# Patient Care Plan Summary Widget

As part of our ongoing efforts to enhance clinical workflows and documentation quality, we have updated the **Patient Care Plan** experience. This update includes a new **Care Plan Widget** embedded in the **Patient Summary** and an intuitive **Drawer Interface** to streamline care planning for patient-reported problems and diagnoses. This improvement is designed with direct feedback from Behavioral Health providers and aligns with regulatory requirements.

## Why This Update Matters | What Has Changed | Widget | Managing Care Plans |

## Additional resources

- Patient Care Plan Summary Widget (Video)
- Create a Patient Care Plan
- Patient Care Plan Observations and Interventions
- Patient Care Plan Clinical Codes
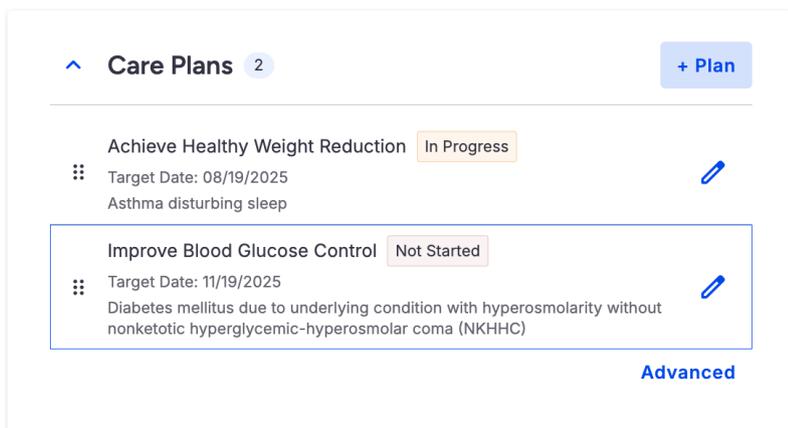- Patient Care Plan CCDA and Onpatient

## Why This Update Matters

- **Increased Visibility & Usability:** Care planning tools are now surfaced in the **Patient Summary**, reducing navigation friction and making care plans accessible within existing clinical workflows.
- **Structured, Standardized Documentation:** Enables providers to document **goals**, **objectives**, and **interventions** for each diagnosis/problem in a structured format.
- **Regulatory Compliance (USCDI v3):** Supports standardized data elements to meet U.S. Core Data for Interoperability (USCDI) version 3 requirements.
- **Interoperability with C-CDA Export:** Facilitates care plan data export in **C-CDA format**, supporting information exchange and regulatory reporting needs.

## What Has Changed

| Previous Experience | Updated Experience |
|---|---|
| Care Plan button hidden in the Clinical Dashboard | Care Plan Widget embedded in the Patient Summary |
| Limited functionality for documenting care goals | Structured fields for goals, objectives, and interventions |
| Poor discoverability and engagement | Accessible via new drawer interface directly from the Patient Summary |
| No support for standardized data elements | USCDI v3-compliant fields and C-CDA export support |

## Care Plan Summary Widget

## Widget Overview

- **Location:** Appears in the **Patient Summary** section of the **Patient Chart** tab.
- **Display:** Collapsible and expandable for flexible viewing.
- **Empty State:** If no care plans are documented for the patient, the widget will show an empty state message.

## Displaying Care Plans

When care plans are documented for a patient:

- **Five (5) most recent** care plans are displayed in the widget.
- Plans are listed in **reverse chronological order** (most recently created at the top).
- Once the user manually reorders the list, that order will be saved and persist on reload.

Each care plan entry includes:

- Goal Name
- Target Date
- Status
- Associated Problems
  - The associated problems dropdown displays only the problems that have already been added to the patient's problem list.  To see a problem in this dropdown within the care plan, you must first add it to the patient's problem list
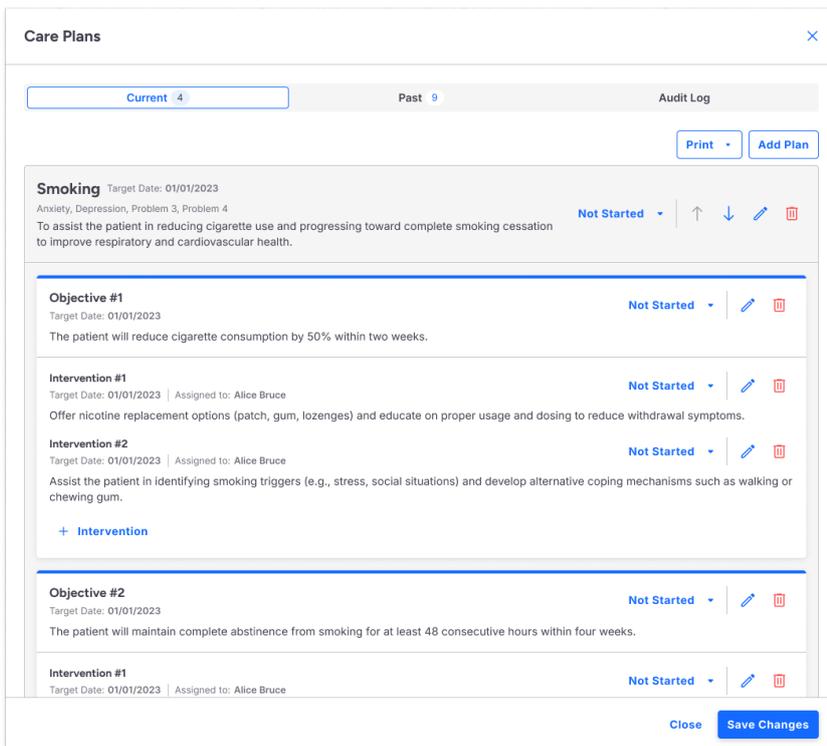- Goal Description

# Managing Care Plans

## Editing a Care Plan

- Click the **pencil icon** next to a care plan to open the editing drawer.
- Edit any of the care plan fields from within the drawer.

## Reordering Care Plans

- Click and drag the **icon on the left side** of the goal name to reorder the care plans.
- The custom order is automatically saved and will persist across sessions.

# Advanced View

Click **Advanced View** to open a full drawer with a detailed view of all care plan information. The Advanced View includes **three tabs**:

**1. Current**
- Displays active care plans.
- Use the **Print dropdown** to print either:
    - The **entire care plan history**, or
    - A **specific care plan**.

**2. Past**
- Displays completed or inactive care plans.
- Includes the same **print functionality** as the Current tab.

**3. Audit Log**
- Tracks all user actions related to the care plans, including:
    - **Create**
    - **Read**
    - **Update**
    - **Delete**
- If no actions have been taken yet, an empty audit state is shown.
- Once actions are recorded, the log will display a chronological list of those actions.

## Reorder Care Plans in Advanced View

In the **Advanced view** of the care plan widget, you can change the order of care plans to prioritize or organize them as needed.

1. Navigate to the **Advanced view** in the care plan widget.

2.  Locate the care plan you want to move.

3.  Use the **up ( ↑ )** or **down ( ↓ )** arrows next to the care plan to move it higher or lower in the list.

The list updates immediately to reflect the new order.

Learn more about the Patient Care Plan

| Create a Patient Care Plan | Patient Care Plan Observations and Interventions |
| Patient Care Plan Clinical Codes | Patient Care Plan CCDA and Onpatient |