

Care Plan

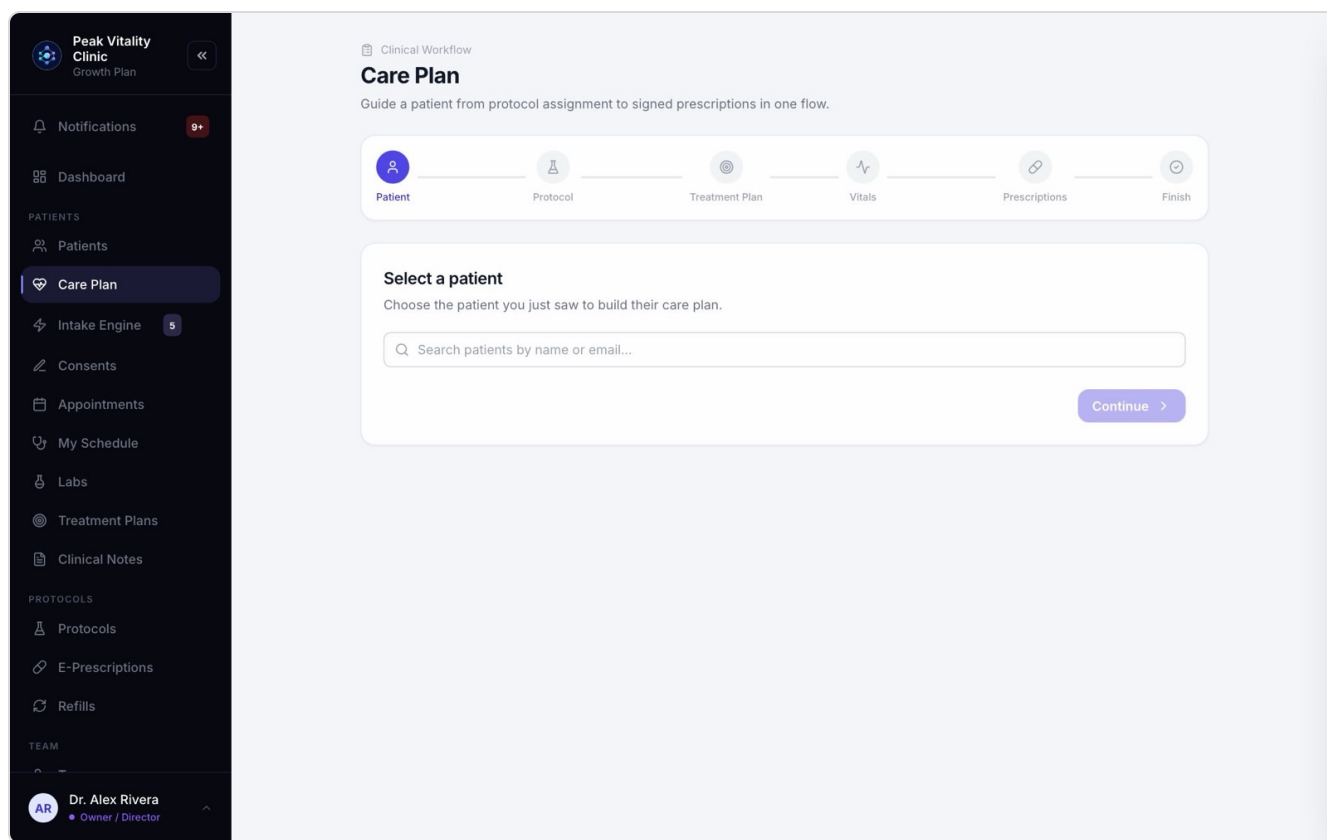
A visit, one step at a time: pick the patient, choose a protocol, build and sign the plan, record vitals, write prescriptions, and finish.

Page manual · For Providers, Owners, Managers · aminova.health/university/care-plan

1. THE PAGE AT A GLANCE

Care Plan is for right after you see a patient. It walks you from picking the patient to a signed plan in their app.

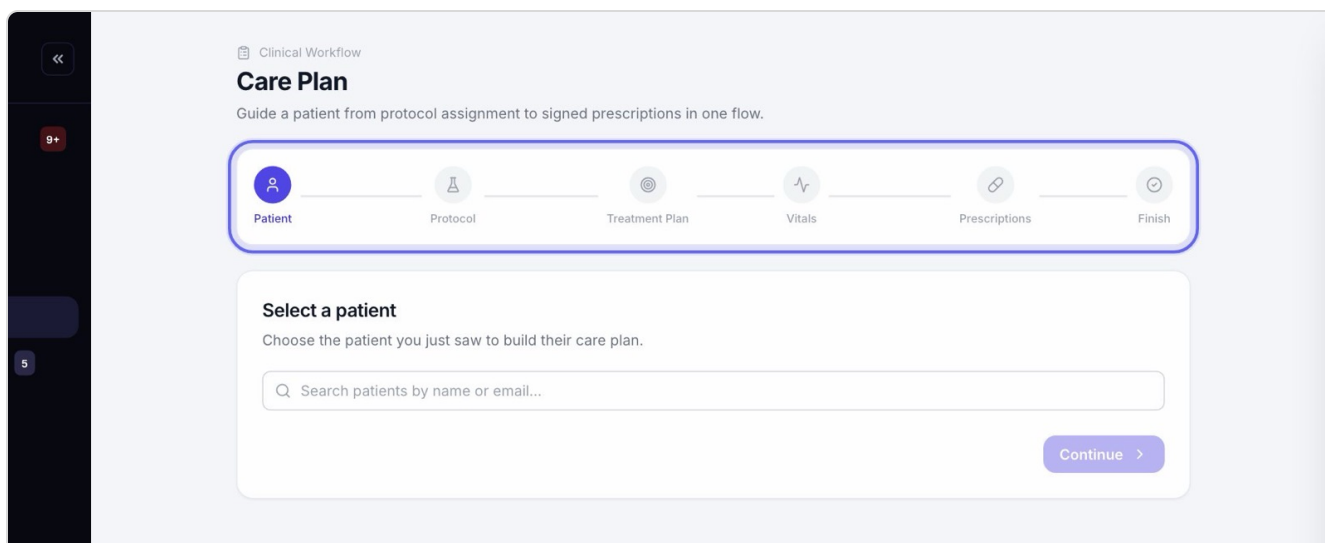
The steps run across the top. Below them is the step you are on, with **Back** and **Continue** at the bottom.



Care Plan: the steps across the top, the step you are on below.

2. THE STEPS

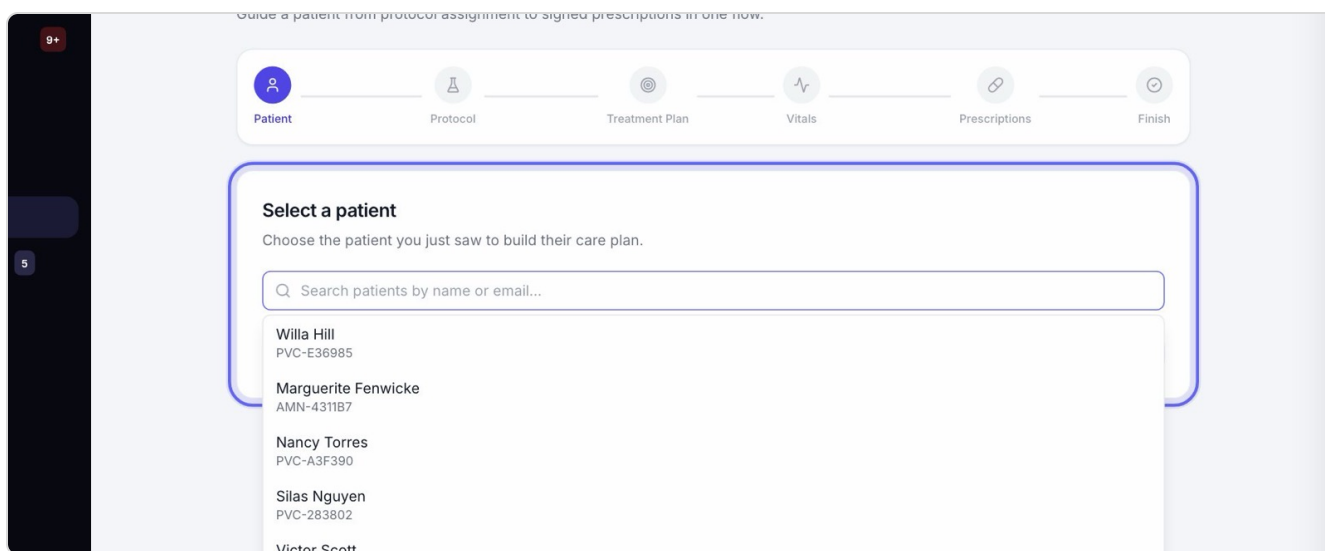
1. **Patient, Protocol, Treatment Plan, Vitals, Prescriptions, then Finish.**
2. You go left to right. A green check means that step is done.
3. If your clinic doesn't prescribe through Aminova, there is no Prescriptions step.



The visit, step by step. Done steps turn green.

3. STEP 1: PICK THE PATIENT

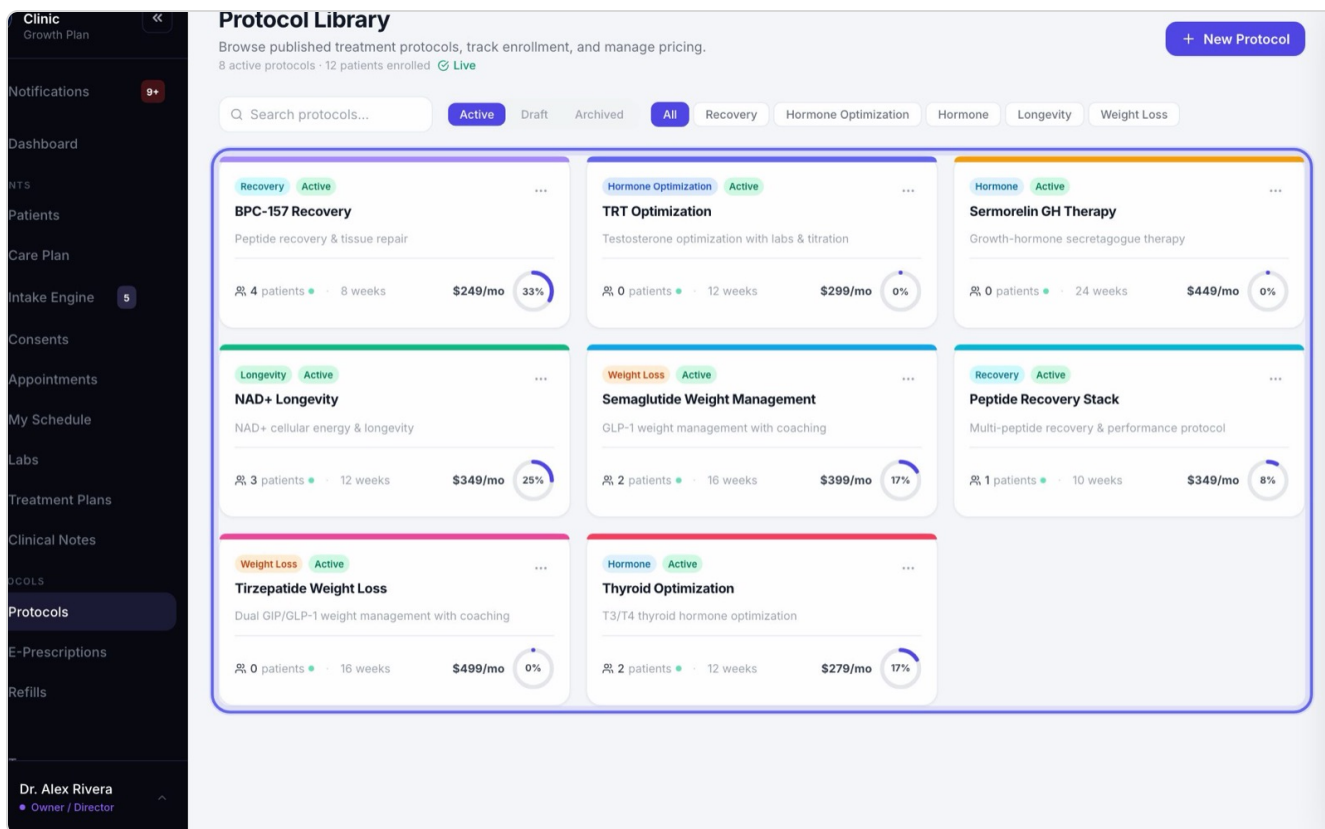
1. Click the search box and type the patient's name or email. Click their name.
2. A card shows their age, goals, conditions and any protocols they are already on.
3. **View chart** opens a short summary without leaving the page.
4. Press **Continue**.



Search for the patient you just saw, or pick them from the list.

4. STEP 2: CHOOSE A PROTOCOL

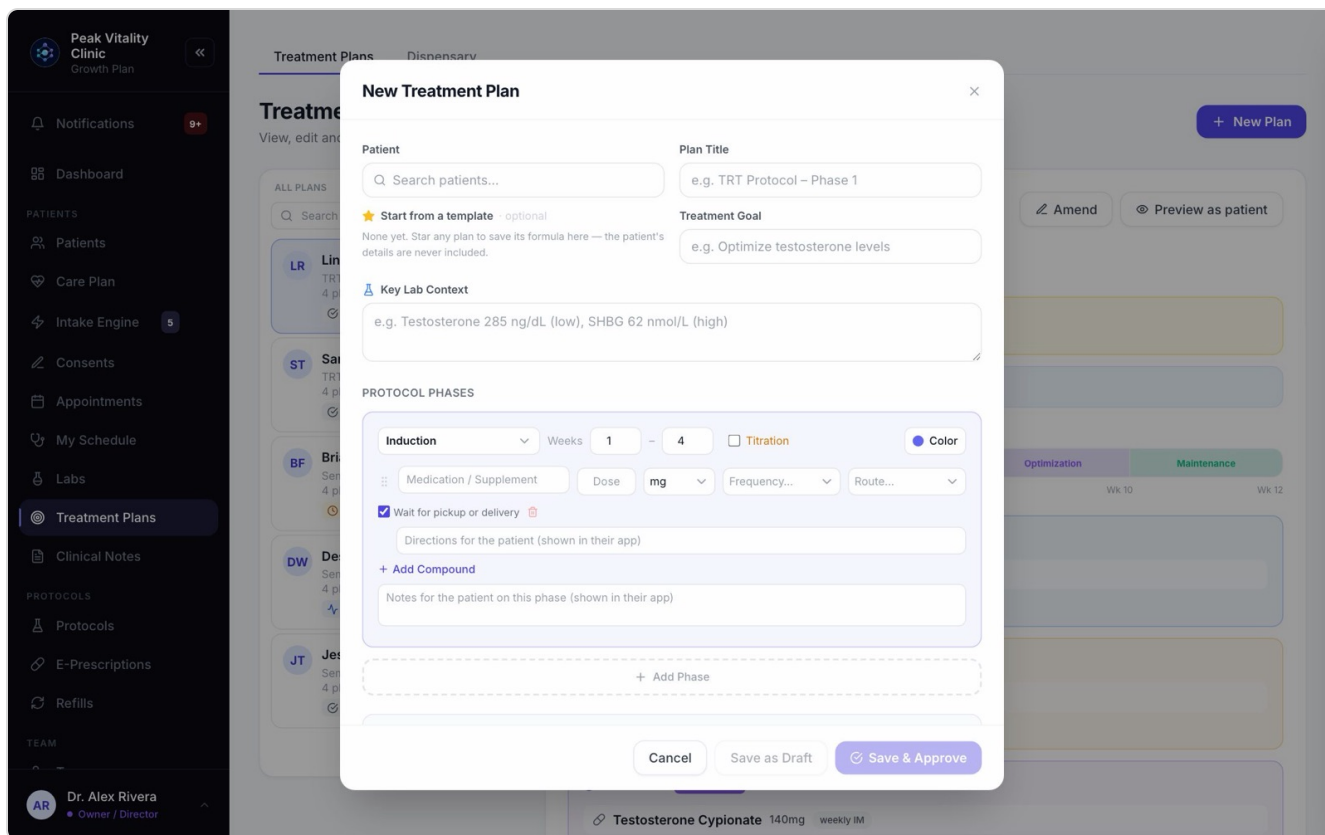
1. Pick one of your protocols. A protocol is a treatment program you set up once on the Protocols page.
2. Or pick **Skip — custom plan** to start from a blank plan.
3. Press **Continue**. If you picked a protocol, the patient is now on it.



The protocols you choose from are the ones on the Protocols page.

5. STEP 3: BUILD THE PLAN

1. Press **Create plan**. The plan builder opens with the patient already picked. If they already have a plan, press **Refresh** to load it instead.
2. If you chose a protocol, its phases and medicines are already filled in. Change anything you like. The protocol itself is not changed.
3. Save the plan. You come straight back to Care Plan, with the plan on screen.
4. To change it again, press **Edit in builder**.



Create plan opens this builder, with your patient already picked.

6. APPROVE AND SIGN THE PLAN

1. If the plan isn't approved yet, press **Approve & sign plan**.
2. Draw or type your signature, then press **Apply Signature**.
3. The plan now says **Approved & signed**. It goes live for the patient when you finish the visit.

Tip. You can keep going without signing, but you can't finish the visit until the plan is approved and signed.

7. STEP 4: VITALS

1. If the patient has vitals on file, the latest ones show here. Press **Edit** to update them.
2. If not, fill in what you measured and press **Save Vitals**.
3. They go on the After-Visit Summary, the page the patient gets at the end.

8. STEP 5: PRESCRIPTIONS

1. The prescriber is filled in and locked, with their NPI and DEA numbers.
2. Press **Create prescription** to write one on the E-Prescriptions page. It comes right back here. Or press **Import existing** to add ones already on file for this patient.
3. On each one, check the directions, strength, amount, days supply and refills. Press **Save** if you change anything. The safety check below it looks for allergies and duplicates.

4. Mark each one ready. The button says **Sign & Mark Ready** or **Mark Ready to Send**.
5. Leave **Send to pharmacy on Finish** ticked to sign and send them when you finish. Untick it to keep them as drafts.

Tip. Continue stays off until every prescription is marked ready. With none at all, you are asked if you want to go on without one.

9. STEP 6: VISIT DETAILS

1. Fill in the **Reason for visit**.
2. Pick the **Check-in schedule**: how often the patient is asked how they are doing. For weekly or every two weeks, you can pick the day.
3. Add **Diagnoses (ICD-10)**, **Labs ordered** and **Patient instructions**.
4. Press **Schedule follow-up** to book the next visit. It is a real appointment on the Appointments page.
5. Everything you type fills in the After-Visit Summary below as you go.

Tip. A patient has one check-in schedule. If they are on other plans with a different one, you are asked before it changes.

10. HOW IT'S PAID, AND WHEN IT STARTS

1. Under **How is this visit being paid?**, pick one. **Paid now** and **Send a bill** open a window to take the payment or send the bill.
2. **No charge** is fine too. Just write why.
3. If the patient owes money from before, it shows here.
4. Under **When does the plan start?**, pick the day. Anything the patient has to pick up or get delivered starts once they confirm they have it.

11. FINISH & SAVE VISIT

1. Press **Finish & Save Visit**.
2. It saves the visit note to the chart, starts the plan on its start date, puts it in the patient's app, and sends them the After-Visit Summary.
3. If you left prescriptions to send, you sign them as part of finishing. The screen tells you if any didn't go through.
4. It won't finish until the plan is approved and signed, and you have said how the visit is paid.

12. SEND, PRINT, AND START THE NEXT ONE

1. **Send to patient** puts the summary in their app, any time. Once sent, the button says **Send again**.
2. **Print packet** prints the summary, plus a page for each prescription.
3. When the visit is done, press **Start new care plan** for the next patient, or **View patient chart**.

Tip. A practice patient never gets an email or text.

13. LEAVING AND COMING BACK

If you leave Care Plan partway, to build the plan or write a prescription, and come back in the same browser tab, it picks up on the same patient and the same step.