

# Creating a PCS Service Plan – In-Home Providers

This guide describes how to complete the PCS Service Plan consistent with PCS policy guidelines and how to use various optional QiRePort service plan features. These features are designed to help enhance the utility of the service plan functionality for PCS service providers.

## Overview

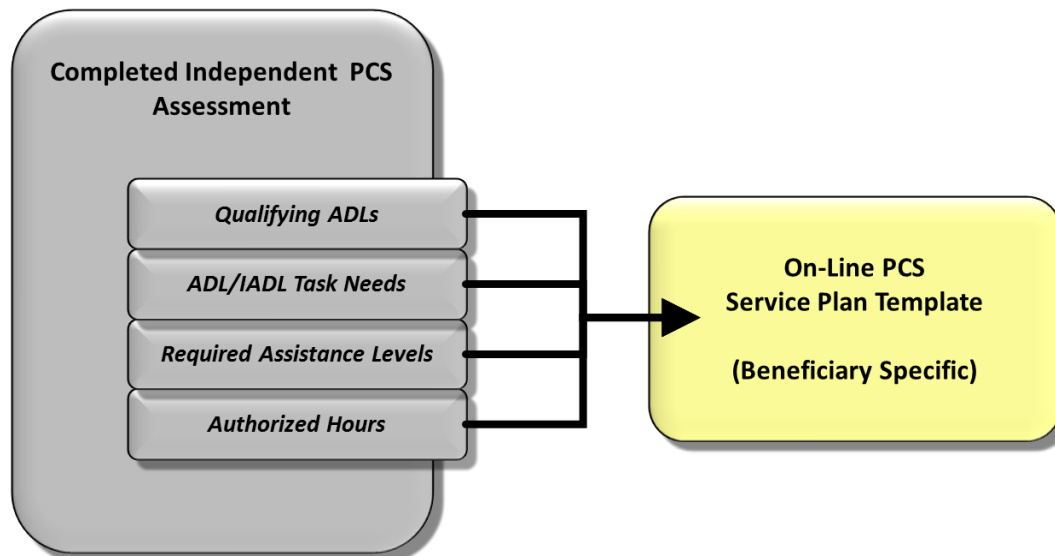
Key service planning requirements:

- Each referral requires a PCS service plan that must be completed in QiRePort.
- Prior approvals are based on a completed PCS service plan.

The on-line PCS service plan will ensure that:

- IAE assessment findings are accurately reflected in the PCS service plan
- The PCS service plan is accurately reflected in the aide task worksheets
- The aide task worksheet is the basis for documentation of aide tasks actually performed

When a referral is accepted, QiRePort extracts key assessment information and generates a service plan “template” for the beneficiary.



- The new service plan is added to the “In Process Plans” list on the “Plan” tab.

The Service Plan is comprised of several sections, below is a list of these sections with a brief description. Each section will be covered in more detail in this document.

Section	Description
<b>Service Schedule Summary</b>	Actual days and times (and shifts if necessary) for PCS tasks to be performed are defined in this section.
<b>PCS Tasks</b>	A list of ADL and IADL tasks from the assessment to be scheduled and performed.
<b>Special Assistance Tasks</b>	A list of Special Assistance Tasks from the assessment to be scheduled and performed.
<b>Delegated Medical Monitoring</b>	A list of Delegated Medical Monitoring Tasks from the assessment to be

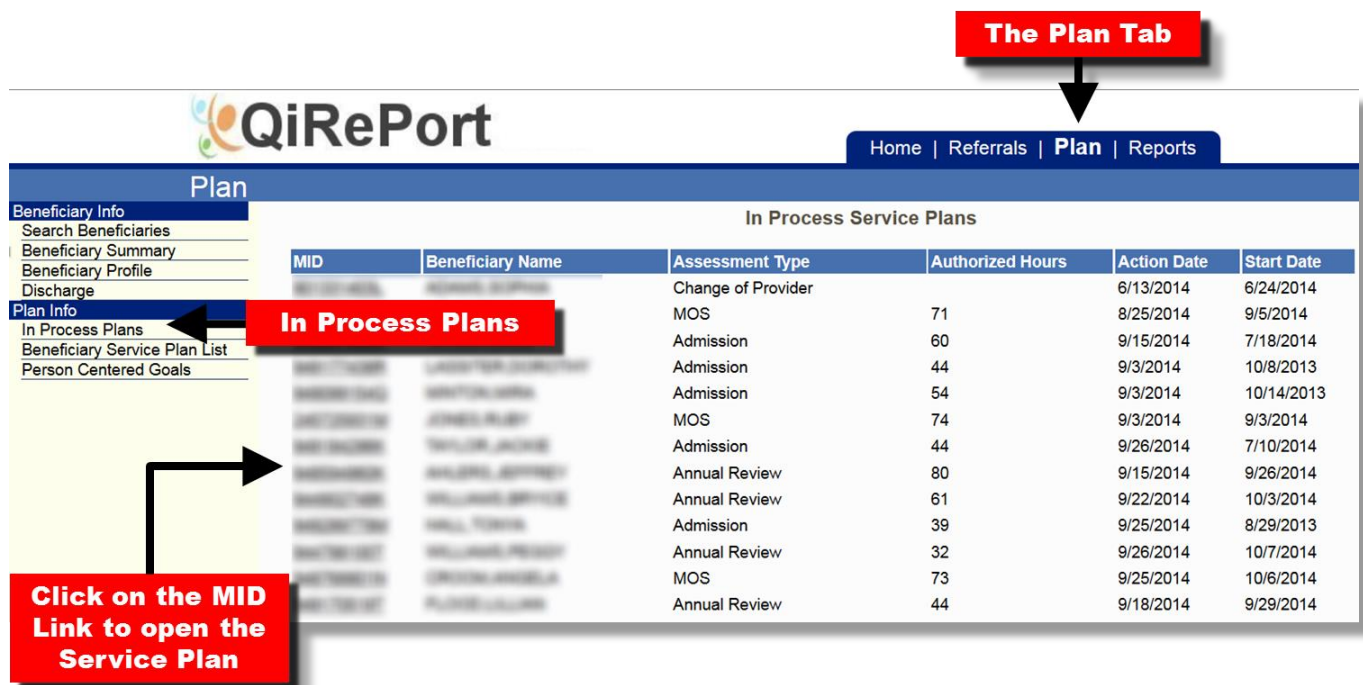
<b>Tasks</b>	scheduled and performed.
<b>Service Outcomes</b>	Outcomes to be accomplished by PCS services. (Optional)
<b>Assigned Aide/History</b>	Aide assignment (one or more) to a beneficiary. (Optional)
<b>Aide Instructions</b>	Specific instructions for the Aide to follow when providing care.
<b>Narrative</b>	A summary description of the beneficiary and the care to be provided.

## In Process Plans

The “In Process Plans” screen contains a listing of all the incomplete plans for your organization. When a referral is approved, it will immediately appear on this list and when plans have been completed and validated by QiRePort, they will no longer be displayed here.

- From the QiRePort Home page, click on the “Plan” tab, and then click on the “In Process Plans” link on the left index to display this page.
- To open a service plan, click on the MID link associated with the beneficiary you wish to see.
- *Only incomplete plans are displayed in this list.*

**The Plan Tab**



**Plan**

Home | Referrals | **Plan** | Reports

**In Process Service Plans**

MID	Beneficiary Name	Assessment Type	Authorized Hours	Action Date	Start Date
		Change of Provider		6/13/2014	6/24/2014
		MOS	71	8/25/2014	9/5/2014
		Admission	60	9/15/2014	7/18/2014
		Admission	44	9/3/2014	10/8/2013
		Admission	54	9/3/2014	10/14/2013
		MOS	74	9/3/2014	9/3/2014
		Admission	44	9/26/2014	7/10/2014
		Annual Review	80	9/15/2014	9/26/2014
		Annual Review	61	9/22/2014	10/3/2014
		Admission	39	9/25/2014	8/29/2013
		Annual Review	32	9/26/2014	10/7/2014
		MOS	73	9/25/2014	10/6/2014
		Annual Review	44	9/18/2014	9/29/2014

**Click on the MID Link to open the Service Plan**

## In Process Plan Column Definitions

Each column can be sorted by clicking on the column heading.

Column Heading	Description/Comments	
<b>MID</b>	Medicaid ID	
<b>Beneficiary Name</b>	The name of the Beneficiary receiving services	
<b>Assessment Type</b>	Admission	<i>Initial or New Assessment</i>
	Annual Review	<i>An Annual Review Assessment</i>
	Change of Provider	<i>Beneficiary has requested a new provider, the assessment used is the most recent assessment</i>
	Change of Status	<i>An assessment completed due to a recent change for the beneficiary (medical, caregiver, care setting, etc.)</i>

	MOS	Maintenance of Service
<b>Authorized Hours</b>	Hours authorized in the Assessment	
<b>Action Date</b>	The date that the service plan was created (the date that the provider accepted the referral)	
<b>Start Date</b>	The plan effective date for authorization of services.	

## The Service Plan Template

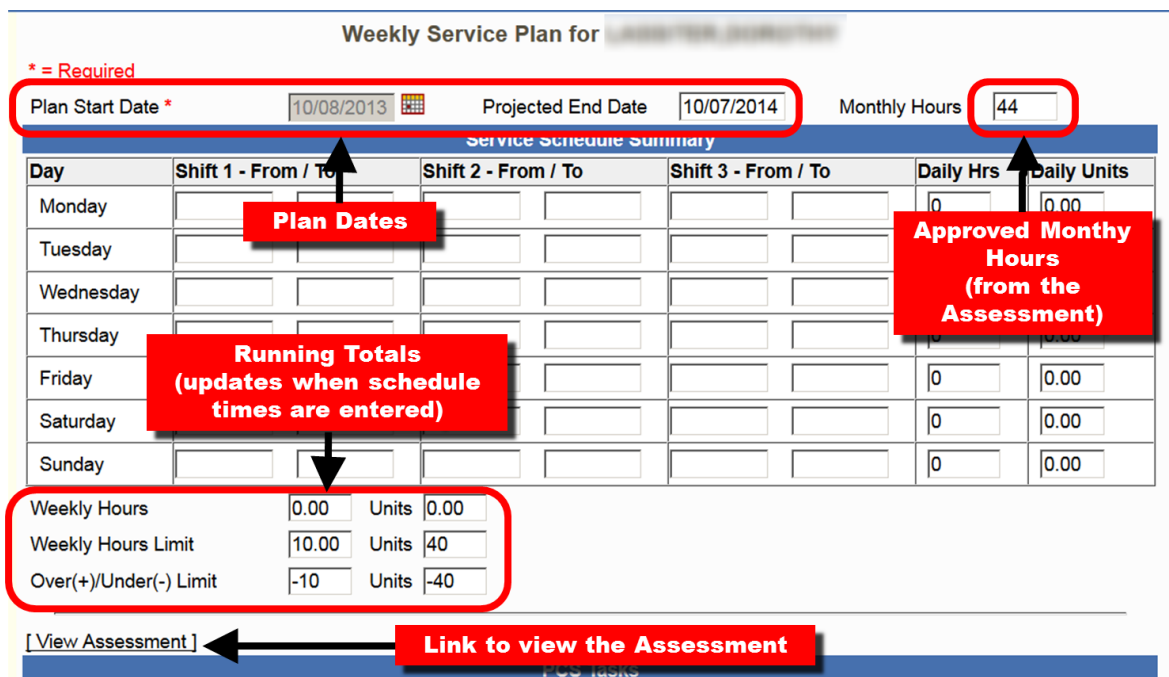
The service plan template is designed for service providers to develop a typical weekly schedule that translates the monthly service authorization into a task specific plan based on tasks needs established by the PCS independent assessment.

- After clicking on the MID link, the Service Plan Template is displayed. The top portion of the plan is the “Service Schedule Summary” where the planned hours are defined.
- To view the current Assessment at any time, click on the “View Assessment” Link at the bottom of the Service Schedule Summary section.

## Service Schedule Summary

This is where the actual times for PCS tasks to be performed each day are defined. There are three columns listed for shifts (if your organization uses shifts), if not then just use the 1<sup>st</sup> shift column to define times.

The approved Monthly Hours are populated from the assessment. The Weekly Hours Limit in the Running Totals section is determined by dividing the Monthly Hours by 4.35.



**\* = Required**

Plan Start Date \*  Projected End Date  Monthly Hours

**Service Schedule Summary**

Day	Shift 1 - From / To	Shift 2 - From / To	Shift 3 - From / To	Daily Hrs	Daily Units
Monday				0	0.00
Tuesday					
Wednesday					
Thursday					
Friday				0	0.00
Saturday				0	0.00
Sunday				0	0.00

**Running Totals (updates when schedule times are entered)**

Weekly Hours	<input type="text" value="0.00"/>	Units	<input type="text" value="0.00"/>
Weekly Hours Limit	<input type="text" value="10.00"/>	Units	<input type="text" value="40"/>
Over(+)/Under(-) Limit	<input type="text" value="-10"/>	Units	<input type="text" value="-40"/>

[ View Assessment ] **Link to view the Assessment**

**Be sure to view the “Frequency/Weekend” fields in the PCS Tasks section before entering time in the schedule. Check the number of days in the frequency and whether weekends are needed so the schedule matches the requirements specified in the assessment.**

Enter the “From” and “To” times (for each shift, if needed) in the time fields as shown below in the example.

Time entry can be reduced by using these shortcuts:

- Enter either an “a” or a “p” after the hour and then pressing the tab key (example – entering “10a” and then a tab will be populated by QiRePort as “10:00 AM”)
- Military time will work as well. (example – entering “1330” and then a tab will be populated by QiRePort as “1:30 PM”)

**Weekly Service Plan for** [Name]

\* = Required

Plan Start Date \*  Projected End Date  Monthly Hours

Service Schedule Summary								
Day	Shift 1 - From / To		Shift 2 - From / To		Shift 3 - From / To		Daily Hrs	Daily Units
Monday	<input type="text" value="8:00 AM"/>	<input type="text" value="10:00 AM"/>					<input type="text" value="2.00"/>	<input type="text" value="8.00"/>
Tuesday	<input type="text" value="8:00 AM"/>	<input type="text" value="10:00 AM"/>					<input type="text" value="2.00"/>	<input type="text" value="8.00"/>
Wednesday	<input type="text" value="8:00 AM"/>	<input type="text" value="10:00 AM"/>					<input type="text" value="2.00"/>	<input type="text" value="8.00"/>
Thursday	<input type="text" value="8:00 AM"/>	<input type="text" value="10:00 AM"/>					<input type="text" value="2.00"/>	<input type="text" value="8.00"/>
Friday	<input type="text" value="8:00 AM"/>	<input type="text" value="10:00 AM"/>					<input type="text" value="2.00"/>	<input type="text" value="8.00"/>
Saturday	<input type="text"/>	<input type="text"/>					<input type="text" value="0"/>	<input type="text" value="0.00"/>
Sunday	<input type="text"/>	<input type="text"/>					<input type="text" value="0"/>	<input type="text" value="0.00"/>

**Enter the beginning and ending time here for each day**

**The daily hours and units are calculated by QiRePort**

Weekly Hours	<input type="text" value="10.00"/>	Units	<input type="text" value="40.00"/>
Weekly Hours Limit	<input type="text" value="10.00"/>	Units	<input type="text" value="40"/>
Over(+)/Under(-) Limit	<input type="text" value="0"/>	Units	<input type="text" value="0"/>

**The weekly running totals are updated as time is entered**

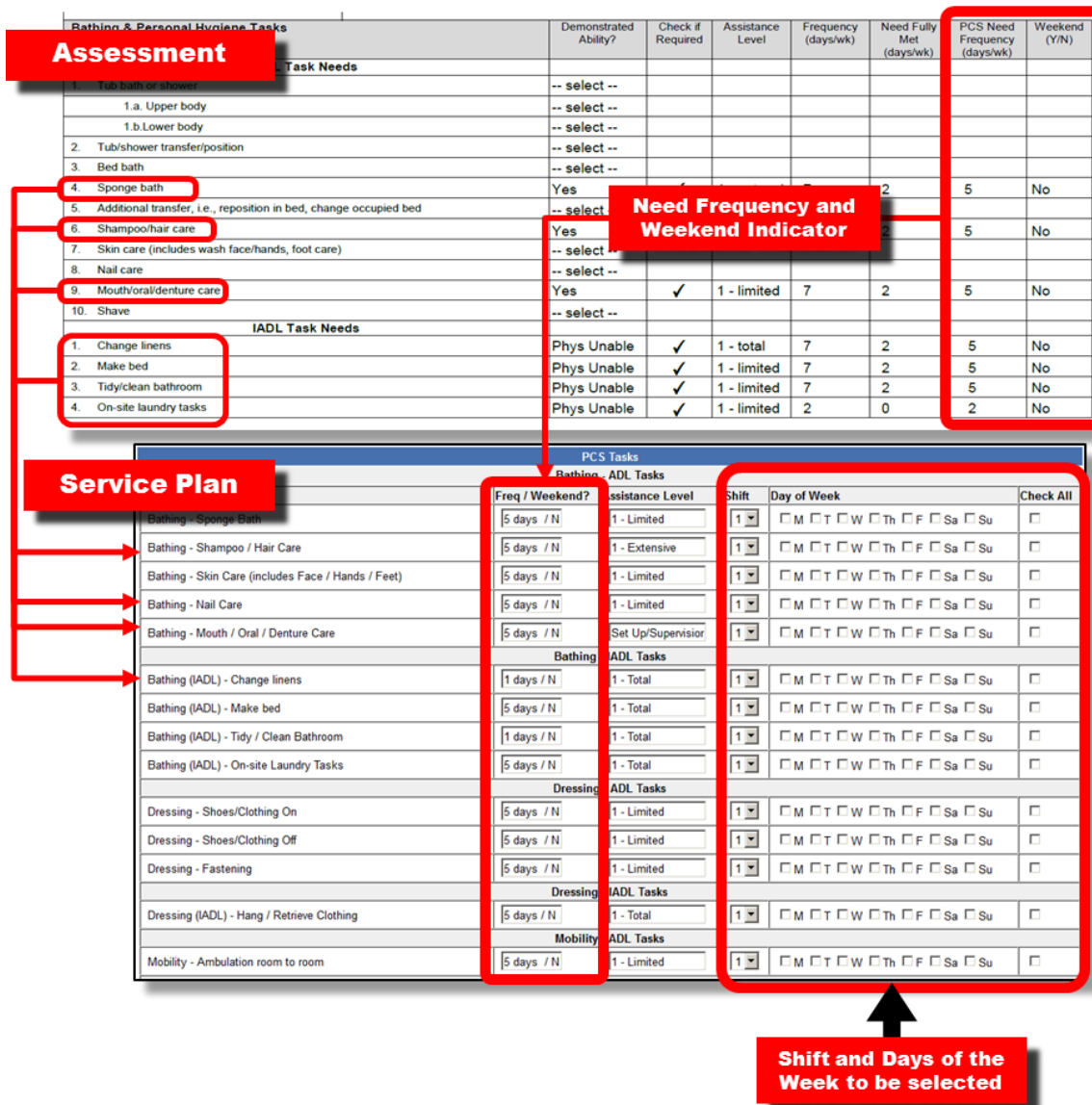
[ View Assessment ]

PCS Tasks

- If the weekly hours/unit limit is exceeded and the Service Plan is marked as “Complete”, a validation error message will be received - “You have surpassed the weekly limit in hours. Please adjust your time entries.”
- Both a “From” and “To” time must be entered, i.e. – if only a “From” time is entered, an error message will appear.

## PCS Tasks

ADL and IADL Task Needs from the Assessment are identified and populated in the Service Plan Template as in this example. The PCS Need Frequency, Weekend Indicator and Assistance Level for each task are populated as well.



**Assessment**

Task Needs	Demonstrated Ability?	Check if Required	Assistance Level	Frequency (days/wk)	Need Fully Met (days/wk)	PCS Need Frequency (days/wk)	Weekend (Y/N)
1. Tub bath or shower	-- select --						
1.a. Upper body	-- select --						
1.b. Lower body	-- select --						
2. Tub/shower transfer/position	-- select --						
3. Bed bath	-- select --						
4. Sponge bath	Yes				2	5	No
5. Additional transfer, i.e., reposition in bed, change occupied bed	-- select --						
6. Shampoo/hair care	Yes				3	5	No
7. Skin care (includes wash face/hands, foot care)	-- select --						
8. Nail care	-- select --						
9. Mouth/oral/denture care	Yes	✓	1 - limited	7	2	5	No
10. Shave	-- select --						
<b>IADL Task Needs</b>							
1. Change linens	Phys Unable	✓	1 - total	7	2	5	No
2. Make bed	Phys Unable	✓	1 - limited	7	2	5	No
3. Tidy/clean bathroom	Phys Unable	✓	1 - limited	7	2	5	No
4. On-site laundry tasks	Phys Unable	✓	1 - limited	2	0	2	No

**Service Plan**

Task	Freq / Weekend?	Assistance Level	Shift	Day of Week	Check All
Bathing - Sponge Bath	5 days / N	1 - Limited	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>
Bathing - Shampoo / Hair Care	5 days / N	1 - Extensive	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>
Bathing - Skin Care (includes Face / Hands / Feet)	5 days / N	1 - Limited	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>
Bathing - Nail Care	5 days / N	1 - Limited	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>
Bathing - Mouth / Oral / Denture Care	5 days / N	Set Up/Supervisor	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>
<b>Bathing (IADL) - Change linens</b>	1 days / N	1 - Total	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>
<b>Bathing (IADL) - Make bed</b>	5 days / N	1 - Total	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>
<b>Bathing (IADL) - Tidy / Clean Bathroom</b>	1 days / N	1 - Total	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>
<b>Bathing (IADL) - On-site Laundry Tasks</b>	5 days / N	1 - Total	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>
<b>Dressing - Shoes/Clothing On</b>	5 days / N	1 - Limited	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>
<b>Dressing - Shoes/Clothing Off</b>	5 days / N	1 - Limited	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>
<b>Dressing - Fastening</b>	5 days / N	1 - Limited	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>
<b>Dressing (IADL) - Hang / Retrieve Clothing</b>	5 days / N	1 - Total	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>
<b>Mobility - Ambulation room to room</b>	5 days / N	1 - Limited	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su	<input type="checkbox"/>

**Shift and Days of the Week to be selected**

- Only tasks with a need frequency of **one day or more** are shown
- Each task should have **at least one day** checked.
- Users **do not** have the ability to add tasks to this list.
- Only the days of the week and the shift need to be checked to complete the PCS Tasks section. Selecting the "Check All" box will cause each day of the week to be selected. (Tip – to select Monday through Friday, it's easier to select the "Check All" box and then unselect Saturday and Sunday)
- If a day of the week is selected without any hours defined for that day in the Service Schedule section an error message will be received. (Warning: You do not have a time entry for all of the days within the shift selected)
- The number of checked days cannot exceed the need frequency.

- At least half of the days indicated by the need frequency must be selected. If more than half are selected but not the full amount of days then a warning message will be displayed. The plan can be completed without the full amount of days by confirming the warning message.

## Special Assistance Tasks

Just as ADLs/IADLs are extracted from the Assessment, Special Assistance Tasks are as well. The example below shows O2 Therapy in the Assessment and then how it appears in the Service Plan.

Special Assistance Tasks		Check if Required	Assistance Level	Frequency (days/wk)	Need Fully Met (days/wk)	PCS Need Frequency (days/wk)	Weekend (Y/N)
<b>Assessment</b>							
1.	Break up and remove fecal impaction						
2.	IV fluid assistive activities						
3.	O2 therapy	✓	1 - limited	7	2	5	No
4.	Ostomy care/irrigation						
5.	Sterile dressing change (wound over 48 hours old)						
6.	Suctioning, nasopharyngeal						
7.	Suctioning, oropharyngeal						
8.	Tracheostomy care						

Special Assistance Tasks					Service Plan						
Need/Task	Freq / Weekend?	Assistance Level	Shift	Day of Week			Check All				
O2 therapy	5 days / N	1 - Limited	1	<input type="checkbox"/> M	<input type="checkbox"/> T	<input type="checkbox"/> W	<input type="checkbox"/> Th	<input type="checkbox"/> F	<input type="checkbox"/> Sa	<input type="checkbox"/> Su	<input type="checkbox"/>

## Delegated Medical Monitoring Tasks

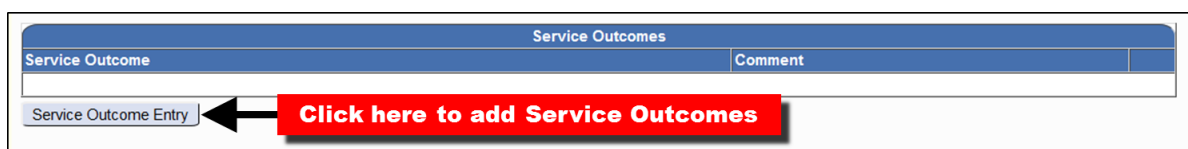
The same process applies to the Delegated Medical Monitoring Tasks.

Delegated Medical Monitoring Tasks		Check if Required	Assistance Level	Frequency (days/wk)	Need Fully Met (days/wk)	PCS Need Frequency (days/wk)	Weekend (Y/N)
<b>Assessment</b>							
1.	BP monitoring	✓	1 - limited	7	2	5	No
2.	Blood glucose monitoring						
3.	Medication self-administration reminders						

Delegated Medical Monitoring Tasks						Service Plan
Need/Task	Freq / Weekend?	Assistance Level	Shift	Day of Week		Check All
BP Monitoring	5 days / N	1 - Limited	1	<input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> Th <input type="checkbox"/> F <input type="checkbox"/> Sa <input type="checkbox"/> Su		<input type="checkbox"/>

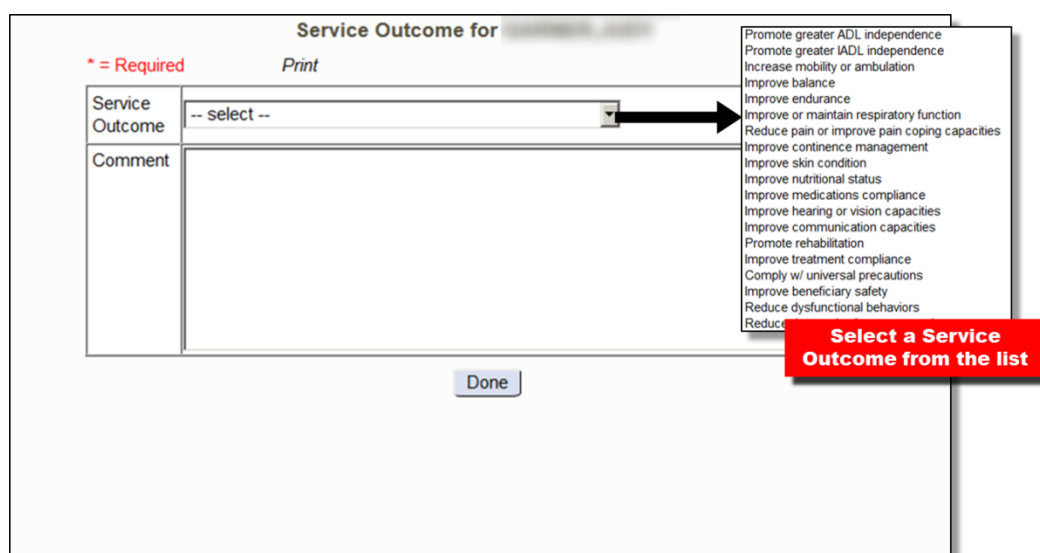
## Service Outcomes

Service Outcomes are an optional feature that describes what will be accomplished by PCS services, relative to the beneficiary's functioning capacity. More than one outcome can be selected for each plan. It's highly recommended to use this feature and to select several applicable outcomes.



The Service Outcome pop up screen will then be displayed.

- Select a Service Outcome from the drop down list.
- Use the Comment section to describe the specifics of the PCS outcome. (Example – if “Increase mobility or ambulation” is selected as an outcome – then detail how this increased mobility will be accomplished)



Below is the full list of Service Outcomes for reference.


Promote greater ADL independence	Reduce beneficiary isolation
Promote greater IADL independence	Improve beneficiary/caregiver self-management
Increase mobility or ambulation	Improve caregiver safety
Improve balance	Enhance caregiver knowledge and skills
Improve endurance	Enhance caregiver availability
Improve or maintain respiratory function	Reduce caregiver isolation
Reduce pain or improve pain coping capacities	Reduce the risk of caregiver burnout
Improve continence management	Reduce caregiver fears and anxieties
Improve skin condition	Increase coping skills associated with death
Improve nutritional status	Improve service coordination and collaboration
Improve medications compliance	Facilitate transitions
Improve hearing or vision capacities	Enhance beneficiary status monitoring
Improve communication capacities	Improve home environment
Promote rehabilitation	Improve community services access (transportation)
Improve treatment compliance	Reduce adverse events/crises

Comply w/ universal precautions	Reduce unplanned hospitalizations
Improve beneficiary safety	Reduce ER visits
Reduce dysfunctional behaviors	Enhance use of medical home/physician oversight
Reduce depression/improve mood	Increase coping skills related to disability
Reduce fears and anxieties for the beneficiary	Improve finances / provide basic resources



## Assigned Aide/History

One or more aides can be assigned to a beneficiary. Aide assignment is not mandatory, but highly recommended. To assign an Aide, click on the “Assigned Aide Entry” button.


Assigned Aide/History			
Assigned Aide	Qualifications	Effective Date	Reason
<div>Assigned Aide Entry</div> <div>  <div>Click here to assign an Aide</div> </div>			

A pop up window will appear.

Assigned Aide for XXXXXXXXXXXX

\* = Required

Print

Assigned Aide: *	-- select --	<div> Select an Aide from the drop down list, then complete the other fields and finally click on the “Done” button </div>
Qualifications		
Effective Date *	<input type="text"/> 	
Reason:	<div></div>	

Done

- Select an Aide from the drop down list. If the Aide desired is not listed, a supervisor must add the Aide in the QiRePort Set Up section ([See the details at the end of this document on adding Aides](#)).
- Complete the rest of the fields and then click on the “Done” button.

## Aide Instructions

This field is used to specify instructions for the Aide to follow when providing care for this specific beneficiary. Beneficiary likes/dislikes and other preferences can be entered here to help guide the Aide. Information entered in the Aide Instructions field will appear on the printed aide task schedule near the bottom.


## Narrative

This field should be used to present a summary description of the beneficiary and the care that will be provided to meet the beneficiary’s needs.

## Saving the Service Plan/Show Errors

The Service Plan can be saved at any time during the creation process to ensure the details are not lost if the user “times out” or loses their internet connection. Mark the Service Plan as incomplete (select “No” for the “Is Service Plan Complete?” question and then click on the “Save” button. It’s always a good idea to save your service plan often to ensure updates and changes are not lost.

When the Service Plan is finished, mark it as complete (select “Yes” for the “Is Service Plan Complete?” and then click on the “Save” button. QiRePort will then validate the Service Plan and if any errors have been discovered then either a warning message or a validation message will be displayed. *See the section on Warning Messages and Validation Messages below for more details.*

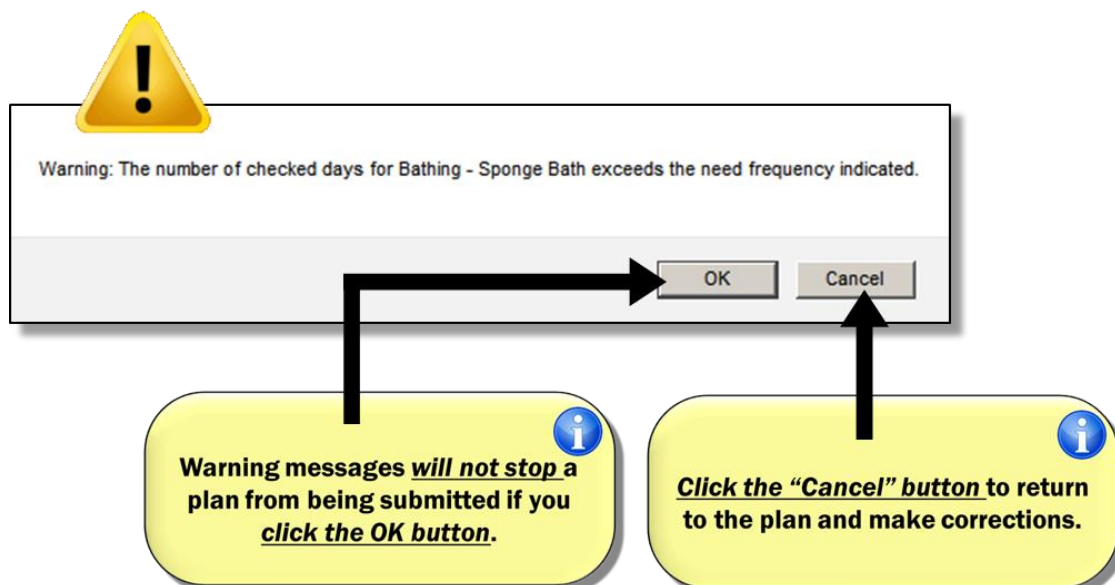
<b>Is Service Plan Complete?</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Date Completed</b> <input type="text"/> 
<input type="button" value="Save"/> <input type="button" value="Show Errors"/>	

- The “Show Errors” button can be clicked at any time to display errors in the Service Plan. A red bell (🔔) will be displayed next to any areas that have been identified with a problem.
- The “Date Completed” field will be populated by QiRePort when the Service Plan is complete and there are no validation error messages.

## Warning Messages

Warning messages are displayed when there are discrepancies between the Service Schedule and the PCS Tasks sections or between the need frequency and the number of days checked. Users have the choice to continue on by clicking the “OK” button or to return to the plan and make changes by clicking on the “Cancel” button.

If you continue on and save the service plan and later discover a change is required, a [Service Plan Revision](#) is possible.

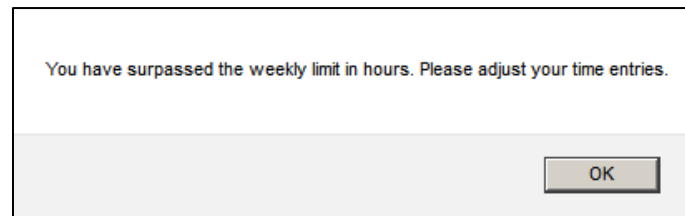


The following warning messages will appear when saving a Service Plan.

Warning Message	Description/Comments
<b>Warning: You do not have a time entry for all of the days within the shift selected for [ADL/IADL/Special Assist/DMM Task]</b>	<i>The user must have a From/To time entry for each of the days for the required frequency. (e.g., 7 day frequency must have From/To time for 7 days between all shifts)</i>
<b>Warning: The number of checked days for [ADL/IADL/Special Assist/DMM Task] exceeds the need frequency indicated.</b>	<i>The user gets this warning if they select more days than the required frequency listed, but they will be allowed to complete the service plan if they confirm this warning.</i>
<b>Warning: You have selected less days than the need frequency for [ADL/IADL/Special Assist/DMM Task]</b>	<i>As noted above, the user gets this warning if they select fewer days than the required frequency listed, but they will be allowed to complete the service plan if they confirm this warning.</i>

## Validation Messages

Validation messages will appear when trying to save a completed Service Plan and QiRePort detects a validation error. Validation errors do not give the user the option to continue on with Service Plan as it is but must be corrected. Below is an example of a validation message:




The following Validation Messages will appear when trying to save a completed Service Plan.

Validation Message	Description/Comments
<b>You cannot enter a time in only 1 of the 'from' and 'to' fields.</b>	<i>The user must enter both the From/To time for each day of the week that is entered for the appropriate shift. If a time is entered for From or To ONLY, this message will show. It will only show if the user is trying to mark the Service Plan Complete.</i>
<b>You have surpassed the weekly limit in hours. Please adjust your time entries.</b>	<i>The user must enter the correct number of approved weekly hours in order to complete the Service Plan.</i>
<b>Complete date cannot occur in the future. Please change and resubmit.</b>	<i>The date that the service plan is completed must be the current date or a prior date, not a date in the future.</i>

## Revising or Printing a Service Plan

To revise or print a Service Plan, first identify the beneficiary and the plan to revise or print. (If the service plan has already been selected or is currently be edited – go directly to step 6 below.)

1. Click on the “Plan” tab
2. In the search fields enter either the beneficiary’s name or MID and click the “Search” button
3. Select the beneficiary’s name from the search results and the Beneficiary Summary screen will be displayed.
4. On the left index, click on Beneficiary Service Plan list
5. Select a Service Plan by clicking on the date link (the Weekly Service Plan will be displayed.)
6. Click on the “Revise Service Plan” link to revise the plan or the “Service Plan Print” link on the left index to print a copy of the Service Plan.



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**Plan**

**Beneficiary Info**

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[Person Centered Goals](#)

**Plan Links**

[Current Service Plan](#)

[Service Plan History](#)

[Aide Task Sheet](#)


[Service Plan Print](#)

Weekly Service Plan for [Beneficiary Name]

\* = Required

[Revise Service Plan](#)

**Click here to revise a Service Plan**

Plan Start Date \*   Projected End Date  Monthly Hours

Service Schedule Summary										
Day	Shift 1 - From / To		Shift 2 - From / To		Shift 3 - From / To		Daily Hrs	Daily Units		
Monday	10:00 AM	1:00 PM					3.00	12.00		
Tuesday	10:00 AM	1:00 PM					3.00	12.00		
Wednesday		1:00 PM					3.00	12.00		
Thursday		1:00 PM					3.00	12.00		
Friday	10:00 AM	12:45 PM					2.75	11.00		
Saturday							0	0.00		
Sunday							0	0.00		
Weekly Hours		<input type="text" value="14.75"/>	Units	<input type="text" value="59.00"/>						
Weekly Hours Limit		<input type="text" value="14.75"/>	Units	<input type="text" value="59"/>						
Over(+)/Under(-) Limit		<input type="text" value="0"/>	Units	<input type="text" value="0"/>						

[\[ View Assessment \]](#)

**PCS Tasks**  
 Bathing - ADL Tasks

**Click here to print a Service Plan**

## The Aide Weekly Task Schedule

The Aide Weekly Task Schedule lists all of the tasks to be performed daily by an aide(s). Tasks are to be checked off when completed, any plan deviations noted, and the sheet should be signed by the Aide and the Beneficiary when complete.

### Aide Weekly Task Schedule

Beneficiary: _____		MID: _____		Phone: _____	
Address: _____		City: _____		Emerg. Contact: _____	
Shift #: 1		Begin Date: 03/02/2015		Employee: Example, Aide	
Emerg. Phone: _____		Empl ID: _____			

Scheduled Days	Monday 03/02/2015		Tuesday 03/03/2015		Wednesday 03/04/2015		Thursday 03/05/2015		Friday 03/06/2015		Saturday	Sunday
Planned Start / Stop	10:00 AM	1:00 PM	10:00 AM	1:00 PM	10:00 AM	1:00 PM	10:00 AM	1:00 PM	10:00 AM	12:45 PM		
Actual Start / Stop	9:55 AM	1:10 PM	9:50 AM	1:00 PM								

**Enter the actual start and stop times here each day**

**\*\* Enter a check mark to show completed tasks in the Status column or use the following codes: R=Refused, U=Unable to perform, or C=Completed**

	Required	Status	Required	Status	Required	Status	Required	Status	Required	Status		
<b>Bathing / Personal Hygiene</b>												
Sponge Bath	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
Shampoo / Hair Care	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
Skin Care (includes Face / Hands / Feet)	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
Nail Care	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
Mouth / Oral / Denture Care	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
Change linens	Yes	✓	No		No		No		No		No	No
Make bed	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
Tidy / Clean Bathroom	No		Yes	C	No		No		No		No	No
On-site Laundry Tasks	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
<b>Dressing</b>												
Shoes/Clothing On	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
Shoes/Clothing Off	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
Fastening	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
Hang / Retrieve Clothing	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
<b>Mobility</b>												

**Enter a check mark to show completed tasks or use the following codes:**

**R = Refused**  
**U = Unable to perform**  
**C = Completed**

<b>IADL Tasks</b>	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
Clean BSC / Urinal / Bed pan / Toileting Area	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
<b>Eating</b>												
<b>ADL Tasks</b>												
Clean Meal Service Area	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
Clean Utensils/Dishes, Empty Trash	Yes		Yes	C	Yes		Yes		Yes		No	No
Open Packages	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
Heat / Assemble Food	Yes	✓	Yes	C	Yes		Yes		Yes		No	No
<b>Special Assistance Tasks</b>												
O2 therapy	Yes	✓	Yes	C	Yes		Yes				No	
<b>Medical Monitoring Tasks</b>												
BP Monitoring	Yes	✓	Yes	C	Yes		Yes				No	
Initial if ALL Tasks Completed for Day						JA						

**Initial here if all tasks for the day were completed**

<b>Aide Instructions</b>	The Beneficiary does not hear well, so knock loudly upon arrival. The Beneficiary also owns a cat that is very friendly.		
<b>Plan Deviations</b>	3/3/2015 - Unable to complete laundry, washing machine being repaired.		
<b>Employee Attestation</b>	I certify that I provided the tasks recorded for each day of the beneficiary's aide schedule	Jane Aide	Date: 11/9/2015
<b>Beneficiary Attestation</b>	I received the assistance documented by my aide for the days listed on this form	Ann Example	Date: 1/9/2015

**Note any plan deviations here**

## Printing the Aide Weekly Task Schedule

There are different methods to producing printed Aide Task Schedules in QiRePort. The most effective method will depend upon an organizations internal working processes and procedures. How this is accomplished is up to each organization.

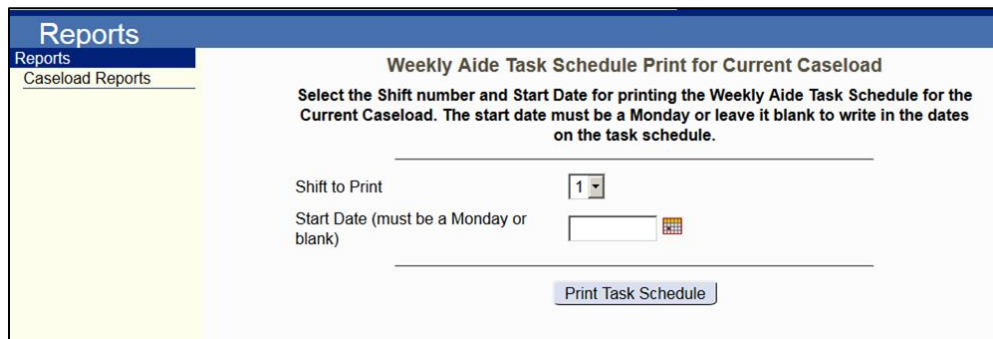
- QiRePort approached printing task sheets with the concept that Task Sheets would be printed weekly, possibly by an organization's administrator or manager and distributed to the appropriate aide(s).
- Aide Task Sheets can be printed with or without dates populated. Some organizations may find it easier to print several task sheets with blank dates to be filled in manually, so this option is available.

Aide Task Sheets printing options:

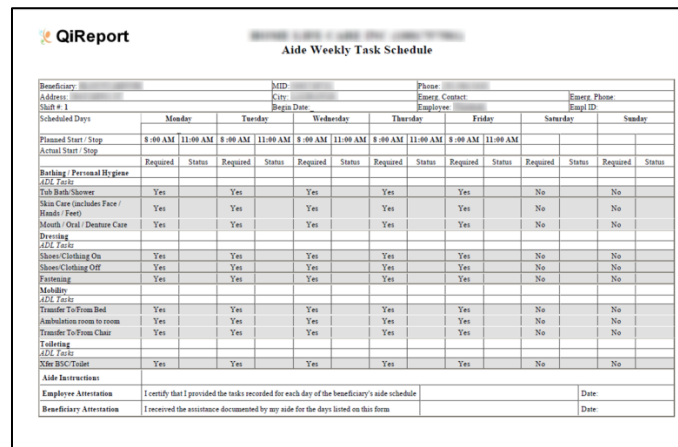
- Print all beneficiary Task Sheets for all Aides at once
- Print a single Aide's task sheets for all assigned beneficiaries at once
- Print a single Task Sheet for a single beneficiary

### To print all beneficiary Task Sheets for all Aides at once:

1. Go to the "Reports" tab
2. Select the "Aide Task Sheets - Current Caseload" link
3. The "Weekly Aide Task Schedule Print for Current Caseload" screen will be displayed as below:



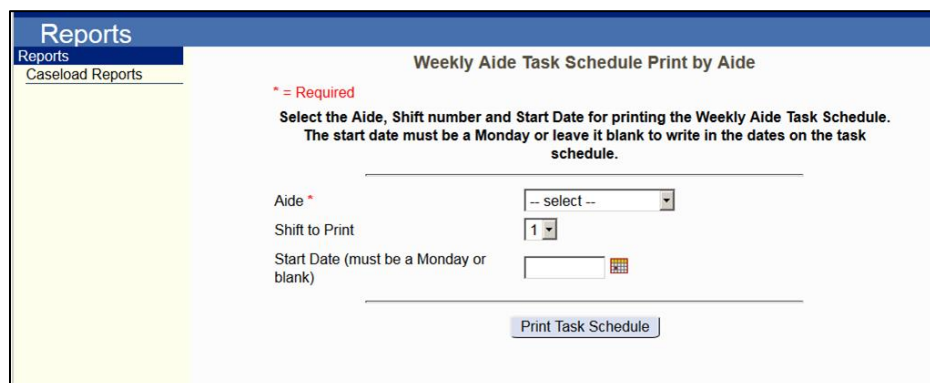
4. Select a shift
5. Enter a start date or leave this field blank to print Task Sheets without dates
6. Click the "Print Task Schedule" button
7. A pop up window will appear with all the Aide Task sheets in PDF form. (This may take a few moments)



8. Now the Task Sheets can be printed all at once.

### To print a single Aide's task sheets for all assigned beneficiaries at once:

1. Go to the "Reports" tab
2. Select the "Aide Task Sheets - By Aide" link
3. The "Weekly Aide Task Schedule Print by Aide" screen will be displayed as below:



4. Select an Aide from the drop down list
5. Select a shift
6. Enter a start date or leave this field blank to print Task Sheets without dates
7. Click the "Print Task Schedule" button
8. A pop up window will appear with the Aide's Task sheets for all their assigned beneficiaries in PDF form. (This may take a few moments)
9. Now the Task Sheets can be printed all at once.


### To print a single Task Sheet for a single beneficiary

7. Click on the "Plan" tab
8. In the search fields enter either the beneficiary's name or MID and click the "Search" button
9. Select the beneficiary's name from the search results and the Beneficiary Summary screen will be displayed.
10. On the left index, click on Beneficiary Service Plan list
11. Select a Service Plan by clicking on the date link (the Weekly Service Plan will be displayed.)
12. Click on the "Aide Task Sheet" on the left index and the "Weekly Aide Task Schedule Print" popup screen will appear

**Weekly Aide Task Schedule Print**

**Select the Shift number and Start Date for printing the Weekly Aide Task Schedule. The start date must be a Monday or leave it blank to write in the dates on the task schedule.**

Shift to Print

Start Date (must be a Monday or blank)  

---

[Print Task Schedule](#)

13. Now select a shift to print and a start date (leave blank for blank dates) and then click on the “Print Task Schedule” button.
14. Now a pop up window with the Task Sheet in PDF format will appear and can be printed



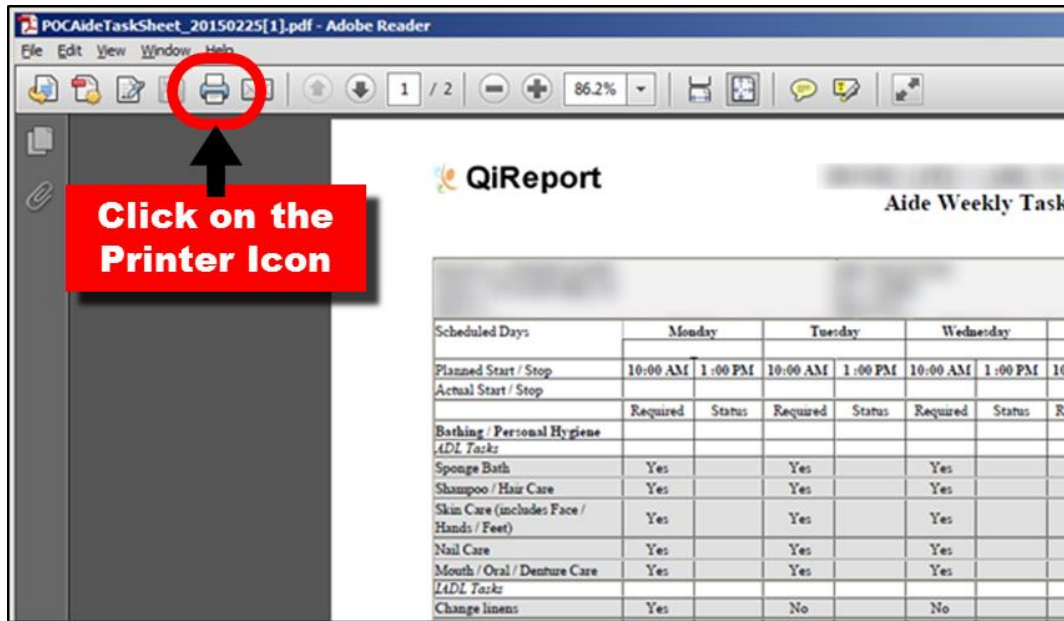
## Printing PDF Documents

There are several possible procedures for printing PDF documents that depend upon the web browser being used (*Internet Explorer, Mozilla Firefox, or Google Chrome*), and how the browser is configured. If you currently print Assessments from QiRePort then the procedure is the same.

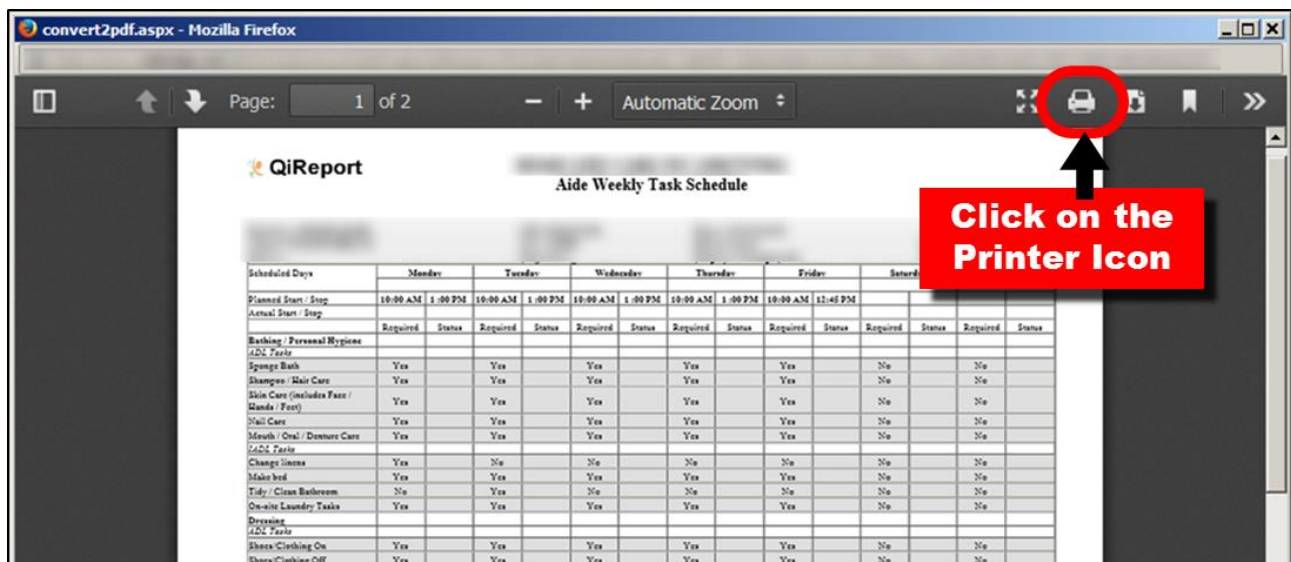
Some browsers have “add on” utilities to handle PDF files while others will display the file directly in Adobe. (*Tip – look for the printer icon.*)

Here are some examples:

### Adobe

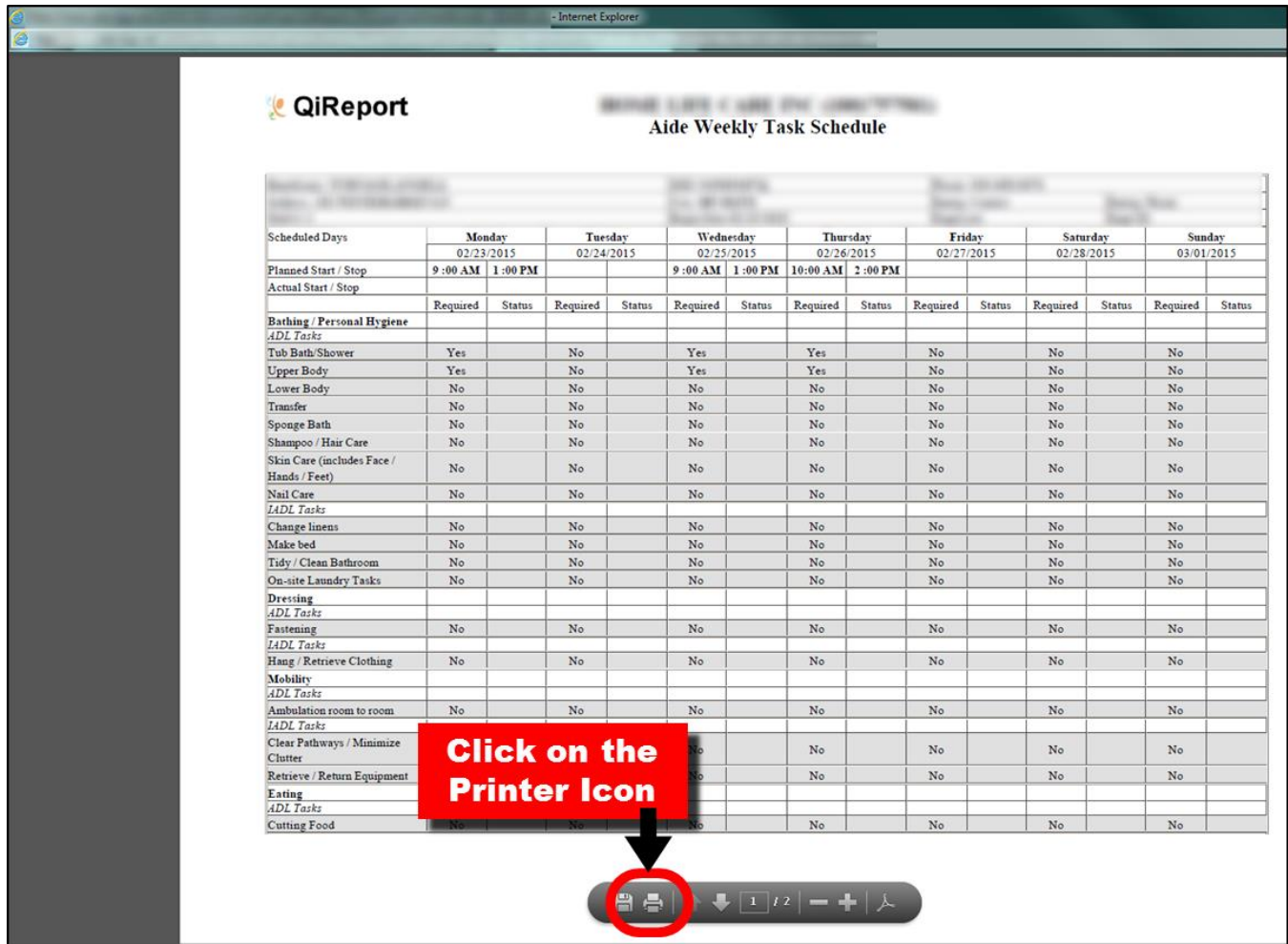


### Mozilla Firefox



## Internet Explorer

Internet Explorer has a floating toolbar at the bottom of the screen. Roll your mouse to the bottom of the screen and the toolbar should appear as in the example below.



**QiReport**

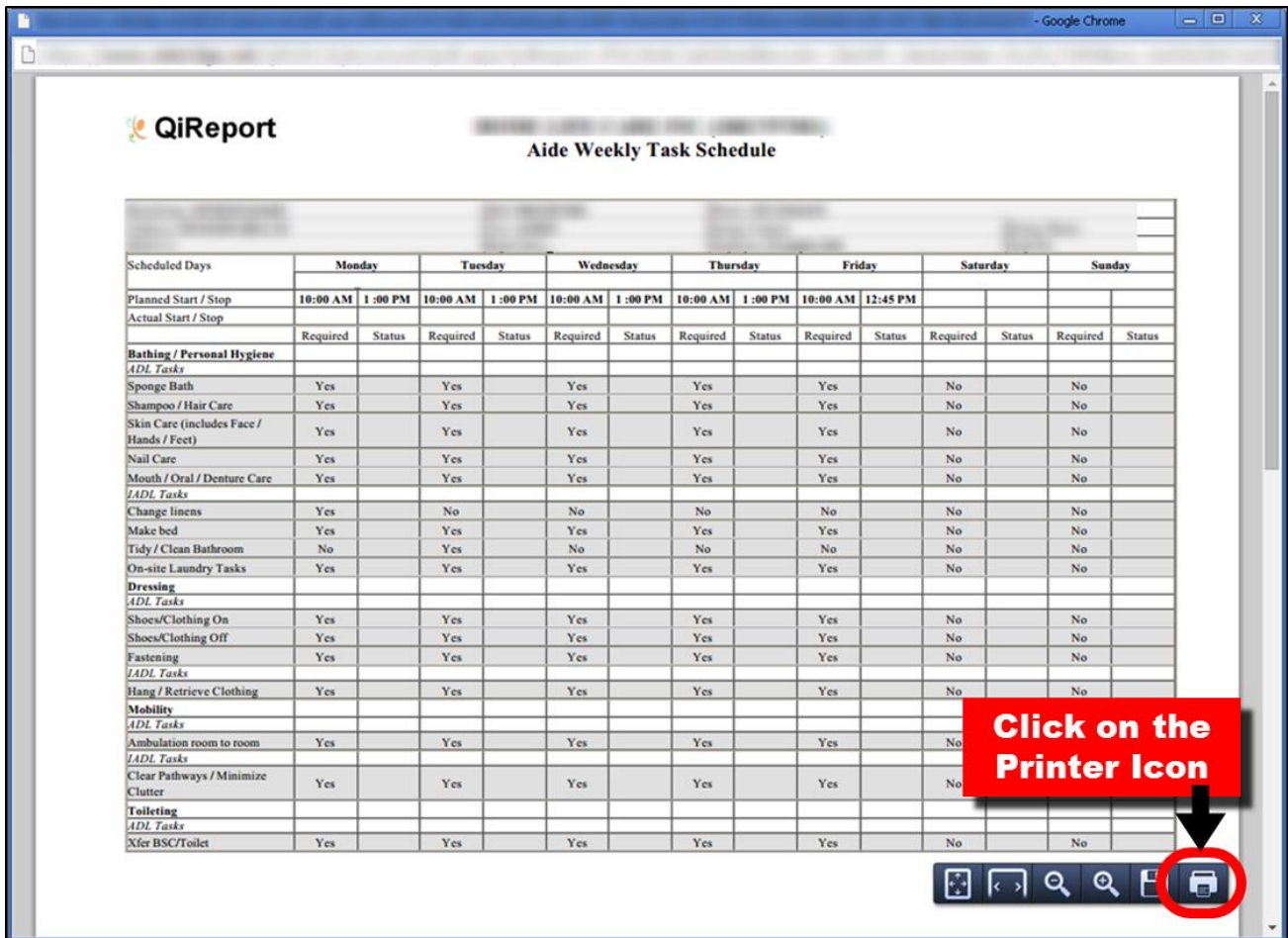
**Aide Weekly Task Schedule**

Scheduled Days	Monday 02/23/2015		Tuesday 02/24/2015		Wednesday 02/25/2015		Thursday 02/26/2015		Friday 02/27/2015		Saturday 02/28/2015		Sunday 03/01/2015	
Planned Start / Stop	9:00 AM	1:00 PM			9:00 AM	1:00 PM	10:00 AM	2:00 PM						
Actual Start / Stop														
	Required	Status	Required	Status	Required	Status	Required	Status	Required	Status	Required	Status	Required	Status
<b>Bathing / Personal Hygiene</b>														
ADL Tasks														
Tub Bath/Shower	Yes		No		Yes		Yes		No		No		No	
Upper Body	Yes		No		Yes		Yes		No		No		No	
Lower Body	No		No		No		No		No		No		No	
Transfer	No		No		No		No		No		No		No	
Sponge Bath	No		No		No		No		No		No		No	
Shampoo / Hair Care	No		No		No		No		No		No		No	
Skin Care (includes Face / Hands / Feet)	No		No		No		No		No		No		No	
Nail Care	No		No		No		No		No		No		No	
ADL Tasks														
Change linens	No		No		No		No		No		No		No	
Make bed	No		No		No		No		No		No		No	
Tidy / Clean Bathroom	No		No		No		No		No		No		No	
On-site Laundry Tasks	No		No		No		No		No		No		No	
<b>Dressing</b>														
ADL Tasks														
Fastening	No		No		No		No		No		No		No	
ADL Tasks														
Hang / Retrieve Clothing	No		No		No		No		No		No		No	
<b>Mobility</b>														
ADL Tasks														
Ambulation room to room	No		No		No		No		No		No		No	
ADL Tasks														
Clear Pathways / Minimize Clutter	No		No		No		No		No		No		No	
Retrieve / Return Equipment	No		No		No		No		No		No		No	
<b>Eating</b>														
ADL Tasks														
Cutting Food	No		No		No		No		No		No		No	

**Click on the Printer Icon**

## Google Chrome

Google Chrome also has a floating toolbar at the bottom of the screen. Roll your mouse to the bottom of the screen and the toolbar should appear as in the example below.



**QiRePort**

**Aide Weekly Task Schedule**

Scheduled Days	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday	
Planned Start / Stop	10:00 AM	1:00 PM	10:00 AM	1:00 PM	10:00 AM	1:00 PM	10:00 AM	1:00 PM	10:00 AM	12:45 PM				
Actual Start / Stop														
	Required	Status	Required	Status	Required	Status	Required	Status	Required	Status	Required	Status	Required	Status
<b>Bathing / Personal Hygiene</b>														
<i>ADL Tasks</i>														
Sponge Bath	Yes		Yes		Yes		Yes		Yes		No		No	
Shampoo / Hair Care	Yes		Yes		Yes		Yes		Yes		No		No	
Skin Care (includes Face / Hands / Feet)	Yes		Yes		Yes		Yes		Yes		No		No	
Nail Care	Yes		Yes		Yes		Yes		Yes		No		No	
Mouth / Oral / Denture Care	Yes		Yes		Yes		Yes		Yes		No		No	
<i>IADL Tasks</i>														
Change linens	Yes		No		No		No		No		No		No	
Make bed	Yes		Yes		Yes		Yes		Yes		No		No	
Tidy / Clean Bathroom	No		Yes		No		No		No		No		No	
On-site Laundry Tasks	Yes		Yes		Yes		Yes		Yes		No		No	
<b>Dressing</b>														
<i>ADL Tasks</i>														
Shoes/Clothing On	Yes		Yes		Yes		Yes		Yes		No		No	
Shoes/Clothing Off	Yes		Yes		Yes		Yes		Yes		No		No	
Fastening	Yes		Yes		Yes		Yes		Yes		No		No	
<i>IADL Tasks</i>														
Hang / Retrieve Clothing	Yes		Yes		Yes		Yes		Yes		No		No	
<b>Mobility</b>														
<i>ADL Tasks</i>														
Ambulation room to room	Yes		Yes		Yes		Yes		Yes		No		No	
<i>IADL Tasks</i>														
Clear Pathways / Minimize Clutter	Yes		Yes		Yes		Yes		Yes		No		No	
<b>Toileting</b>														
<i>ADL Tasks</i>														
Xfer BSC/Toilet	Yes		Yes		Yes		Yes		Yes		No		No	

**Click on the Printer Icon**

## Creating an Aide Profile

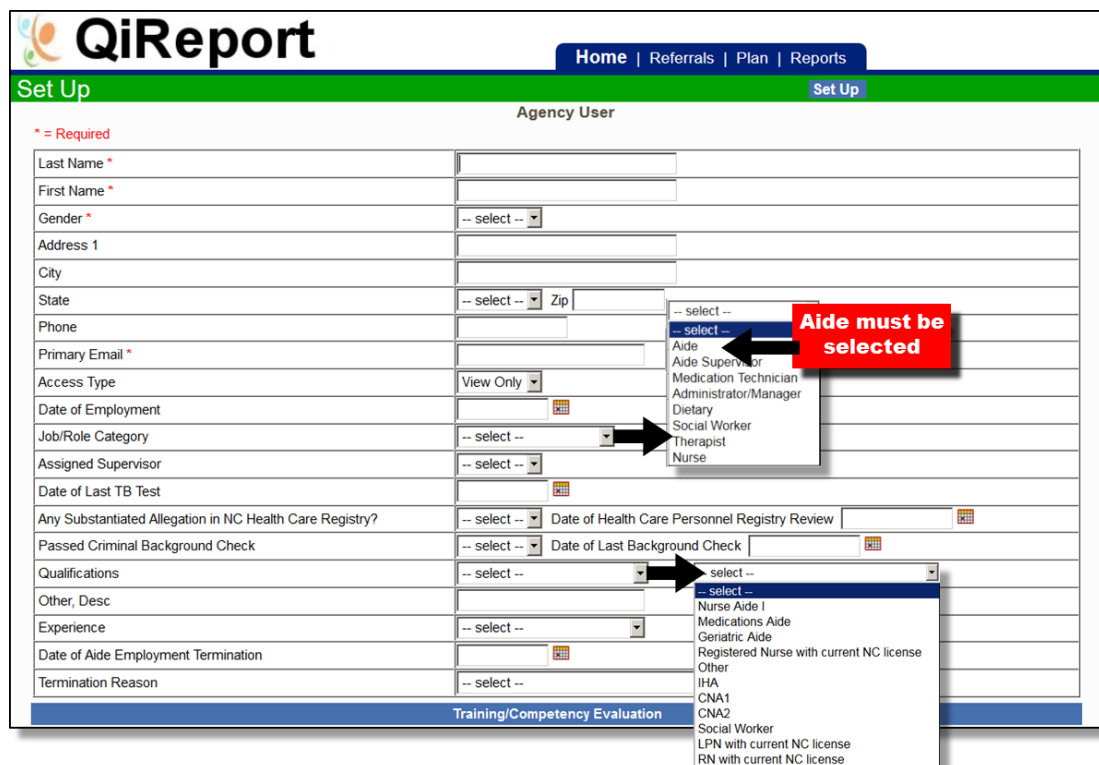
To assign an aide in the Service Plan, the aide requires an aide profile in QiRePort. The aide profile contains specific information about each aide including basic contact information, job roles, qualifications, background checks, training and competencies, and relevant documents.

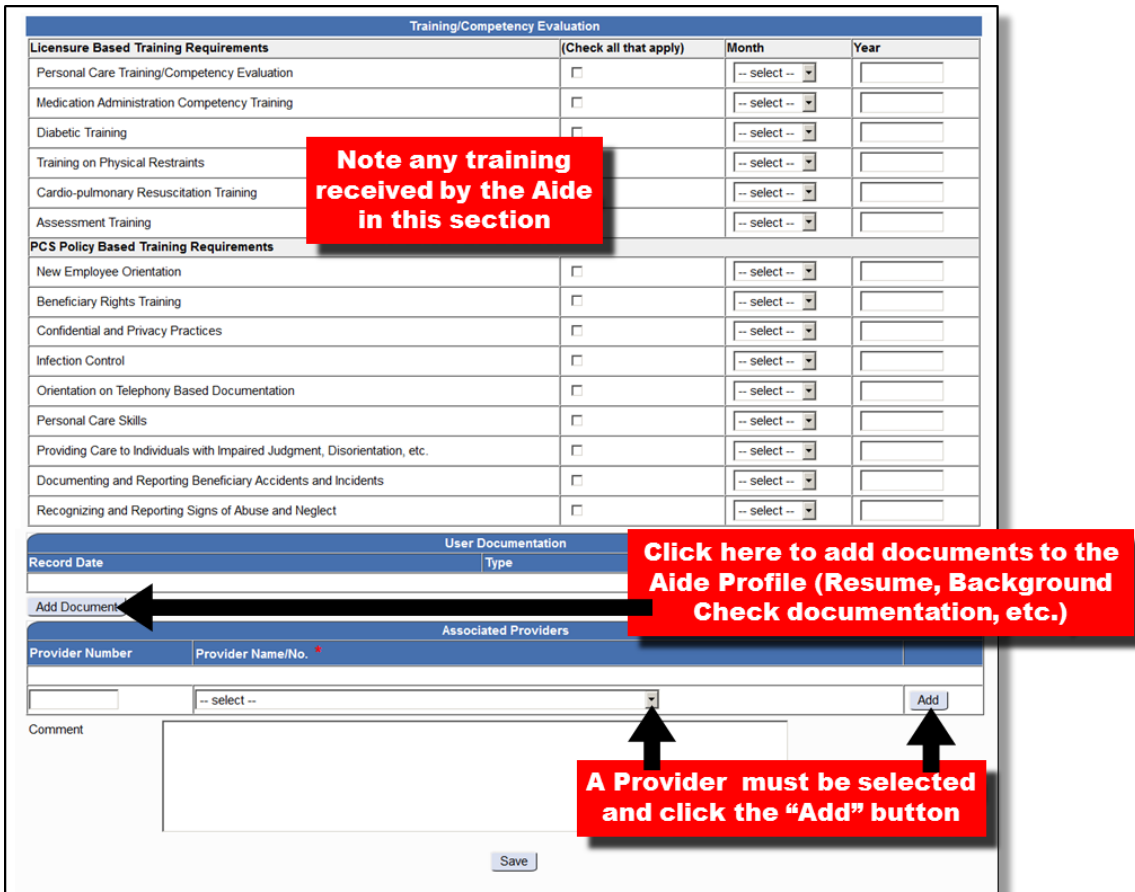
To add an Aide to the drop down list, you must be designated as a supervisor. From the QiRePort Home Page, click on the “Set Up” sub tab. Then click on the “Agency Users” link on the left index, if this link does not appear, contact Support at (888) 705-0970.



Then click the “Add” button at the bottom of the list of Agency Users and a blank provider user screen will be displayed.

1. Complete all the required fields (Last Name, First Name, etc.)
2. Select “Aide” from the Job/Role Category drop down list.
3. On the “Qualifications” drop down list, select a qualification.
4. In the “Training/Competency Evaluation” section, note any training received by the Aide.
5. The “User Documentation” section allows users to add specific documentation about the Aide (such as Resumes, Job Descriptions, Evaluations, etc.) to their profile for reference. [See the section at the bottom on how to add documents.](#)
6. Select a provider from the drop down list and click “Add”.
7. Finally click the “Save” button at the bottom of the page.





**Training/Competency Evaluation**

Licensure Based Training Requirements	(Check all that apply)	Month	Year
Personal Care Training/Competency Evaluation	<input type="checkbox"/>	-- select --	
Medication Administration Competency Training	<input type="checkbox"/>	-- select --	
Diabetic Training	<input type="checkbox"/>	-- select --	
Training on Physical Restraints	<input type="checkbox"/>	-- select --	
Cardio-pulmonary Resuscitation Training	<input type="checkbox"/>	-- select --	
Assessment Training	<input type="checkbox"/>	-- select --	

**Note any training received by the Aide in this section**

PCS Policy Based Training Requirements	(Check all that apply)	Month	Year
New Employee Orientation	<input type="checkbox"/>	-- select --	
Beneficiary Rights Training	<input type="checkbox"/>	-- select --	
Confidential and Privacy Practices	<input type="checkbox"/>	-- select --	
Infection Control	<input type="checkbox"/>	-- select --	
Orientation on Telephony Based Documentation	<input type="checkbox"/>	-- select --	
Personal Care Skills	<input type="checkbox"/>	-- select --	
Providing Care to Individuals with Impaired Judgment, Disorientation, etc.	<input type="checkbox"/>	-- select --	
Documenting and Reporting Beneficiary Accidents and Incidents	<input type="checkbox"/>	-- select --	
Recognizing and Reporting Signs of Abuse and Neglect	<input type="checkbox"/>	-- select --	

**User Documentation**

Record Date:  Type:

Add Document

**Associated Providers**

Provider Number	Provider Name/No. *
<input type="text"/>	-- select --

Comment:

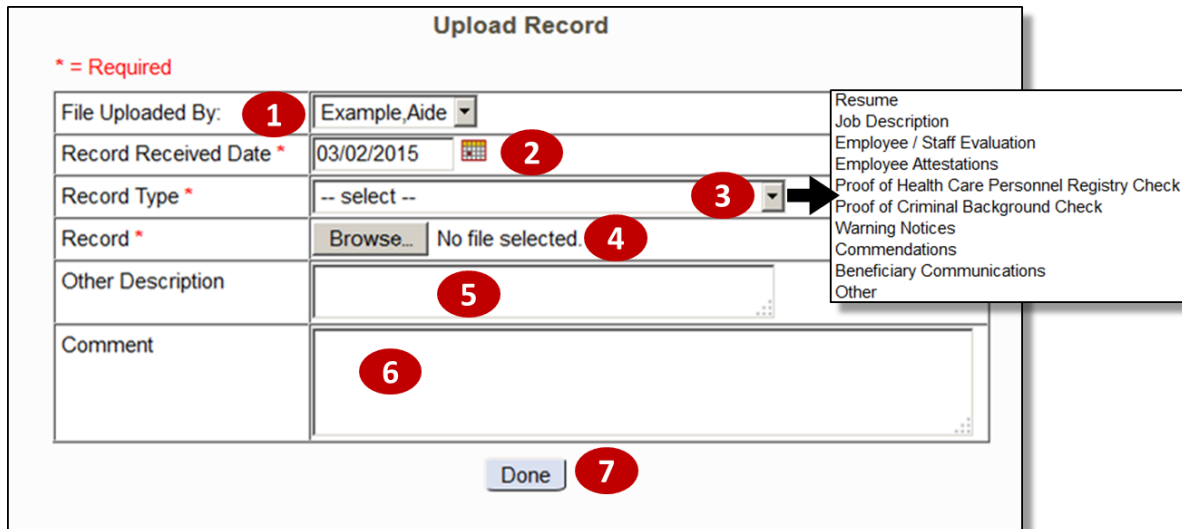
Save

**Click here to add documents to the Aide Profile (Resume, Background Check documentation, etc.)**

**A Provider must be selected and click the "Add" button**

## Adding User Documentation to the Aide Profile

When the "Add Document" button is clicked, the "Upload Record" popup screen is displayed, allowing users to add several types of documents to an aide's profile.



**Upload Record**

\* = Required

File Uploaded By: ① Example, Aide

Record Received Date \* ② 03/02/2015

Record Type \* ③ -- select --

Record \* ④ Browse... No file selected

Other Description ⑤

Comment ⑥

Done ⑦

Resume  
Job Description  
Employee / Staff Evaluation  
Employee Attestations  
Proof of Health Care Personnel Registry Check  
Proof of Criminal Background Check  
Warning Notices  
Commendations  
Beneficiary Communications  
Other

	Field	Instructions
①	File Uploaded By:	The name of the person who added the document. (populated by QiRePort automatically)
②	Record Received Date	The date the file was added. (Also populated by QiRePort)

③	Record Type	<p>Select a record type from the drop down list:</p> <ul style="list-style-type: none"> <li>• Resume</li> <li>• Job Description</li> <li>• Employee / Staff Evaluation</li> <li>• Employee Attestations</li> <li>• Proof of Health Care Personnel Registry Check</li> <li>• Proof of Criminal Background Check</li> <li>• Warning Notices</li> <li>• Commendations</li> <li>• Beneficiary Communications</li> <li>• Other</li> </ul>
④	The record name and the "Browse" button	Click the "Browse" button to locate the file on your local computer using your systems file manager. After the file is added, the file name will be displayed here.
⑤	Other Description	If the Record Type selected is "Other", then a short description of the document is required here.
⑥	Comments	Any comments relevant to the document can be entered here.
⑦	The "Save" button	Click the "Save" button to add the document to QiRePort. If the "Save" button is not clicked, then the document will not be added.