Activate, Enroll, and Privacy

Last Modified on 07/30/2021 8:18 am EDT

> ⚠️ OP sets **all defaults to share all information** Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

Version 14.19

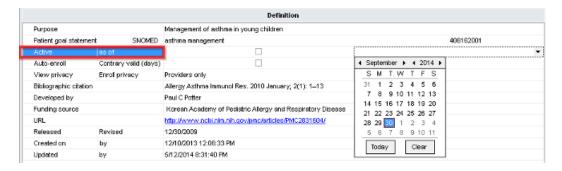**Path: Clinical tab > Care Plans (Customize group)**

About

In this section, you will learn how to activate existing care plans, choose whether or not to auto-enroll patients, and set the privacy level for care plan visibility within Office Practicum.

Click Here to access your Care Plan Checklist.

Activate Care Plans

Making a Care Plan active will allow you to enroll your patients into the respective plans.

1. Open the Manage Care Plans window by following the path above.
2. Select the Care Plan to make active from the **Care Plan/Registry** panel.
3. In the **Definition** section of the window, locate **Active** and click the checkbox.
4. Click in the **as of** field to update the date for when the Care Plan will be **Active**.

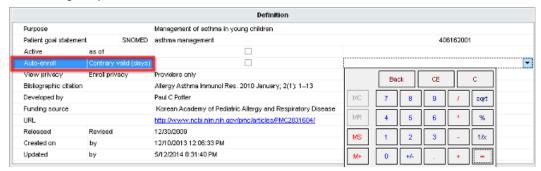
Auto-Enroll and Contrary Valid (Days)

Once your patients meet the triggers, OP will prompt you and ask if you would like to enroll them into the Care Plan. If you have a care plan that you want patients to automatically be enrolled into once the triggers are met, you can **Auto-enroll** them. Even if your patient does not meet the Care Plan **triggers**, you can enroll them on a contrary basis. The days set in the **Contrary Valid (days)** field will determine how long a patient is contrarily enrolled into a Care Plan before Office Practicum has you re-evaluate the patient's enrollment.

1. Open the Manage Care Plans window by following the path above.
2. Select the Care Plan to make active from the **Care Plan/Registry** panel.
3. In the **Definition** section of the window, locate **Auto-Enroll**. Click the **Auto-enroll checkbox** if you want patients to automatically be enrolled in this Care Plan upon meeting the triggers.
4. In the **Contrary Valid (days)** field, update the amount of days you want your patient to be enrolled on the contrary basis

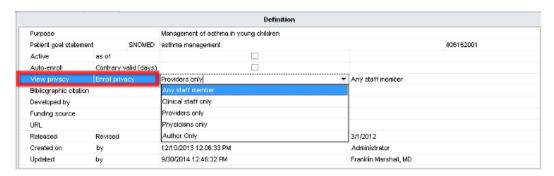prior to re-evaluating that patient's Care Plan enrollment.

Privacy

While managing Care Plans, there are two types of privacy:**View Privacy** and **Enroll Privacy**.

- **View Privacy:** should be set to the minimum**privacy level** for which users can see a patient enrolled into that Care Plan.
- **Enroll Privacy:** should be set to the minimum**privacy level** for which users can authorize enrollment for a patient's Care Plan.

1. Open the Manage Care Plans window by following the path above.
2. Select the Care Plan to make active from the**Care Plan/Registry** panel.
3. In the **Definition** section of the window, locate**View Privacy** and use the drop-down to select from the list.
4. Navigate to **Enroll privacy** field, click the drop-down and select from the list.

> **Note**: If your standard medical records visibility is set to Any Staff Member, you will not be able to see any Care Plans that have a more restrictive privacy level (Clinical Staff Only, Providers Only, Physicians Only).

Version 14.10

Utilities > Manage Clinical Features > Care Plans

Overview

In this section, you will learn how to activate existing care plans, choose whether or not to auto-enroll patients, and set the privacy level for care plan visibility within Office Practicum.
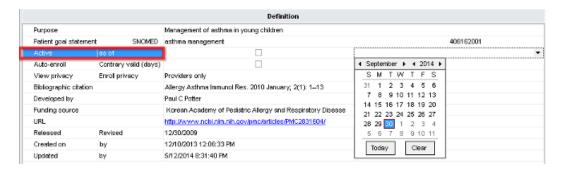
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Activate Care Plans

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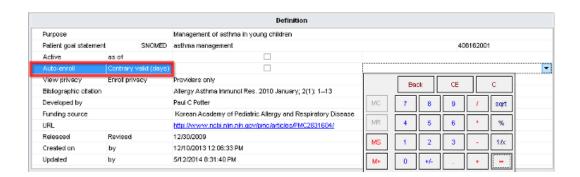
1. Open the Manage Care Plans Window.
2. Under the **Definition** area locate the line to make the Care Plan **Active**.
3. Check off the **box** to make the Care Plan active.
4. Click in the **as of** box to *update* the date for when the Care Plan will be **Active**.

Auto-Enroll and Contrary Valid (Days)

Once your patients meet the triggers, OP will prompt you and ask if you would like to enroll them into the Care Plan. If you have a care plan that you want patients to automatically be enrolled into once the triggers are met, you can **Auto-enroll** them. Even if your patient does not meet the Care Plan **triggers**, you can enroll them on a contrary basis. The days set in the **Contrary Valid (days)** field will determine how long a patient is contrarily enrolled into a Care Plan before Office Practicum has you re-evaluate the patient's enrollment.

1. Open the Manage Care Plans window.
2. Under the **Definition** area locate the line to Auto-Enroll.
3. If you want patients to automatically be enrolled in this care plan upon meeting the respective **triggers**, select the **Auto-enroll** checkbox.
4. In the **Contrary Valid (days)** field, *update* the amount of days you want your patient to be enrolled on the contrary basis prior to re-evaluating that patient's Care Plan enrollment.

Privacy

While managing Care Plans, there are two types of privacy: **View Privacy** and **Enroll Privacy**.

- **View Privacy:** should be set to the minimum **privacy level** for which users can see a patient enrolled into that care plan.
- **Enroll Privacy:** should be set to the minimum **privacy level** for which users can authorize enrollment for a patient's care plan.

1. Open the Manage Care Plans window.
2. Under the **Definition** area locate the line starting with **View Privacy**.
3. Using the dropdown set the **View Privacy**.

4. Using the dropdown set the **Enroll Privacy**.

> ⚠️ **Visibility of Care Plans**: If your standard medical records visibility is set to Any Staff Member, you will not be able to see any Care Plans that have a more restrictive privacy level (Clinical Staff Only, Providers Only, Physicians Only).

Definition			
Purpose		Management of asthma in young children	
Patient goal statement	SNOMED	asthma management	406162001
Active	as of	☐	
Auto-enroll	Contrary valid (days)	☐	
View privacy	Enroll privacy	Providers only ▼	Any staff member
Bibliographic citation		Any staff member	
Developed by		Clinical staff only	
Funding source		Providers only	
URL		Physicians only	
Released	Revised	Author Only	3/1/2012
Created on	by	12/10/2013 12:06:33 PM	Administrator
Updated	by	9/30/2014 12:46:32 PM	Franklin Marshall, MD