



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.

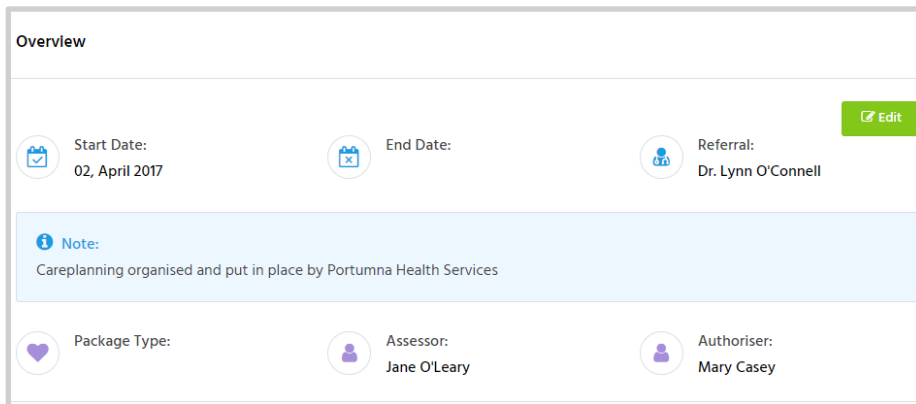
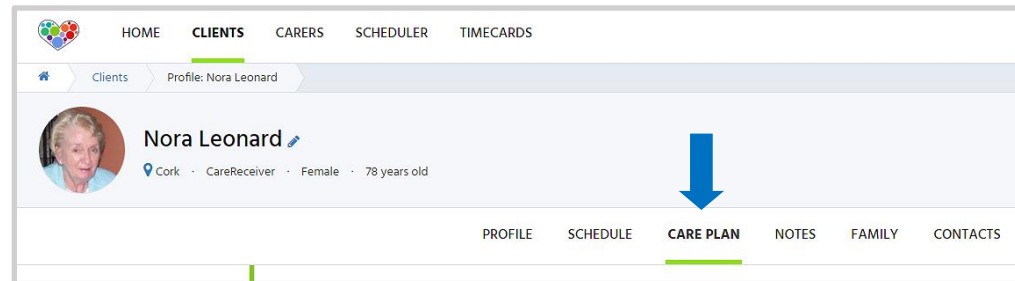
Setting up a Client's Care Plan is easy, so let's get started!

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:

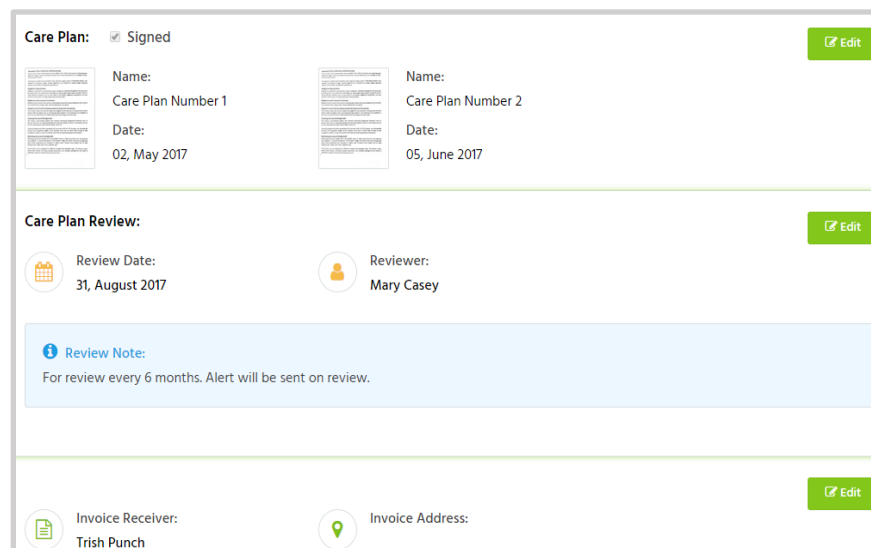
- Upload any **documentation of a Care Plan** and tick the box if it has been **signed** by the family and/or care professional.
- Attach a **Care Plan review document** or **set the date of the next review** and assign it a reviewer. An **alert** will be sent to them on the Review Date.

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**.



The screenshot shows a web interface for managing care plans. 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 for two different care plans. The first column shows 'Name: Care Plan Number 1' and 'Date: 02, May 2017'. The second column shows 'Name: Care Plan Number 2' and 'Date: 05, June 2017'. Below these columns is a 'Care Plan Review' section with an 'Edit' button. This 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 of the interface, there is an 'Invoice Receiver' section with 'Trish Punch' listed and an 'Invoice Address' field, both with 'Edit' buttons.

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.

The screenshot displays the 'General' section of a client's care plan. It is divided into three main areas: 'Note', 'Allergies', and 'Duties Required'. Each area has a 'Cancel' button and a green 'Save' button. The 'Note' section contains a text box with the text: 'Nora has parkinsons and emphysema. She is a very good natured lady, but has been having trouble with her memory and requires help with daily activities.' The 'Allergies' section shows three selected allergies: 'Cats', 'Dairy', and 'Gluten', each with a small 'x' icon to remove it. Below these is a '+ Add Allergy' button. The 'Duties Required' section shows five selected duties: 'Art Therapy', 'Crisis Management', 'Medication Administration', 'Personal Care', and 'Dementia Care', each with a small 'x' icon. Below these is a '+ Add Duty' button.

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](#)

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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**

The screenshot shows a user interface with two main sections: 'Additional Info' and 'Documents'. The 'Additional Info' section has a text area with the placeholder 'Any additional Info can be recorded here.' and an 'Edit' button. The 'Documents' section displays two document entries, each with a thumbnail, a name, and a date. The first entry is 'Medical Authorisation' dated '14, March 2017'. The second entry is 'Consent form' dated '07, February 2017'. Both sections have an 'Edit' button.

Additional Info:		Documents:	
Any additional Info can be recorded here.			
		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 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**.

PROFILE SCHEDULE **CARE PLAN** NOTES FAMILY CONTACTS

Handling

Preferred Carer Gender: Cancel Save

Female Male Doesn't matter

Unsuitable 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. To the right of the text area are 'Cancel' and 'Save' buttons. The bottom section is titled 'Hobbies & Interests:' and contains three buttons: 'Knitting X', 'Singing X', and 'Art X'. To the right of these buttons is a '+ Add Hobbies & Interests' button with a dropdown arrow. To the right of the 'Hobbies & Interests' section are 'Cancel' and 'Save' buttons.

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 a screenshot of a software interface with two distinct form sections. The top section is titled 'Groups & Organization:' and contains a 'Details:' label above a large, empty text input field. To the right of this section are 'Cancel' and 'Save' buttons. The bottom section is titled 'Other:' and also contains a 'Details:' label above a large, empty text input field. To the right of this section are 'Cancel' and 'Save' buttons. The 'Save' buttons are green with a white document icon and the word 'Save' in white text.

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**



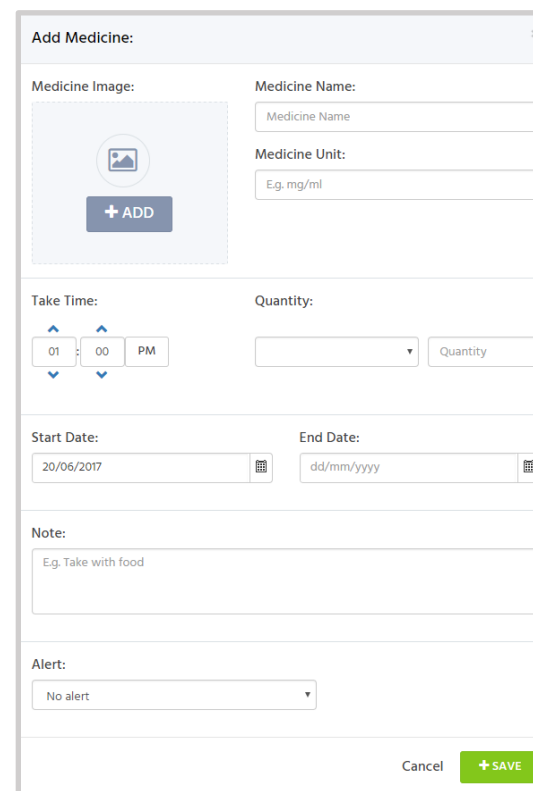
+ ADD MEDICINE

- 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 controls:

- 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 with '01' for hours, '00' for minutes, and 'PM' for the period.
- Quantity:** A dropdown menu and a text input field labeled 'Quantity'.
- Start Date:** A date input field with the value '20/06/2017' and a calendar icon.
- End Date:** A date input field with the placeholder 'dd/mm/yyyy' and a calendar icon.
- Note:** A text area with the placeholder 'Eg. Take with food'.
- Alert:** A dropdown menu with the selected option 'No alert'.
- 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**.