How to Create an Assessment and Print a Plan of Care

Description

Use this function to record an assessment on a Resident's file and create a Plan of Care
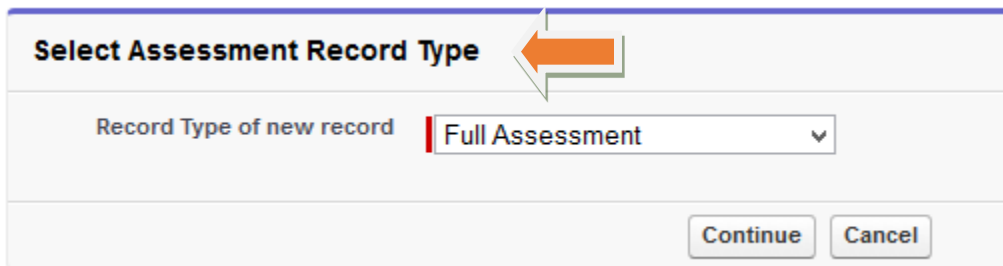
The system will:

- 🏠 Record an assessment on the Resident's file
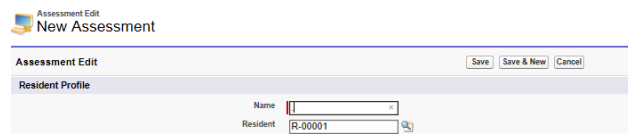- 🏠 Create a Plan of Care

Step by Step

First Assessment

1 Navigate to the Resident's profile page

2 In the baby words at the top of the page, hover over **Assessments**

3 Click **New Assessment**

4 Select *Full Assessment* as the **Record Type of New Record**

5 Click **Continue**

6 The **Name** field will default to the name of the resident, followed by the date and the type of assessment (e.g., Louise Smith – 2016-11-17 – Full Assessment) when you save the assessment. In the meantime, enter a period into this field as a placeholder.

7 Select a **Status** to show that the assessment is *In Progress, Completed, Declined,* or *Pending Approval*

8 Specify an **Assessment Date**

9 Enter a **Reason for Move-In**

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10 The **Default Target Date** will automatically fill in the date of the next scheduled assessment based on the default target date set by your organization (e.g., Six months from the date of the current assessment)

11 Enter in all available assessment details in the fields below

12 Click **Save**

13 When the assessment has been completed, update the **Status** to *Complete*

Subsequent Assessments
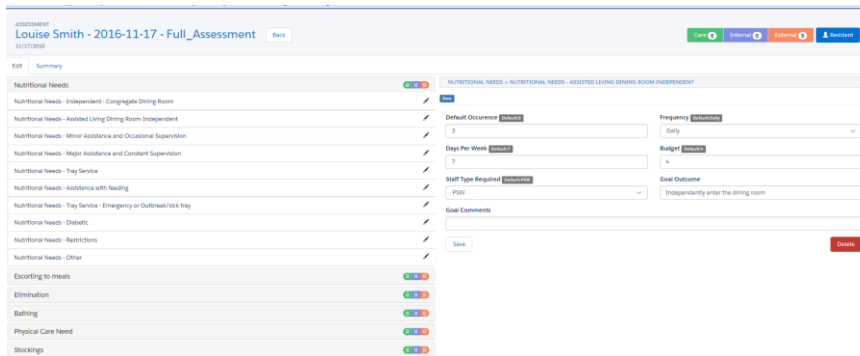Use these instructions to create a new assessment on a resident who has had previous assessments

1 Navigate to the resident's profile page

2 In the baby words at the top of the page, hover over **Assessments**

3 Click on the name of the most recent assessment

4 Click the **Copy to New Assessment** button at the top of the page

5 You now have a new assessment. Click the **Edit** button at the top to make changes to the assessment details.

Assessment Worksheet
Schedule care items

1 Navigate to the resident's most recent assessment

2 Click the **Assessment Worksheet** button at the top of the assessment

3 On the left, select the care item to schedule

4 On the left, click on the type of care item

5 On the right, enter **Default Occurrence**

6 Select **Frequency**

7 Enter **Days Per Week**

8 Select **Staff Type Required**

9 Enter a **Goal Outcome**

10 Enter **Goal Comments**

11 Click **Save**

12 Continue with all necessary care items

Print Plan of Care

1 Navigate to the most recent assessment

2 Click the **Plan of Care** button at the top

3 A Conga Composer window will pop up. Click **Merge & Download.**

4 The plan of care will open in a Microsoft Word document