

Frequently encountered questions about NDoc Plan of Care (POC) Creation:

- *My agency has the POC auto-created. What will appear on the POC?*
If the POC is auto-created, it will base the POC on the current information available at the time of creation. Any data, such as activities permitted, will reflect the most recent information charted. The medications and physician orders will include all that were active at the start of the certification period plus any changes that may have occurred up until the time that the POC was created. Until the time of final approval, medications and physician orders will be available for selection within the Review POC screens for inclusion in the final POC document.
- *Editing the POC through the Create Plan of Care process seems time consuming. Isn't it just easier to create the POC and then edit the POC when reviewing it?*
If you choose to edit the POC at the time it is created, your changes to the Instruction and Outcomes section will be saved for all future POCs and will not require additional editing. For example, if you delete some of the statements associated with a problem and add others, these changes are permanently retained and will not need to be redone if the POC has to be removed and recreated or the patient is recertified.
- *If I decide not to include some of the orders or medications on the POC, won't my agency have a problem because the doctor didn't sign for all of the orders or medications?*
You should carefully evaluate the implications of omitting any orders and medications from the POC to assure compliance with all applicable regulations. If a medication or order is excluded from the POC and it has not previously been confirmed by another POC or PVC, it will print to a PVC once the POC is printed. However, if you exclude an order or medication from the POC and it has previously been confirmed by the doctor, a PVC will not print.
- *If I remove teach statements and short and long term goals from the POC, do they get resolved within Visit Charting too?*
No. The statements you remove will not appear on the POC but will still be active in Visit Charting. If the teaching or outcomes are not appropriate, they should be documented as such in NDoc to resolve the problem.
- *I know I can choose the visit whose status I want used to create the POC. Will I be able to choose from any visit made to the patient?*
No. You will be able to choose from any visit that occurred up to 10 days prior to the start of the cert period, thus allowing you to select the recertification or RFA 4 visit, or any visit occurring during the cert period.
- *I need to get details about the settings and tables that control the POC logic. Where can I find those details?*
The details of the settings and tables related to the POC are found within the **Plan of Care (POC) Documents** section under Documentation>Managing NDoc Guidance within the Thornberry Knowledgebase.
- *I would like to see the source of the data for the sections within the POC. Where can I find those details?*
The details of the mapped fields for the sections included in the POC are found within **NDoc Reference for Plan of Care (POC) Section Mapping**.

Agency Notes

Summary of the NDoc Plan of Care Creation Process: Creating the POC:

Create Plan of Care

- Select the patient.
- Select the cert period.
- Select the visit to be the basis for the POC or click **Select Visit** to capture the most recent compilation of charted data.
- Decide whether to include all applicable orders and medications, meaning all orders or medications that were/are active since the start of the cert period. If not, choose **No** and pick the orders and medications to be included on the POC.

At any time on this screen, click the **Patient Summary** button to access additional information about the patient.

- Select "Yes" to Edit Instructions and Outcomes to customize the assess, do, and teach statements on the POC, as well as the short and long term goals that are based on the Problem List.
- Once done, click either **Create** or **Customize**.
- When completed, the user sees a message indicating success that the Plan of Care has been created.

Creating the POC using the Customize Option: Determine which medications will be included on the POC:

Create Plan of Care

Medications
Orders
Instructions and Outcomes

Once done with medications, click the hyperlink for **Orders** or for **Instructions and Outcomes**. If done, click **Create** at the bottom of the screen.

- Click the box to the left of each medication you want listed on the POC.
- If all medications should appear, click the box at the top of the column for **ALL Meds**.
- The button to access the Patient Summary is located on all of these screens.

If you do not see a DOC # indicated here, and you choose to exclude the medication or order from the POC, it will instead print to a PVC once the POC is printed. If the medication or order had previously printed on a PVC or POC as indicated by a DOC #, it will *not* generate a PVC if excluded from this POC.

Choose which Physician Orders to include on the POC:

Create Plan of Care

Medications
Orders
Instructions and Outcomes

Create Plan of Care Acct #1002421 JENTEST,NORA

Cert Period #10: 12/03/17-01/31/18

Select Visit: (Select Visit) Patient Summary

Bottom

ALL Ords	Physician	Disc	Cat	Order	Order	Start	Hold	Resume	Discontinue	Status	DOC	Comment
<input type="checkbox"/>	Test.Doc	SN	Services	Assess: Testing Order entry	01/01/17	01/01/17				Verbal	PVC-1	
<input type="checkbox"/>	Test.Doc	SN	Frequenoy/pm visit	Increase frequency	12/03/17	12/03/17				Verbal		Visits needed to maintain patient wellbeing.
<input type="checkbox"/>	Test.Doc	MD	Services	Physician Summary: Sample Text for the Physician Summary Order.	12/03/17	12/03/17				Verbal		

Quit Previous Next Create Help

- Similar to the medications, users may wish to select all orders by clicking the box at the top of the column marked **ALL Ords**.
- Pick individual orders to be included on the POC by clicking the box to the left of each order. As with medications, if you do not see a DOC # indicated and you choose to exclude the order from the POC, it will instead print to a PVC once the POC is printed. If the order had previously printed on a PVC or POC as indicated by a DOC #, it will *not* generate a PVC if excluded from this POC.
- Once done with orders, click the hyperlink on the left to go to **Instructions and Outcomes**.
- If done, click **Create** at the bottom of the screen.

Edit the statements that appear on the POC based on the Problem List:

Create Plan of Care

Medications
Orders
Instructions and Outcomes

Create Plan of Care Acct #1002421 JENTEST,NORA

Cert Period #10: 12/03/17-01/31/18

Select Visit: (Select Visit) Patient Summary

Edit Instructions and Outcomes

Problem: (Problem List)

Edit Flag Edit Text

Default Text

Assess:

Additional Assess Comment

Problem: (Problem List)

Cardio Problems - chest pain
Cardio Problems - knowledge/skill deficit: pt
Cardio Problems - knowledge/skill deficit: cg
Integument Problems - stasis ulcer present
Integument Problems - surgical wound present
Activity Problems - ADL assistance required
Activity Problems - knowledge/skill deficit: pt
Activity Problems - knowledge/skill deficit: cq
Safety Problems - cannot be left alone
Diagnoses Problems - knowledge/skill deficit: pt
Musculoskeletal Problems - transfer assistance required
Musculoskeletal Problems - requires human assist to leave home
Services - Baseline Homecare Services
Services - Standard Text-RECERT
Immunization Problem - needs flu vaccine
Immunization Problem - needs pneumonia vaccine

- From here, edit the areas of the POC that are populated by the Problem List.
- Remember that you can access the entire Problem List by clicking the **Patient Summary** button and going to Problems.
- Click the drop down list to view the current Problem List options. Select a problem to review and the screen displays every assess, do, and teach statement that will be included on the POC for the selected problem, as well as the short and long term goals.

Create Plan of Care

Medications
Orders
Instructions and Outcomes

Create Plan of Care Acct #1002421 JENTEST,NORA Cert Period #10: 12/03/17-01/31/18

Select Visit: (Select Visit) Patient Summary

Edit Instructions and Outcomes

Problem: Cardio Problems - chest pain

Default Text Edit Flag Edit Text

Assess:

cardiac status cardiac status

pain status pain status

pain/comfort measure relief pain/comfort measure relief

Additional Assess Comment

Do:

Additional Do Comment

Teach:

activity limitations/precautions activity limitations/precautions

angina id/notification angina id/notification

effects of exercise on disease mgmt effects of exercise on disease mgmt

energy conservation and activity/rest balance energy conservation and activity/rest balance

pain mgmt and symptom control pain mgmt and symptom control

self-management of cardiovascular disease process self-management of cardiovascular disease process

Additional Teach Comment

ShortTerm Outcomes:

compliance w/activity restrictions/precautions compliance w/activity restrictions/precautions

s/s angina and action to take s/s angina and action to take

Additional Short-Term Outcome Comment

LongTerm Outcomes:

ability to self-manage cardiovascular disease process ability to self-manage cardiovascular disease process

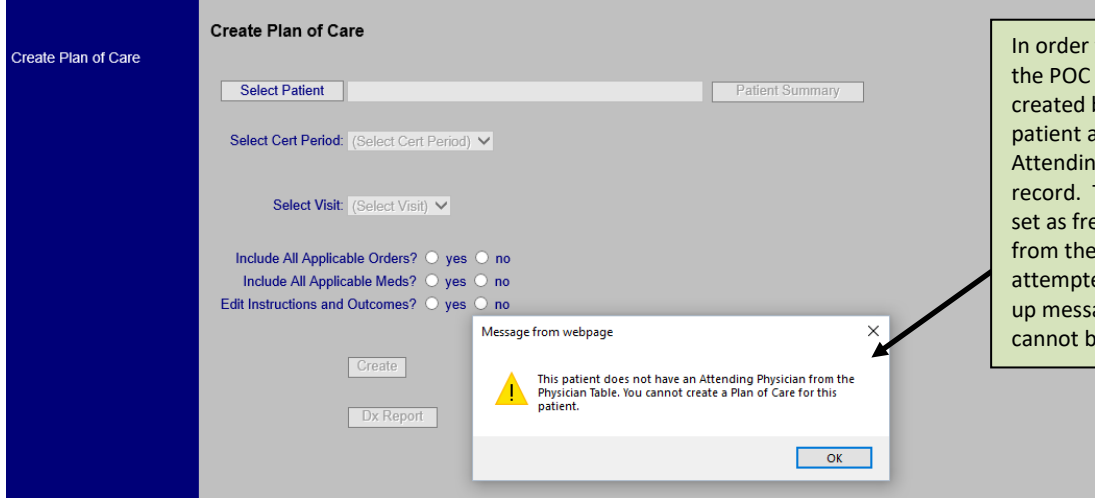
improved cardiac output improved cardiac output

Additional Long-Term Outcome Comment

Quit Save Cancel Create Help

- In each area, the statements can be deleted, edited, or additional statements can be added.
- Once done reviewing the selected problem, **always** click **Save** to save the changes.
- Continue editing as needed by selecting another problem. If finished, click **Create** at the bottom of the screen.

Special Consideration for POC Creation – Physician Entry:



Create Plan of Care

Select Patient Patient Summary

Select Cert Period: (Select Cert Period) ▼

Select Visit: (Select Visit) ▼

Include All Applicable Orders? ☐ yes ☐ no

Include All Applicable Meds? ☐ yes ☐ no

Edit Instructions and Outcomes? ☐ yes ☐ no

Message from webpage

⚠ This patient does not have an Attending Physician from the Physician Table. You cannot create a Plan of Care for this patient.

In order for a POC to be created using the POC Creation function or auto-created based on POC Settings, the patient account must have an Attending Physician charted within record. The physician entry cannot be set as free-text, but must be selected from the Physician Table. If creation is attempted, the user will receive a pop-up message indicating the document cannot be created.

Troubleshooting Tips for the NDoc POC Creation:

- I made changes to the Instructions and Outcomes section, but they aren't appearing on the POC. What happened?*

You must click **Save** after reviewing each problem to save your changes. If you click **Create** without saving your changes, the POC will contain all of the default problem logic.
- My patient is being recertified. Changes were made to the Instructions and Outcomes section before the last POC was created. I don't want those same additions. What do I do?*

When you are creating the POC, select "Yes" at the prompt to Edit Instructions and Outcomes. You will have access to all of the current problems for this patient and can make any changes at that time.
- I removed a teach statement about pain management but it appeared on the POC anyway. Why did that happen?*

Some assess and teach statements as well as short and long term goals apply to more than one problem. For example, the same teach statement would be triggered by the problem of frequent pain as well as intractable pain. If you clear the teach statement from intractable pain but not frequent pain, it will still appear on the POC. It will probably be helpful to review the Patient Summary/Problem List to view all the statements that will appear on the POC based on the problem list.
- I was creating a POC, but there were no visits from which to choose. Why was that?*

You will be able to choose from any visit that occurred up to 10 days prior to the start of the cert period or any visit occurring during the cert period. If there are no visits that fit these criteria, there will be no visits in the drop-down list. In this situation, the POC will be created using the most recent information charted.
- I used the Create Plan of Care function, but my POC did not include charting from a recent PT visit. What am I doing wrong?*

If you select a particular visit to create your POC, then your POC will be created based on that specific visit. In this example, if you selected the SOC visit to create your POC, then the POC will be populated with details of that particular visit and will not include charting from the patient's subsequent PT visit. If you want the most current data to be used to create your POC, you should simply leave **Select Visit** displaying in the dropdown instead of selecting a particular visit date. In this case, using the **Select Visit** option pulls the most current data including the PT visit details.
- I would like to see what my newly created POC is going to look like before it goes through the approval process. Is there a way to do that?*

After a POC has been created, use the **Preview** option to see what the document will look like when it is printed. Go to the Review Plan of Care or View Plan of Care screens to select the **Preview** button. Please note that the "Print Preview" version of the POC will have a different header than the official version of the POC. The header will display "PLAN OF CARE –PREVIEW" and will show the status of the document in the approval process. This document can be used as a reference for the POC's appearance, but it should not be considered the official version for a physician's signature.