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.

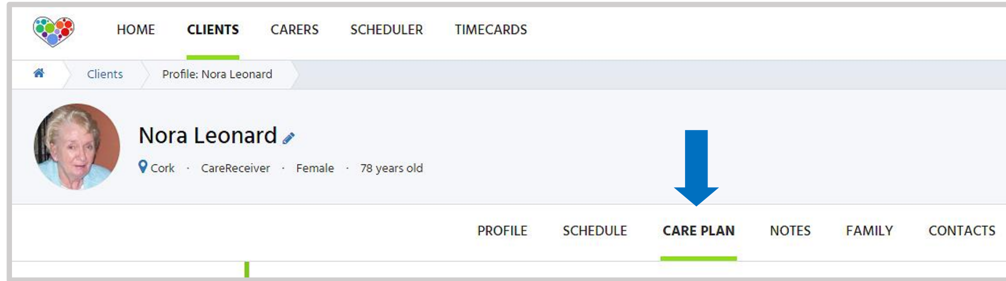
Setting up a Client's Care Plan is easy, so let's get started!

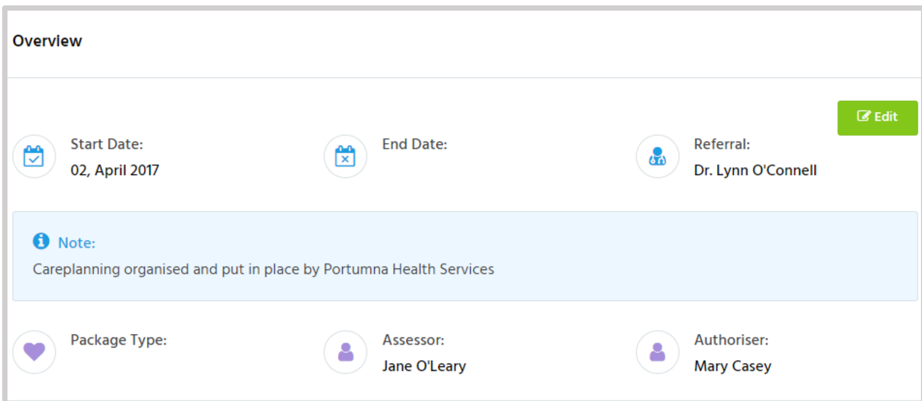
Valuable Features of the Care Plan

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

Overview Section

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



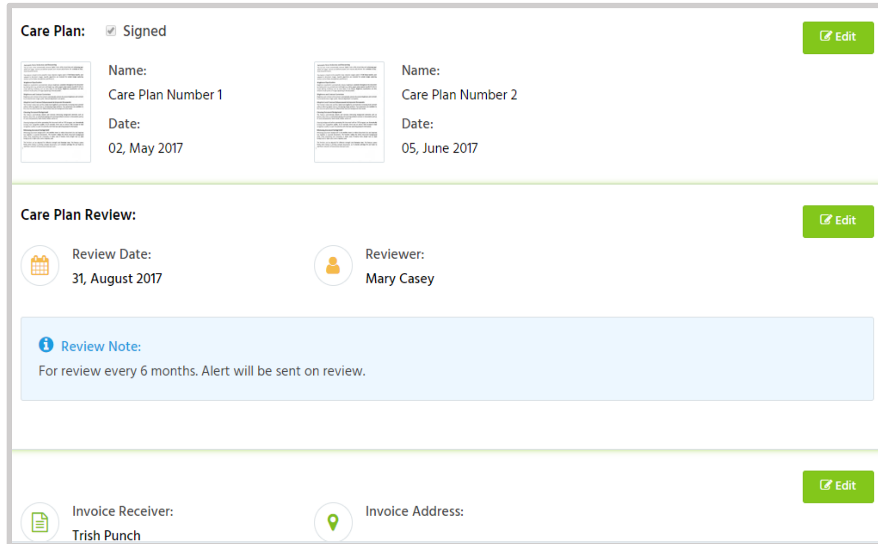


The **Overview** section contains the details of everyone involved in the Client’s **Care Plan**. Select **Edit** to add details for your Client. When finished, select **Save**.

- 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.

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.

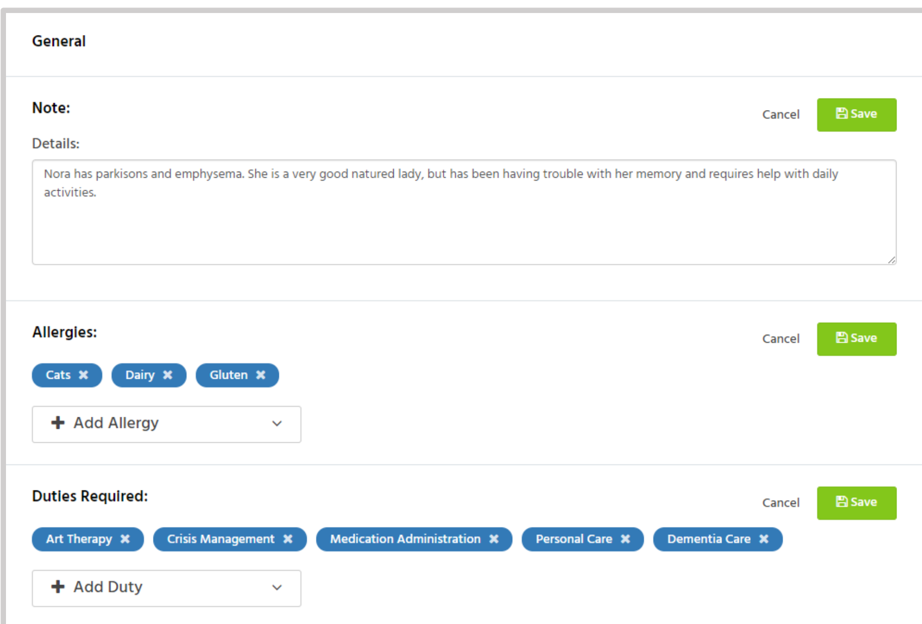
When finished, select **Save**

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.

Add General Health Details

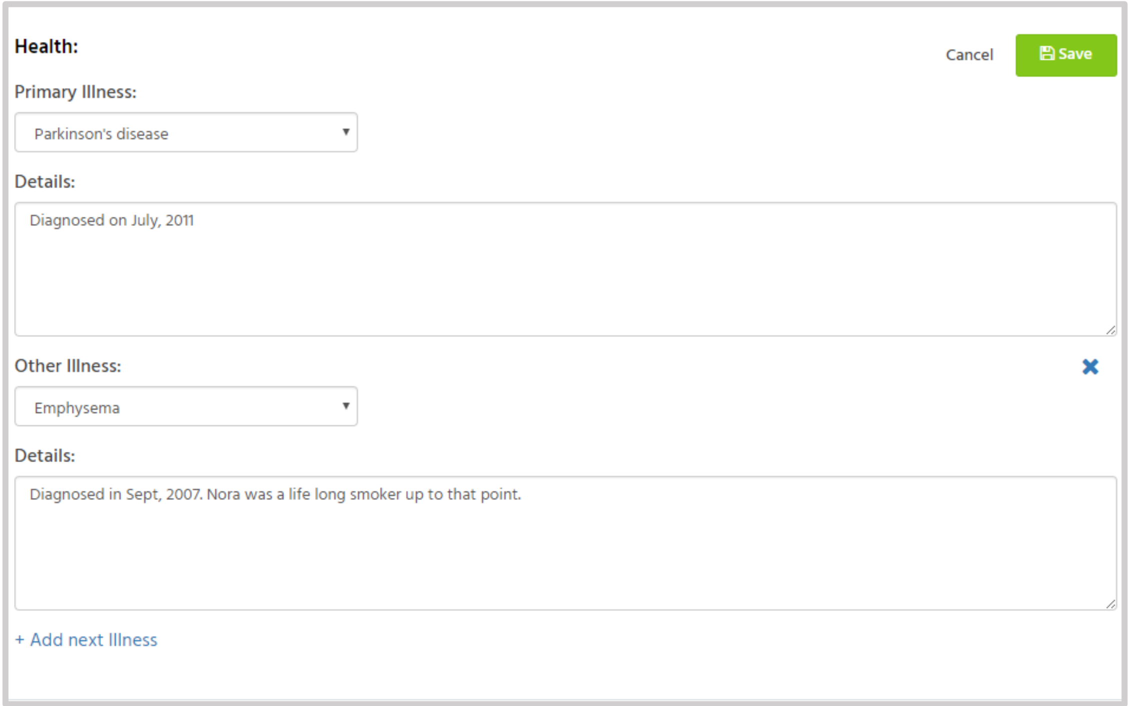
Create a Health history by adding General Health details.

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**.



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.**

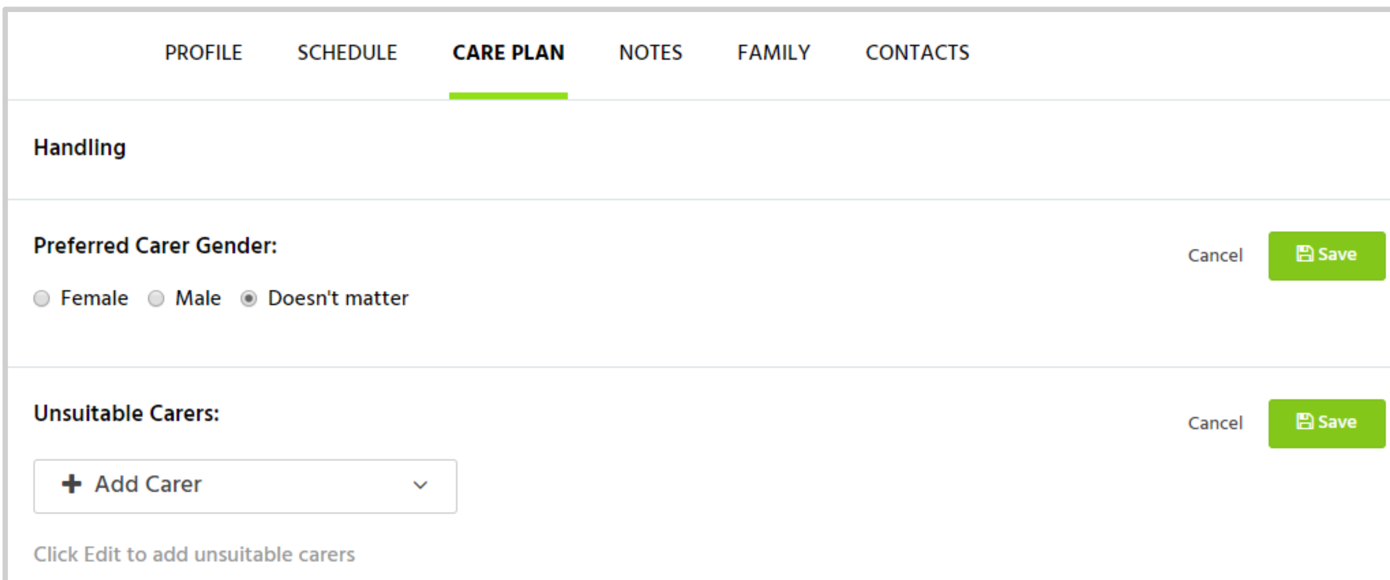
Want to remove a document? No problem. Simply hover over the word and select the X.

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 Unsuitable will prohibit them from being assigned to the Client in the future. To **add an Unsuitable 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.**



Add Environmental Details

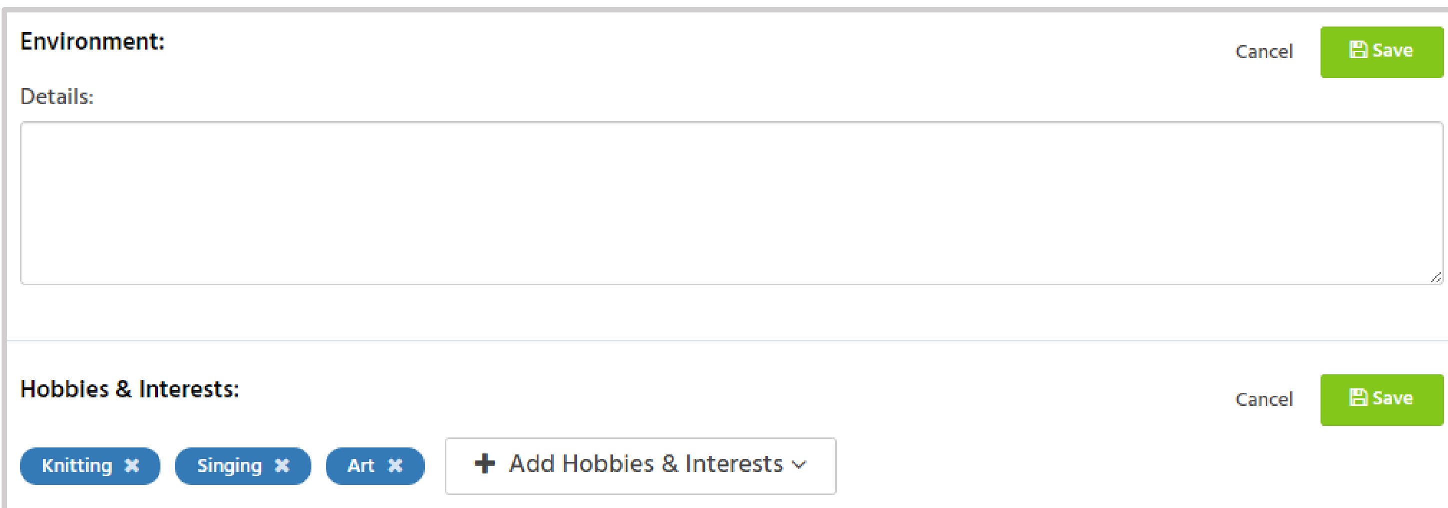
Give details about the Environment in which the client lives for example, what is the community like, is it a loud neighbourhood, does the client sleep upstairs or downstairs?

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**.



Add Groups & Organizations

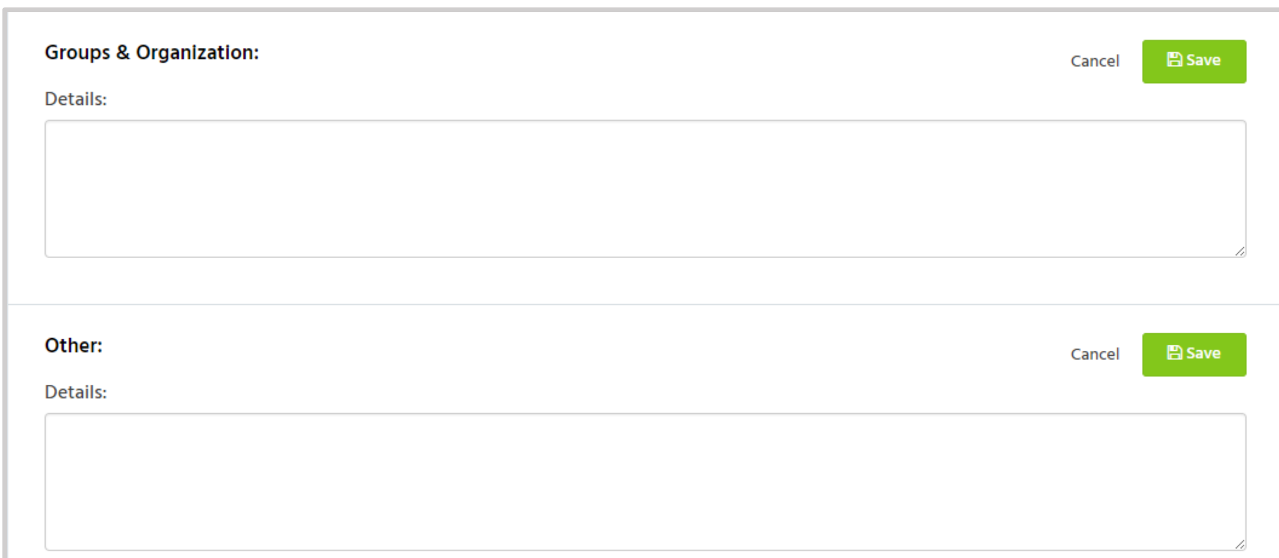
Give details about any **Groups or Organizations** the client may enjoy or be involved with.

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**.

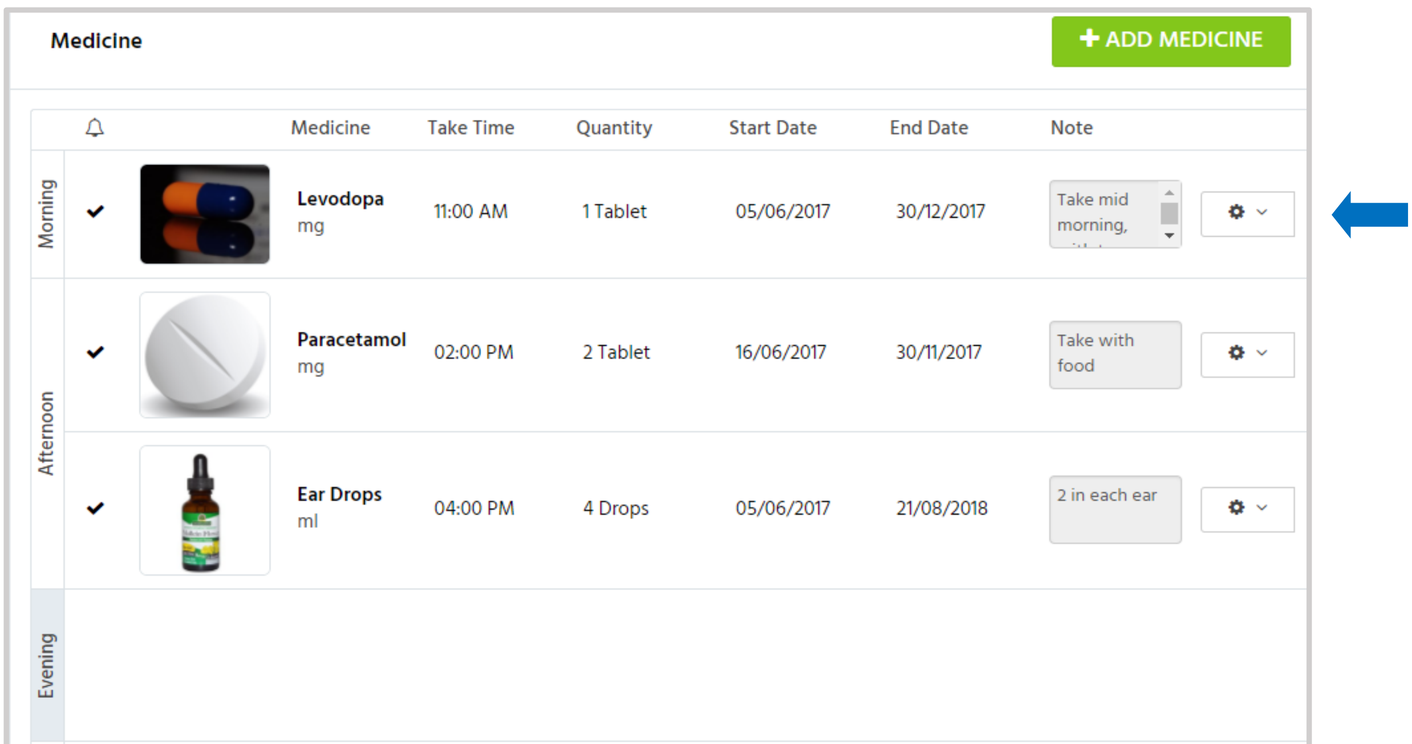


Medicine Section Explained

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.

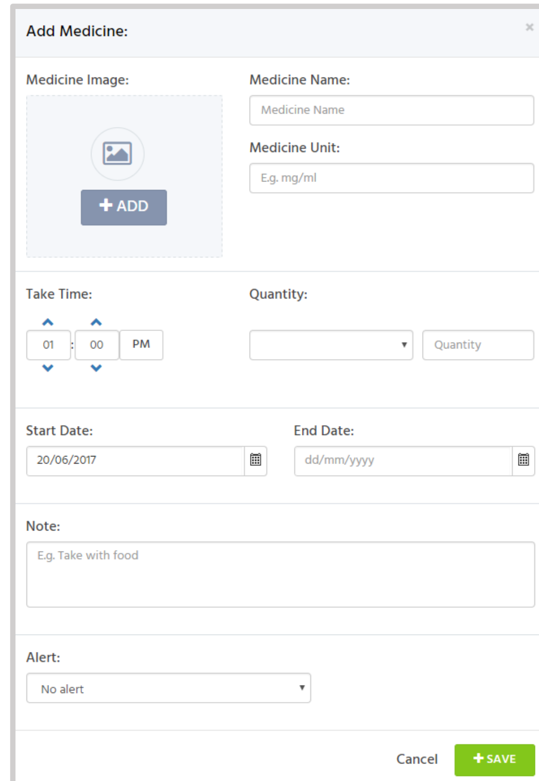
Click on the to **Edit** or **Delete** any existing medicines.



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**.

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**.