

# Manage Care Plans

Last Modified on 08/24/2021 9:25 am EDT

Version 14.19



This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

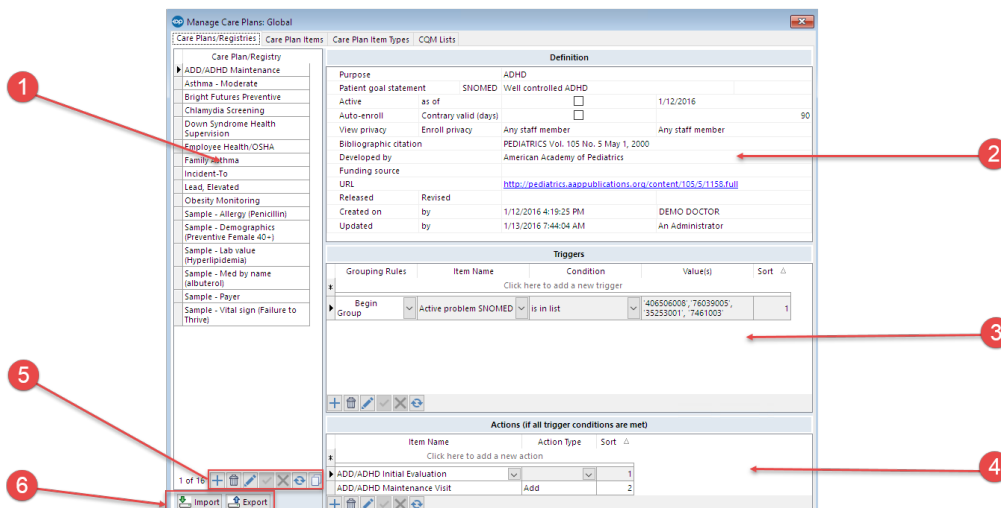
## About Manage Care Plans

**Path: Clinical tab > Care Plans button**

Care Plans are in Office Practicum to help monitor a patient's health maintenance schedule. They can also be customized and created for an individual or group of patients for any ongoing problems where specific screenings, vitals, or tests need to be completed. Once the Care Plans are active for a patient, Office Practicum will prompt the user, according to the type of enrollment and level of the user, to evaluate if the patient should be enrolled in the respective Care Plan.

**Note:** The Bright Futures Preventive Care Plan is linked with the Diagnostic Test Management table and the Vital Signs/Growth Chart table to determine whether a patient has had standard measurements and screening tests performed, which are listed below:

- Well baby visits according to the standard AAP schedule, with documentation of height, weight, head circumference, and development
- After age 2, annual preventive exams with height, weight, and BMI. Vision, hearing, and blood pressure after age three. Developmental assessment up until age 5.
- Newborn Metabolic Screen and newborn hearing screen.
- Hemoglobin & Lead at one and two years of age. Children with WIC require more frequent anemia screens.
- Annual lead risk assessment until age 6, with lead levels if there's a risk of exposure.
- Annual "TB risk" assessment and if positive, a PPD.
- Another anemia screen in adolescence.
- Cholesterol screen in adolescence, but earlier if there are risk factors.

The screenshot shows the 'Manage Care Plans: Global' window. The left sidebar (1) lists various care plan categories like 'ADD/ADHD Maintenance' and 'Asthma - Moderate'. The main area is divided into 'Definition' (2), 'Triggers' (3), and 'Actions (if all trigger conditions are met)' (4). The 'Definition' section includes fields for Purpose, Patient goal statement, Active status, Auto-enroll, View privacy, Bibliographic citation, Funding source, URL, Released, Revised, Created on, and Updated. The 'Triggers' section has a table with columns for Grouping Rules, Item Name, Condition, Value(s), and Sort. The 'Actions' section has a table with columns for Item Name, Action Type, and Sort. At the bottom left, there are 'Import' and 'Export' buttons (5, 6).

## Manage Care Plans Map

Number	Section	Description
1	Care Plan/Registry	The Care Plan/Registry lists the Care Plans in OP.
2	Definition	Definitions set up the purpose of your Care Plan as well as establishes how it will appear within Office Practicum. There is an area for the purpose of this plan, a patient goal, a choice on how to enroll patients, privacy settings, and an area for citation of the source for your Care Plan. All areas in the definition can be updated accordingly when you make edits to the established Care Plans in your system.
3	Triggers	Triggers set to group the patients you would like to see as part of your Care Plan. Within this area, you will set up what triggers a patient must meet in order for Office Practicum to know that they should be part of the Care Plan.
4	Actions	Once all triggers are met for a Care Plan, there are a set of actions that will be added to the patient's chart for completion (i.e vital sign measurement, diagnostic test...). This area is where you add, edit and delete actions to match your practice's needs.
5	Function Buttons	The Function buttons insert a record, delete a record, edit a record, post an edit, cancel an edit, refresh data, and clone a selected care plan.
6	Import / Export	Import or Export OP Care Plan Export Files (*.cpx).

Version 14.10

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**Path: Utilities Menu > Manage Clinical Features > Care Plans (Keyboard Shortcut keys: [Alt][A][M])**

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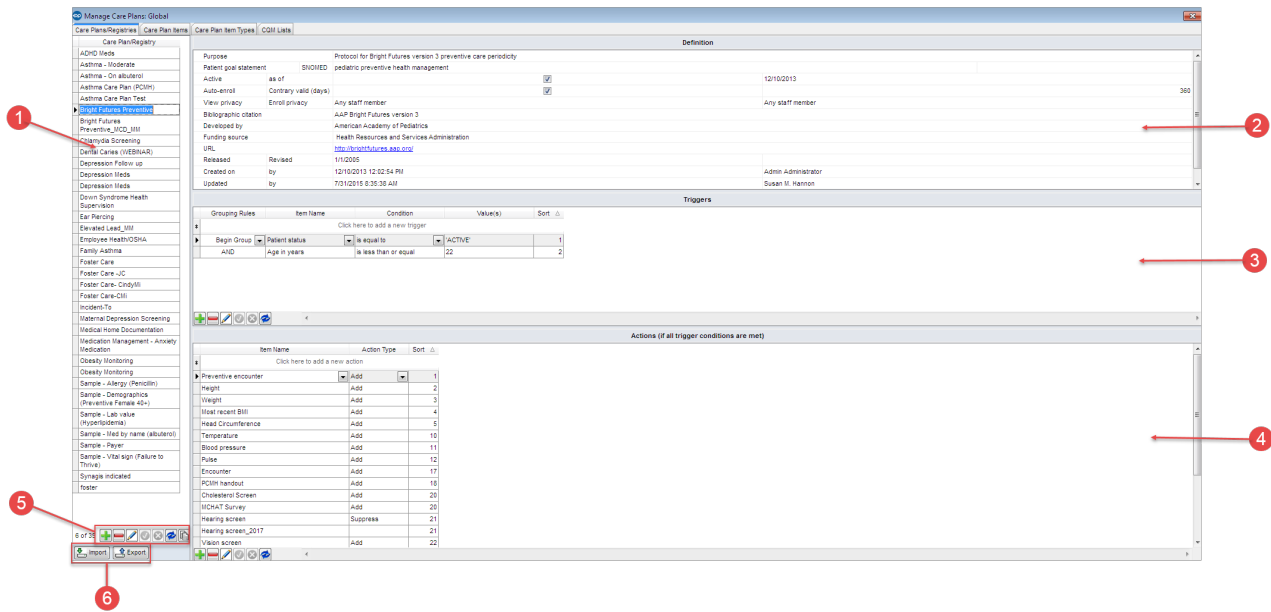
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