

# Service Plan Writing Guide

## Developing Clear, Individualized, and Person-Centered Service Plans for Assisted Living and Home Care Providers

### Purpose

[Minnesota Statute 144G.70, Subdivision 4](#) (assisted living) and [Minnesota Statute 144A.4791, Subdivision 9](#) (home care) require service plans to reflect an individual's assessed needs, preferences, services, and agreed-upon supports and to be updated when changes occur.

Service plans must be:

- Based on assessments.
- Co-developed with the individual and, when applicable, their representative.
- Reviewed and revised when there is a change in the individual's needs, preferences, or services.

### Why Service Plans Matter

Service plans help ensure individuals receive services that are:

- Based on their assessed needs.
- Consistent with their preferences and choices.
- Delivered consistently by staff.
- Updated when needs, services, or conditions change.

A well-written service plan helps staff understand what services to provide, how to provide them, and what is important to the individual. The plan also supports communication among staff, individuals, representatives, and other members of the care team.

Because service plans often involve multiple staff, systems, and documentation requirements, it can be challenging to ensure they remain complete, individualized, and consistently followed.

This guide provides practical strategies and examples to help staff develop clear, individualized, and person-centered service plans that support consistent service delivery and compliance with Minnesota requirements. This guide can help you:

- Develop new service plans.
- Update existing service plans.
- Incorporate individual preferences and choices.
- Document staffing responsibilities.
- Develop meaningful contingency plans.

## Writing Service Descriptions

Services should be based on the individual's current assessment and reflect the individual's needs, preferences, and goals.

| What to Document                                                                                                                                                                                                                                                              | Best Practices                                                                                                                                                                                                                                                                                                                                                            |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• What service will be provided?</li> <li>• Why is the service needed?</li> <li>• How often will the service be provided?</li> <li>• How should staff provide the service?</li> <li>• What preferences should staff follow?</li> </ul> | <ul style="list-style-type: none"> <li>• Describe services in clear, specific terms.</li> <li>• Include enough information for staff to deliver services consistently.</li> <li>• Connect services to assessment findings.</li> <li>• Include relevant preferences.</li> <li>• Update services when needs, preferences, conditions, goals, or services change.</li> </ul> |

### Example:

| Less Specific Documentation    | More Specific Documentation                                                                                                                                                                                                         |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Assist with bathing as needed. | Provide shower assistance every Tuesday, Thursday, and Saturday evening. Individual prefers evening showers and assistance from female staff. Provide standby assistance during transfers and assistance washing lower extremities. |

## Matching Services to Assessments

Assessment findings and service plan entries should clearly support one another. The reader should be able to understand why a service is being provided based on the assessment.

| What to Document                                                                                                                                                                                                                                                | Best Practices                                                                                                                                                                                                                                            |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Does the service address an assessed need?</li> <li>• Would another staff member understand why the service is being provided?</li> <li>• Is there consistency between the assessment and the service plan?</li> </ul> | <ul style="list-style-type: none"> <li>• Link services directly to assessment findings.</li> <li>• Avoid documenting services that cannot be supported by the assessment.</li> <li>• Review service plans whenever assessment findings change.</li> </ul> |

### Example:

| Assessment Finding                 | More Specific Documentation                                                                |
|------------------------------------|--------------------------------------------------------------------------------------------|
| Difficulty remembering medications | Medication management provided according to physician orders. Staff administer medications |

## SERVICE PLAN DEVELOPMENT WORKSHEET

|                                                             |                                                                                  |
|-------------------------------------------------------------|----------------------------------------------------------------------------------|
|                                                             | and document administration according to organizational procedures.              |
| Increased forgetfulness regarding appointments and services | Staff provide reminders 30 minutes before scheduled appointments and activities. |

### Incorporating Individual Preferences and Goals

Preferences help make a service plan individualized and person-centered. When documenting preferences, ask “If a new staff member read this service plan, would they understand what is important to this individual and how those preferences affect service delivery?”

| What to Document                                                                                                                                                                                                                                                                                                                                                                                                            | Best Practices                                                                                                                                                                                                                  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Preferred daily routines</li> <li>• Preferred schedule for services</li> <li>• Food preferences</li> <li>• Language needs</li> <li>• Cultural considerations</li> <li>• Religious practices</li> <li>• Social preferences</li> <li>• Activity preferences</li> <li>• Preferences regarding who provides services</li> <li>• Personal goals that affect service delivery</li> </ul> | <ul style="list-style-type: none"> <li>• Document preferences that affect service delivery.</li> <li>• Include goals when they influence services.</li> <li>• Describe how staff will support preferences and goals.</li> </ul> |

#### Example:

| Less Specific Documentation                                      | More Specific Documentation                                                                                                  |
|------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| Assist with meals.                                               | Individual prefers breakfast after 8 a.m. Staff provide meal set-up assistance and cueing as needed.                         |
| Individual wants to continue participating in social activities. | Individual prefers card games and attending weekly music programs. Staff offer reminders 30 minutes before activities begin. |

### Staffing Responsibilities

The service plan should identify the staff member or staff role responsible for providing each service.

| What to Document                                                                              | Best Practices                                                                                                             |
|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Is the responsible staff role identified?</li> </ul> | <ul style="list-style-type: none"> <li>• Identify staff roles whenever possible (e.g. RN, LPN, mediation aide).</li> </ul> |

## SERVICE PLAN DEVELOPMENT WORKSHEET

|                                                                                                                                                                             |                                                                                                                                                                                     |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Would staff know who is expected to provide the service?</li> <li>• Is the information consistent with actual practice?</li> </ul> | <ul style="list-style-type: none"> <li>• Ensure assigned responsibilities reflect actual practice.</li> <li>• Update responsibilities when staffing arrangements change.</li> </ul> |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### Example:

| Less Specific Documentation       | More Specific Documentation                                                                                                      |
|-----------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| Staff assist with medications.    | Medication aide administers medications according to physician orders. RN completes required assessments and medication reviews. |
| Staff provide bathing assistance. | Direct care staff provide shower assistance three times weekly. RN evaluates changes in skin condition as needed.                |

## Documenting Participation and Agreement

The service plan should reflect the individual's involvement in care planning and agreement with services to be provided.

| What to Document                                                                                                                                                                                                                                | Best Practices                                                                                                                                                                                                                                                                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• How the individual participated</li> <li>• Representative participation, when applicable</li> <li>• Service plan review</li> <li>• Agreement with services</li> <li>• Revisions and updates</li> </ul> | <ul style="list-style-type: none"> <li>• Document the method of participation (e.g., meetings, phone calls, care conferences, written communication).</li> <li>• Include representative involvement when applicable.</li> <li>• Record agreement with significant revisions.</li> </ul> |

### Example:

| Example Documentation                                                                                                                                                                                                                     |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Service plan reviewed with individual on 6/15/26. Individual requested evening bathing schedule and agreed to all services. Daughter participated by telephone and agreed with revisions. Updated service plan provided following review. |

## Developing a Contingency Plan

A contingency plan describes what will happen if a scheduled service cannot be provided. It is the backup plan.

| What to Document                                                      | Best Practices                                                                   |
|-----------------------------------------------------------------------|----------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Services affected</li> </ul> | <ul style="list-style-type: none"> <li>• Keep plans service-specific.</li> </ul> |

## SERVICE PLAN DEVELOPMENT WORKSHEET

|                                                                                                                                                                                |                                                                                                                                  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Backup actions</li> <li>• Responsible staff</li> <li>• Required notifications</li> <li>• How needs will continue to be met</li> </ul> | <ul style="list-style-type: none"> <li>• Use actionable language.</li> <li>• Clearly identify staff responsibilities.</li> </ul> |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|

### Example:

| Less Specific Documentation  | More Specific Documentation                                                                                                                                                                                                                                             |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Follow emergency procedures. | If the assigned caregiver is unavailable, alternate qualified staff will be assigned. The individual and representative will be notified of significant delays. Medication administration will be reassigned to qualified staff according to organizational procedures. |

## Common Documentation Pitfalls

Vague language often results in inconsistent service delivery.

| Best Practice                                                                                                                                                                                                                                                                     |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Describe the following:</p> <ul style="list-style-type: none"> <li>• What staff will do.</li> <li>• When staff will do it.</li> <li>• How frequently staff will do it.</li> <li>• What observations require action.</li> <li>• Any preferences staff should follow.</li> </ul> |

| Avoid                   | Suggested                                                       |
|-------------------------|-----------------------------------------------------------------|
| Assist as needed        | Describe exactly what assistance is provided.                   |
| Monitor                 | Describe what staff should observe and when to report findings. |
| Redirect                | Describe when and how staff should redirect.                    |
| Provide support         | Specify the support being provided.                             |
| Observe                 | Describe what observations are required.                        |
| Encourage participation | Describe how staff will encourage participation.                |

## Documenting Service Refusals

When services are declined, documentation should clearly describe the refusal and follow-up actions taken.

| What to Document                                                                                                             |                                                                                                                         |
|------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Services affected</li> <li>• Backup actions</li> <li>• Responsible staff</li> </ul> | <ul style="list-style-type: none"> <li>• Required notifications</li> <li>• How needs will continue to be met</li> </ul> |

### Example:

| Documentation                                                                                                                                                                                           |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Individual declined scheduled shower on 6/15/26. Staff offered an alternate time and explained the purpose of the service. Individual continued to decline. Refusal documented and supervisor notified. |

## Changes in Condition and Service Plan Updates

Service plans should be reviewed and revised whenever there is a significant change in the individual's needs, condition, preferences, goals, or services.

| Best Practices                                                                                                                                                                                                                                                                                              |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>When a change occurs, ensure that:</p> <ul style="list-style-type: none"> <li>• The assessment reflects the change.</li> <li>• The service plan is updated accordingly.</li> <li>• Staff are informed of revisions.</li> <li>• The individual and representative are involved as appropriate.</li> </ul> |

### Examples:

| Events and Changes                                                                                                                                                  |                                                                                                                                                                                                    |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• New diagnosis</li><li>• Fall</li><li>• Hospitalization</li><li>• Medication changes</li><li>• Changes in mobility</li></ul> | <ul style="list-style-type: none"><li>• Changes in cognition</li><li>• Changes in preferences</li><li>• Addition or discontinuation of services</li><li>• Significant behavioral changes</li></ul> |

*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.*