



WEST LIMERICK INDEPENDENT LIVING CLG

Care Planning and Review Policy

Policy Reference	WLILP68
Category	Operational Policies — Service Delivery
Version	2.0 (numbering conflict flagged, house style applied)
Status	APPROVED — by the Board of Directors on 9 October 2026
Supersedes	Former working number WLILP39 (withdrawn: it belongs to the Digital Communications and Social Media Policy)
Policy Owner	Board of Directors, West Limerick Independent Living CLG
Applies To	Service Coordinators, Personal Assistants, and Management involved in care planning and service review
Related Policies	WLILP23 - Risk Management Policy; WLILP40 - Person Centred Planning Policy; WLIL Care Records and Documentation Policy; WLIL Service Access, Referral and Assessment Policy
Review Cycle	Annually, or sooner following significant changes to service delivery or legislation

1. Purpose

The purpose of this policy is to ensure that all services provided by West Limerick Independent Living CLG (WLIL) are planned, delivered, and reviewed in a structured and person-centred manner.

Care planning ensures that the support delivered reflects the individual's needs, preferences, and goals while maintaining safety, dignity, and independence. The process also ensures that services are delivered in accordance with HSE funding allocations, WLIL policies, and relevant safeguarding and health and safety requirements.

2. Scope

This policy applies to:

- All clients receiving Personal Assistant or Home Support Services from WLIL
- Service Coordinators responsible for assessment and care planning
- Personal Assistants delivering services
- Management responsible for governance and oversight of service delivery

3. Principles

WLIL operates within the **Independent Living model**, which promotes:

- Individual choice and control



- Respect for dignity and privacy
- Participation in decision making
- Flexible support tailored to individual needs
- Safe and respectful working environments for both clients and staff

Care plans are developed **in partnership with the client** and may include family members, advocates, or representatives where requested.

4. Referral and Initial Assessment

4.1 Referral Process

Most referrals to WLIL are received from the Health Service Executive (HSE). Once a referral is received:

1. The General Manager assigns the referral to a Service Coordinator responsible for the relevant geographic area.
2. The Coordinator contacts the applicant using the referral contact details.
3. A meeting is arranged at a time suitable to the applicant.

4.2 Initial Assessment

During the initial meeting, the Service Coordinator will:

- Discuss the individual's needs and circumstances
- Identify areas where support is required
- Explore the type of assistance requested
- Assess the likely number of hours required
- Consider the number of Personal Assistants required to deliver the service
- Discuss any equipment or environmental considerations
- Identify potential risks

Following the meeting, the Service Coordinator prepares an **assessment report** outlining the support requirements and submits this to the HSE for consideration.

5. Approval and Service Allocation

The HSE reviews the assessment and determines:

- Whether the service will be approved
- The number of hours allocated
- The type of service to be delivered

Once approval is received:



1. WLIL contacts the applicant to confirm the service allocation.
2. A second meeting is arranged with the client to initiate service planning.

6. Development of the Care Plan

At the service initiation meeting, the Service Coordinator works with the client to develop a **Care Plan and Service Agreement**.

This process includes:

- Completion of the Service Agreement (Part A and Part B)
- Development of a person-centred Care Plan
- Identification of routines, preferences, and support tasks
- Agreement on the delivery schedule
- Identification of risks and safety measures
- Completion of risk assessments where required

Clients may invite a **family member, advocate, or representative** to attend this meeting.

The care plan reflects the individual's preferences while ensuring that tasks remain within the scope of the service and within safe working practices.

7. Recruitment and Introduction of Personal Assistants

Once the care plan is agreed:

- Personal Assistants are assigned to the service
- New staff are introduced to the client before commencing work
- The care plan and risk assessments are reviewed with staff

Where staffing is not immediately available, WLIL may begin recruitment in the relevant area before the service can commence.

8. Storage of Care Plans and Records

Care plans and service documentation are securely maintained through WLIL's record management systems.

This includes:

- Electronic storage within the Care Planner system
- A client file maintained at the WLIL office

Personal Assistants can access the care plan and service schedule through the Care Planner system and record attendance by logging in and out of scheduled visits.



9. Delivery of Services

Personal Assistants deliver support in accordance with:

- The agreed care plan
- Risk assessments
- WLIL policies and procedures
- The service schedule agreed with the client

The care plan outlines the **type of support to be provided**, but the client retains flexibility within their allocated hours to direct how assistance is provided.

10. Review of Care Plans

Care plans are reviewed regularly to ensure that support continues to meet the client's needs.

10.1 Monthly Reviews

Service Coordinators conduct **monthly telephone reviews** with clients to:

- Confirm that the service is operating satisfactorily
- Identify any concerns or changes in needs
- Discuss upcoming events such as hospital appointments, holidays, or respite
- Address any issues relating to staffing or scheduling

10.2 Annual Review

A **full review is conducted annually**, usually through an in-person meeting with the client.

This review may include:

- Review of the care plan
- Review of risk assessments
- Review of equipment or environmental safety
- Discussion of any changes in needs
- Confirmation that the service continues to meet the client's requirements

10.3 Additional Reviews

Additional reviews may occur when required, including where:

- The client's needs change
- A hospital admission occurs
- A safeguarding concern arises
- A significant incident or accident occurs



- Equipment or environmental conditions change
- HSE funding allocations change

11. Client Participation

Clients are central to the care planning process.

Clients have the right to:

- Participate fully in planning their support
- Request changes to their care plan
- Involve family members or advocates in reviews
- Raise concerns or complaints about the service

WLIL recognises that individuals are best placed to determine their own needs and preferences.

12. Roles and Responsibilities

Service Coordinator

Responsible for:

- Carrying out assessments
- Developing care plans
- Coordinating service delivery
- Conducting reviews
- Ensuring risk assessments are completed

Personal Assistants

Responsible for:

- Delivering support as outlined in the care plan
- Following risk assessments and safety procedures
- Reporting any concerns or changes in circumstances

Management

Responsible for:

- Oversight of service delivery
- Governance and policy compliance
- Supporting recruitment where required
- Ensuring adequate systems are in place for monitoring services



13. Monitoring and Quality Assurance

WLIL monitors service delivery through:

- Monthly contact with clients
- Incident reporting systems
- Care plan reviews
- Staff supervision and training
- Quality and safety committee oversight

These processes ensure that services remain safe, effective, and person-centred.

Approval

Approved by the Board of West Limerick Independent Living CLG on 9 October 2026.

Signed on behalf of the Board, on its instruction, by the General Manager:

Margaret O'Brien O'Connor, General Manager

Date signed: 09-10-2026