

## Assisted Living Service Plan Resources

These tools help assisted living providers develop, review, update, and audit service plans in alignment with [Minnesota Statute 144G.70, Subd. 4](#).

**Note:** Service plan information may be documented in multiple records or systems. However, required information must be current, consistent, and readily accessible upon request.

Suggested workflow:

1. Verify the service plan template using the *Assisted Living Service Plan Template Required Elements Checklist*.
2. Develop the service plan using the *Service Plan Writing Guide*.
3. Review for compliance and completeness using the *Service Plan Compliance Review Worksheet*.
4. Update and coordinate documentation using the *Service Plan Update and Documentation Review Guide* whenever changes occur.
5. Confirm accessibility within the electronic record using the *Service Plan Digital Record Self-Audit*.
6. Conduct ongoing audits using the *Individual Resident Service Plan Audit Tool* to support quality improvement and survey readiness.

## Resource Collection

| Resource                                                                 | Description                                                                                                                                                                                                                                                                                |
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| <b>Assisted Living Service Plan Template Required Elements Checklist</b> | Use this checklist to verify that your organization's service plan template includes all required elements identified in <a href="#">Minnesota Statute 144G.70, Subd. 4</a> . This tool evaluates the template itself and does not assess an individual resident's completed service plan. |
| <b>Service Plan Writing Guide</b>                                        | Use this practical guide for developing clear, individualized, and person-centered service plans. This tool includes strategies and examples to help staff create service plans that reflect assessed needs, preferences, services, and agreed-upon supports.                              |
| <b>Service Plan Compliance Review Worksheet</b>                          | Use this worksheet while developing or reviewing service plans to verify required                                                                                                                                                                                                          |

SERVICE PLAN RESOURCES  
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| Resource                                                  | Description                                                                                                                                                                                                                           |
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|                                                           | elements, identify documentation gaps, and assess overall compliance and consistency.                                                                                                                                                 |
| <b>Service Plan Update and Documentation Review Guide</b> | Use this guide to identify related service plan sections and supporting documentation that should be reviewed whenever resident needs, services, conditions, or staffing arrangements change.                                         |
| <b>Service Plan Digital Record Self-Audit</b>             | Use this tool to verify that required service plan information is documented within the electronic record, aligned across documentation systems, and readily accessible for care delivery and survey review.                          |
| <b>Individual Resident Service Plan Audit Tool</b>        | Use this comprehensive audit tool to review individual resident service plans for completeness, accuracy, implementation, and compliance. This tool supports routine quality assurance, mock surveys, and ongoing monitoring efforts. |

*This material was prepared by Stratis Health under contract with the Minnesota Department of Health (MDH). Use of this tool is not mandated by MDH, nor does its completion ensure regulatory compliance.*