Care Plan Item: Add, Edit, Delete

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Version 14.19

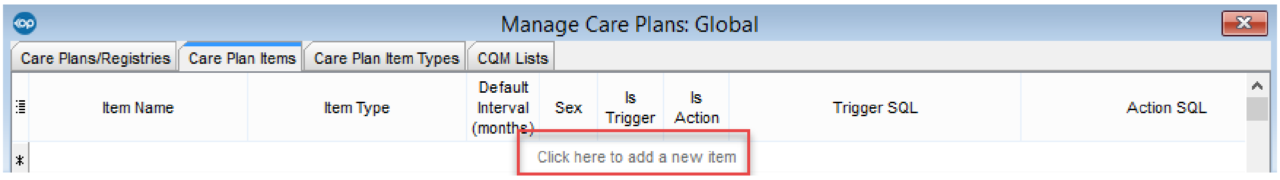
Path: Clinical tab > Care Plans

About

Care Plan Items can be added, edited, and deleted according to your Practice's needs for the Care Plans you build. The Care Plan Items are created based off of the Care Plan Item Types, which are the building blocks to pull the correct information into your respective Care Plans. In the section, you will find information on how to add, edit, and delete Care Plan Items.

Adding Care Plan Items

1. Open the **Manage Care Plans** window by following the path above.
2. Click the **Care Plan Items** tab.
3. To add a new Care Plan Item, click the **Add** button , or click into the section labeled **Click here to add a new item**



4. Type the **name** of your Care Plan Item.
5. Use the drop-down to select an **Item Type.** This list is driven by what is listed on the Care Plan Item Types tab, where the program is set up to pull in the appropriate information from those areas in the patient's record.
6. Type the **default interval** in months. If there is no set monthly interval, you are required to create a recall schedule.
7. Use the drop-down to select **Sex** if the item is gender-specific. Otherwise, leave it blank.
8. Select the **Is Trigger** checkbox if the item being added is a Trigger that needs to be fulfilled for a Care Plan.
9. Select the **Is Action** checkbox if the item is an Action that needs to be added to a Care Plan when all Triggers are met.
10. Click the **Add** button to add additional Care Plan Items, as needed.
11. Click the **Save** button to save all changes.

> **Note**: There are instances where an item could qualify as an Action and a Trigger. Select both checkboxes if this applies to the Care Plan Item.

Editing Care Plan Items

1. Open the **Manage Care Plans** window by following the path above.
2. Click the **Care Plan Items** tab.
3. Click to select the Care Plan Item you would like to edit.
4. Click the **Edit** button in the lower-left corner of the window to put the current line in edit mode.
5. Click into the field and make your edits, as needed.
6. Click the **Save** button to save your changes.

Deleting Care Plan Items

1. Open the **Manage Care Plans** window by following the path above.
2. Click the **Care Plan Items** tab.
3. Click to select the Care Plan Item you would like to edit.

4. Click to select the Care Plan Item you would like to delete.
5. Click on the **Delete** button in the lower-left corner to delete the Care Plan Item.

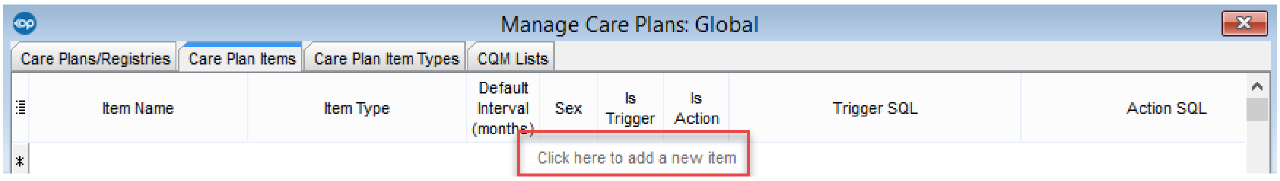
Version 14.10

Overview

Care Plan Items can be added, edited, and deleted according to your practice's needs for the Care Plans you build. The Care Plan Items are created based off of the Care Plan Item Types, which are the building blocks to pull the correct information into your respective Care Plans. In the section, you will find information on how to add, edit, and delete Care Plan Items.

Adding Care Plan Items

1. Open the **Manage Care Plans** window and click the **Care Plan Items** tab.
2. To Add a new Care Plan Item click the **green plus** to insert a record or click into the section labeled **Click here to add a new item**.



3. Type the name of your Care Plan Item.
4. Use the drop down to select an item type This list is driven by what is listed on the Care Plan Item Types tab, where the program is set up to pull in the appropriate information from those areas in the patient's record.
5. Type the **default interval** in months. If there is no set monthly interval you are required to create a recall schedule.
6. Use the drop down to select **Sex** if the item is gender specific, otherwise, leave it blank.
7. Check the **box** if the item being added is a trigger that needs to be fulfilled for a Care Plan.
8. Check the **box** if the item is an action that needs to be added to a Care Plan when all triggers are met.
9. Use the to continue to add Care Plan Items as needed.
10. Use the to save all changes.

Note: There will be instances where an item could qualify as an action and a trigger. Check both boxes if this applies to the Care Plan Item.

Editing Care Plan Items

1. Open the **Manage Care Plans** window and *Click* on the **Care Plan Items** tab.
2. Click to highlight the Care Plan Item you would like to edit.
3. Click on the **edit** button in the lower left to put the current line in edit mode.
4. *Type* to edit the name of your Care Plan Item.
5. Use the *dropdown* to change the **item type.** This list is driven by what is listed on the Care Plan Item Types tab, where the program is set up to pull in the appropriate information from those areas in the patient's record.
6. *Type* in change the **default interval** in months.
7. Use the *dropdown* to select **sex** if the item is gender specific, otherwise, leave it blank.
8. *Check* or *Un-check* the boxes according for whether or not the item is an **Action** or **Trigger**.

Deleting Care Plan Items

1. Open the **Manage Care Plans** window and *Click* on the **Care Plan Items** tab.
2. Click to highlight the Care Plan Item you would like to delete.
3. Click on the *edit *button in the lower left to delete the Care Plan Item.