

Aide Care Plan

Create New Aide Plan

Select a patient by clicking the **Select Patient** button from the main menu and then typing the chart number or the first 3 letters of the patient's first or last name. Then, select the patient from the list.

Click the **Aide Activity > Aide Plan** button from the main menu. Then select the **New** button to start a new Aide Plan.

From Point of Care you can pull this screen up from the Aide Plan tab on the main menu or you can go to the Aide POC screen within the assessment.

Plan Tab

- If the patient has authorization dates keyed into the Patient Histories screen then it will show up at the top of this screen.
- Select the authorized From and Thru dates. **Note:** there are some limitations related to overlapping care plans here. You will not be able to overlap multiple care plans for the same aide. Be sure to add multiple care plans for the same aide on one care plan. You can click on the **Match Auth Dates** to auto populate the From and Thru date to match that of the Authorizations screen (Authorized Hours shown at the top).
- Select the **Aide** and **Case Manager** from the drop down list. **Note:** You can do a search by name or Barnestorm employee code by typing in this field. **Note:** There is a global setting that will make the Case Manager match the Aide when selected.
- Select if the care plan is for the AM and/or PM.
- Select the program/payer, job code and visit code. **Note:** There is a global setting for our CAP customers where the job code will automatically match the payer code (you'll use this if your database is setup specifically to match).
- Adding Times: If all days will start and end at the same time, key in the **Start** and **End** times and then click on **Set Time for All Days** button. If the time is day specific, then select the SMTWTFS buttons and set the time for each day needed. Repeat with PM as needed. The times will save select the days or times. Note: This part is optional, if you do not set any times the default time used is 8:00 AM – 8:30 AM.
- Select all possible tasks that need performed for the select patient. This will include any combination of AM and PM plans. Even if some tasks will only be needed on some days but not all.

Tasks Tab

This is the feature that will be used to create the schedule for the aide, adding the appropriate tasks to the aide note. All task selected from the **Plan** tab will show up for each day. There's a section for the AM and PM tasks - use the checkbox next to the day to select all or deselect all. Check or uncheck tasks for each day as needed. If an aide is assigned in the AM and PM be sure to select the correct tasks for each section. As soon as you start to select tasks for the day you'll notice that the time assigned on the Plan tab will appear below the day.

Precautions

This is background information about the patient that the Aide may need to know. You only need to fill in this information once and it will appear on the Aide Visit Note screen and on the note preview.

Vital Sign Parameters: you can set an upper and lower limit for vital signs so that the Aide knows to inform the Case Manager if the vital sign exceed or drop below the limits you set. Click the **Fill Defaults** button to automatically fill in each vital sign with the default answers. ***Note:** See article Aide Visit Note to see how this impacts charting.




Special Instructions

Allows you to type any additional instructions or information for the Aide as needed. This information will show up on the Aide Visit Note screen and on the note preview.

Create Schedule

Use this feature if you are using Barnestorm to track the aide schedule and/or creating aide notes. Once you click on Create Schedule it will add an entry for the AM and/or PM aide and for the days/times assigned. It will cover the From and Thru date range used on the Plan tab.

Settings icon next to Create Schedule button = Use this to select dates before updating schedules. Check **Clear All Unfinished Visits** to replace all existing aide schedules. This will also clear any that are NOT tied into the aide care plan. Doing so this way will help clear out any duplicate entries keyed in over time. Leave this unchecked if you have manual aide schedules keyed, not assigned to the aide care plan. Leaving unchecked will prevent the manual entries from being deleted.

Create Schedules		
From:	8/ 2/2019 	
Thru:	7/ 5/2020 	
<input type="checkbox"/> Clear All Unfinished Visits		
	Create Schedule	Save Plan

Save Plan

Before exiting click on **Save Plan** to save all information.

Updating Aide Plan

There are a couple of examples of updating the Aide Care Plan.

1) Renewing an Expired Plan

Instead of editing the existing one we highly recommend you create a new plan. We have an easy way to copy forward the information.

- Select the existing care plan
- Check the box **Copy Previous Plan**
- Click on **New**
- This will pull forward all the information from the selected plan
- From here you can edit any information needed, including the From and Thru dates
- Click the Create Schedule button to update the schedule with the new From and Thru dates, aide and tasks

2) Edit changed/incorrect information

- Select the care plan that needs updated
- Click the Edit button
- Modify the information that needs updated or corrected
- If you have schedules created, click the **Create Schedules** button to update the schedule screen

3) Temporary: Fix issues related to the older aide care plan

This is pretty much the same as option 2. If you have recently had any issues with tasks disappearing or schedules doubling up you can edit the current care plan to fix any print preview or schedules.

- Select the existing care plan
- Click the Edit button
- Verify the tasks on the Plan tab is correct
- Go to the Tasks tab and verify the correct days are assigned and have the correct times and tasks
- Click the Create Schedules button to update and fix any schedules and print preview issues

Preview Aide Care Plan

The main difference in printing any of the reports from the Aide Plan tab is we now have a "Use PM Plan" checkbox. Use this button when you need to preview the PM Plan. Unchecked will default to the AM. This will decide which tasks to pull for the Aide Weekly and Week View reports.

The main screen on the Aide Plan will show you the Visit Frequency and if the plan has an AM and/or PM.