

Adding and Editing Triggers

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Version 14.19

Path: Clinical tab > Care Plans

About

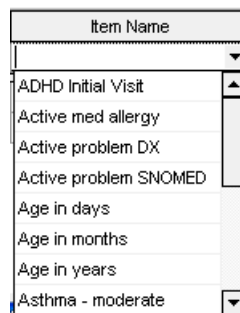
Triggers within established Care Plans can be added, edited, or deleted to meet your Practice's needs. In this section, you'll learn how to make changes to the triggers within your existing Care Plans.

Triggers

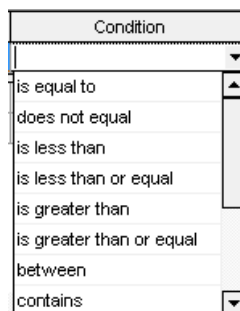
1. Open the Manage Care Plans window by following the path above.
2. Highlight the Care Plan you want to update.
3. In the Triggers section of the window, click the **Edit** button .
4. Use the drop-down in the **Grouping Rules** field to update the Grouping Rules. These are used to make a group of patients that would qualify for the Care Plan. Your choices are as follows:




5. Use the **Item Name** drop-down (list generated from the Care Plan Item tab where you can define what would be a Trigger) to update the Item Names.




6. Use the **Condition** drop-down as it applies to the Trigger.



7. **Value(s)** are what apply to the Condition. Type in the numeric or text value as it applies to the Trigger. The **Sort** field allows you to set the order in which your triggers are listed. Each Trigger must have a unique Sort order.

Value(s)	Sort 

8. Once all Triggers are added, you are able to move on to the Actions that the Care Plan makes when all Triggers are met.

Triggers				
Grouping Rules	Item Name	Condition	Value(s)	Sort 
Click here to add a new trigger				
Begin Group	Patient status	is equal to	'ACTIVE'	1
AND	Age in years	is less than or equal	21	2

Version 14.10

Utilities > Manage Clinical Features > Care Plans

Triggers within established care plans can be added, edited or deleted to meet your practice's needs. In this section, you will find the steps to make changes to the triggers within your existing Care Plans.

Triggers



1. Open the Manage Care Plans window.
2. Highlight the Care Plan you want to update.
3. From the triggers section, there is an option to add, delete, edit, save changes, cancel changes, and refresh the grid.



4. **Grouping Rules** are used to make a group of patients that would qualify for the Care Plan. Use the dropdown to update the Grouping Rules. Your choices are as follows:

Grouping Rules
* 
Begin Group
AND
OR
AND Begin Group
OR Begin Group

5. The **Item Name** list is generated from the Care Plan Item tab where you can define what would be a Trigger. Use the dropdown to update the Item Names.

Item Name

ADHD Initial Visit
Active med allergy
Active problem DX
Active problem SNOMED
Age in days
Age in months
Age in years
Asthma - moderate 

6. **Condition** applies to the Trigger. Use the dropdown to update the Condition.

Condition	
	▼
is equal to	▲
does not equal	
is less than	
is less than or equal	
is greater than	
is greater than or equal	
between	
contains	▼

7. **Value(s)** are what applies to the condition. Type in the numeric or text value as it applies to the Trigger. The **Sort** field allows you to set the order in which your triggers are listed. Each Trigger must have a unique Sort order.

Value(s)	Sort ▲

8. Once all Triggers are added, you are able to move on to the Actions that the Care Plan makes when all Triggers are met.

Triggers				
Grouping Rules	Item Name	Condition	Value(s)	Sort ▲
Click here to add a new trigger				
Begin Group ▼	Patient status ▼	is equal to	'ACTIVE'	1
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