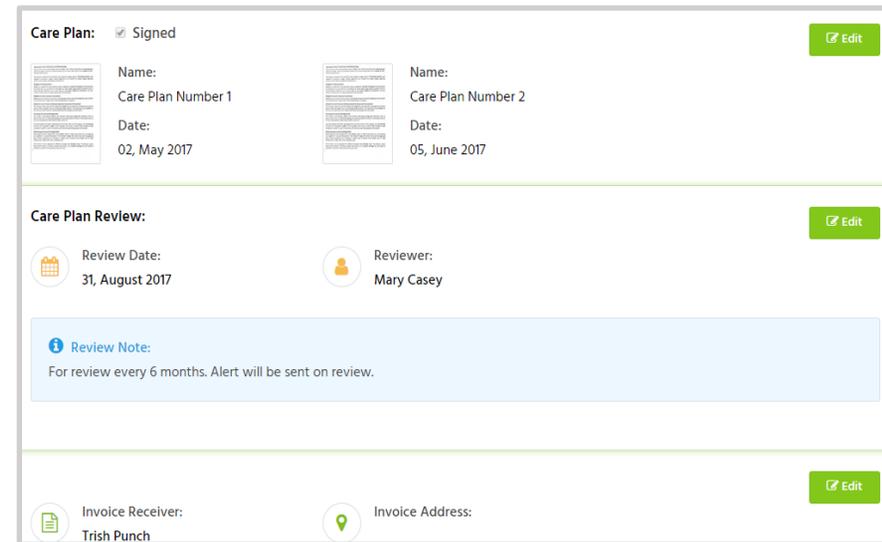
- Type in the date or use the calendar for the **Start Date** and **End Date** (if applicable) of the Care Plan
- Type in the name of the **Referral** - the person who referred the Client and their family to the Company
- Add a **Note** or any administrative details about the Client or the Care Plan
- Choose a **Package Type**. These may be customized by a Care Manager in **Company Settings > Care Plans**
- Choose the name of the **Assessor** - the person who conducted the interview with the Client and their family
- Choose the name of the **Authoriser** - the Care Manager or Administrator who authorized the plan

Upload Care Plan Documentation

Do you already have a Care Plan in a document? Upload the file and set the date for the plan to be reviewed.

Select **Edit** and then:

- Upload any **documentation of a Care Plan** and tick the box if it has been **signed** by the family and/or care professional.
- Attach a **Care Plan review document** or **set the date of the next review** and assign it a reviewer. An **alert** will be sent to them on the Review Date.



The screenshot shows a web interface for configuring a care plan. At the top, there is a 'Care Plan' section with a 'Signed' checkbox checked and an 'Edit' button. Below this are two columns of information: 'Care Plan Number 1' with a date of '02, May 2017' and 'Care Plan Number 2' with a date of '05, June 2017'. The 'Care Plan Review' section includes a 'Review Date' of '31, August 2017' and a 'Reviewer' named 'Mary Casey'. A 'Review Note' box contains the text: 'For review every 6 months. Alert will be sent on review.' At the bottom, there is an 'Invoice Receiver' field with the name 'Trish Punch' and an 'Invoice Address' field, both with 'Edit' buttons.

When finished, select **Save**.

Adding an Invoice Receiver

Finally, include contact details for all invoice receivers, who will receive invoices on behalf of the Client. Select **Edit** and type in the **name and contact information** for whomever will receive invoices for services provided by your Company.

When finished, select **Save**.

3 Create a Client's Care Plan

Add Allergies, Duties, and General Health Details



Add Health Notes, Allergies, and Duties Required

Record any past or current related health issues, treatments, and any other information necessary to provide care for your Client. Select **Edit** on the Client's Care Plan to add information.

- Include helpful **Notes** about diagnosis, personality, likes/dislikes.
- To **add Allergies**, select **+Add Allergy**, and type a keyword in the search box or browse through the list.
- To add **Duties Required**, select **+Add Duty**, and type a keyword in the search box or browse through the list.

Finally, click the **Save** button for each amendment.

Want to remove an allergy or duty from the list?

No problem. Simply hover over the item and select the **X**.

Note: You can customize the illness, allergy or duty list if you wish. For more information on this, see [Company Settings](#). **Note:** Only users with the role **Care Manager** can view company settings.

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Create a Client's Care Plan

Add Allergies, Duties, and General Health Details



Add General Health Details

Create a Health history by adding General Health details.

Add a **Primary Illness** from the dropdown list.

Record related information (e.g. date of diagnosis, stage of progression) under **Details**.

Need to highlight more than one illness?

No problem. Choose **+Add next Illness** and repeat the previous steps.

When finished, select **Save**.

Health: Cancel **Save**

Primary Illness:

Details:

Other Illness: ✕

Details:

[+ Add next Illness](#)

3

Create a Client's Care Plan

Add Allergies, Duties, and General Health Details



Additional Documentation

Need to add a bit more information? Use this section to provide any additional documentation that would be helpful in caring for the Client.

- To add **Additional Information**, select **Edit** and then type out the details. When you are finished, select **Save**.
- To attach any extra **Documents** like authorization forms, diet plan) select **Edit** and then **+Add New**. Then click on **Find Document** and choose a file from your computer. Click **Open**. Give your document a name and add a **Date** to the document. Then select **Add**.

Want to remove a document? No problem. Simply hover over the word and select the **X**.

Additional Info: Edit

Any additional Info can be recorded here.

Documents: Edit

	Name: Medical Authorisation		Name: Consent form
	Date: 14, March 2017		Date: 07, February 2017

4 Create a Client's Care Plan

Personalize Handling



Personalize Handling

Specify the details for the **Handling** of a Client. In each section below, select **Edit** and when finished, select **Save**.

- **Preferred Carer Gender:** Select Female, Male or Doesn't Matter.
- If a Carer is **not suited** for the Client for whatever reason, adding them as Unsuited will prohibit them from being assigned to the Client in the future. To **add an Unsuited Carer**, select **+Add Carer** and choose the name from the drop down.

Oops! Made a mistake? Remove the Carer by hovering the cursor over their name and select the **X**.

PROFILE SCHEDULE **CARE PLAN** NOTES FAMILY CONTACTS

Handling

Preferred Carer Gender: Cancel Save

Female Male Doesn't matter

Unsuited Carers: Cancel Save

+ Add Carer

Click Edit to add unsuitable carers

4 Create a Client's Care Plan

Personalize Handling



Add Environmental Details

Give details about the Environment in which the client lives for example, what is the community like, is it a loud neighbourhood, does the client sleep upstairs or downstairs?

To **update the Environment**, select **Edit**, and type in the **Details**. When finished, selected **Save**.

Add Hobbies & Interests

To include a client's **Hobbies and Interests**, select **+Add Hobbies & Interests**, and type a keyword in the search box or browse through the list.

Want to remove a Hobby or Interest from the list? No problem. Simply hover over the word and select the **X**. When finished, selected **Save**.

The screenshot shows two form sections. The top section is titled 'Environment:' and contains a 'Details:' text area. The bottom section is titled 'Hobbies & Interests:' and features a list of hobbies: 'Knitting', 'Singing', and 'Art', each with a small 'X' icon for removal. There is also a '+ Add Hobbies & Interests' button with a dropdown arrow. Both sections have 'Cancel' and 'Save' buttons in the top right corner.

4 Create a Client's Care Plan

Personalize Handling



Add Groups & Organizations

Give details about any **Groups or Organizations** the client may enjoy or be involved with.

To include Groups and Organizations, select **Edit** and type in the names and details about them. When finished, selected **Save**.

Add Other Details

Use **Other details** to include those '**small things**' that may be greatly important to the Client and their comfort and care for example, how do they like their tea or what temperature to keep the thermostat on.

To **add other information**, select **Edit** and type in the information. When finished, selected **Save**.

The image shows two screenshots of a web application interface. The top screenshot is titled 'Groups & Organization:' and features a 'Cancel' button and a green 'Save' button with a floppy disk icon. Below the title is a 'Details:' label followed by a large, empty text input field. The bottom screenshot is titled 'Other:' and also features a 'Cancel' button and a green 'Save' button with a floppy disk icon. Below the title is another 'Details:' label followed by a large, empty text input field. Both screenshots are enclosed in a light gray border.

5 Create a Client's Care Plan

Create a Medicine Schedule

Medicine Section Explained

The **Medicine** section makes it easy for you to keep track of all medicine in a Client's **Care Plan**. Confusion about varying dosages and timing is minimized with detailed information and scheduled alerts.

At a glance, you can see the medicine name, image, quantity, 'take time', and any important notes.

Click on the  to **Edit** or **Delete** any existing medicines.

Medicine		+ ADD MEDICINE						
		Medicine	Take Time	Quantity	Start Date	End Date	Note	
Morning	✓	 Levodopa mg	11:00 AM	1 Tablet	05/06/2017	30/12/2017	Take mid morning, 	 
Afternoon	✓	 Paracetamol mg	02:00 PM	2 Tablet	16/06/2017	30/11/2017	Take with food	 
	✓	 Ear Drops ml	04:00 PM	4 Drops	05/06/2017	21/08/2018	2 in each ear	 
Evening								



5 Create a Client's Care Plan

Create a Medicine Schedule

Adding Medication

To add a medicine to the plan, select **+ Add Medicine**

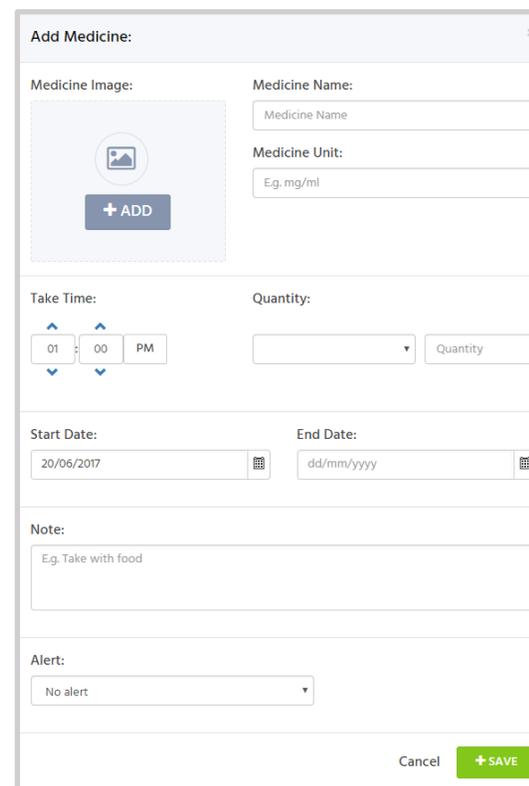


- Upload an **image of the medicine** to make it easily identifiable.
- Add the **Medicine Name** and **Medicine unit**
- Add the **Take Time**. Type in the exact time or adjust the arrows.
- Select a **Quantity** type from the dropdown menu for example, tablet, teaspoon, spray and so on. Add the Quantity amount.
- Type in the date or use the calendar for the **Start Date** and **End Date**
- Type in any additional **Notes** related to the medication for example whether it has to be taken with food.
- Set an **Alert** to notify the **Primary Carer** and any **assigned Carers** visiting the Client during the **Take Time**.

Want to add more than one medicine?

Repeat the process by selecting **+ Add Medicine**.

When finished, select **+Save**.



The screenshot shows a 'Add Medicine' form with the following fields and options:

- Medicine Image:** A dashed box containing a camera icon and a '+ ADD' button.
- Medicine Name:** A text input field with the placeholder 'Medicine Name'.
- Medicine Unit:** A text input field with the placeholder 'Eg. mg/ml'.
- Take Time:** A time picker showing '01 : 00 PM' with up/down arrows for each component.
- Quantity:** A dropdown menu and a text input field labeled 'Quantity'.
- Start Date:** A date input field showing '20/06/2017' with a calendar icon.
- End Date:** A date input field showing 'dd/mm/yyyy' with a calendar icon.
- Note:** A text area with the placeholder 'Eg. Take with food'.
- Alert:** A dropdown menu with 'No alert' selected.
- Buttons:** 'Cancel' and '+ SAVE' buttons at the bottom right.

Congratulations! You have completed setting up your Client's Care Plan 🎉

For more information on how to manage your Client's profile, see **How to Manage your Client's Profile**.