SERVICE PLAN UPDATE FACT SHEET

Service Plan Updates *do not replace the Initial, Six Months or the Annual Service Plan and completed by the Case Manager. Updates are intended for minor changes in risks, services, resources or the emergency back-up plan.*

Service Plan Update	Key Points to Remember	Who
Change in Service Plan	✓ For major changes, a new Service Plan is needed. **Example:** Person had a major stroke and has numerous changes in needs. ✓ CM enters the date of Service Plan Update under the Change in Need/Service Level box on page one. ✓ Service Plan Updates are for minor changes only ✓ CM speaks with the participant who requests a change in service, risk resource or emergency back-up plan(s).	CM
Service Plan Update	✓ Enter the change to a service under the Service Plan section. Example: Add a new service such as home health; add a secondary PA agency or change frequency of a service; remove a service the person no longer needs. ✓ CM adds the date and his/her initials to the left of the new addition to the Service Plan. Please note the conversation of approval with the participant in the CM notes.	CM
Risk Plan Update	✓ When the person has a new risk, enter the description of the risk under the Risk Plan. Example: Fall risk in the home. Under the Risk Plan, describe how the risk will be addressed. **Example:** Participant will use a walker in the home and wheel chair outside the home for long distances. ✓ CM adds the date and his/her initials to the left of the new addition to the Service Plan. Please note the conversation of approval with the participant in the CM notes.	CM
Resource Plan Update	✓ When the person needs a new resource**,** add the resource. Example: Hospital Bed. Contact physician and Best DME for bed. ✓ CM adds the date and his/her initials to the left of the new addition to the Service Plan. Please note the conversation of approval with the participant in the CM notes.	CM
Emergency Back-up Plan Update	✓ Participant's son and niece have moved to Florida and they were both back-up for the person. Participant has a cousin who lives next door is willing to be the back-up. Add cousin's information as a back-up for an emergency (verify contact information for the cousin). ✓ CM adds the date and his/her initials to the left of the new addition to the Service Plan. Please note the conversation of approval with the participant in the CM notes.	CM

PERSONAL ATTENDANT LOG (PAL) UPDATE FACT SHEET

PAL Updates *do not replace the Initial, Six Months or the Annual Service Plan and completed by the RN. Updates are intended for minor changes in the activities, days of week, or times of service.*

PAL Update	Key Points to Remember	Who
PAL Change(s) and Verification	✓ Do not use a PAL Update when major changes occur. Example: Participant was admitted to the hospital and had a stroke. She was level B and now needs full assistance with all activities. She is a level D now and is unable to get out of bed. ✓ Complete the change in activity, type of assistance, days or times of day. This change is based on the participant's request. Example: Participant reports daughter's work hours have changed and she now needs a PA there on the weekend. RN will do a PAL Update. ✓ Do not do a PAL Update when the worker cannot go to the home during the plan hours. The PAL Update is to meet the participant's needs, not the PA or agency's needs. It is a "Person-Centered Plan". ✓ Once the RN verifies the participant approval of the update, the RN signs/dates on page 4 of the PAL and marks whether it was a phone call or a home visit. ✓ Do not do a PAL Update, home visit or RN billing unless the person is asking for the change. ✓ RN send the PAL Update to the CM.	RN
CM Incorporates PAL into the Service Plan	✓ CM initials and dates the PAL Update box at the top of the PAL. ✓ If the CM has no questions, the PAL is attached to the Service Plan and a new date is added on page one of the Service Plan under "Change in Need/Service Level". This indicates that there has been a change and the new PAL can be easily located attached to the Service Plan.	CM
CM Ensures Person-Centered Planning	✓ A CM may have questions about the change. ADW policy requires the CM to ensure it was a participant choice. The CM may accept the RN's approval of the change or may contact the person themselves to verify the change in the PAL. The CM will document the contact and contact the RN if the contact results in a further change in the PAL. Example: The member speaks with the CM reporting that she really wants morning services but the granddaughter/worker won't work in the morning. She can't get out of bed. She did not report this to the RN initially because she did not want the worker to know.	CM