Checklist for Activating Care Plans

Verify that staff have the correct permissions to:	☑

1. View and Enroll Care Plans:
    a. Utilities> Manage Practice>Staff Directory> Standard Medical Records Visibility
 	
       i.
 	
Standard medical records visibility: Physicians only
 	
2. Manage and Create Care Plans
    a. Utilities>Staff Directory>Security Access
       i. Care Plan Permissions:
          ➤ Care_Plan_Global_Manage
          ➤ Care_Plan_Global_View
          ➤ Care_Plan_Item_Manage
          ➤ Care_Plan_Patient_Customize
          ➤ Care_Plan_Patient_View	

Activate Care Plans	

1. Required Fields:
    a. Active
    b. As of Date
    c. Auto Enroll
    d. Contrary Days
    e. View Privacy
    f. Enroll Privacy	

Review Care Plan Enrollment Monthly:	

1. Run>Reports> Demographic Analysis Recall Report for Care Plans
    a. Check "Include All"
    b. Enroll Qualified (If auto-enroll status)	