

Home Care Service Plan Resources

These tools help home care providers develop, review, update, and audit service plans in alignment with [Minnesota Statute 144A.4791, Subd. 9](#).

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 *Home Care 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 Client Service Plan Audit Tool* to support quality improvement and survey readiness.

Resource Collection

Resource	Description
Home Care Service Plan Template Required Elements Checklist	Use this checklist to verify that your organization's service plan template includes all required elements identified in Minnesota Statute 144A.4791, Subd. 9 . This tool evaluates the template itself and does not assess an individual client's completed service plan.
Service Plan Writing Guide	Use this practical guide for developing clear, individualized, and person-centered service plans. This tool includes strategies and examples to help staff translate assessment findings into service plan language that supports consistent service delivery and compliance.

SERVICE PLAN RESOURCES
HOME CARE

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Service Plan Compliance Review Worksheet	Use this worksheet while developing or reviewing service plans to verify required elements, identify documentation gaps, and evaluate overall consistency and compliance.
Service Plan Update and Documentation Review Guide	Use this guide to identify related service plan sections and documentation that should be reviewed when changes occur, such as condition changes, new services, incidents, or staffing changes. This tool supports consistent and coordinated updates.
Service Plan Digital Record Self-Audit	Use this tool to confirm that required service plan information is documented within your electronic record system and can be easily located for service delivery, audits, and survey review.
Individual Client Service Plan Audit Tool	Use this comprehensive audit tool used to evaluate individual client service plans for completeness, accuracy, implementation, and compliance. This tool is ideal for internal audits, quality improvement activities, mock surveys, and ongoing monitoring.

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.