

S2S Support Planning Quick Reference

Overview

Support planning facilitates inter-agency service coordination for clients with complex or multiple issues.

S2S Support plans allow you to:

- Choose services and practitioners involved in the client's plan;
- Control Edit/View permissions for the plan;
- Define goals, strategies, tasks and desired outcomes;
- Schedule reviews to evaluate goals and client progress;
- Attach supporting documents (eg. diabetes management plan);
- Link to an existing S2S eReferral (and SCTT forms) for that client;
- Track changes and activity.

Participants and Access Levels

The Support plan is designed to span across multiple practitioners and services therefore a key part of setting up a new Support plan is to define permissions and access levels;

- a) who will be involved;
- b) what their 'role' will be; and
- c) what their Access Level is.

Participants

Participants are the other people who will be given access to a client's Support plan - i.e. who can view the plan and who can edit the plan. Participants are not necessarily a reflection of everyone who will be providing care to the client.

Participant(s) can be both from within your organisation or from a different organisation. Either way, the person(s) must be a registered 'user' of the eReferral system. How to setup participants will be explained under 1.2 Completing the Support plan.

There are three types of participants:

- 1. Key Participants**

There can only be one key participant for a Support plan.

The person who creates the new Support plan is automatically the key participant, however this can be changed to another participant if required.

The key participant can add active and non-active participants to the Support plan.
- 2. Active Participants**

There can be multiple active participants and there is no limit to the number of active participants on a Support plan.

Active participants can add other participants to the Support plan but only if they have been given edit access to the plan by the key participant (see Access Levels).

3. Non-Participants There can be multiple non-participants with no limit to the number.

Access Level

The Key Participant sets the Access Level for a Support plan and determines who can view and edit the plan based on the type of participants they are.

- The Key Participant can **always Edit** and **View** the Support plan.
- Non-participants can **never Edit** the Support plan.

There are four access levels:

Access Level	Key Participant	Active Participants	Non-Participants
1. Only the key participant can edit the Support plan, only the active participants can view	✓ Edit plan ✓ View plan	✗ Edit plan ✓ View plan	✗ Edit plan ✗ View plan
2. Only active participants can view and edit the Support plan	✓ Edit plan ✓ View plan	✓ Edit plan ✓ View plan	✗ Edit plan ✗ View plan
3. Active participants can view and edit the Support plan, others can see the basic plan information	✓ Edit plan ✓ View plan	✓ Edit plan ✓ View plan	✗ Edit plan ✓ View ltd plan
4. Everyone can view the Support plan, but only active participants can edit	✓ Edit plan ✓ View plan	✓ Edit plan ✓ View plan	✗ Edit plan ✓ View full plan

The Support plan form has several sections as outlined below;

Dates and Reason Section

Fields
Plan Status
Reason for Plan
Start Date / End Date
Next Review Date
Schedule a Review (button)
Access Level

Supporting Documentation Section

- ✓ You can add a client's existing Referrals, Support plans or Client Notes to a Support plan (S2S records).
- ✓ You can add attachments and links to a Support plan.

Goals Section

- ✓ Identify the issue(s)*, goal, desired outcomes and strategy.
 - Multiple goals can be added to a Support plan.
- ✓ Set tasks, due dates and assign responsibility.
 - Multiple tasks can be added to each goal.
- ✓ Assign an overall participant responsible for each goal.
- ✓ Rate each goal by importance and difficulty to achieve.
- ✓ Review/evaluate progress of the Support plan against your identified goals (see Review Section).

Support plan documented by Section

- ✓ Change the key participant; the key participant can be changed by selecting a different person from the drop down list.
- ✓ Indicate that the Support plan has been approved by the key participant and client and on what dates.

Review Section

- ✓ Set dates for reviews of the Support plan as part of your monitoring and evaluation process.
- ✓ Record outcomes, participant comments and client comments.
- ✓ Write summary, recommendations and next steps.