



Age-Friendly Health Systems:

# Guide to Electronic Health Records Requirements for Adoption of the 4Ms in Nursing Homes

## An Implementation Guide with PointClickCare Examples

March 2026

[ihi.org/AgeFriendlyNH](https://ihi.org/AgeFriendlyNH)

*This content was created especially for:*

**Age-Friendly**   
Health Systems

An initiative of The John A. Hartford Foundation and the Institute for Healthcare Improvement (IHI) in partnership with the American Hospital Association (AHA) and the Catholic Health Association of the United States (CHA).

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Learn more at [ihi.org/AgeFriendly](http://ihi.org/AgeFriendly).

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# Introduction: Age-Friendly Health Systems Overview

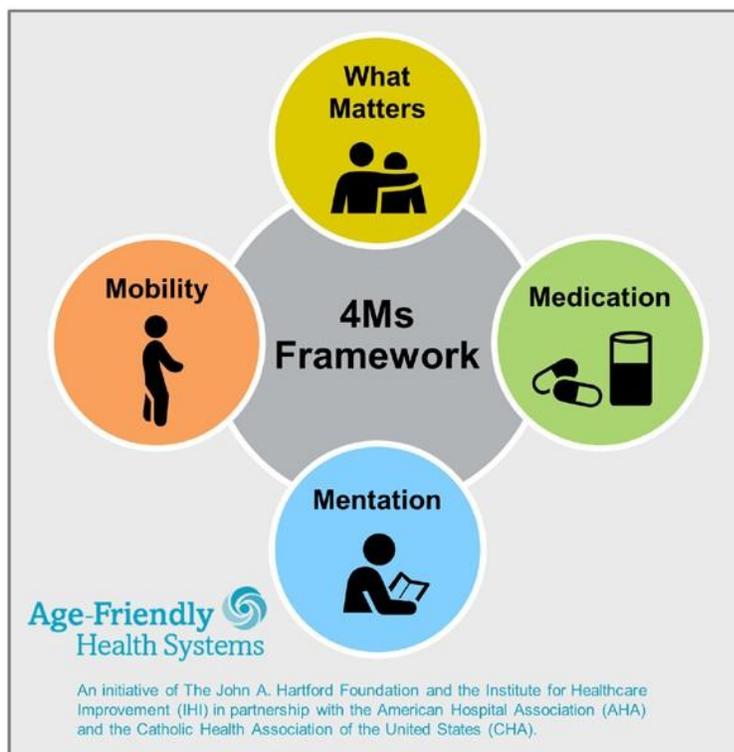
The United States is aging. The number of older adults, individuals age 65 years and older, is growing rapidly. As we age, care often becomes more complex. Health systems frequently are not prepared for this complexity, and older adults suffer a disproportionate amount of harm while in the care of the health system.

To address these challenges, in 2017, The John A. Hartford Foundation and the Institute for Healthcare Improvement (IHI), in partnership with the American Hospital Association (AHA) and the Catholic Health Association of the United States (CHA), set a bold vision to build a social movement so that all care with older adults is age-friendly care, which:

- Follows an essential set of evidence-based practices (4Ms);
- Causes no harm; and
- Aligns with What Matters to older adults and their family caregivers.

Becoming an Age-Friendly Health System entails reliably providing a set of evidence-based elements of high-quality care, known as the “4Ms,” to all older adults in your system. When implemented together, the 4Ms represent a shift by health systems to focus on the needs of older adults (see Figure 1).

Figure 1. 4Ms Framework of an Age-Friendly Health System



## What Matters

Know and align care with each older adult's specific health outcome goals and care preferences including, but not limited to, end-of-life care, and across settings of care.

## Medication

If medication is necessary, use Age-Friendly medication that does not interfere with What Matters to the older adult, Mobility, or Mentation across settings of care.

## Mentation

Prevent, identify, treat, and manage dementia, depression, and delirium across settings of care.

## Mobility

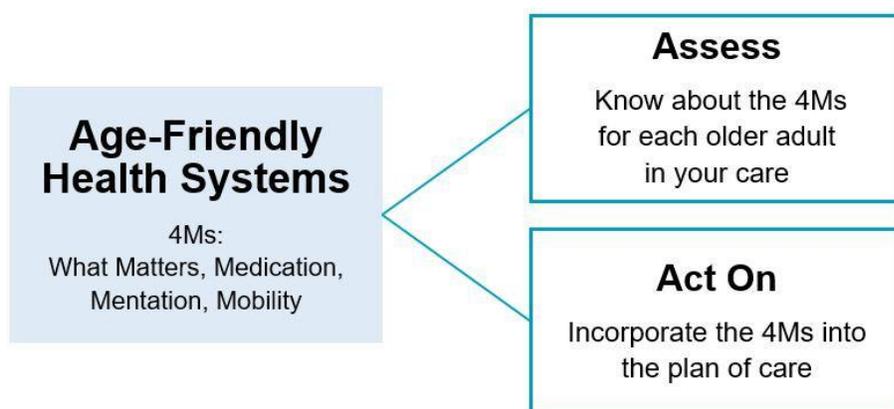
Ensure that older adults move safely every day in order to maintain function and do What Matters.

For related work, this graphic may be used in its entirety without requesting permission. Graphic files and guidance at [ihi.org/AgeFriendly](http://ihi.org/AgeFriendly)

The 4Ms – What Matters, Medication, Mentation, and Mobility – make care of older adults that can be complex, more manageable. The 4Ms identify the core issues that should drive all care and decision making with older adults. They organize care and focus on the older adult’s wellness and strengths rather than solely on disease. The 4Ms are relevant regardless of an older adult’s individual condition(s). They apply regardless of the number of functional problems an older adult may have, or that person’s cultural, ethnic, or religious background.<sup>1</sup>

The 4Ms are a framework, not a program, to guide all care of older adults wherever and whenever they touch health system’s services. There are two key drivers of age-friendly care: knowing about the 4Ms for each older adult in care (“assess”) and incorporating the 4Ms into the plan of care accordingly (“act on”) (see Figure 2).

Figure 2. Two Key Drivers of Age-Friendly Health Systems



There are many ways to improve care for older adults; however, there is a finite set of key actions. The [Age-Friendly Health Systems: Guide to Care of Older Adults in Nursing Homes](#) presents a systems-based approach to implementing the 4Ms throughout the nursing home. It summarizes the key actions that can dramatically improve care when implemented together and offers a list of key actions, tips, and resources to get started with each element in your setting ([Guide to Using the 4Ms, Appendix B](#)). This list of actions is considered the gateway to your journey to becoming an Age-Friendly Health System. A companion document, [Age-Friendly Health Systems Workbook for Nursing Homes Teams](#), is designed by and for point-of-care teams that interact with individual residents each day.

Integrating the 4Ms into the electronic health record (EHR) is a mechanism to ensure reliable practice of these essential elements across care settings. This implementation guide was designed as a resource for nursing homes to build the 4Ms, and associated care practices, into PointClickCare, a common nursing home EHR platform. The examples may be useful as a starting point for nursing homes using other EHR platforms.

## Nursing Home EHR Implementation

The team at Presbyterian Senior Care generated all example screenshots and content that follows. There was no cost outside of staff time to add tools and workflows to PointClickCare.

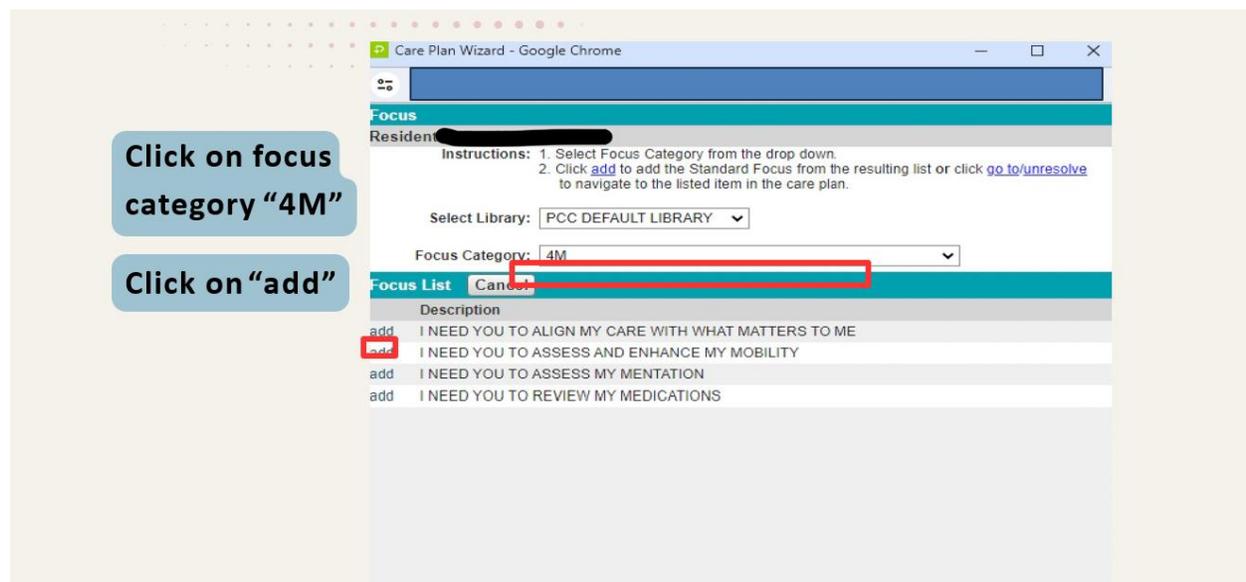
Examples included in this document required someone with IT access to the EHR and knowledge of how to add and make changes. These additions can be made to the standard version of PointClickCare. When getting started, ask your nursing home's IT department to assist in building 4Ms workflows.

These examples provide a starting point for nursing homes to think about building 4Ms workflows and data tracking in the EHR. Age-Friendly Health Systems continues to encourage EHR vendors to add consistent 4Ms options to products.

## PointClickCare 4Ms Care Plans

PointClickCare offers the ability to build custom care plans. The example below illustrates how Presbyterian Senior Care built a care plan aligned with each of the 4Ms. This approach ensures that 4Ms act on interventions are documented and seen by the clinical team.

### Example: Building a Care Plan



Each custom care plan includes the ability to utilize a standard Patient Focus or edit to be more representative of the resident. The ability to personalize the focus is especially relevant to What Matters, as illustrated in the next example.

### Example: Personalized Patient Focus

Add information and press “next”

Care Plan Wizard - Google Chrome

**Edit Focus**

Resident: [REDACTED]

Standard Focus: I NEED YOU TO ALIGN MY CARE WITH WHAT MATTERS TO ME

Instructions: 1. Make any changes required.  
2. Click Next.

Date Initiated: 6/26/2024

Status:  Active  Resolved  Cancelled

Description: [REDACTED]

Care Plan Type: Nursing

Review Department One: Nursing

Review Department Two: [REDACTED]

Review Department Three: [REDACTED]

Review Department Four: [REDACTED]

Review Department Five: [REDACTED]

Next Cancel

Care Plan Wizard - Google Chrome

**Edit Focus**

Resident: [REDACTED]

Standard Focus: I NEED YOU TO ALIGN MY CARE WITH WHAT MATTERS TO ME

Instructions: 1. Make any changes required.  
2. Click Next.

Date Initiated: 6/26/2024

Status:  Active  Resolved  Cancelled

Description: What matters most to me is being healthy and practicing religion

Care Plan Type: Nursing

Review Department One: Nursing

Review Department Two: [REDACTED]

Review Department Three: [REDACTED]

Review Department Four: [REDACTED]

Review Department Five: [REDACTED]

Next Cancel

Click “next” and then “save”

Care Plan Wizard - Google Chrome

**New Goal**

Resident: [REDACTED]

Focus: I NEED YOU TO ASSESS AND ENHANCE MY MOBILITY

Instructions: 1. Check all desired Goals.  
2. Click Next.

Goal List

Goals	Status
I WILL <-	Available

Next Cancel

Care Plan Wizard - Google Chrome

**New Intervention**

Resident: [REDACTED]

Focus: What matters most to me is being healthy and practicing religion... (more)

Instructions: 1. Check all desired interventions.  
2. Click Save.

Intervention List

Intervention List	Description	Status
<input type="checkbox"/>	I NEED <-	Available
<input type="checkbox"/>	I NEED <-	Available

Save Cancel

PointClickCare care plans also have the capability for staff to create custom goals and interventions. The examples below demonstrate these features for Mobility.

### Example: Custom Goals and Interventions (Mobility Sample)

**Click on "new custom goal"**

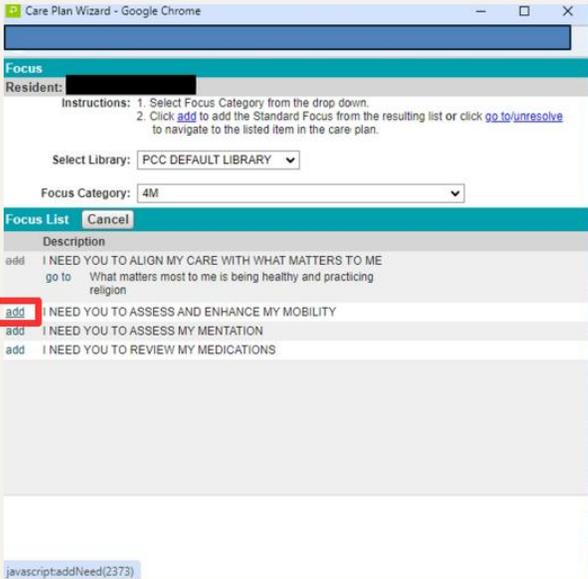


**Add custom goal and press "save"**

**Add custom intervention and press "save"**



**Adding a new focus  
move onto  
mobility and press  
"add"**



**Add custom goal and intervention for mobility then repeat with the mentation and medication**

**To ensure each has a description, goal and intervention press "all" and see each completed**

Care Plan Type: **All**

Department: **All** | CTI | DIET | NURS | SOCS | THER

Printable View | Back | New Alert | Jump to MDS

1 | 2 | 3 | 4 | Next >

Focus	Goals	Interventions/Tasks
I NEED YOU TO ASSESS AND ENHANCE MY MOBILITY + H	I will stretch in bed as well as walk each day + H	Encourage movement that resident enjoys + H NO ASSIGNED TASKS
I NEED YOU TO ASSESS MY MENTATION + H	I will maintain or enhance my mentation + H	Encourage engagement in reading, painting and word searches + H NO ASSIGNED TASKS
I NEED YOU TO REVIEW MY MEDICATIONS + H	I will feel stable and comfortable on my medications + H	Assess medications frequently + H NO ASSIGNED TASKS
What matters most to me is being healthy and practicing religion + H	My care will be aligned with what matters to me + H	Align resident's care with what matters most to her + H NO ASSIGNED TASKS

Presbyterian Senior Care offers the following complete custom 4Ms care plan examples. These illustrate how age-friendly care can be integrated for every resident in ways that matter most to them.

### 4Ms Care Plan: Example A

<p><b>lit pn</b> I NEED YOU TO ALIGN MY CARE WITH WHAT MATTERS TO ME: COLORING, MUSIC AND PUZZLES CROCHET H</p>	<p><b>edit pn</b> Resident's care will align with what matters to her H</p>	<p><b>edit pn</b> Assess what is important to the resident and incorporate into her care H</p> <p><b>edit pn</b> I WANT TO GO TO BINGO AND WIN [ACT] H</p> <p><b>edit pn</b> I WILL GIVE MY COLORINGS TO STAFF TO HANG IN COMMON AREAS, THIS MAKES ME HAPPY TO SHARE MY ART [CNALPN] H</p> <p>New Task New Custom Task</p> <p><b>NO ASSIGNED TASKS</b></p>
<p><b>lit pn</b> I NEED YOU TO ASSESS AND ENHANCE MY MOBILITY, ROM EXERCISES WITH ARMS AND HANDS H</p>	<p>New Goal New Custom Goal</p> <p><b>edit pn</b> Resident will enhance or maintain level of mobility H</p>	<p>New Intervention New Custom Intervention</p> <p><b>edit pn</b> Assess resident's mobility and working with what matters to her, encourage appropriate movements H</p> <p><b>edit pn</b> I NEED MY PAIN MEDS ON TIME AND MY OINTS APPLIED TO MY NECK / KNEES [LPN] H</p> <p>New Task New Custom Task</p> <p><b>NO ASSIGNED TASKS</b></p>
<p><b>lit pn</b> I NEED YOU TO ASSESS MY MENTATION: ENCOURAGE MY CREATIVITY AND ENGAGING MY MIND H</p>	<p>New Goal New Custom Goal</p> <p><b>edit pn</b> Resident will enhance or maintain level of mentation H</p>	<p>New Intervention New Custom Intervention</p> <p><b>edit pn</b> Assess resident's mentation and working with what matters to her, encourage appropriate stimulating activities [LPN,ACT,CNA] H</p> <p>New Task New Custom Task</p> <p><b>NO ASSIGNED TASKS</b></p>
<p><b>lit pn</b> I NEED YOU TO REVIEW MY MEDICATIONS: CURRENTLY NO CONCERNS H</p>	<p>New Goal New Custom Goal</p> <p><b>edit pn</b> Resident will feel comfortable on her medications H</p>	<p>New Intervention New Custom Intervention</p> <p><b>edit pn</b> Assess resident's med list frequently [NP,LPN] H</p> <p><b>edit pn</b> I WANT MY PAIN MEDS EXPLAINED MY USED WHEN I NEED THEM</p>

## 4Ms Care Plan: Example B

<p><b>it pn</b> I NEED YOU TO ALIGN MY CARE WITH WHAT MATTERS TO ME. WHAT MATTERS MOST TO ME IS SINGING, SPORTS, WOODWORKING, READING AND RELIGION H</p>	<p><b>edit pn</b> resident's care will align with what matters most to him H</p>	<p><b>edit pn</b> Align resident's care with what matters most to him H  <b>edit pn</b> FAMILY REQUESTS BAW FOR BETTER MOBILITY IN MY ROOM , I HAVE A VERY LARGE TV [CNA,LFN] H  <b>edit pn</b> I LIKE TO WALK IN MY ROOM AND COMMON HALLWAYS W/ MY WALKER [LPN,CNA] H  <b>edit pn</b> I WANT EXTRA SNACKS FOR IN MY ROOM [ACTA,CN,LPN] H                      New Task New Custom Task  <b>NO ASSIGNED TASKS</b>                      New Intervention New Custom Intervention</p>
<p><b>it pn</b> I NEED YOU TO ASSESS AND ENHANCE MY MOBILITY: I HOPE TO CONTINUE PLAYING GOLF AND WALKING EVERYDAY H</p>	<p>New Goal New Custom Goal  <b>edit pn</b> Resident will enhance or maintain his level of mobility H</p>	<p><b>edit pn</b> Assess resident's mobility and working with what matters to him, encourage appropriate movements [ACTA,CNA] H  <b>edit pn</b> I WANT TO BE REMINDED OF GOLF GAMES ON TV [ACTA,CNA] H                      New Task New Custom Task  <b>NO ASSIGNED TASKS</b>                      New Intervention New Custom Intervention</p>
<p><b>it pn</b> I NEED YOU TO ASSESS MY MENTATION: I ENGAGE MY MIND BY READING AND LEARNING NEW THINGS H</p>	<p>New Goal New Custom Goal  <b>edit pn</b> resident will enhance or maintain his level of mentation H</p>	<p><b>edit pn</b> Assess resident's mentation and working with what matters to him, encourage appropriate stimulating activities H  <b>edit pn</b> I NEED UPDATED CROSS WORD PUZZLES WHEN I START TO RUN LOW , I NEED NEW PENS WHEN MINE STOP WORKING [ACTA,CNA] H                      New Task New Custom Task  <b>NO ASSIGNED TASKS</b>                      New Intervention New Custom Intervention</p>
<p><b>it pn</b> I NEED YOU TO REVIEW MY MEDICATIONS. NO CURRENT CONCERNS H</p>	<p>New Goal New Custom Goal  <b>edit pn</b> Resident will feel stable on his medications H</p>	<p><b>edit pn</b> assess medications frequently H  <b>edit pn</b> I NEED NOTIFIED W/ NEW MEDS AND WHY I NEED MEDS [LPN,NPI] H</p>

## Charting Delirium Screening, Assessment, and Intervention

Presbyterian Senior Care added the [Ultra-Brief 2-Item Screener \(UB-2\)](#) and [Confusion Assessment Method \(CAM\)](#) to PointClickCare for delirium screening and assessment. When the UB-2 screening is negative, no delirium is detected. When it is positive, then staff administers the CAM for assessment.

Building in delirium screening and assessment encourages just-in-time delirium screening outside of MDS (Minimum Data Set) assessment cycles. Many nursing homes may have their own delirium screening and assessment protocols in place. The order set below is offered as an example of one approach to standardize delirium screening.

### Example: Delirium Screening and Assessment

**Under the "Assessments" tab click "New"**

**Use to drop down menu to find "UB-2" and click "save"**

The screenshot shows the PointClickCare interface. At the top, there are navigation tabs: Dash, Profile, Census, Med Diag, Allergy, Immun, Orders, Wts/Vitals, Results, MDS, **Assmnts**, Therapy, and P. Below the 'Assmnts' tab, there are buttons for 'Standard Assessments', 'New', and 'Edit Schedules'. A 'Next Assessment Due:' field is visible. Below this, there is a 'Reasons for Assessment' section with an 'Assessment Date:' field set to 7/22/2024 and a time dropdown set to 09:36. A dropdown menu is open, showing a list of assessment options, with 'UB-2' highlighted at the bottom.

**Negative: Stop here**

**Positive: Go to page 3**

**Administer a UB-2**

SECTION 2 - cont. UB-2

2 ITEM Instructions

2.1 ITEM A. POSITION Try to sit at eye level.

2.2 ITEM B. SENSORY Be sure sensory aides (glasses, hearing) are in place.

2.3 ITEM C. WORDING Please read the script exactly as written.

Question 1

1. Please tell me the day of the week.

1. Correct

2. Incorrect

Question 1 Instruction

1a. The participant can check anywhere (e.g. white board, newspaper, etc.), but cannot ask anyone else in the room.

Question 2

2. Please tell me the months of the year backward, say December as your first month.

1. Correct

2. Incorrect

Question 2 Instructions

2a. MISSED MONTH If participant finished reciting months but missed one or more, it is incorrect and no prompting is allowed.

2b. STUCK Prompted one with "what month comes before \_\_\_\_\_ (last month they said)?" Prompt up to two times. If after 2 prompts participant is frustrated, confused, or taking a long time, mark it correct and offer them an exit such as, "That's a tough one, sorry we'll ask you the next question."

2c. USING TYPE OF ANSWER If the participant begins at November, starts forward, or begins spelling, assume they don't understand the question and re-read the instructions ONCE. If the participant is incorrect again, mark it as incorrect but let them finish.

3. If incorrect on either question, use an additional CAM Screening tool to further assess.

**Negative: Repeat UB-2**

**Positive: Go to page 4**

**Under assessments press: "New" then administer a Confusion Assessment Method (CAM)**

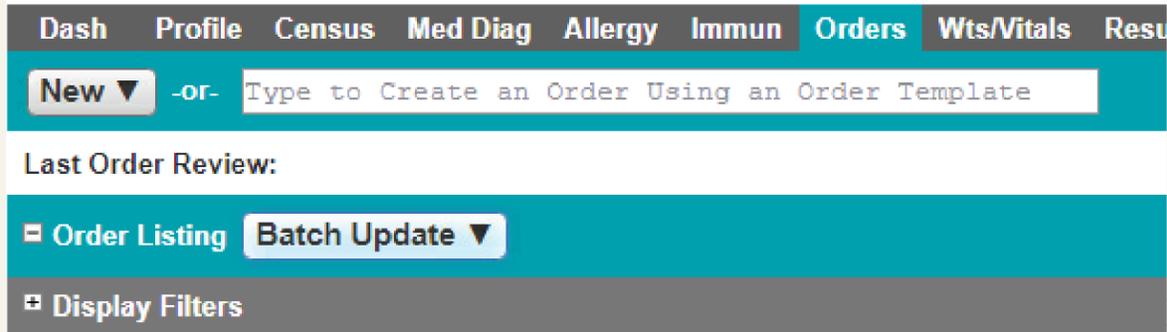
Dash Profile Census Med Diag Allergy Immun Orders Wts/Vitals Results MDS Assmnts

Standard Assessments **New** Edit Schedules

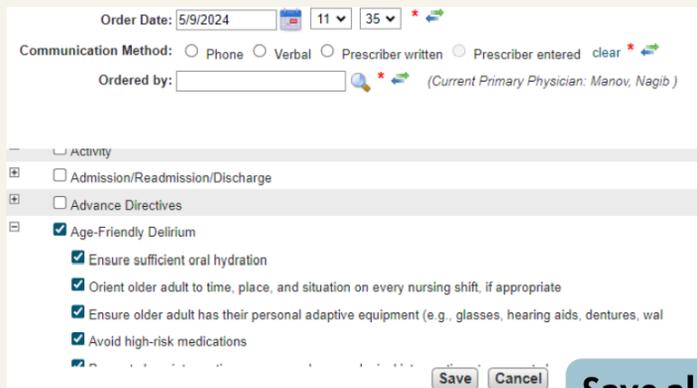
When the CAM is positive for delirium, Presbyterian Senior Care has a custom order set that automatically adds delirium interventions to the resident's medical record.

### Example: Delirium Interventions

Go to "Orders" tab and then "Batch Update"



Click "Age-Friendly Delirium" to add batch order for a resident with a positive UB-2 followed by a positive CAM



Reassess in 24 hours!

Save all delirium interventions!

## Certified Nursing Assistant (CNA) 4Ms Charting

CNAs in nursing homes are a vital part of the daily care routine for all residents. They may know more about the resident's preferences, goals, and daily activities than other nursing home staff. Their resident observations are a critical part of quality care.

Presbyterian Senior Care added the ability for CNAs to chart the 4Ms within PointClickCare.

## Example: CNA 4Ms Charting

**Under "Tasks"**

The screenshot shows an EHR interface with a 'Tasks' tab selected. A table lists tasks with columns for 'Task Description', 'Position', and 'Frequency'. A callout box points to the 'edit' icon in the first row. An inset shows the 'Edit' dialog for the '4M - Medication' task, with a text area for 'Description' containing a sample instruction.

Task Description	Position	Frequency
4M - Medication	CNA	Every Shift
4M - Mentation	CNA	Every Shift
4M - What Matters	CNA	Every Shift
Behavior Monitoring & Interventions	CNA, CMA/T, LPN, RN, DON	Every Shift

**Click "Edit" to see the CNA charting spot**

Task Details (4M - Medication):

- Status: Active
- Date Initiated: 7/23/2023
- Standard Task: 4M - Medication
- Focus: 4M - Medication
- Description: [Empty text area]
- Instruction: I NEED STAFF TO KEEP ME AND MY FAMILY OUT OF BED AND LAB CHGS. I NEED MY MD TO REVIEW MY MEDS WITH ME AND MY FAMILY AND DECREASE MED AMTS AS NEEDED. (147 characters)
- Kardex Category: [Dropdown]
- Flowsheet Type: None
- Position One: Certified Nursing Aide
- Position Two: [Dropdown]
- Position Three: [Dropdown]
- Position Four: [Dropdown]
- Position Five: [Dropdown]

## Conclusion

While there is still a larger need to ensure that all EHRs support the documentation and implementation of the 4Ms model, this guide was designed to help nursing homes get started. Validate all content and workflows inside your nursing home. Update all policies and procedures to reflect any adopted build.

Further, building the 4Ms in the EHR is simply a starting point. Consider the barriers to making electronic data useable and interoperable, understand how this tool might integrate into existing clinical workflows, and plan to train staff on how workflows will change. The goal is to ensure the 4Ms can be documented and used in a reliable and efficient way to ensure that care is consistent with the 4Ms across interactions and care settings.

We welcome feedback and shared learnings. Email us at: [AFHS@IHI.org](mailto:AFHS@IHI.org).

## References

1. Adapted from: Tinetti M. “How Focusing on What Matters Simplifies Complex Care for Older Adults.” Institute for Healthcare Improvement Blog. January 23, 2019.  
<http://www.ihl.org/communities/blogs/how-focusing-on-what-matters-simplifies-complex-care-for-older-adult>