
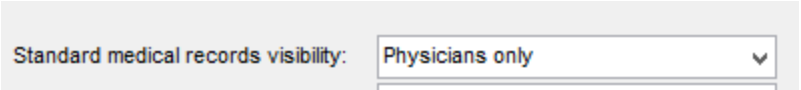




Checklist for Care Plans

Verify that staff have the correct permissions to:	
<p>1. View and Enroll Care Plans:</p> <p>a. Utilities> Manage Practice>Staff Directory> Standard Medical Records Visibility</p> <p>i. </p> <p>2. Manage and Create Care Plans</p> <p>a. Utilities>Staff Directory>Security Access</p> <p>i. Care Plan Permissions:</p> <ul style="list-style-type: none">→ Care_Plan_Global_Manage→ Care_Plan_Global_View→ Care_Plan_Item_Manage→ Care_Plan_Patient_Customize→ Care_Plan_Patient_View	
Activate Care Plans	
<p>1. Required Fields:</p> <p>a. Active</p> <p>b. As of Date</p> <p>c. Auto Enroll</p> <p>d. Contrary Days</p> <p>e. View Privacy</p> <p>f. Enroll Privacy</p>	
Review Care Plan Enrollment Monthly:	
<p>1. Run>Reports> Demographic Analysis Recall Report for Care Plans</p> <p>a. Check "Include All"</p> <p>b. Enroll Qualified</p>	