

How to Add Notes to Plan of Care

NEW POC FORMAT

(1/10/2022)

eXPRS Plan of Care (POC) has been updated to enhance the POC Notes features. Users can add notes to a POC at any time by using the POC notes field found on the Plan Overview tab.

There is a 2000-character limit to the notes field, including spaces.

For new POCs that are created by copying the previous POC, the notes from that previous POC will now show in a [Plan of Care Notes Archive](#) section, to maintain a history of information. This frees up the 2000-characters in the new POC to add new notes, as needed.

To add notes to a Plan of Care, CDDPs will need to be assigned one of the below roles to do this update Plan of Care work:

- CDDPs: **Local Authority POC Manager** or **POC Super User**
- Brokerages: **Brokerage POC Manager** or **POC Super User**
- State Kids Services: **State Kids Svcs POC Manager** or **POC Super User**

To Add Notes to a Plan of Care:

1. Log in to eXPRS. If users have more than one **Organization/Program Area** option, they will need to be logged in under the correct level for POC work, like shown here:

CDDPs choose the **Local Authority** option

Login

Password accepted. Choose your organization and/or program area for this session.

You are in the User Acceptance environment

Login Name:	<input type="text" value="userID"/>
Password:	<input type="password" value="••••••••"/>
Organization/Program Area:	<input type="text" value="County (Local Authority)"/> ▼

[Forgot your password?](#)

Brokerages choose the **Contractor** option

Login

Password accepted. Choose your organization and/or program area for this session.

You are in the **User Acceptance** environment

Login Name:

Password:

Organization/Program Area:

[Forgot your password?](#)

State Kids services choose the **State Kids (State)** option

Login

Password accepted. Choose your organization and/or program area for this session.

You are in the **User Acceptance** environment

Login Name:

Password:

Organization/Program Area:

- From the yellow, left-hand navigational menu, click on **Plan of Care** → **Plan of Care**. The new Plan of Care layout uses just one menu option.

Client ▶ **Home**

Provider ▶ **My Notifications**

Contracts ▶

Prior Authorization ▶ **Filtered By**

Plan Of Care ▶ **Plan Of Care**

Claims ▶ **Service Delivered** ▶

CM/PA TCM Billing ▶ **Travel Time** ▶

Liabilities ▶ **Reports** ▶

Reports ▶

Financial ▶

Maintenance ▶

Administration ▶

No matching notifications were found

- In the **Find Plan of Care** page you can search to find the POC that you wish to add notes to.

Easiest method to find an individual's POC is likely to search using their **PRIME** number. Additional search criteria can also be used, as needed.

With the search criteria entered, click **Find** to search POCs.

Find Plan of Care

Note: If criteria entered results in more than 20,000 rows, data returned will be truncated. You may need to narrow your search criteria to return a smaller dataset.

Plan ID:	<input type="text"/>
Client Prime:	xyz0000a
Service Element:	All <input type="text"/>
Plan Begin:	<input type="text"/> <input checked="" type="radio"/> Overlap <input type="radio"/> Contain <input type="radio"/> Exact
Plan End:	<input type="text"/> <input checked="" type="radio"/> Overlap <input type="radio"/> Contain <input type="radio"/> Exact
DHS Contract Num:	<input type="text"/>
Status:	<input type="text"/>
Max Displayed:	25 <input type="text"/>

- From the list of POCs returned, click on the **blue Plan ID** number for the POC that needs notes added to open it.

Find Plan of Care

Note: If criteria entered results in more than 20,000 rows, data returned will be truncated. You may need to narrow your search criteria to return a smaller dataset.

Plan ID:	<input type="text"/>
Client Prime:	xyz0000a
Service Element:	All <input type="text"/>
Plan Begin:	<input type="text"/> <input checked="" type="radio"/> Overlap <input type="radio"/> Contain <input type="radio"/> Exact
Plan End:	<input type="text"/> <input checked="" type="radio"/> Overlap <input type="radio"/> Contain <input type="radio"/> Exact
DHS Contract Num:	<input type="text"/>
Status:	<input type="text"/>
Max Displayed:	25 <input type="text"/>

Export options: CSV | Excel | PDF | RTF

Plan ID	Client Prime	Client Name	DHS Contract Num	Plan Begin	Plan End	Status
35***22	xyz0000a	CHRIS P BAYCON	1***5	12/13/2019	03/31/2020	Accepted
37***17	xyz0000a	CHRIS P BAYCON	1***5	04/01/2020	03/31/2021	Accepted

Plan of Cares found: 2 (displaying all rows)

5. In the view **Plan of Care** page, be sure you are on the **Plan Overview** tab.

The screenshot shows the 'Plan of Care' interface. At the top, it displays 'Plan of Care' in blue. Below this, there are two columns of information: 'Plan Id: 37*****7', 'Client Name: CHRIS P BAYCON', and 'Plan Status: Draft' on the left; and 'Plan Dates: 4/1/2020 - 3/31/2021' and 'Client Prime: xyz0000a' on the right. Below the information are three buttons: 'Edit', 'Copy', and 'Print Summary'. A red arrow points to the 'Plan Overview' tab in a row of tabs that includes 'Service Eligibility', 'Plan Overview', 'In Home Services', 'Residential', 'Supported Living', 'Community', 'Transportation', 'Ancillary', and 'Legacy'. Below the tabs is a section titled 'Monthly Assessed Attendant Care/Skills Training Hours' with a table:

Dates	Hour Limit
9/1/2020 - 8/31/2021	67.00

6. To add notes to a POC, click on **Edit** to open the POC for updating/edits.

This screenshot is similar to the previous one but with a different plan ID: 'Plan Id: 38*****4'. The 'Plan Overview' tab is still selected. A red arrow points to the 'Edit' button. Below the tabs, there is an 'Add Ons' section and a 'Plan of Care Notes' section with a large empty text area for input.

7. With the **Plan Overview** tab now open for edits, scroll to the bottom of the page to find the **Plan of Care Notes** section. You can then add any notes you wish to the POC. When finished, click **Add** to add those notes to the POC.

Attachments

Type: Individual Service Plan Assessment Report Other

Attach File: No file selected. File size must not exceed 4 MB

Plan of Care Notes

Add Notes: (0/1976)

1/10/2022 - CME Staff Name

Add any notes here that may be needed for this Plan of Care.

▶ **Plan of Care Notes Archive**

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
3/1/2021 - 2/28/2022	108.00

Add Ons

Plan of Care Notes

1/10/2022 - Staff Name: Add any notes here that may be needed for this Plan of Care.

▶ **Plan of Care Notes Archive**

8. When the POC is copied to make a new **draft** POC, any notes from the copied POC will be moved to the **Plan of Care Notes Archive** section. Simply expand that header to view any previous POC notes that were copied over.

Add Ons

Plan of Care Notes

▼ **Plan of Care Notes Archive**

1/10/2022 - Staff Name: Add any notes here that may be needed for this Plan of Care.