Epic : Reference Guides

Individualizing Patient Care Plans
Tip Sheet

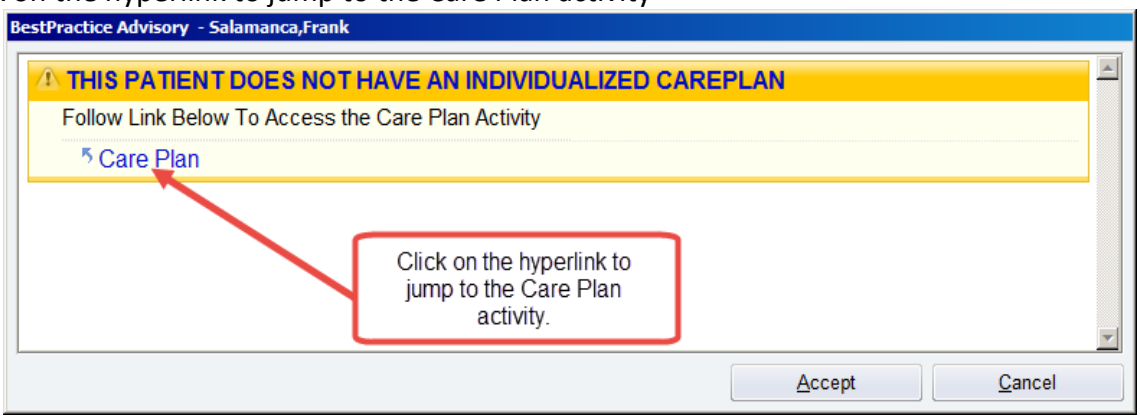
Expectation: Care plans must be added within 8 hours of admission and then reviewed daily.

Reviewed means:

- Review all added templates
- Review all goals and expected end dates
- Review all interventions
- Update and resolve added templates, topics, goals and interventions as appropriate

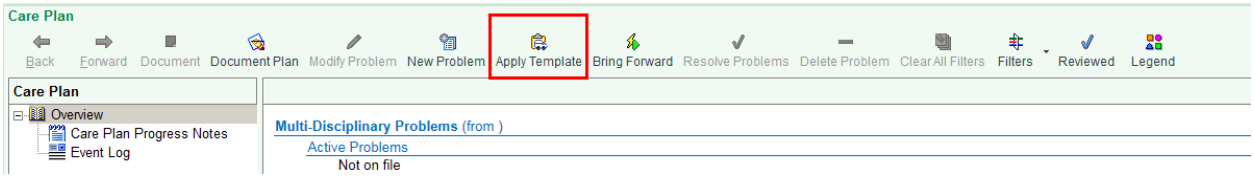
Updated Best Practice Alert (BPA):

- Pops up when chart is opened and no care plan created
- The generalized care plan will no longer automatically be added to every admitted patient
- Click on the hyperlink to jump to the Care Plan activity

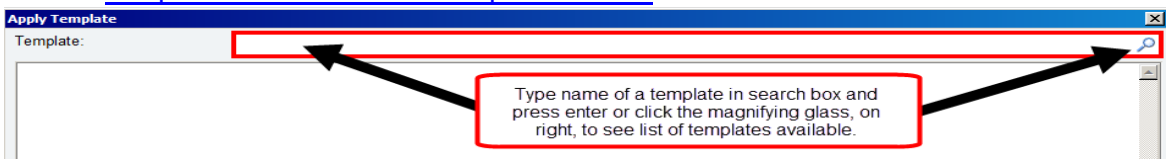


Adding Care Plans:

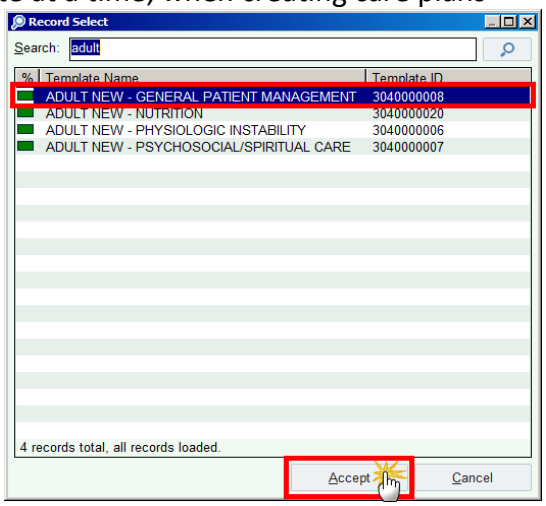
1. The Care Plan Activity will be blank for newly admitted patients
2. Click Apply Template to create a care plan
   - ***Do not*** *use the New Problem button to create Care Plans*



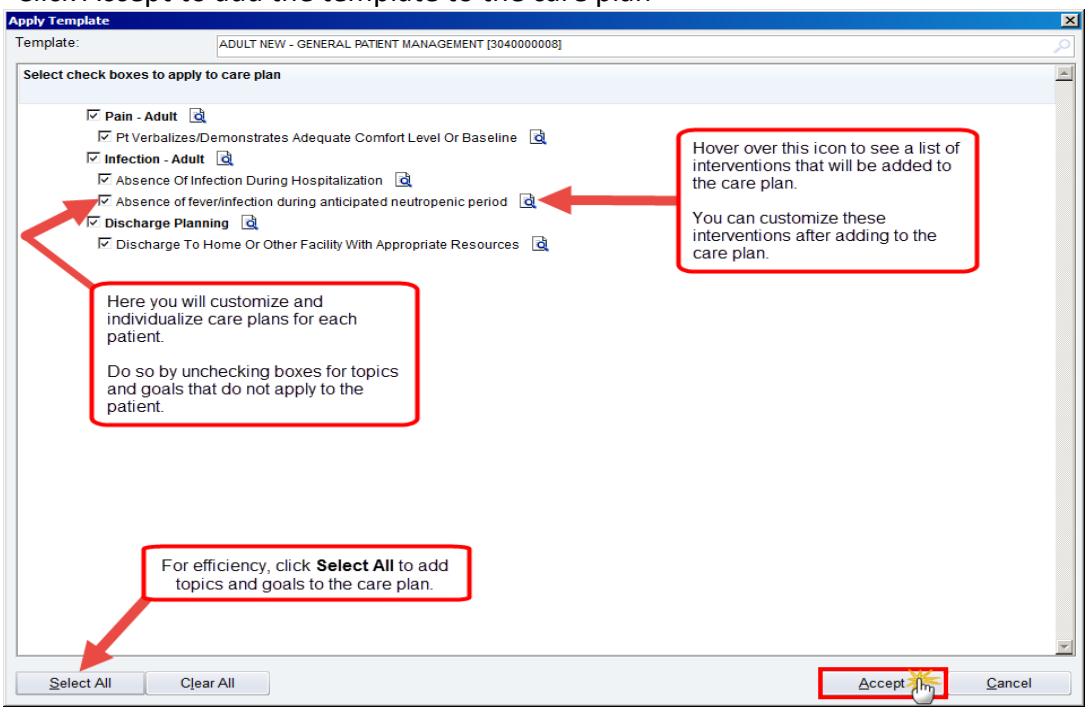
3. Type the name of a care plan template in the search field or click the magnifying glass to view all care plan templates
    - Examples of search words: adult, PED, OB, NICU, BH, Psych, Diabetes, Vent
      Jump to List of Care Plan Template Names



4. Choose a care plan template and click Accept
    - Choose one template at a time, when creating care plans



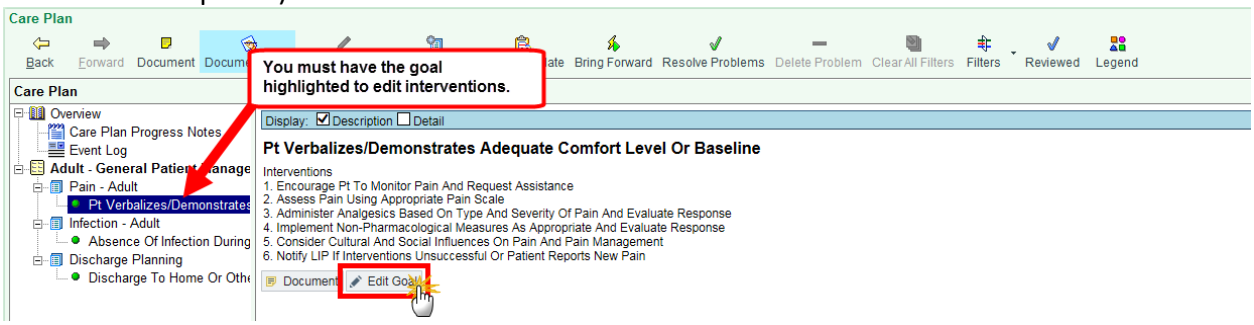
5. **<u>Customization</u>** and **<u>Individualization</u>** begins by only choosing appropriate topics and goals for each patient
    - Choose appropriate problems and goals for patients by checking boxes next to them OR
    - Use Select All button for efficiency and then uncheck problems/goals that do not apply
    - Click Accept to add the template to the care plan



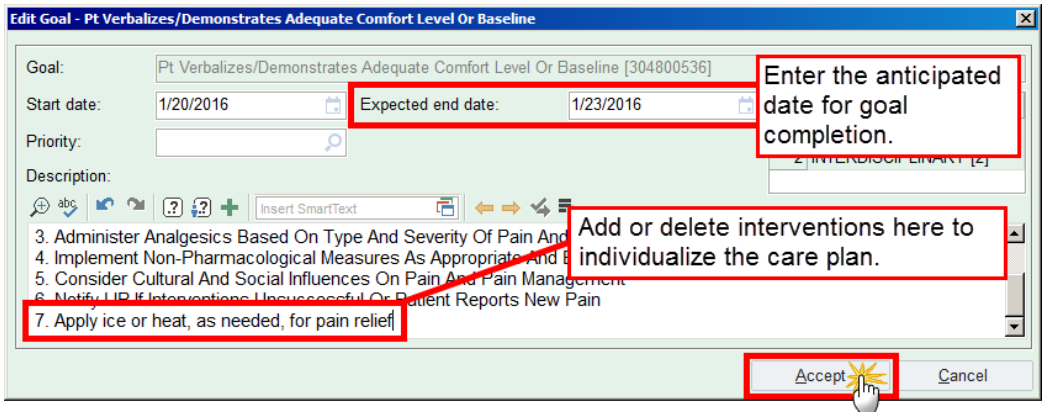
Adding or Deleting Interventions:

Review all Interventions listed and **customize/individualize** by:

1. Highlight a goal and click Edit Goal in your workspace
   A. Remember to add interventions if none are listed (this is true for most UVA specific templates)



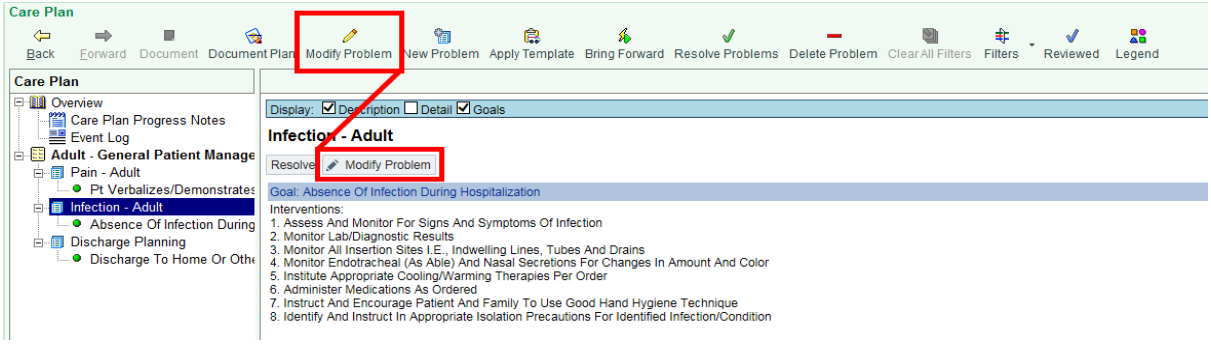
2. Enter an expected end date (when you anticipate the goal will be completed)
3. Delete any inappropriate interventions by highlighting the intervention and pressing delete or backspace
4. Add appropriate interventions to the list
   A. You can create smartphrases for standard interventions: [Epic Tip Sheet for Creating a Smartphrase]
5. Click Accept to finalize changes



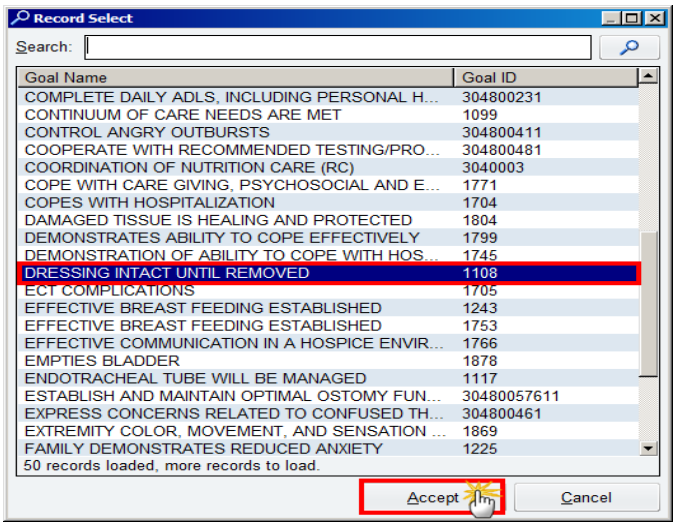
Editing Goals Previously Added:

You have the ability to individualize goals even after adding a template

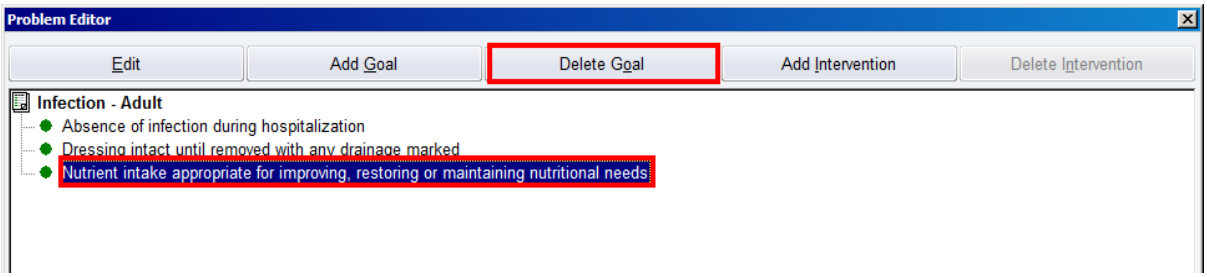
1. Highlight the problem on the left, for goal(s) needing individualization
2. Click Modify Problem from your toolbar or in your workspace



3. In the window that opens, you can now Add or Delete goals.
    - To add a goal, click Add Goal
    - Click the icon to select a goal
    - Select one from the list and click Accept



    - Click Accept once more
    - To delete a goal, highlight the one you would like removed
    - Click Delete Goal



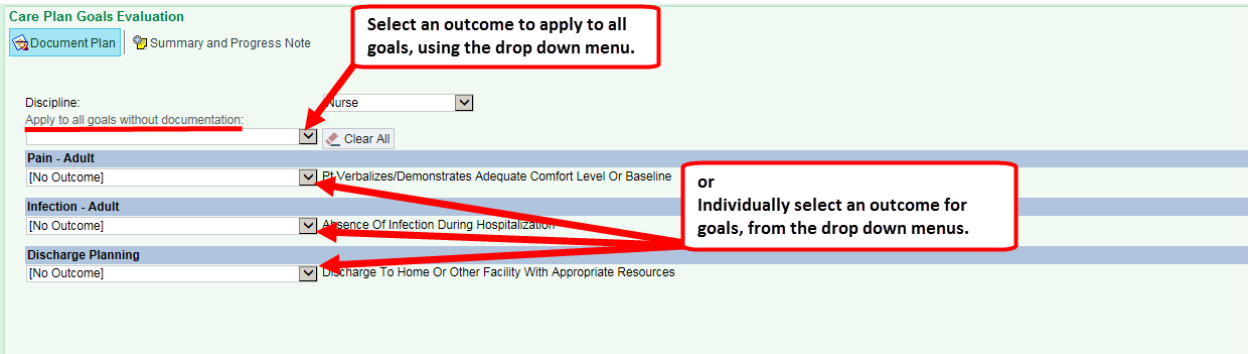
    - A pop-up will open asking if you want to delete the goal; Click Delete in this window
    - Click Accept once more
4. Once you have added care plan templates and updated goals and interventions, click Reviewed from the toolbar

Documenting Goal Outcome Progress and a Care Plan Note:

Nurses should document the outcome of goals daily and create a care plan note on patients not progressing towards an expected outcome. Quickly document both from the Care Plan activity:

1. Click Document Plan from the toolbar.

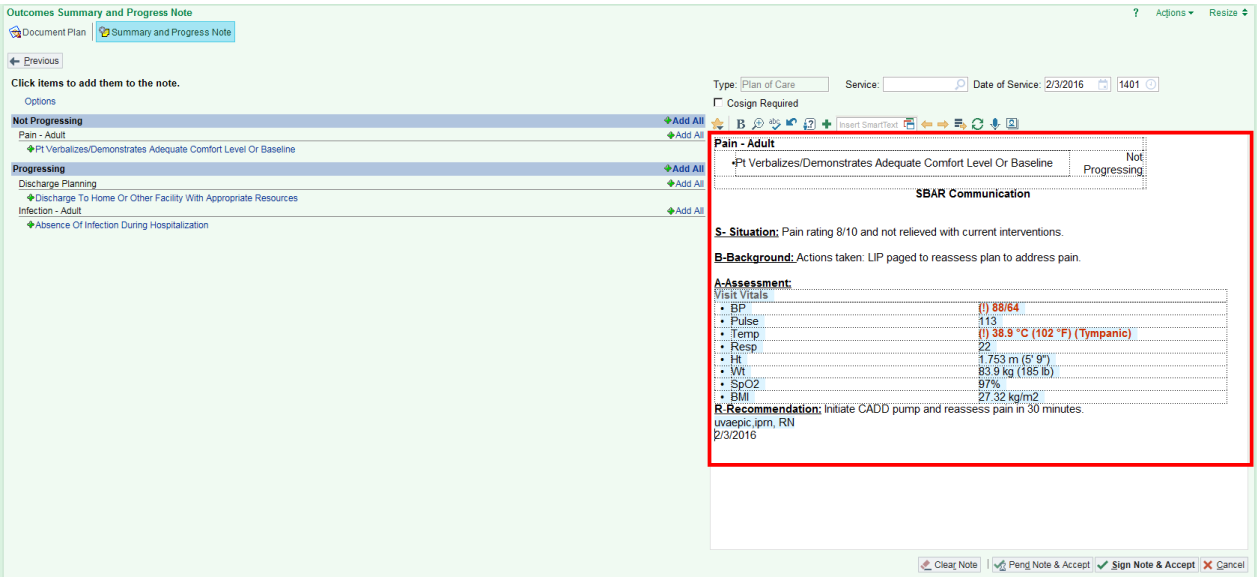
2. Select Outcomes for goals using one of the following methods:



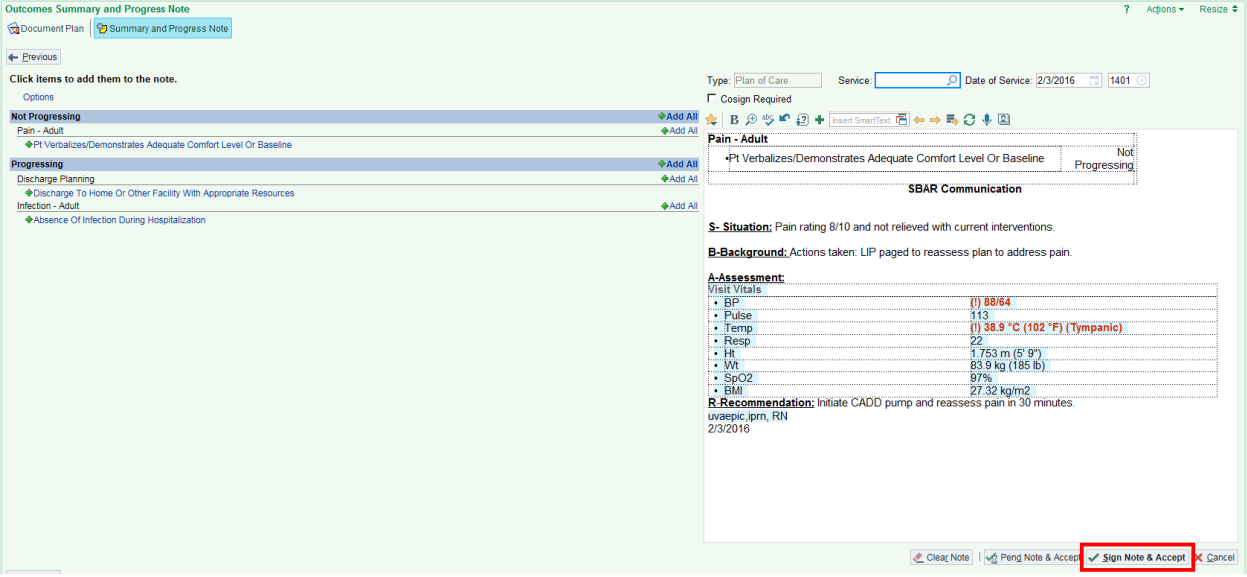
3. Click the Next button to move to the next screen.

4. Click the Add All hyperlink for each outcome or problem for which you will create a note.
   - The problem, goal and outcome are added to the note, on the right side of your workspace.

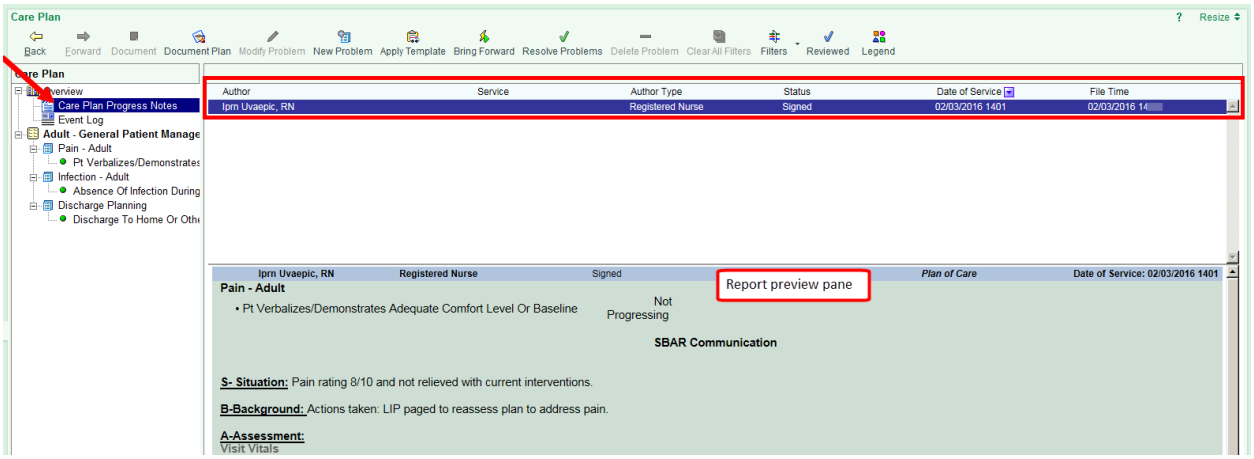
5. Document barriers to meeting the goals, additional information, or how the goal was met in the note section.
   - Click on the next goal on the left or click Next toward the bottom left of the note.
   - You may use SmartPhrases for documenting a standardized note.



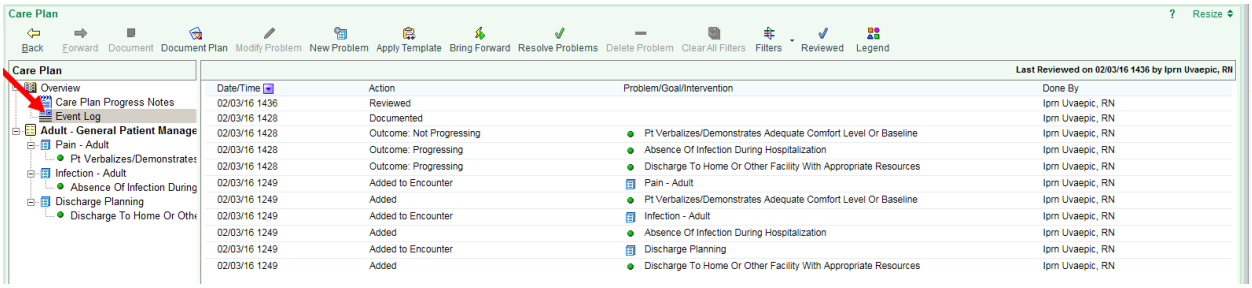
6. When you have finished creating the care plan note, click Sign Note & Accept, lower right.



7. Details for care plan notes can be found in the Care Plan Progress Note section of the Care Plan activity.
   - To see more details for progress notes, select a report in the top half of the window and view it's details in a report preview pane at the bottom.



8. The Event Log section of the Care Plan activity will list actions taken by individuals.

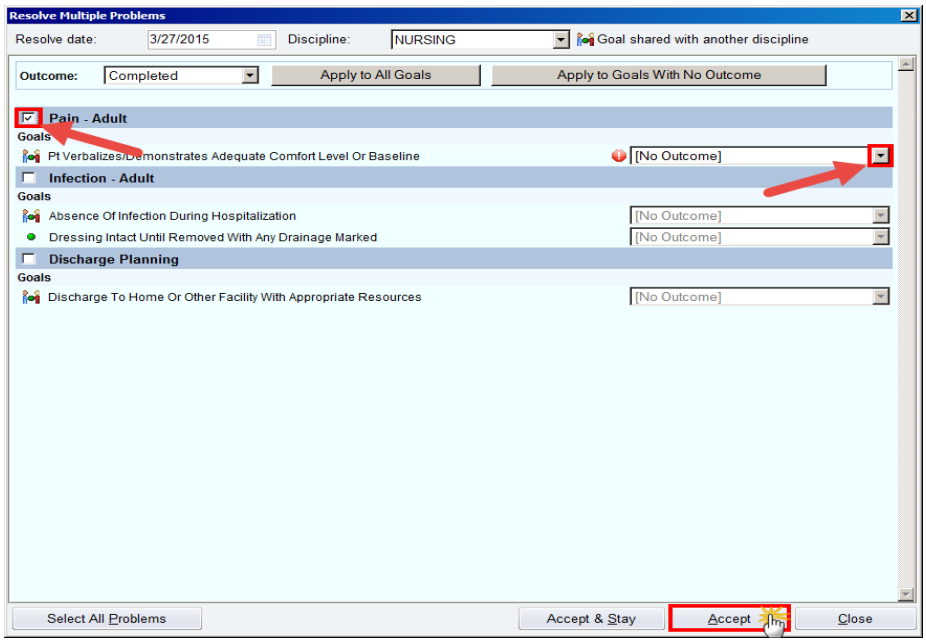


Expectation: Goals not met by the time of discharge must have care plan notes created addressing a plan for completion.

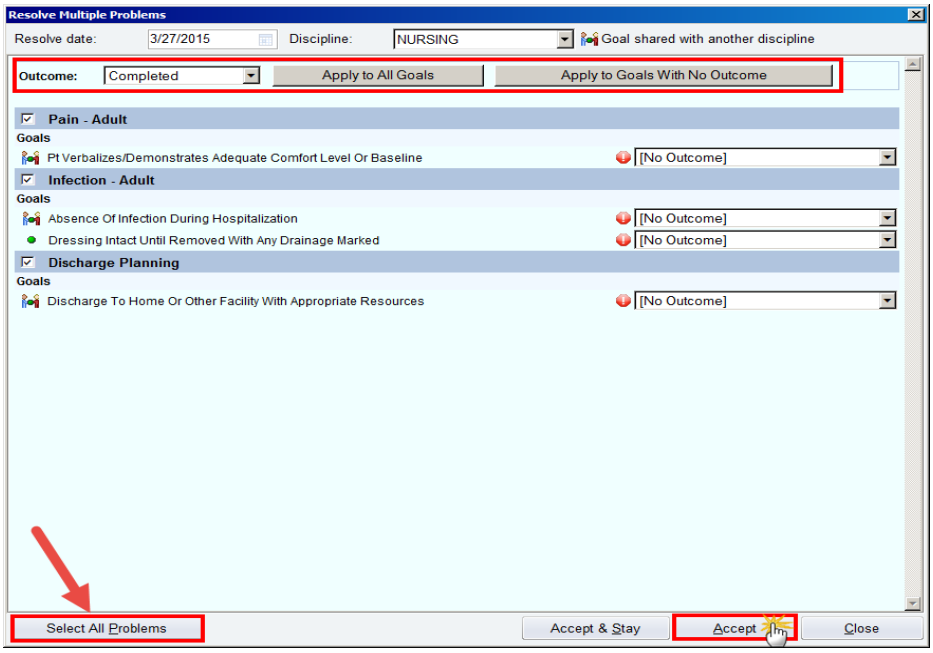
Resolving Care Plans:

1. In the Care Plan activity, click Resolve Problems from the toolbar

2. Resolve a single topic by clicking on the box next to the topic
3. Click the drop down arrow and select a Completed outcome
4. Click Accept

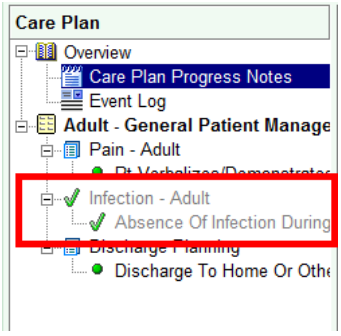


5. Resolve all topics by clicking Select All Problems at the bottom left
6. At the top left, the Outcome is selected as Completed. Click Apply to all Goals or Apply to Goals with No Outcome, to satisfy the hardstops present.
7. Click Accept



Resolved topics and goals will have a green check mark present. As an example, the Infection topic is resolved below.

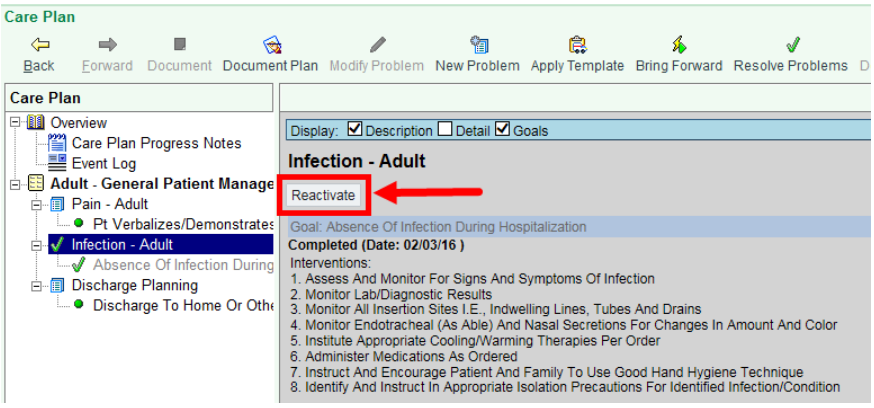
- Note the topic and goals are not active/grayed out
- A green checkmark appears next to things resolved



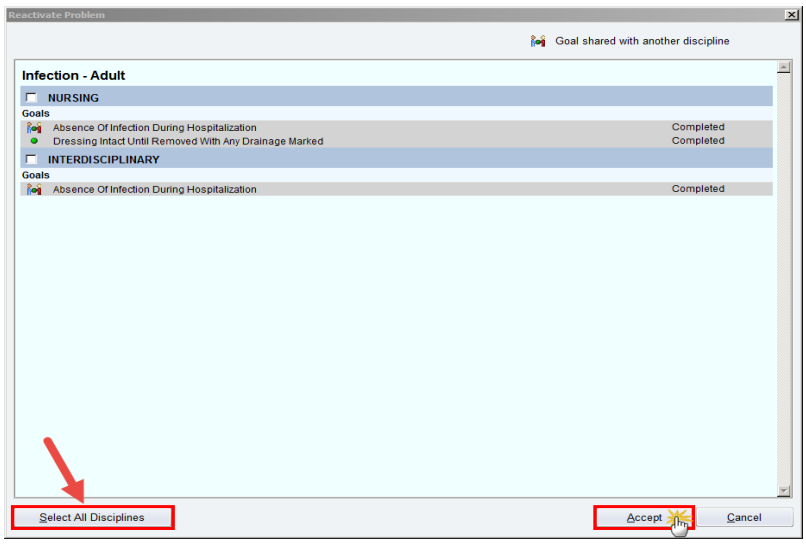
Reactivate a Resolved Care Plan:

If at any time, you need to reactivate a topic, do the following:

1. Click on the resolved topic
2. Click the Reactivate button



3. For topics involving more than one discipline, click Select All Disciplines at bottom right, then click Accept.



4. Review goals and interventions and add or delete as appropriate.

List of Templates: Return to Adding Care Plans

Adult	Peds	NICU	OB	Newborn	Psych
Adult New-General Patient Management	Pediatric NEW General Patient Management	Pediatric NEW General Patient Management	OB NEW General Patient Management	NEWBORN General Patient Management	BHS-NEW General Patient Management
Adult New-Nutrition	Pediatric NEW Nutrition	NICU NEW Nutrition	Adult New-Nutrition	NEWBORN NEW Nutrition	Adult New-Nutrition
Adult New-Physiologic instability	Pediatric NEW Physiologic Instability	NICU NEW Physiologic Instability	OB NEW Physiologic Instability	NEWBORN Physiologic instability	BHS-NEW Physiologic Instability
Adult New-Psychosocial/Spiritual Care	Pediatric NEW Psychosocial/Spiritual Care	NICU NEW Psychosocial/Spiritual Care	OB NEW Psychosocial/Spiritual Care	NEWBORN NEW Psychosocial/Spiritual Care	BHS NEW-Psychosocial/Spiritual Care
Diabetes Management	Diabetes Management	Diabetes Management	Diabetes Management	Diabetes Management	Diabetes Management
Fractures	Fractures	Mechanical Ventilation	OB NEW Lactation	NEWBORN Normal	ECT
Mechanical Ventilation	Mechanical Ventilation	NICU Apnea of Infancy	OB NEW Pregnancy	UVA At risk for Aspiration/Reflux	Inpatient Psychiatric Treatment Plan
UVA IP Non-violent Restraint	PEDS Apnea of Infancy	NICU Bronchopulmonary Dysplasia	C-section-PRE, Intra and Recovery Care	UVA IP Unique Patient Needs	UVA IP Non-violent Restraint
UVA IP Violent Restraint/Seclusion	PEDS Asthma	NICU Congenital Heart Disease	C-section-Postpartum	UVA Unique needs Isolation	UVA IP Violent Restraint/Seclusion
UVA At risk for Aspiration/Reflux	PEDS Bronchiolitis	NICU Feeding Issues/Reflux	Labor and Delivery-vaginal Delivery	UVA Unique needs Skin Integrity	UVA At risk for Aspiration/Reflux
UVA IP Total Joint Replacement Care Plan	PEDS Bronchopulmonary dysplasia	NICU General Care Plan	OB Vaginal Delivery-Recovery and Postpartum		UVA IP Total Joint Replacement Care Plan
UVA IP Unique Patient Needs	PEDS Cerebral Palsy	NICU Hydrocephalus	UVA IP Non-violent Restraint		UVA IP Unique Patient Needs
UVA Unique needs Delirium	PEDS Croup	NICU Intraventricular Hemorrhage	UVA IP Violent Restraint/Seclusion		UVA Rehab Team meeting Care Plan
UVA Unique needs Fall Risk	PEDS Cystic Fibrosis	NICU Necrotizing Enterocolitis	UVA At risk for Aspiration/Reflux		UVA Unique needs Delirium
UVA Unique needs Isolation	PEDS Foreign Body Aspiration	NICU Parent/Infant Bonding	UVA IP Total Joint Replacement Care Plan		UVA Unique needs Fall Risk
UVA Unique needs Obstructive Sleep Apnea	PEDS Hydrocephalus	NICU Postoperative	UVA IP Unique Patient Needs		UVA Unique needs Isolation
UVA Unique needs Skin Integrity	PEDS Pertussis	NICU Prematurity	UVA Rehab Team meeting Care Plan		UVA Unique needs Obstructive Sleep Apnea
UVA Unique needs Suicide	PEDS Pneumonia	NICU Respiratory Distress Syndrome	UVA Unique needs Delirium		UVA Unique needs Skin Integrity
	PEDS Postoperative	NICU Short Bowel Syndrome	UVA Unique needs Fall Risk		UVA Unique needs Suicide
	PEDS Seizures	UVA At risk for Aspiration/Reflux	UVA Unique needs Isolation		
	NICU Congenital Heart Disease	UVA IP Unique Patient Needs	UVA Unique needs Obstructive Sleep Apnea		
	NICU Necrotizing Enterocolitis	UVA Unique needs Isolation	UVA Unique needs Skin Integrity		
	NICU Feeding Issues/Reflux	UVA Unique needs Skin Integrity	UVA Unique needs Suicide		
	UVA IP Non-violent Restraint				
	UVA IP Violent Restraint/Seclusion				

	UVA At risk for Aspiration/Reflux				
	UVA IP Unique Patient Needs				
	UVA Unique needs Fall Risk				
	UVA Unique needs Isolation				
	UVA Unique needs Obstructive Sleep Apnea				
	UVA Unique needs Skin Integrity				
	UVA Unique needs Suicide				