

Patient Care Plan CCDA and Onpatient

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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 outlines how to include patient care plans in exported documents and share them via Onpatient, allowing care plans to be captured in **CCDA files**, **clinical notes PDFs**, and securely delivered to the **patient's Onpatient inbox**. These options support continuity of care, compliance, and improved patient access to care plan details.

Include the Care Plan in a CCDA File

When exporting a **CCDA file** for a patient:

- Navigate to the patient's chart and select the option to **export CCDA**.
- The system automatically includes a **dedicated section for the care plan** within the exported file.
- All data entered in the care plan, including goals, objectives, and interventions, is captured and structured in the CCDA format.

Include the Care Plan in the Clinical Notes PDF

To include care plans in the **Clinical Notes PDF** from the **legacy clinical notes screen**, follow these steps:

- Go to **Account Settings → General → Clinical Notes**.
- Locate the setting called **Include Care Plan**.
- Set the toggle as needed:
 - **Enabled** – All care plans for the patient will appear in the clinical note PDF.
 - **Disabled** – Care plans will not be included in the PDF.
- When enabled, the care plan will be rendered in a **table format** on a **new page** within the PDF.

This setting controls whether care plans are visible in printed or downloaded clinical documentation.

Send the Care Plan to the Patient's onPatient Inbox

To send the care plan to the patient's **onPatient inbox**:

- Open the patient's care plan in DrChrono.
- Click the option to **Send to Patient** via onPatient.
- The care plan is sent to the patient's inbox, and the action is **logged in the audit trail** for compliance.



- You can send the same care plan more than once.
- The version sent reflects a **snapshot at the time of sending**.
- If changes are made to the care plan after it is sent, resend it to deliver the updated version.

This feature improves patient engagement by providing direct access to their care plan through a secure digital

platform.

Learn More about the Patient Care Plan

Patient Care Plan Summary Widget	Create a Patient Care Plan
Patient Care Plan Observations and Interventions	Patient Care Plan Clinical Codes
