



1. Identify clinical focus of the care plan (such as diagnosis or preventive care).
2. Set Goals - Review current care plan content and/or develop new care plans.
  - Include evidence-based medicine practices and/or practice guidelines
  - Incorporate quality improvement goals (PQRI, P4P, DOQ-IT)
  - Capture performance measures
  - Include regulatory initiatives and accreditation requirements (NCQA, JCAHO)
  - Customize individual patient goals (such as weight loss targets, exercise goals)
  - Address local practice population needs
3. In migrating to an electronic health record consider integrating care plan components into the EHR:
  - Order sets for easy order entry of labs, X-rays, point of care testing and prescriptions
  - Documentation templates with pick lists, check boxes or other forms of structured data entry.
  - Care plan data elements, both current and previously documented, can be viewed within a customized flow sheet or data summary display
  - Care plan data that can be readily queried to produce printouts for patient use, including follow up appointment dates, and future tests.
  - Care plan data that can be readily queried to extract population-based reports and performance measures for reporting to outside agencies.
  - Medication reconciliation

<b>Care Plan Component</b>	<b>EHR Components Tool(s) To Use</b>	<b>EHR Summary/Aggregate Data Views</b>
<b>Education and Patient Specific Goals:</b> <ul style="list-style-type: none"> <li>• Diet</li> <li>• Exercise</li> <li>• Activity</li> <li>• Habits (i.e., tobacco, alcohol use)</li> </ul>	Problem list Order sets Work lists for nurses, dieticians, etc. Documentation templates with <ul style="list-style-type: none"> <li>• Pick lists/Check boxes</li> <li>• Structured/semi-structured data entry</li> </ul>	Customized flow sheet to view previous and current documentation
<b>Test Results</b>	Direct data entry (point of care tests) Interfaced results from lab/rad systems	Customized flow sheet to view previous and current results
<b>Medication Management</b>	<ul style="list-style-type: none"> <li>• Order sets for prescriptions</li> <li>• e-prescribing</li> <li>• Medication list</li> <li>• Allergy list</li> <li>• Clinical Decision Support –drug/drug, drug/allergy, drug/lab interaction checking</li> </ul>	Medication List – Active meds Reporting capability by medication for drug recalls
<b>Follow-up</b> <ul style="list-style-type: none"> <li>• Lab studies</li> <li>• Radiology studies</li> <li>• Immunizations</li> <li>• Referrals</li> </ul>	<ul style="list-style-type: none"> <li>• Order sets</li> <li>• Electronic Referrals</li> <li>• Clinical Decision Support– Reminders/Alerts when care plan components are due</li> </ul>	Exception Reports Customized flow sheet to view previous and current documentation/results
<b>Patient Care Plan Summary</b>	Schedule future appointments Clinical Decision Support – Electronic reminders to patients Patient Portals for Personal Health Record	Patient handout with future appointments, tests, medication list, goals and educational information