

MDS Alert

Care Planning: Bring Facilitation and Efficiency to Care Planning Meetings

With so many responsibilities already on your plate, don't let meetings overwhelm you any more than necessary.

Care planning meetings can be a relief gasket for stressed out families or residents who aren't thriving. Nurse assessment coordinators (NACs), along with just about anyone who works in a long-term facility, rarely have a spare moment while on the clock, and spending a lot of time in meetings can feel frustrating and unproductive.

Figure Out Whose Presence is Required

Look to your state's laws and your facility's rules to figure out who, exactly, is supposed to initiate or lead a care planning meeting and who needs to be there as a representative of a particular department or role.

Use these guidelines from the State Operations Manual Appendix PP for some guidance on who should be at a care planning meeting. This information is surveyors' guidance for citation F657 and concerns comprehensive care plans, but it's a great framework if you're reevaluating attendance requirements for all of your care planning meetings:

- (i) Developed within 7 days after completion of the comprehensive assessment.
- (ii) Prepared by an interdisciplinary team, that includes but is not limited to:
 - (A) The attending physician.
 - (B) A registered nurse with responsibility for the resident.
 - (C) A nurse aide with responsibility for the resident.
 - (D) A member of food and nutrition services staff.
 - (E) To the extent practicable, the participation of the resident and the resident's representative(s). An explanation must be included in a resident's medical record if the participation of the resident and their resident representative is determined not practicable for the development of the resident's care plan.
 - (F) Other appropriate staff or professionals in disciplines as determined by the resident's needs or as requested by the resident.
- (iii) Reviewed and revised by the interdisciplinary team after each assessment, including both the comprehensive and quarterly review assessments.

Beware: Surveyors may cite other Ftags beyond F657 concerning care planning meetings.

While this guidance doesn't list NACs explicitly as required attendees, many facilities assign NACs to attend or even lead care planning meetings - especially when the meetings are scheduled around assessment dates.

Care planning meetings are crucial to delivering care that is truly centered on each individual resident's needs and realities. They're a chance for the interdisciplinary team (IDT) to come together and provide a comprehensive and cohesive perspective on care, as well as an opportunity for the resident and even the resident's family to bring up concerns. When family attend care planning meetings, they may even provide additional context that helps facility staff better understand a resident's maybe-peculiar needs or patterns of behavior.

With all of these realities in mind, and the knowledge that wiping your schedule of meetings probably is neither practical nor realistic, check out these tips for making meetings feel smoother and more productive.

Plan Ahead

Though some care plan meeting attendees will know the resident as an individual and be familiar with her particular needs, encouraging some pre-meeting preparation can go a long way and make time together more efficient, with better communication. No matter how familiar you believe you are with a particular resident's situation, look over charts, assessments, and notes again before the meeting - and encourage your colleagues do to the same.

Know Why You're There

Prepare an agenda beyond your typical care plan meeting template. Is this care plan meeting conducted due to an initial assessment, a quarterly assessment, a significant change in behavior? If everyone knows exactly why the meeting is called, all attendees can feel better prepared to focus on the tasks at hand.

If the care planning meeting is set in order for the resident, family, and staff to collaborate and discuss the resident's goals for discharge, construct the meeting around the steps everyone involved must take to make that a reality.

If the resident is behaving differently and the meeting is called to figure out how to proceed in a way that helps everyone better understand the different level of care that the resident now needs, then consider constructing the agenda and conversation around those changes.

Be Ruthless in Efficiency

Set a time limit for each meeting beforehand and stick to it. While care planning meetings may be the best or only time residents and their families can meet with staff to discuss concerns, staff time is precious. Make a point to set a predetermined meeting length when organizing the meeting, but also make it clear to residents and their families that they can bring their hopes or concerns to the attention of staff in other ways as well.

Everyone in the healthcare industry knows that timeliness and punctuality are relative - there's no escaping the fact that emergencies often arise and people cannot always meet at an appointed time. However, don't let that reality bog down your schedule too. If someone's late, don't wait, says **Brian Tracy**, chairman and CEO of **Brian Tracy International**, in a blog post about ways to make meetings more efficient.

"Don't wait for the latecomer. Assume the latecomer is not coming at all and start at the designated time. It is unfair to punish the people who are on time by making them wait for the person who gets there late, if at all," Tracy says.

While nonhealthcare companies may use stricter measures to enforce habits of punctuality, like locking the conference room door from the inside at the meeting's appointed start time, you don't need to go that far.

Thorough documentation is always helpful, and taking good notes can make a big difference if someone crucial is missing from the meeting - include the notes in a summary of the care plan meeting.

Provide Other Avenues to Invite Discussion

Consider including contact information for the staff members you believe would be the most helpful in understanding or advocating for a particular resident in all pre-meeting communications, so residents and their families know they have other avenues for addressing their needs beyond a brief 15 minutes with the care team.

Hint: If your facility provides residents or their families with a care plan meeting summary, you can include helpful contact information on the summary as well.