

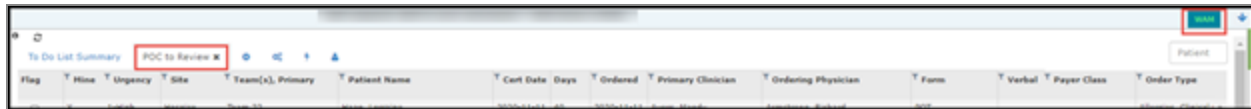


Plan of Care Review Steps Quick Reference Guide

Document version 1

Here are some suggested steps to help guide the **Plan of Care** reviewer when reviewing Plan of Care orders:

1. Access the Plan of Care (POT or 485) to review from the **POC To Review** WAM To Do List.



2. Review the **Scanned Docs**.



3. Do one of the following:
 - For a Home Health patient, view the **OASIS**
 - For a Hospice patient, view the **HIS**



To get back to the **Plan of Care** being reviewed after viewing the **OASIS** or **HIS**, select the WAM **POC to Review** To Do List and re-access the **Plan of Care** from there.

- Review the **Referral** via the Quick Link. Look to see what disciplines were ordered and any special referral orders.

PT: Start on 10/12/2020: 1x/da x 1 da, 1x/wk x 1 wk, 1-2x/wk x 8 wks
 Evaluate/monitor co-morbid conditions as listed osteopenia, HTN. Patient identified steps toward personal goal: "do therapy". Plan of Care de patient/caregiver/family with written and/or oral education on basic pain management principles including medication, heat/cold, changing po
 OT: Start on 10/13/2020: Once every 2 wks x 1 wk, 3-5x/mo x 3 mos
 ADL/IADL Training, Functional Mobility/Transfer Training, Meal prep/kitchen safety

22. Goals/Rehabilitation Potential/Discharge Plans
 PT Goals: Goal: Increased Strength of R Hip to Grade 4/5 within cert period. Goal: Patient ROM of R Hip joint will increase 75-90 degrees of F

Review Signature Send to Physician Confirm Signature

PDGM for episode starting on Oct 18, 2020

	CP	SN	PT	HCA	Other
1		\$0.00	\$308.14	\$0.00	\$466.42
2		\$0.00	\$0.00	\$0.00	\$0.00

- Review the **Auth** Quick Link for any insurance authorization details, as needed. See screenshot in #4.
- Complete a clinical review of the content of the Plan of Care in the **Order Update** and **Order History** screens of the Plan of Care and in the **POC Update** as needed.



It is important to use the **Quick Link** to access the **POC Update**, so the user will remain connected to the order that was selected to review from WAM. Selecting the POC Update **Quick Link** will allow the user to then return to that order when leaving the **POC Update** screen to continue their review. If the user selects POC Update from the Chart instead, then after the corrections are made, the user will need to re-access the order that they were reviewing from WAM to see the error resolved and continue their review.

- Review the **View Month** Calendar. To open the **View Month** Calendar:
 - For patients with a non-PDGM payor, the **View Month** Quick Link is available from the POC Update and Plan of Care **Quick Links** areas.
 - For patients with a PDGM payor, the **View Month** Quick Link is available in the Plan of Care screen at the bottom right, under the Assessment Card, instead of in the Quick Links area.

The **View Month** calendar provides a picture of past visits and future appointments for each discipline.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	29	30	31	SLP Un-assigned	OT Un-assigned
3	SN Brown, Melinda, RN	OT Un-assigned	SLP Un-assigned SN Brown, Melinda, RN	OT Un-assigned	SLP Un-assigned	OT Un-assigned
10	SN Brown, Melinda, RN	OT Un-assigned Moro, Barbara, LDCW	SLP Un-assigned SN Brown, Melinda, RN	OT Un-assigned	SLP Un-assigned	Cert End OT Un-assigned
Cert End	Cert End SN Brown, Melinda, RN	Cert End OT Un-assigned	Cert End SLP Un-assigned SN Brown, Melinda, RN	Cert Start		
24	25	26	27	28	29	30
31	1	2	3	4	5	6

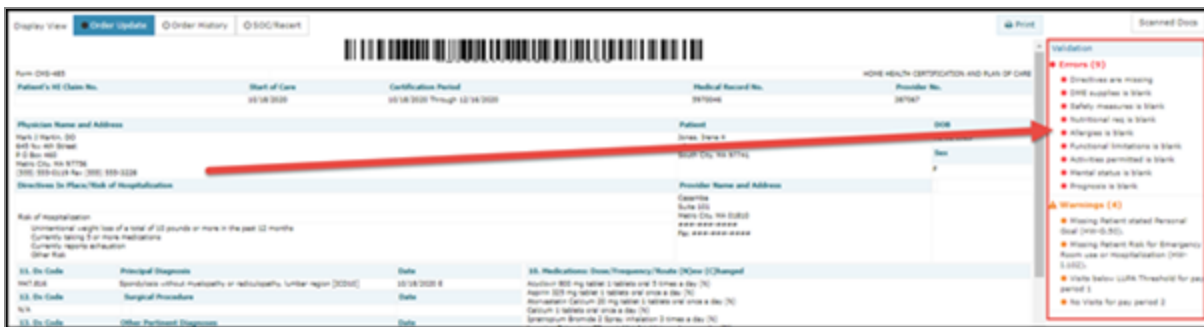
- Review and update the **Clinical Summary** if needed, using the **Correct** function in the Order History screen.



- Review any **Validation** warnings or errors.



The "Plan of Care Review Validation Errors" and "Plan of Care Review Validation Warnings" sections of the *HomeOffice Web Patient Chart: POC Update and Plan of Care Training Manual* will assist with resolving those.



10. The last step a Plan of Care reviewer should take prior to review signing the Plan of Care is to make sure the medications and diagnoses are displaying on the Plan of Care correctly. There may be a Plan of Care Diagnoses/Medication display issue when the Plan of Care Medications or Diagnoses are updated subsequent to any Med or Dx Interim Order. The **Dx/Meds** Quick Link displays only signed diagnoses and medication orders which are both Plan of Care (485 or POT) and Interim Orders.

To see if this display issue is occurring for Diagnoses and to correct it:

- a. Access the **Dx/Meds** Quick Link and scroll to the bottom of the list. Then slowly scroll back up and look for Interim orders that include a diagnosis followed by 485/POT order that includes diagnoses.
- b. If you find that step a is true, the content of those interim order(s) has created a display issue on the Plan of Care that needs correction. If the interim order(s) contains a new additional diagnosis, then that diagnosis is incorrectly displaying on the Plan of Care. And if the Interim Order was a discontinued diagnosis, then that diagnosis has incorrectly been removed from the Plan of Care.
- c. Use the *Correcting Diagnoses on a Plan of Care Quick Reference Guide* that will explain on how to redirect that diagnosis to the Plan of Care.

To see if this display issue is occurring for Medications and to correct it:

- a. Access the **Dx/Meds** Quick Link and scroll to the bottom of the list. Then slowly scroll back up and look for Interim orders that include medication(s) followed by 485/POT order that includes medication(s).
- b. If you find that step a is true, the content of those interim order(s) has created a display issue on the Plan of Care that needs correction. If the interim order(s) contains a new additional medication, then that medication is incorrectly displaying on the Plan of Care. And if the Interim Order was a discontinued medication, then that medication has incorrectly been removed from the Plan of Care.
- c. Use the *Correcting Medications on a Plan of Care Quick Reference Guide* that will explain on how to redirect that medication to the Plan of Care.

11. When the review is complete and any updates have been made, select **Review Signature** to review sign the Plan of Care document.