



PDPM Checklist

Stage 4: Optimize

You developed a plan in Stage One. You standardized processes in Stage Two. You analyzed data in Stage Three. Now, let's refine that plan with insights gained from that data.

We hope this checklist helps you work through this stage of your Journey through PDPM.



Review Your Plan	Notes	Date Completed
Review processes end to end to ensure you aren't missing anything		
Review plan – make updates as necessary		
Communicate changes to plan to stakeholders and staff		

Update QAPI	Notes	Date Completed
Implement/update QAPI programs to close any identified gaps		
Close process gaps as identified and retrain staff		
Review tools affecting gaps and identify what must change		
Train staff on changes		
Review Additional Revenue Sources	Notes	Date Completed
Identify opportunities for additional service offerings to address occupancy and new revenue streams		
Determine what new opportunities you can manage and develop a plan for change		
Connect with your referral partners to update them on what types of referrals your facility can manage after new workflows and revenue streams are implemented		

Review Resources	Notes	Date Completed
Review staffing plan and ensure adequate staff to care for changing population		
Review resource needs to ensure resources are in place to care for residents		
Update your facility assessment		
Identify roll-out needs for the rest of the facility/organization		

We're here to help answer any questions you might have.

YES, I HAVE A PDPM QUESTION.