

Create a Patient Care Plan

Last modified on 02/05/2026 7:12 pm EST



This feature is currently in beta. To become a beta partner for this feature, add a comment to the DrChrono roadmap [portal card](#) submit your request.

This article provides an overview of managing patient care plans within the system. It covers how to create a new care plan, edit an existing care plan, and update the status of a care plan to reflect completion or patient refusal.

Create Care Plan

Edit Care Plan

Update Care Plan Status

Creating a New Care Plan

Add Care Plan



Goal Name *

0 / 60

Goal *

Problems *

Select problems

Target Date *

08/13/2025

Status

Not Started

Attach Clinical Codes

Find SNOMED

Find LOINC

Type	Code	Description	Action
No records			

Cancel

Add Care Plan

- Enable staff permission to manage care plans.
 - Navigate to Account > Staff Permissions > Manage Care Plan and/or Share Care Plan
 - Enabled permission: User can add a new care plan or edit the information for any fields in the care plan.
 - Disabled permission: User can only has read access to view are plans.
- Go to the patient chart, then navigate to Patient Summary > Care Plans, and click the **+ Plan** button to start a new care plan.
- A side drawer will appear on the screen.
- In this drawer, you'll document key details about the patient's goal, target date, status, objectives, and interventions associated with a specific problem/diagnosis.

Term

Description

Goals	<ul style="list-style-type: none"> • Goal Name <ul style="list-style-type: none"> ◦ Field Type: Single-line text ◦ Character Limit: 60 characters ◦ Required: Yes • Goal Description <ul style="list-style-type: none"> ◦ Field Type: Free text ◦ Character Limit: None ◦ Required: Yes ◦ Expandable Field
Problems/Diagnoses	<ul style="list-style-type: none"> • Field Type: Dropdown with search • Functionality: Begin typing to search and select from a list of existing problems/diagnoses. • Required: Yes
Target Dates	<ul style="list-style-type: none"> • Field Type: Pick a date from the calendar • Required: Yes
Status	<ul style="list-style-type: none"> • Field Type: Dropdown • Options: <ul style="list-style-type: none"> ◦ Not Started ◦ In Progress ◦ Partially Complete ◦ Complete ◦ Patient Refused ◦ Held ◦ Normal ◦ Nullified ◦ Obsolete ◦ Suspended • Required: Yes • Attach Clinical Codes

Objectives	<ul style="list-style-type: none"> • Free Text Field • Target Date <ul style="list-style-type: none"> ◦ Date field • Status <ul style="list-style-type: none"> ◦ Dropdown field ◦ Options include: <ul style="list-style-type: none"> ▪ Not started ▪ In Progress ▪ Partially Complete ▪ Complete ▪ Patient Refused ▪ Held ▪ Normal ▪ Nullified ▪ Obsolete ▪ Suspended
Interventions	<ul style="list-style-type: none"> • Free Text Field • Target Date <ul style="list-style-type: none"> ◦ Date field • Status <ul style="list-style-type: none"> ◦ Dropdown field ◦ Options include: <ul style="list-style-type: none"> ▪ Not started ▪ In Progress ▪ Partially Complete ▪ Complete ▪ Patient Refused ▪ Held ▪ Normal ▪ Nullified ▪ Obsolete ▪ Suspended • Assigned To <ul style="list-style-type: none"> ◦ Dropdown field ◦ Options include all users within the practice group • Attach Clinical Codes

Attach Clinical Codes

- Find SNOMED CT Code (optional)
 - Start typing keywords. The system will display relevant SNOMED CT codes for selection.
- Find LOINC Code (optional)
 - Start typing keywords. The system will display relevant LOINC codes for selection.

Edit Care Plan

- **Enable staff permission to manage care plans.**
 - Navigate to Account > Staff Permissions > Manage Care Plans.
 - Enabled permission: User can add a new care plan or edit the information for any fields in the care plan.
 - Disabled permission: User can only has read access to view are plans.
- **Locate the Patient's Existing Care Plan**
 - Navigate to the patient's profile or record where the care plan is listed.
- **Click the Pencil Icon**
 - If a care plan already exists, click the **pencil icon** next to the care plan. This action opens a drawer containing the care plan fields.
- **Edit Care Plan Fields**
 - In the opened drawer, update any of the care plan fields as needed. You can modify existing entries or add new information.
- **Choose One of the Following Actions:**
 - **Click "Close"**
 - This closes the drawer **without saving** any changes. All edits are discarded.
 - **Click "Save"**
 - This saves all changes made to the care plan and closes the drawer.
 - **Click "Add Care Plan"**
 - This allows you to create and add a **new care plan** in addition to the existing one (if supported by your system). Follow the prompts to complete the new care plan.

Complete Care Plan Status

Finalize or Cancel

After filling in all necessary details, use the following buttons:

- **Add Care Plan:** Saves all entered data and closes the drawer. The care plan is now added to the patient's record.
- **Close:** Closes the drawer without saving any changes. The care plan will not be added.

Update Status

- **Open the Care Plan Drawer**
 - Click the **pencil icon** next to the care plan to open the drawer for editing.
- **Update the Status Field**
 - In the care plan drawer, change the **Status** to **Complete, Patient Refused, Nullified, or Suspended**.

- **Review the Confirmation Modal**
 - Once the status is changed, a **confirmation modal** automatically appears. This modal informs the user that the care plan will be moved to the **Past** tab.
- **Click the "Proceed" Button**
 - Click **Proceed** in the modal to confirm the status change. This action manually triggers the transition.
- **View the Updated Care Plan**
 - After proceeding, the care plan is automatically moved to the **Past** tab within the care plan widget.

Learn more about the Patient Care Plan

Patient Care Plan Summary Widget	Patient Care Plan Observations and Interventions
Patient Care Plan Clinical Codes	Patient Care Plan CCDA and OnPatient
