

CORE PROCESS

Care Delivery & Documentation

PURPOSE

To ensure clients consistently receive safe, high-quality care in alignment with their service plan – and to properly document every visit for compliance, billing, and care coordination.



01

DAILY SCHEDULE GENERATION

Owner: Scheduler / Operations Coordinator

- Pull visit requirements from service plans.
- Auto-generate daily visit schedule per caregiver.
- Route optimization if needed for multiple visits.



02

CAREGIVER NOTIFICATION & PREPARATION

Owner: Scheduler or Mobile App Notification System

- Notify caregivers of assigned visits (via mobile app/text).
- Provide visit details: client name, address, tasks, preferences.
- Confirm shift availability and transportation.

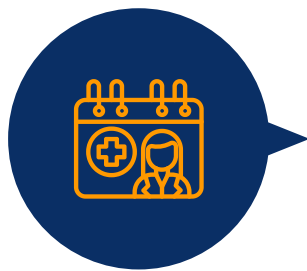


03

PRE-VISIT REVIEW

Owner: Caregiver / Clinical Supervisor

- Caregiver reviews recent visit notes and alerts.
- Check for medication changes or care plan updates.
- Contact supervisor for any red flags before arrival.



04

VISIT EXECUTION

Owner: Caregiver

- Perform care tasks per service plan (ADLs, meds, companionship).
- Note any client concerns, changes in condition, or incidents.
- Follow infection control and safety protocols.



05

VISIT DOCUMENTATION & VERIFICATION

Owner: Caregiver / Compliance Team

- Capture start/end time, tasks completed, and caregiver notes.
- Collect client or family signature if required.
- Sync data with central system for review.



06

CLINICAL REVIEW & EXCEPTION HANDLING

Owner: Nurse Supervisor / QA Team

- Supervisor reviews notes for concerns, omissions, or escalation.
- Trigger alerts for incidents, skipped tasks, or visit irregularities.
- Document follow-up steps if needed.



07

DOCUMENTATION FILING & RETENTION

Owner: Admin or Compliance Lead

- Store completed documentation securely and in the correct format.
- Tag documents for billing, compliance, and future audits.
- Maintain records per state/federal guidelines.