

Preparing for a Service Plan Conference

PREPARE · DISCUSS · DECIDE · FOLLOW UP — the resident's goals lead the meeting

THE RESIDENT'S GOALS GO IN THE MIDDLE OF THE TABLE

Every item reviewed at this conference is measured against what the resident says she wants. Assessment data informs the decisions; it does not replace her stated goals.

INVITATION SENT April 15, 2027 (10 days notice)	PACKET ISSUED April 19, 2027	SCHEDULED LENGTH 75 minutes	NEXT CONFERENCE Quarterly, on or before July 26, 2027
--	---------------------------------	--------------------------------	--

PREPARE

Preparation is the part of this meeting most often skipped, and it is the part that decides whether the hour is useful. Everyone who attends brings something specific, listed in the table below. Nobody is expected to bring an opinion about a care tier — that is the output of the meeting, not the input.

1. WHO ATTENDS AND WHAT EACH PERSON BRINGS				
ATTENDEE	ROLE	ATTENDANCE	HOW	WHAT THIS PERSON BRINGS
Eleanor R. Whitfield	Resident	Required	In person	Her three goals in her own words, and what is not working
Claire Whitfield-Oyelaran	Responsible party and healthcare POA	Invited	In person	The family's questions and any outside appointment results
Daniel Whitfield	Emergency contact 2	Optional	By phone	Questions only
Priya Raghunathan, RN	Director of health & wellness	Required	In person	Nurse assessment dated April 22, service delivery log, medication record exceptions
Tomás Iglesias	Resident services coordinator	Required	In person	Open-item list, inventory updates, authorization form status
Andre Pellerin	Dining services director	As needed	In person	Dining intake observations and preference sheet
Noor Habib	Life enrichment director	As needed	In person	Participation log for April 12–24
Joyce Wembley	Business office manager	As needed	Joins at the end	Fee effect of any decision, and the 30-day notice requirement
If the resident asks for a family member to be excluded from part or all of the meeting, that request is honored and recorded without discussion in front of the family.				

2. RESIDENT GOAL WORKSHEET — COMPLETE BEFORE MONDAY, APRIL 26				
Write each goal the way the resident says it. Do not translate it into a clinical objective. The staff will do the translating during the meeting and will read the translation back.				
#	IN THE RESIDENT'S WORDS	WHAT WOULD BE DIFFERENT IN 30 DAYS	WHO HELPS	REVIEWED AT
1				July conference
2				July conference
3				July conference

Plain words first: Example of the difference, using a fictional goal: the resident says “I want to stop needing someone to walk me to breakfast.” The clinical translation is a mobility and confidence objective with a specific distance and an escort plan that steps down over four weeks. The resident's sentence stays at the top of the service plan; the translation sits underneath it.

DISCUSS

The data below is read aloud in this order. Each item is short. The purpose is to put the same facts in front of everyone before any decision is made, and to give the resident and family a chance to correct anything that does not match what they have seen.

3. INFORMATION REVIEWED AT THIS CONFERENCE

SOURCE	PERIOD COVERED	OWNER	WHAT IT SHOWS
Nurse assessment, form BC-HA-01	Completed April 22, 2027	Health & wellness	Baseline function, mobility, skin, continence, cognition screening, and stated preferences
Service delivery log	April 12–24, 2027	Neighborhood staff	Which scheduled services were delivered, declined, or not needed
Medication administration record exceptions	April 12–24, 2027	Health & wellness	Refusals, holds, late administrations, and any pharmacy delay — 3 entries this period
Fall and incident reports	April 12–24, 2027	Health & wellness	None filed this period
Weight log	April 12 and April 22, 2027	Health & wellness	Two recorded weights, recorded at the same time of day
Dining intake observations	April 12–24, 2027	Dining services	Meals attended, tray service requests, and texture preference compliance
Life enrichment participation log	April 12–24, 2027	Life enrichment	7 of 14 offered group activities attended; 2 declined; 5 not offered in the neighborhood
Pendant and call system report	April 12–24, 2027	Maintenance	4 activations, all answered; longest response 6 minutes 20 seconds
Open-item list from move-in week	Started April 16, 2027	Resident services	6 items, 4 closed, 2 carried into this conference
Outside provider notes supplied by family	As provided	Responsible party	None supplied as of April 23

A family member may ask to see any item in this list. Records are produced within two business days for anyone authorized to receive health information on form BC-COM-04.

DECIDE

Each row below gets a decision, an effective date, and a named owner before the meeting ends. A row with no decision becomes a follow-up item with a due date — it does not quietly disappear.

4. DECISION LOG

TOPIC	OPTIONS ON THE TABLE	DECISION	EFFECTIVE DATE	OWNER
Care services tier	Tier 1 · Tier 2 · Tier 3			Priya Raghunathan, RN
Medication management tier	Self-administration · Assisted · Full			Priya Raghunathan, RN
Bathing and personal care schedule	Days and times			Neighborhood staff
Escort to meals	Yes · No · As requested			Neighborhood staff
Dining texture and preference sheet	Continue · Change			Andre Pellerin
Activity invitations and reminders	Continue · Change			Noor Habib
Pendant, equipment, or apartment modification	None · Requested			Curtis Boyd
Transportation arrangements	Scheduled · Individual · None			Tomás Iglesias
Family communication level and call order	Confirm · Change			Tomás Iglesias
Monthly fee effect of the decisions above	No change · Change with 30-day notice			Joyce Wembley

Care services and medication management tiers are assigned here, based on the assessment and the resident's preferences. Any tier change that increases the monthly fee requires 30 days written notice before the charge appears on a statement.

5. UNRESOLVED QUESTIONS

#	QUESTION OR OPEN ITEM	OWNER	DUE
1			
2			
3			
4			

Two items carried over from move-in week are pre-loaded by the coordinator before the meeting starts.

6. IF SOMEONE DISAGREES

1. Say so during the meeting. Disagreement is recorded in the decision log with the reason.
2. A signature records participation, not agreement. Anyone may sign and note a disagreement.
3. A second opinion from the resident's own prescriber may be requested for any care decision that depends on a clinical judgment.
4. If the disagreement is not resolved, the executive director reviews it within two business days and responds in writing within ten.
5. The grievance process on form BC-GRV-02 remains available at every step and does not delay any service.

FOLLOW UP

The meeting is not finished when the room empties. The written plan, the distribution, and the next date are all part of the same commitment.

7. WHAT HAPPENS AFTER THE CONFERENCE

STEP	WHO	WHEN	EVIDENCE IT HAPPENED
Service plan is written and signed	Priya Raghunathan, RN	Within 2 business days	Signed plan in the resident record
Copy delivered to the resident	Tomás Iglesias	Within 3 business days	Delivery noted in the record
Copy posted for authorized contacts	Tomás Iglesias	Within 3 business days	Portal post timestamp
Neighborhood staff briefed on changes	Priya Raghunathan, RN	Before the next shift change	Shift huddle log
Fee change notice issued, if any	Joyce Wembley	At least 30 days before the charge	Written notice to resident and responsible party
Follow-up items checked	Tomás Iglesias	Weekly until closed	Open-item list
Next conference scheduled	Tomás Iglesias	Before the packet is filed	Calendar invitation dated on or before July 26, 2027

8. SIGNATURES

A signature below records attendance and participation in this conference. It does not record agreement with every decision, and it is not a consent to any treatment.

SIGNATURE	PRINTED NAME	ROLE	AGREE / NOTE DISAGREEMENT	DATE
	Eleanor R. Whitfield	Resident		
	Claire Whitfield-Oyelaran	Responsible party and healthcare POA		
	Priya Raghunathan, RN	Director of health & wellness		
	Tomás Iglesias	Resident services coordinator		

Boundary: A service plan is not a physician order. Nothing decided at this conference changes a prescription, a therapy order, or a treatment plan written by the resident's own prescriber. Changes of that kind require an order from the prescriber and a new assessment.

FICTIONAL SPECIMEN. Brookmere Commons Senior Living, the resident, the family, the staff, the form numbers, the assessment dates, the logs, the tiers, and the notice periods shown here are invented for demonstration only. This document is not a service plan, an assessment tool, a care agreement, a level-of-care determination, or a regulatory record for any real community or resident.