



HOW TO CREATE AND PRESENT A CARE PLAN

How to Create and Present an Care Plan

Learning Objectives

After completing this lesson, you should be able to:

- Define high-level steps in Medicare advocacy workflow
- Define and communicate the purpose of a Care Plan
- Identify the essential details to be included in a Care Plan
- Develop a written Care Plan
- Identify methods for presenting a Care Plan
- Describe techniques to confirm mutual understanding

Workflow



What is a Care Plan? What is its Purpose?

- Patient-Centered Care Plan
- Required for Medicare documentation
- Summarizes
 - Goals, objectives, and barriers
- Outlines
 - Next steps and action items

Creating Advocacy Care Plans

Key Elements

- Name
- Date of birth
- Goals identified
- Steps taken
- Summary of findings
- Next steps
- Available advocacy services

Creating Advocacy Care Plans

Key Elements

- Name
- Date of birth
- Date of Care Plan
- Goals identified
 - Long-term, broad goals
 - SMART: Specific, Measurable, Achievable, Relevant, Time-bound

Creating Advocacy Care Plans

Writing strong goals

- Broad (long-term goals) provide overall direction
- SMART goals (Specific, Measurable, Relevant, Time-Bound) break goals into actionable steps
- Client priorities
- Document both health related and SDOH (Medical care, transportation, billing support)

Creating Advocacy Care Plans

Key Elements

- Steps taken
 - Strengthens care plan
 - Interviews/conversations, medical records/insurance review, observations, time spent
- Summary of findings
 - Snapshot of situation
 - Diagnoses, barriers, observations, insurance/billing concerns, upcoming appointments, pending referrals

Creating Advocacy Care Plans

Key Elements

- Next steps
 - specific action items towards goals
- Available advocacy services
 - Appt. preparation, appt. coordination, visit summaries, disease mgmt. education, medical binder, insurance navigation, community resources, technology coaching, self-advocacy

Creating Advocacy Care Plans

Guidelines to a successful presentation

- Key people are included
- Review each key element
 - Answer questions
 - Assess understanding
 - Set clear expectations
- Provide copy

Creating Advocacy Care Plans

- Present each key element
 - Name
 - Date of birth
 - Goals identified
 - Steps taken
 - Summary of findings
 - Next Steps
 - Available advocacy services
- Answer questions
- Assess understanding

Client Decision: Accept, Review, Modify or Decline

Possible outcomes

- Accept as written
- Brief review period
- Request to modify (if not yet submitted)

Client Decision: Modifications

Types of modifications

- Identifying new goals
- Re-organizing priorities
- Requesting additional services

Thank you!