

Factor 1 - Care Plan Development

Subfactor 1 - Initial Interview

- 14 Obtain HIPAA Release from referral source/injured person
- 26 Schedule Initial Interview/Home Visit
- 28 Perform face-to-face interview with injured person
- 29 During Initial Interview/Home Visit, document current medical condition
- 30 Document Current Medications During Initial Interview/Home Visit
- 31 Evaluate through observation or through test cognitive status During Initial Interview/Home Visit
- 34 Evaluate through observation physical limitations During Initial Interview/Home Visit
- 35 Assess the need for training in activities of daily living (ADLs) and instrumental activities of daily living (IADLs), such as cooking, shopping, housekeeping, and budgeting
- 37 Address needs/preferences of the evaluatee and/or family
- 39 During Initial Interview/Home Visit makes notes of potential home barriers and identifies some potential home modification needs
- 40 During Initial Interview/Home Visit assesses presence of familial support system for the evaluatee
- 41 Interviews immediate family members
- 42 Identify attitudinal, social, economic, and environmental forces that may present barriers and/or advantages to evaluatee's rehabilitation
- 50 Examines the relationship between the evaluatee's needs and existing functional capabilities
- 52 Assess injured person's potential for long-term independent functioning
- 53 Assess independent living and adaptive equipment needs.
- 54 Assess the need for transportation (e.g., adapted/modified vehicle with hand controls)
- 62 During Initial Interview/Home Visit documents current family members living in and away from residence
- 205 Conduct a comprehensive interview with the evaluatee, his/her family and/or significant other(s), if possible

Subfactor 2- Referral Source Contact

- 15 Upon receipt of referral, communicate with referral source regarding specific case needs, projected time for LCP completion, and projected fee for completed life care plan
- 16 Request specific medical records

Subfactor 3 - Cost Analysis

- 36 If applicable, specifies cost for independent living and adaptive equipment needs for independent function/living
- 51 Determines costs of needed equipment for the injured person
- 67 Specifies cost for physical therapy services

- 68 Specifies the cost of speech therapy services
- 69 Specifies the cost of occupational services
- 70 Reviews current catalogs to determine the costs of assistive devices needed by the evaluatee
- 78 Specifies cost for and replacement of orthotics and prosthetics (e.g., braces, ankle/foot orthotics)
- 80 Specifies cost for projected evaluations (e.g., PT/OT, SLP, individual counseling, family counseling, group counseling, family counseling, group counseling, marital counseling, etc.)
- 81 Specifies cost for projected therapeutic modalities (e.g., PT, OT, SLP, individual counseling, family counseling, group counseling, marital counseling, etc.)
- 82 Specifies cost for case management services
- 83 Projects associated costs for non medical diagnostic evaluations(e.g., recreational, nutritional) for the injured person
- 86 Specifies cost for architectural renovations for accessibility (e.g., widen doorways, ramp installations)
- 87 Specifies costs for evaluatee's home furnishing needs and accessories (e.g., specialty bed, portable ramps, patient lifts)
- 90 Specifies cost for health/strength maintenance (e.g., adaptive sports equipment and exercise/strength training)
- 93 Determines costs of needed social services for the evaluatee
- 108 Determines costs of needed medical services for the evaluatee
- 121 Research pricing of medical recommendations
- 124 Research services costs and frequencies
- 161 Reviews current catalogs and web sites to determine the costs of needs and services
- 162 Provide fair and representative costs relevant to the geographic area or region

Subfactor 4 - Report Writing

- 47 Upon return to office, summarizes assessment/home visit
- 48 Maintains log of time and mileage
- 49 Contact attending physician and medical/rehabilitation providers
- 109 Documents and summarizes all meetings with medical and rehabilitative providers, and extraneous facilities.
- 110 Write the report to include a log of all resources contacted
- 111 Write the report to include a complete chronology of the medical and rehabilitation histories
- 112 Write the report to include demographic information
- 114 Write the report to include recommendations based on assessment of evaluatee, home visit, review of all medical and rehabilitative records, and communications with medical and rehabilitative team members and providers
- 115 Present various health care options (facility vs. home care).
- 117 Write the report to include comorbid conditions
- 123 Apply knowledge of family dynamics, gender, multicultural, and geographical issues
- 127 Clearly state the nature of the evaluatee's problems for referral to service providers

- 128 Apply knowledge regarding the types of personal care (e.g., hospital, extended care facility, subacute facility; home, hospice) when developing the life care plan
- 129 Recognize psychological problems (e.g., depression, suicidal ideation) requiring consultation or referral
- 138 Prepare case notes and reports using applicable forms and systems in order to document case activities in compliance with standard practices and regulations
- 142 Total all spreadsheets and check figures for accuracy
- 143 Finalize the plan and proof it
- 144 Itemize your bill for services
- 163 Synthesize assessment information to prioritize care needs and develop the life care plan
- 164 Compile and interpret evaluatee information to maintain a current case record
- 165 Provide list and date of responses received from life care planning referral sources
- 166 Select evaluation/assessment instruments and strategies according to their appropriateness and usefulness for a particular client
- 167 As appropriate, review/utilize current literature, published research and data to provide a foundation for opinions, conclusions and life care planning recommendations
- 168 Use reliable, dependable, and consistent methodologies for drawing life care planning conclusions
- 169 Have an adequate amount of medical and other data to form recommendation
- 178 Address gaps in records and/or life care plan recommendations
- 186 Consider the impact of aging on disability and function when developing life care planning recommendations
- 200 As appropriate, rely upon qualified medical and allied health professional opinions when developing the life care plan

Subfactor 5 - Standards of Practice

- 131 Accept referrals only in the areas of yours or your agency's competency
- 132 Refrain from inappropriate, distorted or untrue comments about colleagues and/or life care planning training programs
- 133 Identify one's own biases, strengths, and weaknesses that may affect the development of healthy client relationships
- 134 Avoid dual/biased relationships, including but not limited to, pre-existing personal relationships with clients, sexual contact with clients, accepting referrals from sources where objectivity can be challenged (such as dating or being married to the referral source, etc.)
- 135 Be credentialed in your area of expertise that also provides a mechanism for ethics complaint resolution
- 136 Abide by life care planning-related ethical and legal considerations of case communication and recording (e.g., confidentiality)
- 137 Consider the worth and dignity of individuals with catastrophic disabilities
- 139 Monitor to ensure that the life care planning work is performed and that it meets standards and accepted practices
- 140 Disclose to the evaluatee and referral sources what role you are assuming and when or if roles shift

- 158 Provide progress of life care plan development to retaining party
- 170 Apply knowledge of clinical pathways, standards of care, practice guidelines
- 176 When working with pediatric cases, keep abreast of guardian issues for protecting minors or those deemed mentally incompetent
- 190 Educate parties (e.g., attorneys, evaluatees, insurance companies, students, family members) regarding the life care planning process
- 193 Stay current with the relevant life care planning literature
- 196 Belong to an organization that reviews life care planning topics and issues, as well as offers continuing education specifically related to the industry
- 197 Maintain continuing education in areas associated with your life care planning practice

Subfactor 6 - Forensics

- 148 Serves as an expert witness in court case for an individual who sustains a catastrophic injury or a non-catastrophic injury

Subfactor 7 - Communication Skills

- 159 Apply interpersonal communication skills (verbal and written) when working with all parties involved in a case

Subfactor 8 - Fee Schedule

- 187 Establish fee schedules (how much you or your practice charge) for life care planning services to be rendered

Subfactor 9 - Practice Analysis

- 194 Evaluate one's own practices and compare to ongoing evidence-based practice

Factor 2 - Needs Assessment

- 56 Determines needed medical supplies
- 57 Determines a feasible support system for the evaluatee if none exists
- 58 Assess the need for home/attendant/facility care (e.g., personal assistance, nursing care)
- 59 Determines Assistive Devices needed by the evaluatee
- 60 Determines evaluatee's adaptive equipment needs
- 61 Provides an assessment of the evaluatee's potential for self-care
- 63 Identifies the need for physical therapy services
- 64 Identifies the need for speech therapy
- 65 Identifies need for occupational therapy
- 66 Determines evaluatee's need for counseling services (i.e., psychological intervention, licensed professional counselor services, licensed social worker, counseling services)
- 72 Assess the need for wheelchair/mobility needs
- 73 Assess the need for wheelchair/mobility accessories and maintenance
- 74 Specifies cost for wheelchair/mobility needs
- 75 Assess the need for medications and supplies (bowel/bladder supplies, skin care supplies)
- 76 Assess the need for future routine medical care (e.g., annual evaluations, psychiatry, urology, etc.)

- 77 Assess the need for and replacement of orthotics and prosthetics (e.g., braces, ankle/foot orthotics)
- 79 Identifies the need for music therapy
- 85 Determines evaluatee's home furnishings and accessories needs (e.g., specialty bed, portable ramps, patient lifts)
- 88 Assesses the evaluatee's recreational equipment needs
- 89 Assess the need for health/strength maintenance (e.g., adaptive sports equipment and exercise/strength training)
- 91 Identifies the need for nutritional counseling
- 92 Identifies the need for audiological services
- 95 Assess the need for case management services
- 179 Assess the need for projected evaluations (e.g., PT/OT, SLP, individual counseling, family counseling, group counseling, marital counseling, etc.)
- 180 Assess the need for projected therapeutic modalities (e.g., PT/OT, SLP, individual counseling, family counseling, group counseling, marital counseling, etc.)
- 181 Assess the need for diagnostic testing/educational assessment (e.g., neuropsychological, educational, medical labs)

Subfactor 1 - Service Recommendation

- 94 Recommend services that maximize functional capacity and independence for persons with catastrophic disabilities through the aging process
- 99 Evaluate and select facilities that provide specialized care services for evaluatees
- 130 Include recommendations that are within your area of expertise

Factor 3 - Vocational Consideration

- 55 During Initial Interview/Home Visit gathers a work history from the evaluatee
- 103 Either personally or through vocational rehabilitation consult referral, identifies the evaluatee's need for long-term vocational/educational services
- 104 Either personally or through vocational consult referral, assesses the evaluatee's need for vocational services
- 105 Either personally or through vocational rehabilitation consult referral, determines the evaluatee's ability to pursue gainful employment
- 106 Either personally or through vocational rehabilitation consult referral, obtains information on past occupational/educational performance for purposes of vocational planning
- 107 Either personally or through vocational rehabilitation consult referral, specifies cost for long-term vocational/educational services for the injured person
- 202 Assess the need for short/long-term vocational/educational services
- 203 Specifies cost for short/long-term vocational/educational services

Subfactor 1 - Economist Consult

- 152 Consults an economist for an estimate of the lifetime costs of the LCP

Factor 4 - Litigation Support

- 146 Add the case to your list of cases for Federal Rules of Evidence purposes, marketing, etc.
- 147 Assists with the development of information for settlement negotiations for legal representatives
- 149 Consults with a plaintiff attorney to reasonably map out what long-term care services will be needed for the evaluatee
- 150 Consults with a defense attorney to reasonably map out what long-term care services will be needed for the evaluatee
- 151 Provides information located in the LCP to an official of the court
- 153 Advises the evaluatee's attorney on the cross-examination of opposing counsel's expert witness
- 154 Recommends other expert witnesses to an evaluatee's attorney when appropriate
- 155 Advises defense attorney on the cross-examination of plaintiff counsel's expert witness
- 156 Review the plaintiff's plan and develop a rebuttal or comparison plan when consulting with defense attorneys

Factor 5 - Knowledge Applications

- 174 Apply knowledge regarding legal rules (justification for valid entries in a life care plan may vary from state to state)
- 175 Apply knowledge of health care/medical/rehabilitation terminology
- 182 Apply medical knowledge of potential complications, injury/disease process, including the expected length of recovery and the treatment options available
- 183 Apply knowledge regarding the interrelationship between medical, psychological, sociological, and behavioral components
- 184 Apply knowledge of human growth and development as it relates to life care planning
- 185 Apply knowledge of the existence, strengths and weaknesses of psychological and neuropsychological assessments

Subfactor 1 - Evaluatee Interactions

- 160 Maintain contact with life care planning recipients in an empathetic, respectful, and genuine manner, and encourage participation

Subfactor 2 - Time Management

- 191 Use effective time management strategies when developing the life care plan

Factor 6 - Marketing

- 188 Promote and market the field of life care planning
- 192 Perform life care planning in multiple venues (e.g., personal injury, special needs trust, case management)
- 198 Obtain regular client feedback regarding the satisfaction with services recommended and suggestions for improvement in a life care plan

Subfactor 1 - Report Writing

- 71 Specifies costs for maintaining the evaluatee's exercise equipment
- 84 Identifies the need for pharmaceutical counseling
- 97 Research and investigate the community to identify client-appropriate services for creating and coordinating agency service delivery
- 113 Write the report to include formatting the report template rather than an office clerical person
- 119 Write the report to include bibliography

Subfactor 2 - Process Evaluation

- 199 Perform program evaluations and research functions to document improvements in evaluatee outcomes following life care plan development

Factor 7 - Information Sharing

- 43 Educate evaluatee regarding his/her rights under federal and state law
- 44 Explain the services and limitations of various community resources to evaluatees.
- 45 Apply advocacy, negotiation, and conflict resolution knowledge.
- 46 Educate evaluatees how to facilitate choice and negotiate for needed services
- 96 Educate life care planning subject in modifying their lifestyles to accommodate functional limitations

Subfactor 1 - Invoicing

- 145 Send your bill with the report

Factor 8 - Data Collection

- 33 Observes or requests demonstration of activities of daily living During Initial Interview/Home Visit
- 38 During Initial Interview/Home Visit evaluates socio-economic status
- 125 Research literature for standard of care for client for national, regional, and local areas and include in report

Subfactor 1 - Expense Projection

- 126 Write the report to include bills the evaluatee is expected to incur onetime only, monthly, annually, and remaining lifetime

Subfactor 2 - Resource Application

- 204 Apply financial management knowledge when working with evaluatees (e.g., balance checkbook, banking, etc.)
- 206 Apply risk management knowledge as it relates to life care planning

Factor 9 - Report Preparation

- 25 Sorts medical records by medical provider(S)
- 32 Sorts medical records by facility
- 116 Write the report to include all graphs and tables.
- 118 Write the report to include category of need tables

Subfactor 1 - Marketing

- 12 Market LCP services through mailings, e-mail, presentations, etc.
- 189 Provide information regarding your organization's programs to current and potential referral sources

Factor 10 - Records Request

- 17 Request educational transcripts
- 18 Request vocational/employment records
- 19 Request financial records
- 21 Request social records if available (i.e., foster care, juvenile detention, adult detention)

Factor 11 - Professional Development

- 177 Attend conferences/workshops for continuing education to be applied to recertification and/or licensure renewal
- 195 Attend professional conferences

Factor 12 - Report Writing

- 120 Write the report to include life expectancy
- 122 Write the report to include coding for costs
- 208 Utilize medical coding when developing a life care plan (e.g., CPT, ICD-9/10, HCPIIC coder)

Factor 13 - Financial Resources

- 157 Apply knowledge regarding other funding sources as it relates to legal cases
- 171 Apply managed care (insurance industry) knowledge when developing life care plans
- 172 Apply knowledge regarding workers' compensation benefits within the state of injury as it relates to life care planning
- 173 Keep abreast of the laws, policies, and rule making affecting health care and disability-related rehabilitation service

Factor 14 - File Development

Subfactor 1 - Primary Data Collection

- 13 Obtain and sign retainer fee agreement from referral source

Subfactor 2 - Secondary Data Collection

- 20 Request deposition transcripts
- 27 Monitor evaluatee progress and outcomes during the life care planning process
- 207 Obtain and review day-in-the-life videos of clients when developing a life care plan.

Subfactor 3 – Tertiary Data Collection

- 201 Have a physician review the life care plan prior to submission to referral source

Factor 15 - Collaboration

- 98 Makes referrals for assessments of the evaluatee
- 100 Request meeting with treatment/rehabilitation team members
- 101 Request meeting with medical providers
- 102 Request meetings with extraneous entities that may include daycare facilities, education facilities, recreational facilities, etc.

Factor 16 - Records Review

- 22 Review medical records, associated summaries, and all other requested records
- 23 Review medical records from physicians, nurses, PTs, OTs, and speech therapists to assess the evaluatee's medical status
- 24 Sorts medical records by chronological order

Subfactor 1 - Objectivity

- 141 Remain objective in your assessments