

Care Plan Functionality

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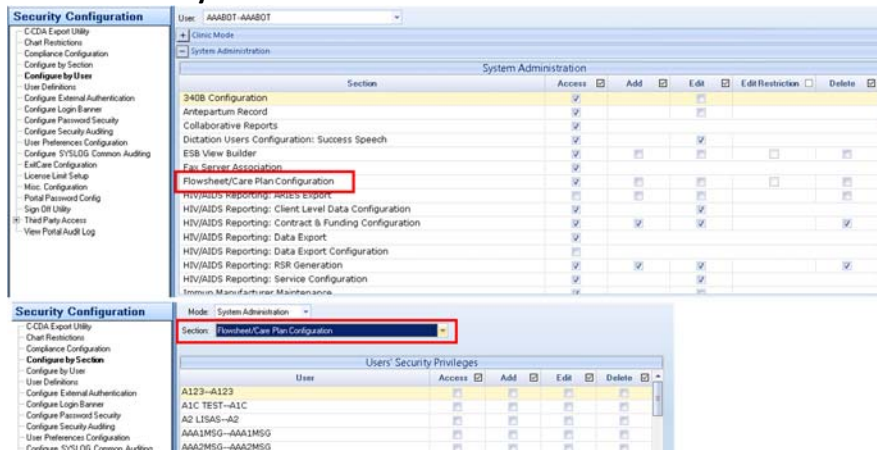
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Introduction

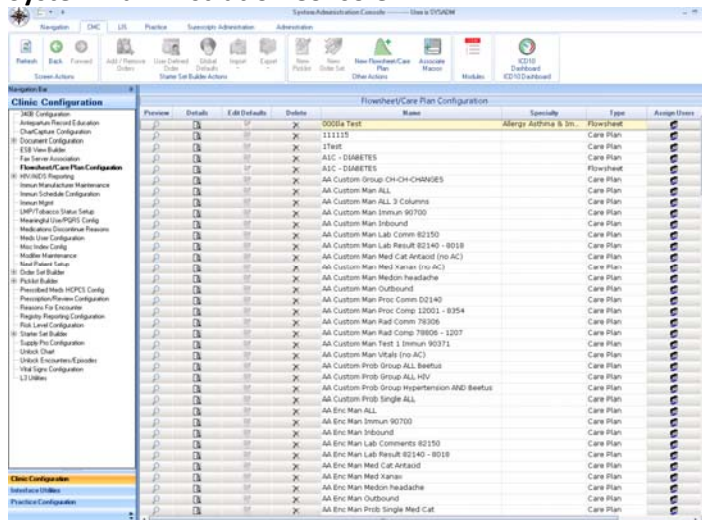
A **Care Plan** functionality has been added to Clinical Console that enables users to configure trackable items for a patient and view those items in a single location. Users may view previously documented data, add orders, and create and track goals for a patient.

Security Access

Security access to the Care Plan is defined by enabling the **Flowsheet/Care Plan Configuration** option for the user in the **System Administration** mode of the **Configure by User/ Configure by Section** screens in **Clinical Console Security**.



Care plans are configured via the **Flowsheet/Care Plan Configuration** screen in **Clinic Configuration** in the **System Administration Console**.



The following information is available for viewing:

- **Preview** – (Available for flowsheets only; this is disabled for Care Plans.)
- **Details** – Displays the Care Plan details.
- **Edit Defaults** – This function is disabled for Care Plans.
- **Delete**– Allows the user to delete the Care Plan (if configured to do so in **Clinical Console Security**).
- **Name** – Displays the name of the specific Care Plan.

- **Specialty** – Displays the specialty associated to the Care Plan if one exists. (If no specialty is associated, this field will be blank.)
- **Type** – Displays the type of document (**Flowsheet** or **Care Plan**)
- **Assign Users** – Enables users to assign the Care Plan to one or more users.
- **Assign Clinical Groups** – Enables the user to assign the Care Plan to one or more clinical groups.

Configuring Care Plans

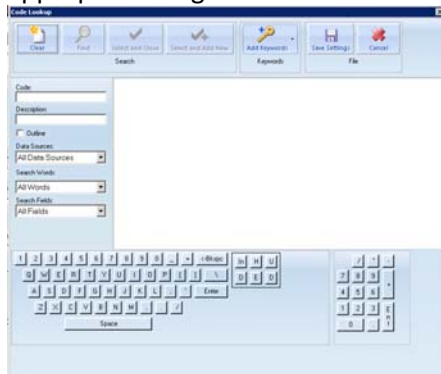
1. To add a new Care Plan, click **New Flowsheet/Care Plan** in the **CMC** menu ribbon.
2. A **New Flowsheet/Care Plan** window displays. Select the **Care Plan** radio button in the **Type** section.

3. Enter an appropriate Care Plan **Name**.
4. Select the appropriate **View Type** for the Care Plan (**Encounter View** [default] or **Custom View**).
 - **Encounter View** is designed to mimic Flowsheets where the column headers are encounter dates. If a component is added to the Care Plan and it is not documented for a given encounter, the column will be blank.
 - **Custom View** enables users to do additional configuration for components (see below) and only pull data as it is configured in the columns that appear (up to a maximum of four columns).
For example, if a care plan is looking for two of the most recent weight values, instead of having a column for each encounter, it will only show the values and date of the two most recent weights, which could span a period of two years to avoid blank data and unnecessary scrolling.

5. Select the appropriate items to trigger the Care Plan in the **Associate Items** section:
 - **Manual** (default) – Select **Manual** to associate the Care Plan to all manually entered orders.
 - **Problems** – Select **Problems** to associate the Care Plan to diagnosis codes or code groups.

- Select **Single Code** to associate the plan to a single diagnosis code.

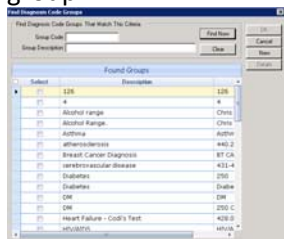
- Click  in the **Code** field to launch the **Code Lookup** window. Search for and select the appropriate diagnosis code.



The selected **Code** and its accompanying **Description** will populate.



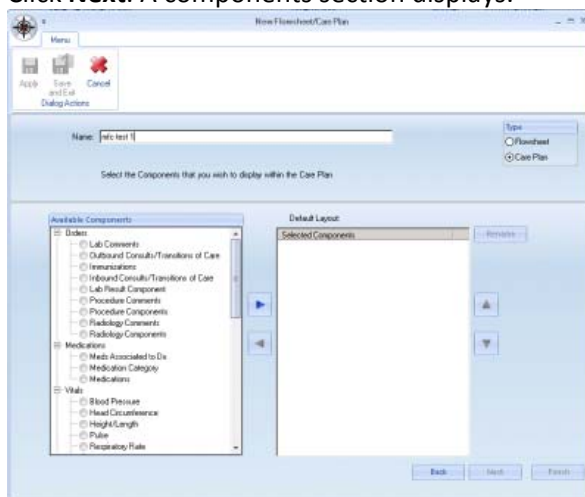
- Select the time frame within which to search for patients in the **Pull patients who have had this problem within field**.
- Select **Code Group** to associate the plan to a diagnosis code group.
- The **Find Diagnosis Code Group** window displays. Search for and select the appropriate code group.



The selected **Code** and its accompanying **Description** will populate.







- Click **Next**. A components section displays.



7. Select the appropriate components to display on the Care Plan.

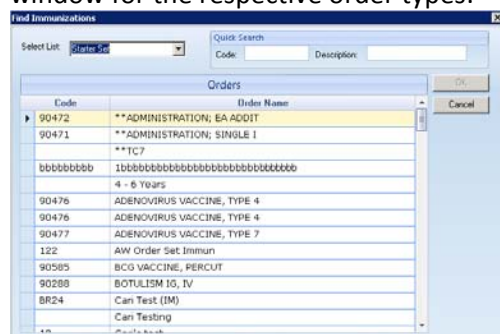
If Encounter View was selected in Step 4:

- Select the appropriate components in the **Available Components** column and click  to move it to the **Selected Components** column.
- To remove a component, select the item in the **Selected Components** column and click  to return it to the **Available Components** column.
- Click  and  to re-order the items in the **Selected Components** column.

The following components, when selected and moved to the **Selected Components** column, will trigger a secondary dialog box to display:

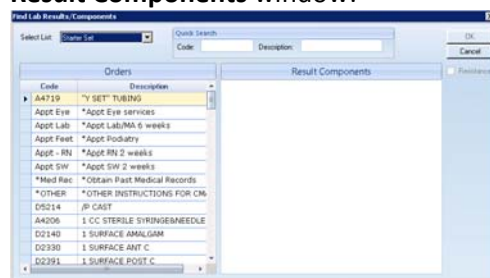
- **Orders** section:

Immunizations, Procedure Comments, and Radiology Comments display an appropriate **Find** window for the respective order types:



- Select the appropriate list from the **Select List** drop-down list. Options include the respective **Starter Set** and all active picklists for the specific order type.
- Select the appropriate order(s) from the **Orders** table. Multiple order(s) can be selected by pressing **CTRL** on your keyboard while selecting from the table.
- Click **OK** to add those items to the **Selected Components** table.

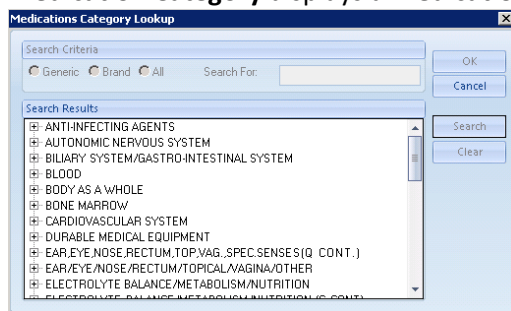
Lab Result Components, Procedure Components, and Radiology Components display a **Find Lab Result Components** window:



- Select the appropriate lab result(s) from the **Orders** table. Multiple lab result(s) can be selected by pressing **CTRL** on your keyboard while selecting from the table. These items will populate in the **Result Components** list.
- Click **OK** to add those items to the **Selected Components** table.

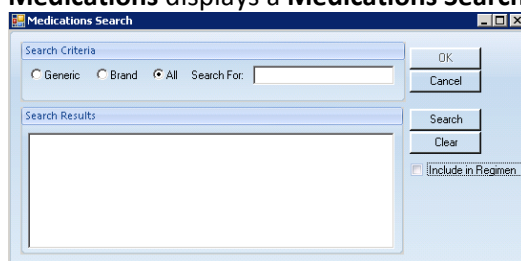
– **Medications** section:

Medication Category displays a **Medications Category Lookup** window:



- Search for the appropriate medication via the **Search Criteria** section.
- Click **OK** to add the selected medication to the **Selected Components** table.

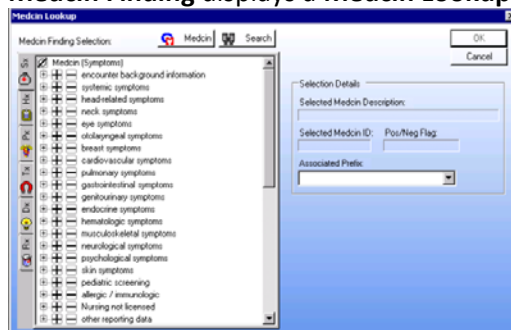
Medications displays a **Medications Search** window:



- Search for the appropriate medication via the **Search Criteria** section.
- Select the appropriate medication search result in the **Search Results** table.
- Click **OK** to add the selected medication to the **Selected Components** table.

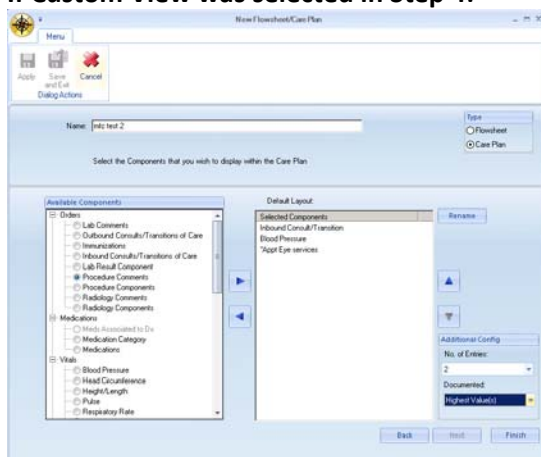
– **Medcin** section:

Medcin Finding displays a **Medcin Lookup** window:

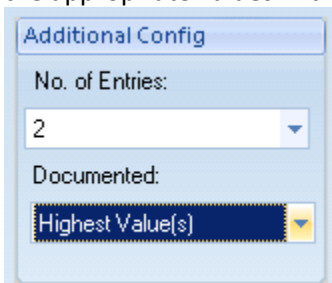


- Search for the appropriate finding and click **OK** to add the finding to the **Selected Components** table.

If Custom View was selected in Step 4:



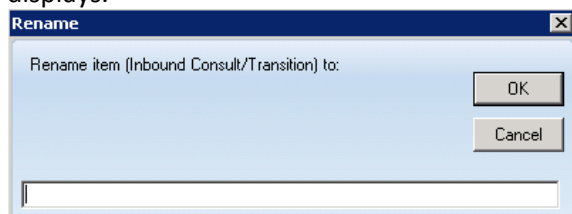
- Select and arrange the appropriate components as above.
- For each component in the **Selected Components** table, select the name of the component and enter the appropriate values in the **Additional Config** section:



- **No. of Entries** – Select the number of entries (**1–4**) for the component to display on the Care Plan. This determines the number of columns that display on the Care Plan screen.
- **Documented** – Select the appropriate search parameter for component values:
 - **Ever** – Searches for the first most recent of the component ever documented.
 - **Most Recent** – Searches for the most recent example(s) of the component documented.
 - **Highest Value** – Searches for the highest values of the component documented.
 - **Lowest Value** – Searches for the lowest values of the component documented.

The default values are **2** for the number of entries and **Most Recent** for documented components; i.e., the Care Plan will display the two most recent examples of a component.

8. To rename a component, select the appropriate component and click **Rename**. A **Rename** dialog box displays.



Enter the new component name in the field and click **OK**.

9. Click **Finish** to save the configuration. The configuration will be added to the main table on the **Flowsheet/Care Plan Configuration** screen.

10. To edit a Care Plan, click the **Details** button for the appropriate Care Plan. An edit dialog box for the Care Plan displays.

Make the appropriate edits and click **Apply** to save your changes and keep the window open, or **Save and Exit** to save your changes and close the window.

11. To delete a Care Plan, click the **Delete** button for the appropriate Care Plan. A confirmation message displays.

Click **Yes** to delete the plan, or **No** to cancel deletion.

Viewing Care Plans

Care plans may be viewed by accessing the appropriate patient and clicking the **Care Plan** icon on the **Navigation** ribbon. (This icon may also be added to the **Quick Access Toolbar**.)



The **Care Plan** window displays for the patient.

Note - The logged in user must have Security access and at least one care plan assigned to their user in order for the button to appear.

Access is defined by enabling the **Care Plan Access** option for the user in the Miscellaneous mode of the **Configure by User/Configure by Section** screens in Clinical Console Security.

The screenshot shows the 'Miscellaneous' section of a security configuration interface. It contains a grid of checkboxes for various permissions. The 'Care Plan Access' checkbox is highlighted with a red rectangular box. Other visible checkboxes include 'Specified View Access', 'Delete Attachments', 'Import Data to Medicin', 'CEM Access (Results Only)', 'EPCS Config', 'HIV/AIDS Reporting Data', 'Modify Reaction Severity', 'Flowsheet Access', 'Delete Note in Medicin.Net', 'Activate Deferred Orders', 'Discontinue Deferred Orders', 'Meaningful Use / PQRS Reports (All Providers In FG)', 'Meaningful Use/PQRS Reports (Default Provider Only)', 'Exclude from HIE/CDA documents', 'Enable Transition/Referral Dialog', 'Associate Macros - Main Ribbon', 'Document Configuration Admin', 'Override Medicin Form/List Ownership', 'Edit Eligible for eRx in CMC', 'Inactivate/Activate from PMH Import', 'Reply to Patient', 'Risk Level Override', 'PNG Access', 'Override Correspondence Form Ownership', 'Care Plan Access', 'Problem Mapping', 'Unfinalize Antepartum Record Episodes', 'Delete Direct Messages', 'Generate Files for MU and PQRS reporting', and 'Duplicate Problems'. 'Delete Antepartum Record Episodes' and 'ICD9 Visit Override' are also present.

The Care Plan window has two view tabs, **Encounter View** and **Custom View**. Care Plans configured for Encounter View will appear in the **Encounter View** tab only and care plans configured for Custom View will appear in the **Custom View** tab only. The two configuration types cannot merge within the same tab view.

If the selected patient has only one view configured for a patient, only that tab view will be available. If a new care plan with a different view is assigned to the patient, both tabs will display.

If a given patient has multiple care plans, they will appear one under the other as parent rows with the child row components or data items in between. To re-order the parent rows, select the appropriate care plan and click or to move the plan to the desired position in the **Care Plan** window. If a new care plan is added for a given patient, it appears as the last care plan by default.

Encounter View

The screenshot shows the 'Encounter View' window. It features a 'Plans' tab and a table with columns for 'Hide', 'Add Codes', 'Flag', 'View Details', and three encounter columns for 8/17/2015, 8/16/2015, and 8/15/2015. The table lists various medical components like 'AMYLOSE rename', 'Outbound Consult/Transition', 'DTAP VACCINE, IM', 'Inbound Consult/Transition', 'DISANTIN', '1 SURFACE AMALGAM', 'IRON', 'BONE IMAGING, WHOLE BODY', 'Size', 'ABSORBABLE SULFONAMIDE ANTIBACTERIAL AGENTS', 'Kanax', 'Blood Pressure', 'Height/Length', 'Pulse', 'Resp. Rate', 'Temperature', 'Weight', 'Pain', 'BMI', 'BMI%', 'BSA', 'Waist', 'Hips', 'WHR', 'Head-related symptoms', and 'Headache'. Each component has corresponding data values for the three dates.

- The **Encounter View** tab displays all Care Plans associated to the patient designated as Encounter View on the **Flowsheet/Care Plan Configuration** screen. Each Care Plan is located in a parent row, with the components associated to the specific plan in child rows.
- All encounters for the patient are listed in individual columns, reading left to right from most recent to oldest encounter. Each column displays the values corresponding to the Care Plan components for that

encounter date.

Encounter	07/17/2015	07/16/2015	07/15/2015	
AMYLOSE rename	Ordered	Performed: 16-JUL-15	Performed: 16-JUL-15	Per
Outbound Consult/Transition	JESSIE ALTMAN, ANE...	A-OUTBOUND TRAN...	JESSIE ALTMAN, ANE...	ELV
DTAP VACCINE, IM	Ordered	Performed	Ordered	
Inbound Consult/Transition	JESSIE ALTMAN, ANE...	GEORGE WASHINGT...	GEORGE WASHINGT...	BES:
DILANTIN	6	3	3	
1 SURFACE AMALGAM	Ordered, Ordered, Or...	Performed: 16-JUL-15	Ordered	Per
IRON	4	4	4	
BONE IMAGING, WHOLE BODY	Ordered	Performed: 16-JUL-15	Ordered	Per
Size	3	2	5	
ABSORBABLE SULFONAMIDE ANTIBACTERIAL AGENTS	sulfadiazine 500 mg t...	sulfadiazine 500 mg t...	Bactrim DS 800-160...	
Xanax	Xanax 1 mg tab Sig:...	Xanax 1 mg tab Sig:...	Xanax 1 mg tab Sig:...	
Blood Pressure	115/80	/ , 114/82	/ , 118/80	
Height/Length	77 in	in, 76 in	in, 73 in	
Pulse	89	, 88	, 86	
Resp. Rate	5	, 7	, 4	
Temperature	98.7 F	99 F, 98.6 F	F, 98 F	
Weight	180.61 pounds	pounds, 154.18 po...	150 pounds, 216.74...	:
Pain	1	, 0	, 2	
BMI	21.4	18.8 ,	, 28.6	
BMI%	Off Chart	, Off Chart	, Off Chart	
BSA	2.1	, 1.9	, 2.2	
Waist	30	, 29	, 28	
Hips	30	, 28	, 28	
WHR	1	, 1.04	, 1	
head-related symptoms	Head symptoms	No head symptoms	Head symptoms	i
headache	No headache	No headache	Headache	

Custom View

Custom View			Plans			
Complete			Add Component	Add from Test		
All Enc Non All						
Hide	Add	Flag	Entry 1	Entry 2	Entry 3	Entry 4
X	+	▼	AMYLASE	07/16/2015 : Performed.	07/15/2015 : Performed.	07/14/2015 : Performed.
X	+	▼	Outbound Consult/Transition	07/17/2015 : JESSIE AL.	07/17/2015 : ELVIS PRE.	07/16/2015 : A-OUTBO-
X	+	▼	OTAP VACCINE, IM	07/17/2015 : Ordered	07/16/2015 : Performed	07/15/2015 : JESSIE
X	+	▼	Inbound Consult/Transition	07/17/2015 : JESSIE AL.	07/16/2015 : GEORGE-	07/14/2015 : Perfo
X	+	▼	OSLANTIN	07/16/2015 : 8	07/08/2015 : 8	07/13/2015 : 7
X	+	▼	1 SURFACE AMALGAM	07/17/2015 : Ordered	07/17/2015 : Ordered	07/17/2015 : Ordered
X	+	▼	IRON	07/16/2015 : 1	07/10/2015 : 3	07/16/2015 : 4
X	+	▼	BONE IMAGING, WHOLE BODY	07/17/2015 : Ordered		
X	+	▼	Site	07/17/2015 : 3	07/16/2015 : 2	07/15/2015 : 5
X	+	▼	ABSORBABLE SULFONAMIDE ANTIBACTERIAL	07/17/2015 : sulfadiazin.	07/16/2015 : sulfadiazin.	07/15/2015 : Bactrim O.
X	+	▼	Xanax	07/17/2015 : Xanax 1.	07/16/2015 : Xanax 1.	07/15/2015 : Xanax 1.
X	+	▼	Blood Pressure	07/17/2015 : 115/80	07/16/2015 : 114/82	07/15/2015 : Xanax 1.
X	+	▼	Height/Length	07/17/2015 : 77 in	07/16/2015 : 76 in	07/13/2015 : Xanax
X	+	▼	Pulse	07/17/2015 : 89	07/16/2015 : 88	
X	+	▼	Resp. Rate	07/17/2015 : 5	07/16/2015 : 7	
X	+	▼	Temperature	07/17/2015 : 98.7 F	07/16/2015 : 99.6 F	
X	+	▼	Weight	07/17/2015 : 180.61 p.	07/16/2015 : 154.18 p.	
X	+	▼	Fan	07/17/2015 : 1	07/16/2015 : 0	
X	+	▼	BMC	07/17/2015 : 21.4	07/16/2015 : 18.8	
X	+	▼	BMC%	07/17/2015 : Off Chart	07/16/2015 : Off Chart	
X	+	▼	BSA	07/17/2015 : 2.1	07/16/2015 : 1.9	
X	+	▼	Wast	07/17/2015 : 30	07/16/2015 : 29	
X	+	▼	Hqs	07/17/2015 : 30	07/16/2015 : 28	
X	+	▼	WHR	07/17/2015 : 1	07/16/2015 : 1.04	
X	+	▼	head-related symptoms	07/17/2015 : Head sym.	07/16/2015 : No head s.	07/15/2015 : Head sym.
X	+	▼	headache	07/17/2015 : No headac.	07/16/2015 : No headac.	07/14/2015 : Head-

- The **Custom View** tab displays all Care Plans associated to the patient designated as Custom View on the **Flowsheet/Care Plan Configuration** screen. Each Care Plan is located in a parent row, with the components associated to the specific plan in child rows.
- Entry columns listed reading left to right from each component child row.

Entry 1	Entry 2	Entry 3	Entry 4
---------	---------	---------	---------

Values will display in each column corresponding to the **No. of Entries** and **Documented** settings in the **Additional Config** section for the Care Plan in the **Flowsheet/Care Plan Configuration** screen.

Additional Config

 No. of Entries:

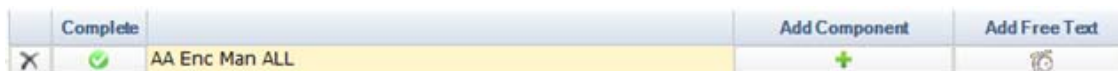
 Documented:

- For example, if 20 components are present in a Care Plan, and each component has a **No. of Entries** value of **2** and a **Documented** value of **Most Recent**, the two most recent entries for that component will display in columns **Entry 1** and **Entry 2**, respectively. The **Entry 3** and **Entry 4** columns will not display.
If another component is added to the same Care Plan with a **No. of Entries** value of **3**, then the three most recent entries for the new component will display in columns **Entry 1** through **Entry 3**. The **Entry 3** column will be blank for all other components (as they are only configured for two entries).

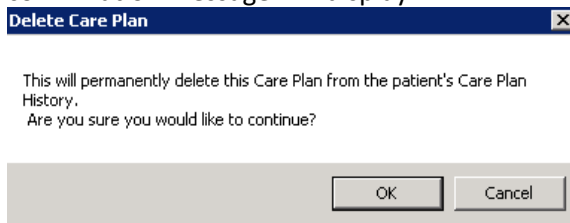
Managing Care Plans

Users may add, edit, and manage data in Care Plans as follows:

Parent Row

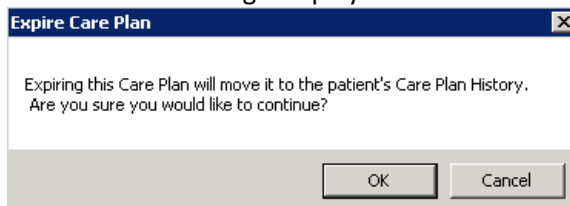


- Delete** – Clicking the delete icon (X) permanently deletes the care plan from the patient's record. A confirmation message will display:



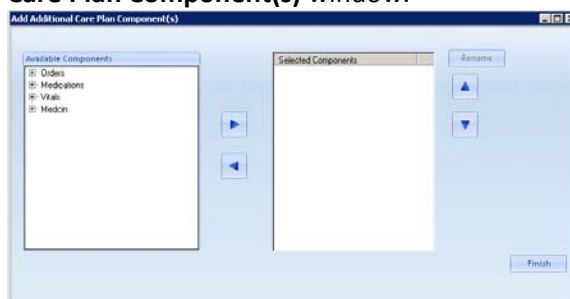
Click **OK** to delete the Care Plan.

- Complete** – Clicking **Complete** expires the plan and move it to the patient's Care Plan history. A confirmation message displays:



Users may click **OK** to mark the plan completed.

- Add Component** – Enables users to add a component to the selected Care Plan via the **Add Additional Care Plan Component(s)** window.



Users may select the appropriate component(s), specify the order displayed, and rename components as in the **Add New Flowsheet/Care Plan** window on the **Flowsheet/Care Plan Configuration** screen.

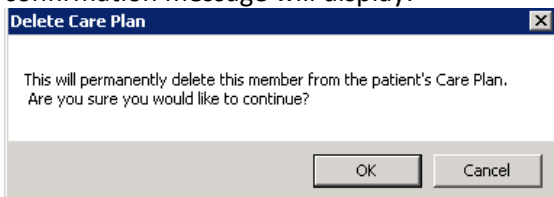
- **Add Free Text** – Enables users to add a free text child row in the Care Plan.

Users may free text in the component and any encounter date or entry field.

Child Rows



- **Delete** – Clicking the delete icon (X) permanently deletes the component from the Care Plan. A confirmation message will display:



Click **OK** to delete the component.

- **Hide** – The **Hide** button enables the user to hide a row in the case of duplicate items in the Care Plan. Hiding a row hides it for the patient's Care Plan and is hidden for all users. Hidden rows will not display on printed Care Plans.

Users may select (check) the **View Hidden Data** checkbox to temporarily view all hidden rows. To permanently unhide all hidden rows, users may click the **Unhide All Data** button.



- **Add Order** (Encounter View only) – Clicking the **Add Order** button adds one instance of a component to the most recent encounter on the Care Plan. An **Ordered** label will display in the appropriate encounter column indicating that the appropriate component has been ordered.

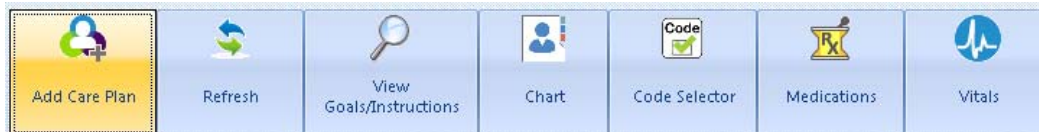
Hide	Add Order	Flag	View Details	07/17/2015	07/17/2015
X	+			Ordered	Performed
X	+			AMYLASE Renal	
X	+			Outbound Consult/Transition	JESSIE ALTMAN, ANE... A-OUTBOU
X	+			DTAD VACCINE 1M	Ordered

- **Flag** – Clicking the **Flag** button launches the standard **Flag Detail** window and enables the users to add a flag to the component.

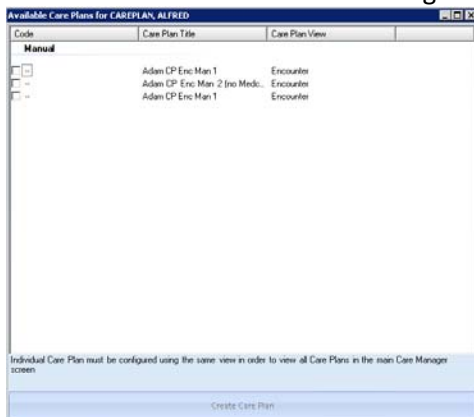
Note - The Flag icon will be disabled in Custom View if the component is not configured for Most Recent documented data.

- **View Details** – Clicking the **View Details** button launches the standard detail window for the appropriate component.

Care Plan Toolbar

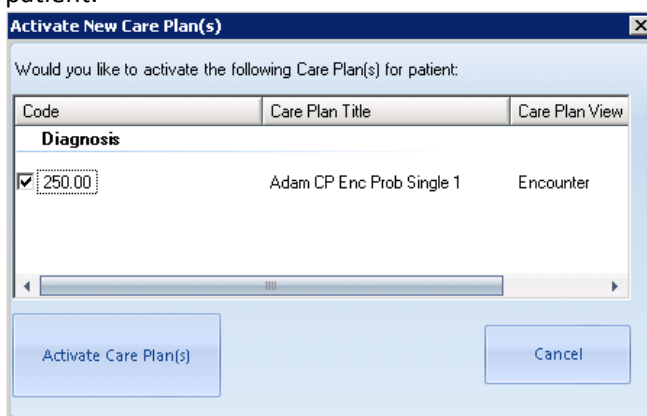


- **Add Care Plan** – Users may assign additional Care Plans to the patient's record by clicking **Add Care Plan**. An **Available Care Plans** dialog box displays.



Users may select (check) the checkbox for the appropriate Care Plan and click the **Create Care Plan** button to add the plan to the patient's record.

- For Care Plans associated to **Problems** (configured as such in the **Flowsheet/Care Plan Configuration** screen), an **Activate New Care Plan(s)** prompt will display whenever the Care Plan window is launched **and** any Problem-associated templates **match an active diagnosis code** for the patient.



All care plans associated to the diagnosis code will display. The user may select (check) the checkbox(es) for the appropriate Care Plans and click the **Activate Care Plan(s)** button for the selected plans.

- **Refresh** – Clicking **Refresh** refreshes the information on the **Care Plan** window as per normal.

- **View Goals/Instructions** – The **View Goals/Instructions** button allows users to add and track specific goals for the Care Plan.

To add a goal to a patient's Care Plan:

1. Click **Add** in the **Care Plan Goals** section. A blank row displays.
2. Enter the **Goal** and its **Due Date**.
3. Select the appropriate **Status** for the goal from the drop-down menu. Statuses include **Unknown**, **Accomplished Goal**, **On Target**, **Improving**, and **Goal Not Met**.

Del	Goal	Due Date	Status	Last Modified
	Stop smoking.	1/31/2017	<div style="border: 1px solid red; padding: 2px;"> Unknown Accomplished Goal On Target Improving Goal Not Met </div>	

4. Click **Display Goals in Medcin** to send the goal to the Medcin note.

Note - If goals or instructions are edited after they feed to Medcin, the user must relaunch the **View Goals/Instructions** window and click the **Display Goals in Medcin** button again to update Medcin. Users will not be allowed to edit these items from Medcin and have them appear as updated in the table shown above.

5. Select (check) the **Hide Accomplished Goals** checkbox to remove all accomplished goals from view.
6. Click **Apply** to save your changes and keep the window open, or **Save** to save your changes and close the window.

To add an instruction to a patient's Care Plan:

1. To add an instruction to the Care Plan, click **Add** in the **Care Plan Instructions** window. A blank row displays.
2. Enter the **Instructions**.
3. Click **Display Instructions in Medcin** to send the goal to the Medcin note.
4. Click **Apply** to save your changes and keep the window open, or **Save** to save your changes and close the window.
5. To delete a goal or instruction, click the appropriate button in the **Delete** column.

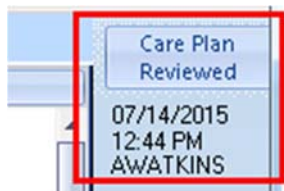
- **Chart** – Clicking the **Chart** button will navigate the user to the current patient's chart.

- **Vitals** – Clicking the **Vitals** button will launch the **Vital Signs** screen. From here, users may add vitals measurements to the most recent encounter.

Date	Temp (F)	Pulse	RR (b)	O2 Sat	BP (mm Hg)	Ht/Len (ft)	Ht (in)	Wt (kg)	Wt (lb)	BMI (kg/m ³)	BMI (lb/in ²)	BSA (m ²)
07/17/2015	98.7	89	5	98%	115/90	6' 5"		82	180 lb	21.40	OH	2.10
07/16/2015	99.0											
07/16/2015	98.6	88	7	99%	114/82	6' 4"		70	154 lb	18.80	OH	1.90
07/15/2015	98.0	86	4	98%	118/80	6' 1"		98.4	216 lb	28.60	OH	2.20
07/15/2015								68.1	150 lb			
07/14/2015	99.0	87	4	98%	117/81	6' 0"		98.5	216 lb	28.40	OH	2.20
07/13/2015	99.2	88	5	97%	118/87	6' 3"		99.2	218 lb	27.30	OH	2.30
07/10/2015	99.4	90	9	93%	120/90	6' 2"		99	218 lb	28	OH	2.30
07/09/2015	99.3	89	8	96%	130/95	6' 2"		99.5	219 lb	28.10	OH	2.30
07/08/2015	98.0	84	3	93%	115/75	6' 3"		69	151 lb	19	OH	1.90
07/07/2015	98.0	170	9	98%	130/80	6' 1"		98.4	216 lb	28.60	OH	2.20
07/02/2015	99.5	84	8	99%	132/81	6' 1"		98.5	216 lb	28.60	OH	2.20
06/29/2015	97.0	82	7	96%	125/95	6' 1"		98.2	216 lb	28.50	OH	2.20
06/26/2015	98.0	81	8	97%	140/80	6' 1"		98.1	216 lb	28.50	OH	2.20
06/25/2015	99.0	80	9	95%	120/80	6' 1"		98.3	216 lb	28.60	OH	2.20

Reviewing Care Plans

After reviewing the information in a patient's Care Plan, users may click the **Care Plan Reviewed** button to indicate that the plan has been reviewed. The date/time and username of the reviewer will display immediately below the button.



The reviewed status will also display in the **Medcin** note.