Get Started with Health Cloud

Salesforce, Winter '17

@salesforcedocs

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CONTENTS

DELIVER COLLABORATIVE, CONNECTED PATIENT CARE WITH HEALTH CLOUD

Delivering outstanding patient care means more than simply managing your patients' information and healthcare events. Health Cloud reinvents the way that care coordinators engage with patients. The Health Cloud console gives you a consolidated view of critical patient records, access to a patient's care team, and the tools to bring it all together to improve healthcare outcomes. You create a strong, collaborative relationship with patients and caregivers to assist your patients' journey to better health.

Excellent care requires a complete picture of the data coming from electronic health record (EHR) systems to guide smart and efficient decisions. With Health Cloud, you have all the tools to manage your patients with greater efficiency. The Health Cloud console includes:

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

- Comprehensive snapshot of vital patient data from EHRs
- Working view of your prioritized tasks related to all your patients
- Care timelines that lets you see a representation of patient history events, like appointments, prescriptions, conditions, and other care-related encounters
- Customized care plans that set measurable goals with tasks that can be assigned to the patient

When you configure Salesforce Communities, you also have a private patient community that unites professional and personal caregivers in a collaborative network that drives care plan compliance. You can assign ownership of health tasks to members of the care team, including other health professionals, patients, and family members. You can exchange secure, private messaging between you, the patient, and members of the community—and they can access those messages on any device.

The Tools You Need in One Place

As a busy healthcare professional, you need one place to manage your patients and the tasks associated with their care. The Health Cloud console pulls everything you need into a complete view of the patient, care team, and activities relevant to getting and keeping that patient healthy. It also provides a central place to manage communication between the individuals involved in the patient's care, such as messages to the primary care physician or reminders to the family member who drives the patient to the doctor.

Get Ready to Use the Health Cloud Console

To start using the Health Cloud console to manage your patients, you have a few things to set up.

Use Care Plans to Help Patients Reach Their Goals

Easily manage health problems with goals and tasks that you assign to patients or caregivers so that patients stay on track and improve their health. Customizable care plans represent an action plan for improving a patient's health.

Care Plan Templates Help Simplify Patient Onboarding

Take the "work" out of workflows with care plan templates that let care coordinators create customized patient care plans with just a few clicks. Coordinators can add problems, goals, and tasks in bulk to a patient's care plan. Predefined care plan templates reduce the time spent to create a care plan and enforce standards of care that improve healthcare outcomes.

Monitor the Timeline of a Patient's Medical Events

The patient timeline gives you a snapshot of your patient's healthcare events and activities in chronological order.

Engage Patients with the Private Patient Community

The care team is the hub of your patient's private community—it represents everyone working to make sure that your patient succeeds with his or her care plan. It includes healthcare professionals from inside and outside of your organization, and family members of the patient.

Drive Learning with Protocols and Articles

Salesforce Knowledge lets you easily create and manage content and make it available to other healthcare professionals and to the patient and care team members. An article can contain the protocols you use to manage conditions or can hold educational materials you send to patients. You can write, edit, publish, and archive articles using the Articles Management tab or find and view published articles using the Articles tab.

Health Cloud Console Keyboard Shortcuts

Keyboard shortcuts let you quickly perform actions by pressing keys instead of using a mouse.

Health Cloud Limitations

Learn about display, access, and customization limitations for Health Cloud.

Health Cloud Resources

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Get to Know the Health Cloud Console

You can view the big picture of your caseload, including tasks that need attention, new patients you've received, and all the communication surrounding your patients. The console lets you work with individual patients and their related care plans, health history, and care teams in separate tabs. So you can work on multiple patients at the same time.

See What's in Store with the Today Page

Start out your day on the Today page to get a panoramic view of everything you need to optimize your day.

Use Chatter to Find Out What's Happening

The What's Happening feed, powered by Salesforce Chatter, keeps you up to date with what's happening with your patients and team members. Chatter is a Salesforce collaboration application that connects you with people and lets you share information securely and in real time. Chatter feeds show you posts and comments that you and other people make, as well as record updates across your Salesforce org.

Manage Patient Care with Custom Lists

Customized patient lists let you organize your master patient list into smaller lists based on criteria like shared protocols, diagnoses, or treatment plans. For example, you can divide up your master list of recently discharged surgical patients into groups based on their type of surgery. Or you can send follow-up appointment reminders, surveys, or educational materials to multiple patients at once rather than individually.

Use the Patient Card for a Comprehensive View of Your Patient

To effectively manage your patients, you need their information at your fingertips. The Patient Card extracts the most important information from a patient's medical records, such as conditions, medications, and contact information, and displays it all in one place. You can easily see the information you need without searching for it or clicking to other pages.

Search for Educational Articles and Protocols

Use the Knowledge widget to get the right information to your patients. You can search for protocols, educational articles and videos, and links to websites right from the console, without leaving the page that you're working from.

Get to Know the Health Cloud Console

You can view the big picture of your caseload, including tasks that need attention, new patients you've received, and all the communication surrounding your patients. The console lets you work with individual patients and their related care plans, health history, and care teams in separate tabs. So you can work on multiple patients at the same time.

The primary tab shows the patient's medical information on the patient card. Subtabs contain information about the patient, such as the patient's care plan, timeline, medical device information, or prescriptions. You can open multiple subtabs on a patient.

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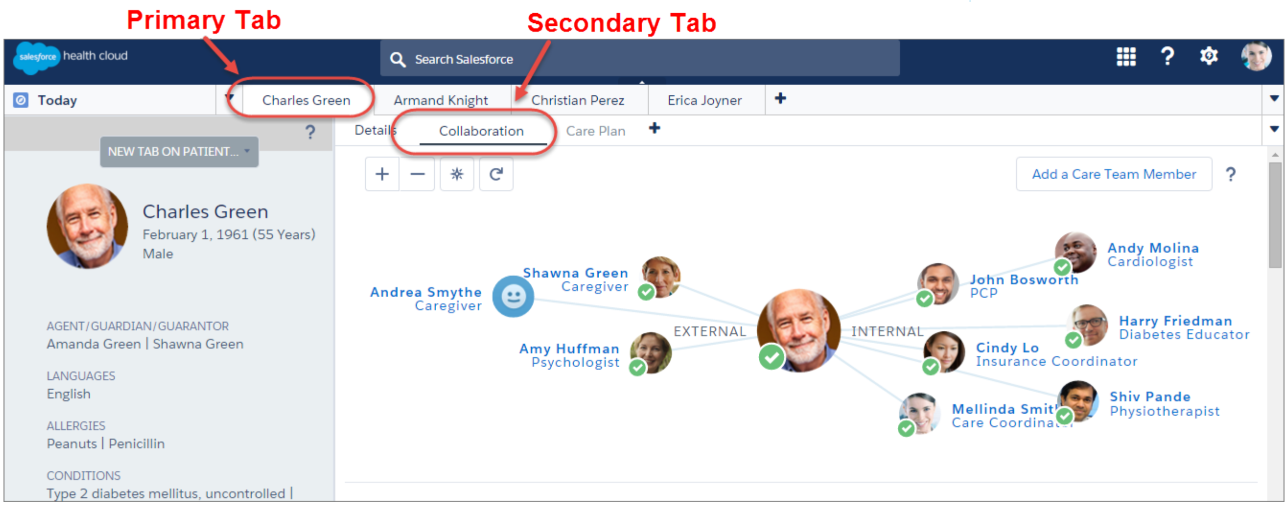
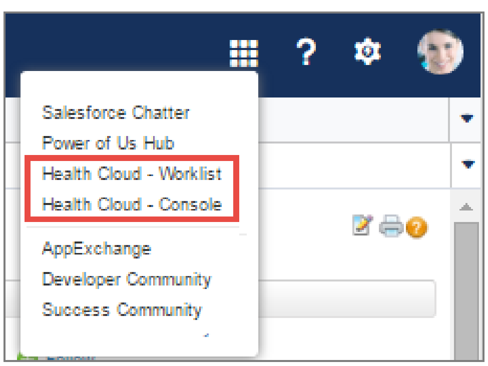


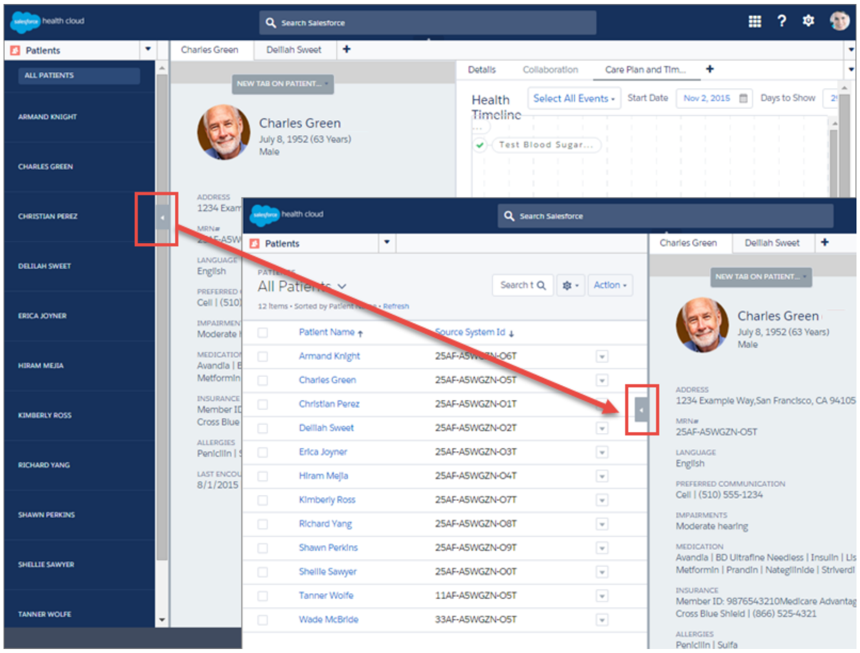
Pick Your Console App

Two Health Cloud apps are available for you to use depending on your work preferences. You can select either option from the app menu at the top of the page and switch between apps at any time.



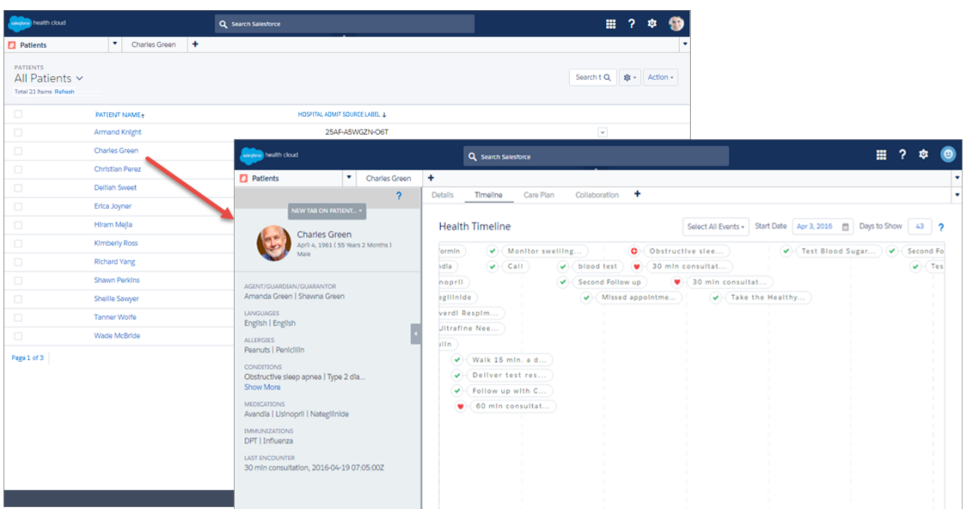
Health Cloud - Worklist

With the Health Cloud - Worklist app, you work from a pinned version of the patient list. The pinned list is on the left side of the page and is always visible. When you select a patient from the list, the patient card and subtabs open to the right of the list. To resize the pinned list, click the right margin of the list pane and drag it to the size you want. To minimize the pinned list, click the arrow on the right margin. To display the full patient list including options to edit or manage the list, drag the arrow to the right until the full page appears.



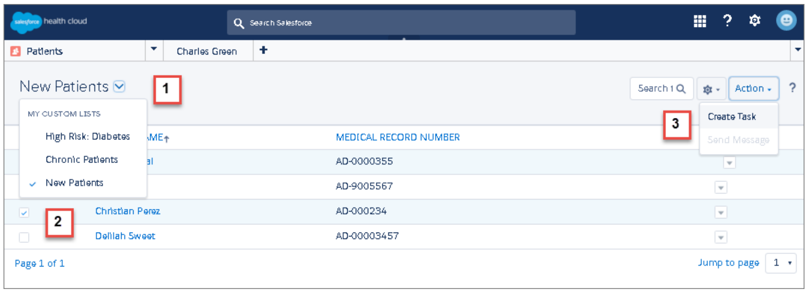
Health Cloud - Console

The Health Cloud - Console App takes you straight to your patient—letting you drill straight through to each individual patient's profile, tabs, and subtabs. Just click the patient's name from the list and you see the patient's information and subtabs at full-screen view. You can return to the patient list by selecting `Patients` from the menu list in the upper left of the page.



Customized Lists of Patients

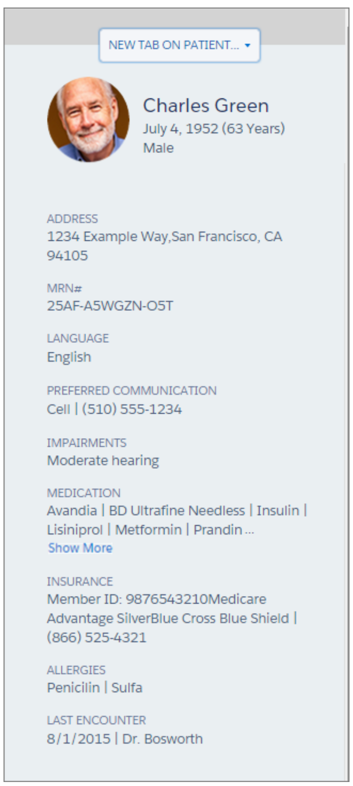
You can divide up your patients into groups with similar conditions or criteria and then work with them in parallel.



- Create lists that group similar patients **(1)**. For example, you have six patients with hypertension who are all following the same protocol.
- Select one or more patients to work with **(2)**.
- In one place, you can assign all six patients a task **(3)** to get the prescribed amount of exercise each week. Or you can send reminders to make an appointment with their doctor.

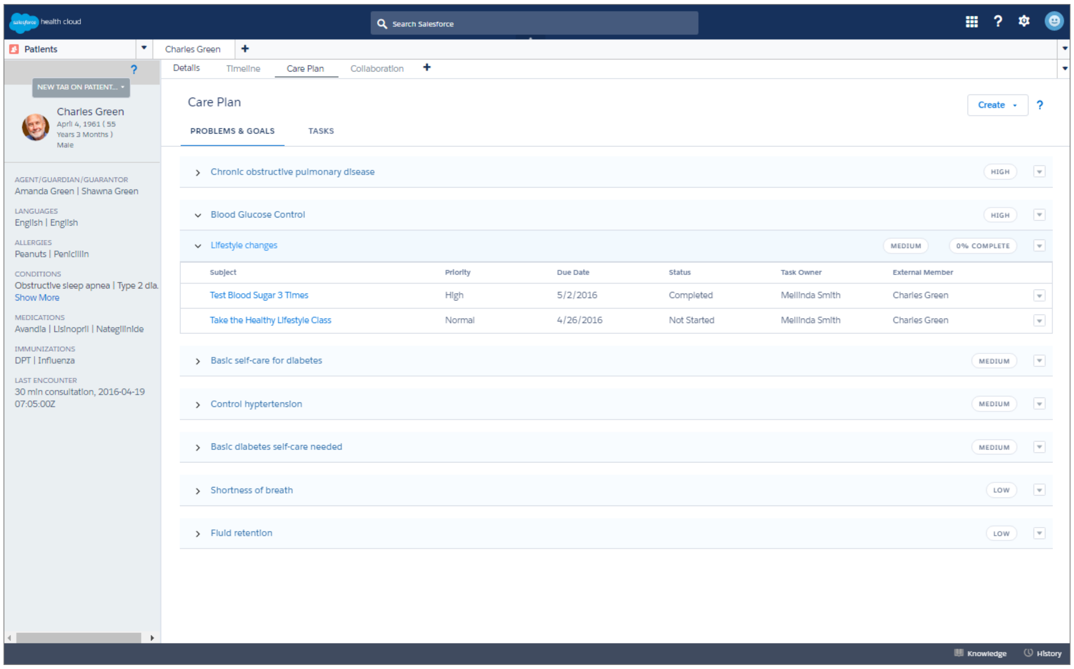
Patient Card

The patient card shows you all the information you need about a patient's conditions, prescriptions, appointments, and contact information. You can also use the New Tab on Patient picklist to open subtabs and view that patient's care plan, health timeline, and care team.



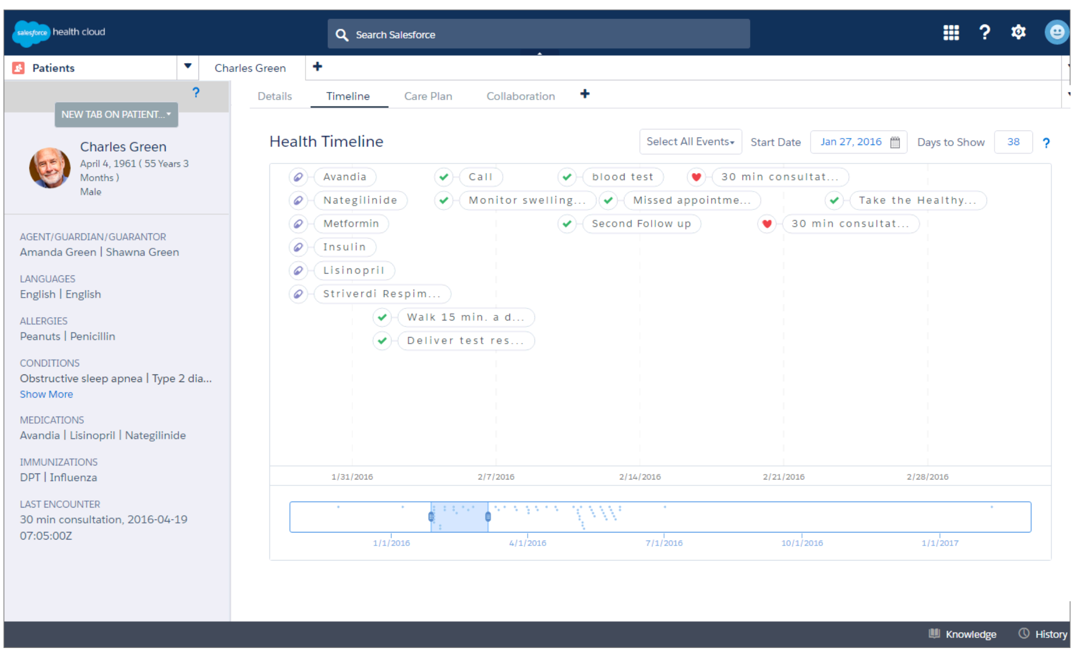
Care Plan

Manage chronic conditions, provide preventive care, and apply health and wellness protocols with a personalized care plan. Empower patients to take a more active role in their own clinical outcomes.



Health Timeline

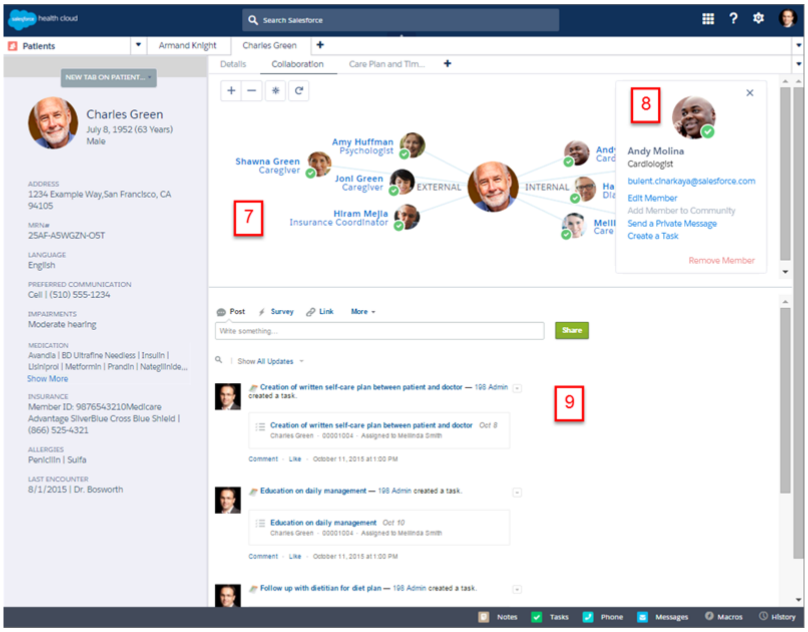
Plan treatments and perform follow-ups more efficiently. The health timeline provides a bird's-eye view of things like encounters, prescriptions, and tasks that the patient has done or still must complete.



Patient Care Team

Note: Salesforce Communities provides the collaboration support for Health Cloud. Some of the collaborative features aren't available until you enable Salesforce Communities and create a private patient community.

Get team support for your patient by engaging a community that keeps tabs on the patient's progress. Through the community, patients can access their care plans and the tasks that they need to perform. Caregivers can take action on tasks that are their responsibility. With the convenience of having the information on any device, the community members are engaged and empowered to act. A community allows you to form a partnership with the patient and their external care team. You can add internal and external participants and manage all the players and resources available in each patient's care team.



- The care team view **(7)** represents the relationships that make up the patient's professional and personal network of caregivers.
- When a person is a community member, you can select the person's picture **(8)** and do things like send a private message or create a task for them.
- Collaborate with care team members using Chatter **(9)**. Send private messages to the patient and caregivers, and collaborate with internal members of the team without leaving the patient's profile.

See What's in Store with the Today Page

Start out your day on the Today page to get a panoramic view of everything you need to optimize your day.

Watch a Demo: Manage Your Day with the Today Page

Access the Today page by selecting it from the tab switcher in the Health Cloud - Console app. Browse all the tasks you're tracking, and keep current on conversations that are relevant to your patients and your company.

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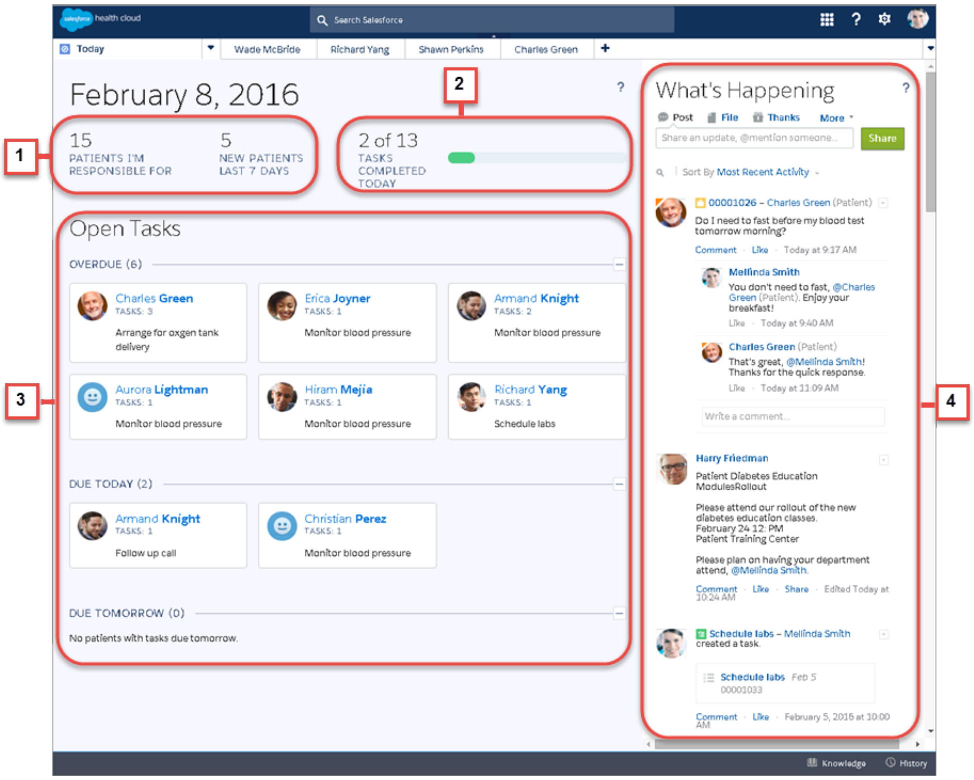

- Get a quick summary **(1)** of how many patients you're managing and how many of them are new to you this week. Patients are counted as your responsibility as long as you're the assigned care coordinator or until the care plan and case status are closed.
- A handy progress bar **(2)** shows your progress toward completing the tasks that are assigned to you or that you oversee and manage.
- Browse tasks **(3)** that are related to specific patients so that you can prioritize your work and know which patients need attention. Each tile shows the name of the patient along with the number of tasks associated with the care plan. Click the tile to bring up the patient overview and review and update tasks.
- The What's Happening feed **(4)**, powered by Salesforce Chatter, keeps you up to date with what's happening with your patients and team members. It's a secure, centralized place where you can review and participate in all conversations that are important to your job. You see messages between you and your patient, conversations with care providers within your organization, and events or company announcements.

  Note: The Today page, like the other pages in Health Cloud, are responsive and adapt to the size of the device you're using. On smaller devices, the What's Happening feed moves from the side to the bottom of the page. Just scroll down to view and use the feed.

Use Chatter to Find Out What's Happening

The What's Happening feed, powered by Salesforce Chatter, keeps you up to date with what's happening with your patients and team members. Chatter is a Salesforce collaboration application that connects you with people and lets you share information securely and in real time. Chatter feeds show you posts and comments that you and other people make, as well as record updates across your Salesforce org.

Watch a Demo: Collaborate with Patients and Colleagues Using Chatter

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Use Chatter to discuss your patient's care with the internal care team. Good communication makes care coordination and patient hand-offs easier and more efficient. Physicians and other medical professionals within your organization can discuss and manage patient care as a private group without involving the external care team.

You can stay current with the people and conversations that are important to you in several ways. You can follow a person or a group, and you can like a post or comment.

- Track a post by clicking `Like` below a post or comment. After you like a post, you receive email notifications if others comment on that post. If you click Like on a comment, only the user who posted the comment receives an email notification, but you receive an email notification for any subsequent comments.
- Make it easy to keep up with what your coworkers are doing by following everyone who is important to you. Locate a person's profile page, and click **Follow**. When you follow a person, you see updates from that person in your feed. When you follow people and records, you see their updates in your Chatter feed.

Typically, you see feed updates for:

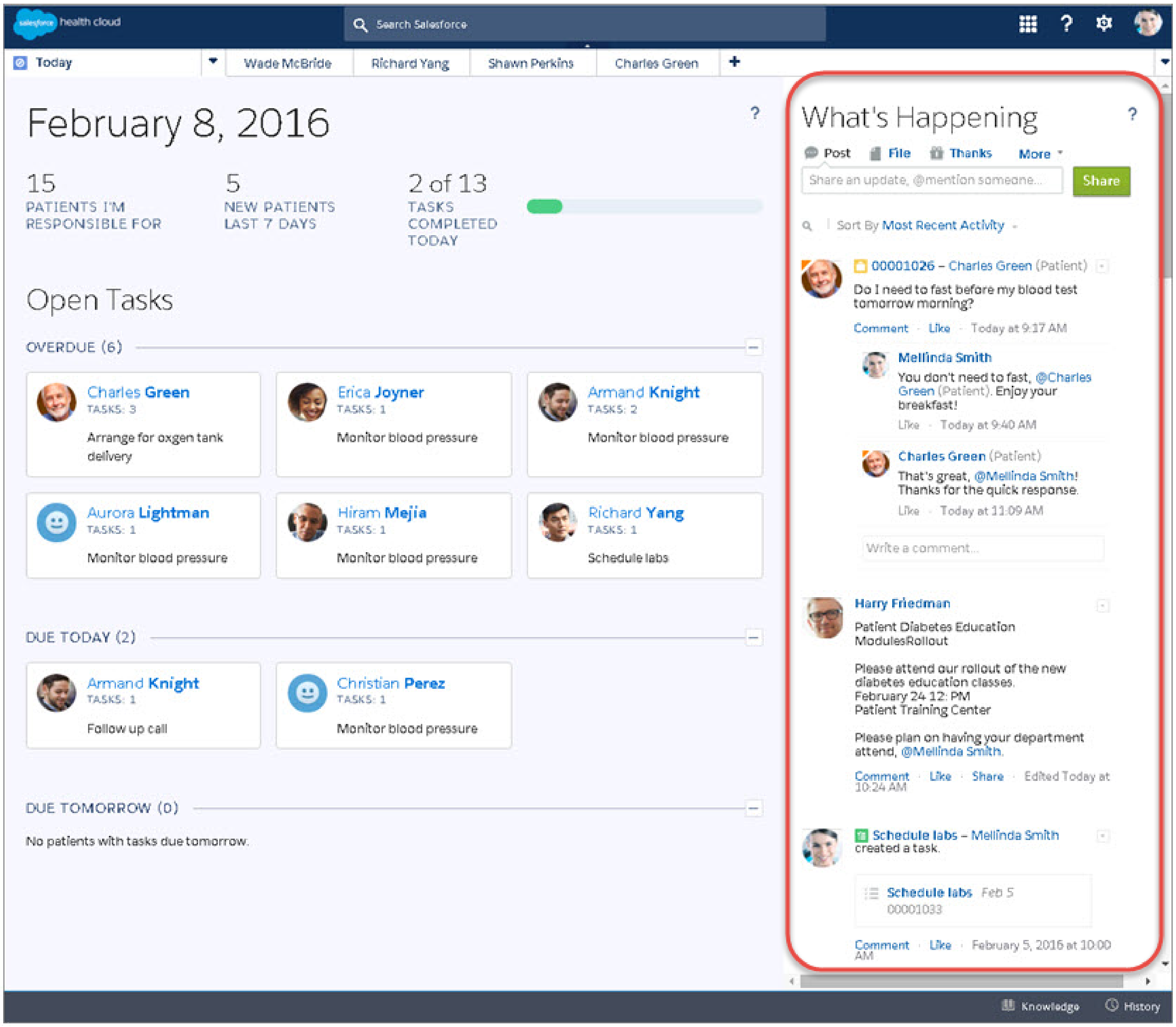
- Comments and posts between you and your patients and care team community members

  These posts aren't visible to internal coworkers within your company. Patients or care team community members are identified by the orange upper-left corner of their photo.

- Conversations with physicians and other providers within your org
- Events and company announcements
- Posts, comments, and files on Chatter groups you're a member of
- Shared files and lists
- Tasks and other events
- Record field changes, like changes to record owner and care plans that are created

Note: Remember that private messages sent from the care team profile don't appear in your feed, your profile, global search results, or any other part of Chatter that's publicly visible.

Record updates are also called system-generated posts. They are updates that Salesforce generates when someone creates a record or changes a tracked field on a record. The record updates you see depend on how your administrator has configured feed tracking and whether you have access to the record. You don't see tracked feed updates that are older than 45 days and have no likes or comments, because they are deleted.



Manage Patient Care with Custom Lists

Customized patient lists let you organize your master patient list into smaller lists based on criteria like shared protocols, diagnoses, or treatment plans. For example, you can divide up your master list of recently discharged surgical patients into groups based on their type of surgery. Or you can send follow-up appointment reminders, surveys, or educational materials to multiple patients at once rather than individually.

Watch a Demo: Create Customized Lists of Patients

Your Health Cloud admin controls access to patient lists.

To show a filtered list of patients, select a predefined list from the **Select a List** drop-down list, or click **Create New List** to define your own custom list. To edit or delete a list you created, select it from the drop-down list and click **Edit Current List**.

- Click a patient's name to view details about the patient in the console.

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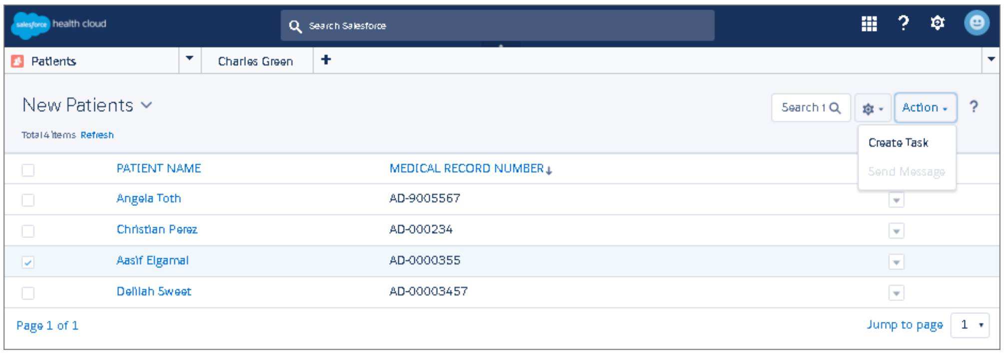
- Click a column heading to sort in ascending or descending order.
- Create or edit a list by clicking the gear button .
- Search for items that appear within the page by entering text in the Search text box. You can search for text within the page you're viewing. Each page displays up to 500 patients. If the list contains more than 500 patients, you see multiple pages of patients, and must search within each individual page.
- From the **Action** list, create a task for selected patients.



Patients appear in custom lists as long as they remain a part of the criteria that was used to create the list. For instance, you have a custom list that shows patients who've had knee replacement surgery in the past 30 days. Patients appear in the list for the 30 days after their surgery. They no longer appear in the list after the window of time has ended. So if Joe Smith had knee surgery on May 1, he appears in this list until May 31. Although Joe no longer appears in the custom list, he remains in the system, and you can add him to other lists as long as he is a patient.

Use the Patient Card for a Comprehensive View of Your Patient

To effectively manage your patients, you need their information at your fingertips. The Patient Card extracts the most important information from a patient's medical records, such as conditions, medications, and contact information, and displays it all in one place. You can easily see the information you need without searching for it or clicking to other pages.

Watch a Demo: Get a Comprehensive View of Your Patient's Medical Records

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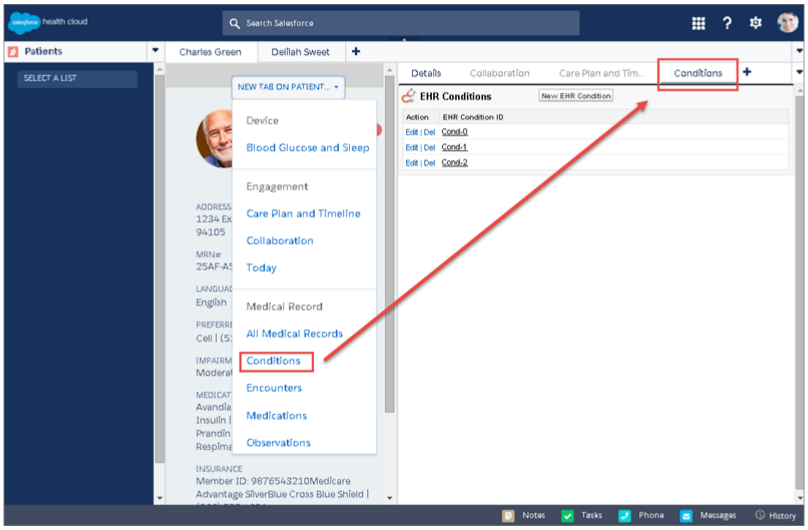
To drill down into more detailed information related to the patient, select **New Tab On Patient**. Your administrator can add links to subtabs for things like medications, conditions, medical device data, and so on. The subtabs show all the information regarding that aspect of patient care, so you don't have to switch context or leave the page. You can view and work with many different types of patient information simultaneously.



Search for Educational Articles and Protocols

Use the Knowledge widget to get the right information to your patients. You can search for protocols, educational articles and videos, and links to websites right from the console, without leaving the page that you're working from.

- Create and manage articles **(1)** if you have permission to author articles.
- Search **(2)** for articles and protocols.
- Adjust the size and position of the widget based on your window width. In windows smaller than 600 pixels, the searchable objects are displayed in a drop-down menu.

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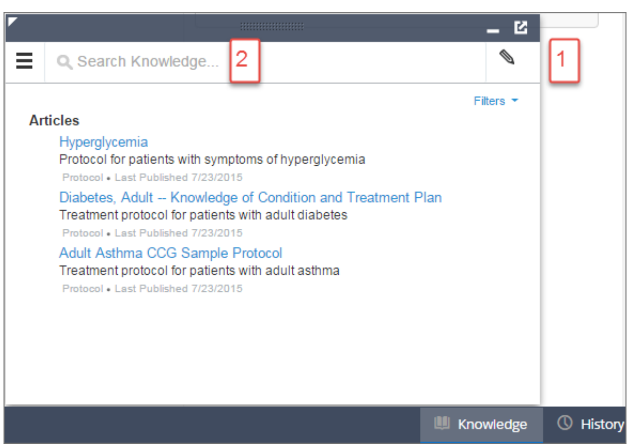

Get Ready to Use the Health Cloud Console

To start using the Health Cloud console to manage your patients, you have a few things to set up.

EHR and other clinical systems provide the medical information that is critical to the planning, execution, and management of patient care plan. The Health Cloud console gives you a birds-eye view into your patient's medical records, however Health Cloud is a separate system designed to augment your EHR. It receives information from the source medical records system, but doesn't send information back to your EHR. The EHR system always remains the system of record.

One of the first tasks is to create patients from information that is brought over from an integration with the medical records. During that process, you can assign yourself as the care coordinator so that your patients are ready for you to manage. Then you add the physicians, family members, and other care providers to the care team. Finally, you create a care plan that is tailored to the patient's specific condition.

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Complete Your Chatter Profile

Your profile communicates who you are to your coworkers and the patients you communicate with. It features your photo and basic information like your professional title and contact details. Set up your Chatter profile soon after you begin using Chatter, and make sure to keep it up to date. Your patients will appreciate it!

Create Patients

When you select a patient name from the EHR system, Salesforce creates all the records and objects you need to start managing that patient.

Create a Customized List of Patients

You can create your own list of patients based on things like shared conditions, common protocols, or other similarities that are important to managing their care. We've made it easy to break up your master patient list into smaller, more manageable lists.

Complete Your Chatter Profile

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1. In the Health Cloud header, click the profile image placeholder. Find the placeholder profile image on the left side of the page, and select **My Profile**.

   

2. To update your profile photo, hover over the placeholder image and click **Add Photo**.

   Tip: Use a photo of you and not a group of people or a pet. The recommended resolution for photos is 200 x 200 pixels.

3. To edit your contact information, click in the Contact section.
4. On the Overview tab, add any other information about yourself.

   Tip: Complete your profile with details about the department you work in, your experience, and so on.

5. Click **Save All**.

Create Patients

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A Behind-the-Scenes Look at Patient Creation

Each time you create a patient, Salesforce performs the following actions.

- Creates the patient as an individual, based on the fields you've mapped from the EHR system. An individual is an object view of both Account and Contact, linked by the Individual ID.
- Creates an account for the individual.
- Creates a contact record for the individual. The contact record is linked to the account through the Individual ID.
- Creates a case with a CarePlan record type so that the page layout for the care plan appears automatically. If a care coordinator has been selected, the coordinator becomes the owner of the case.
- Adds the case that represents the care plan to the account record.
- Creates a case team with the individual as the patient, and adds the care coordinator, if one has been selected.
- Adds the patient's account ID to the Candidate Patient record.

Create Patients from Imported Records

Create patients using the information you receive through the integration with an electronic medical records system.

Watch a Demo: Create Patients in the Health Cloud Console

The frequency with which you create patients largely depends on how your organization chooses to integrate back-end systems like the EHR with Health Cloud.

The Candidate Patients pages show all the records that have been brought into Salesforce through integration with an EHR system.

- **All** shows all patients that have been brought over from the source records system, including those patients who haven't been converted to Health Cloud patients yet. For patients who have already been converted, you can click their Candidate Patient Record and view their patient data in the Health Cloud console. For those patients who haven't been converted, click the patient's name to view the information waiting to be brought into a Health Cloud patient record.
- **Not Converted** contains records that have been brought over from the source records system, but have not been converted to a Health Cloud patient record.
- **Converted** shows the records that have been successfully converted into Health Cloud patient records. You can pin this list in the console when the console primary tabs are open.

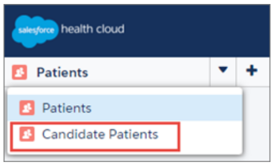
When you select a record to convert to a patient, the system does all the behind-the-scenes setup for that individual, in addition to creating:

- A patient card that includes the MRN or other identifiers, basic contact information, and the fields that show important medical information, such as conditions and medications

- An empty care plan
- A care team consisting of the patient and the care coordinator, when one has been selected

You can create patients from the Health Cloud - Console or the Health Cloud - Worklist app.

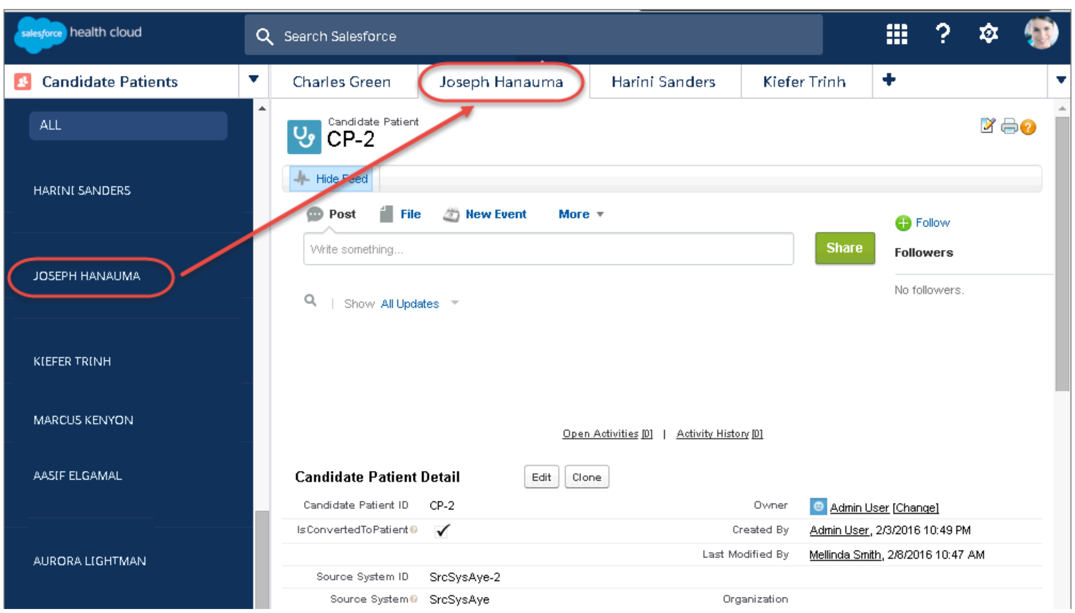
1. From the worklist or the console, select the **Candidate Patients** list.



2. From the All page, select **Not Converted**.

On the Not Converted page, you can select patients who don't have patient records in Health Cloud yet.

3. Optionally, view details about the patient that come from the source record system by clicking the patient's name in the Worklist view. The patient's information opens in a separate tab.



4. Select one or more incoming patient records to convert.
5. From the Actions menu, select **Convert to Patients**.

   The system checks for duplicate MRNs and lists them. You can't select names with duplicate MRNs. They must be resolved in the originating records system. After the duplicate identifiers are removed, you can re-import the record and convert it to a patient.

6. Review any duplicate patients. If there are no duplicates, click **Next**.

   Duplicate records must be resolved in the source medical records system before they can be converted.

7. Optionally, search for and select the name of the care coordinator to assign to the patients.

   Note: If you choose not to assign a care coordinator during this step, you can assign one later in the Case Team section of the Care Plan case record. You can also have your admin create automatic case assignment rules.

8. Click **Next**.
9. Review the list of patients and the assigned coordinator, if one is assigned, and click **Save**.

Create a Customized List of Patients

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USER PERMISSIONS

To create patient lists:
- "Health Cloud Standard"

You can create your own list of patients based on things like shared conditions, common protocols, or other similarities that are important to managing their care. We've made it easy to break up your master patient list into smaller, more manageable lists.

Note: If you don't see the records and fields you want to use in your patient list, contact your Health Cloud admin to request access.

1. On the Patient List tab, click the gear, and select **Create New List**.
2. In the first row, click inside the first lookup and type the name of the record to use as a filter. The field displays a dynamic list of matching records when you start typing in the lookup field.

   For example, select a record that holds prescription information to create a list based on a common medication. When you select a record, you can select any field in the record and display it as a column in your list. If the record you need isn't in the list, your Health Cloud admin can add the object by creating a cross-object relationship to that object. For information, see the *Health Cloud Implementation Guide*.

3. In the second lookup field, type the name of the field in that record to display.

   For example, select the medication name or ID.

4. Choose a filter operator.

   The operator in a filter is like the verb in a sentence. Use an operator to specify the action you want the filter to take.

5. Enter a value to match or exclude.

   For example, you can create a filter with the operator `equals` and a value of `insulin` to return results for patients who use insulin.

   The values that appear in this field are dependent of the type of field you select. For example, if you select `Hospitalize Period End`, a date field and a time field appear. Or, if you select a checkbox field, like `Hospital Readmission`, a checkbox with the value `True` appears.

6. Add more rows, if necessary.

   For example, add criteria for patients with diabetes that were admitted to the hospital in the past six months.

7. Click **Next**.
8. Select the fields you want to display for each category. The Patient Name field automatically appears in the patient list.
   a. To add or remove fields, select a field name, and click the **Add** or **Remove** arrow.
   b. Use the arrows to arrange the sequence of the fields.
9. Click **Next**.
10. Enter the name for the list.

11. Click **Save New List**.

Example: Here's an example of how to create a list of patients with diabetes. You can create additional rows of filter critieria to narrow the scope of the list.

Add these filter criteria on the Add Filters page:

- **Record**: Record
- **Object**: EHR Condition
- **Field**: Code Label
- **Filter**: contains
- **Value**: diabetes

To customize how the list appears, select the fields you want to show and arrange their sequence. Name the list and save your work.

Use Care Plans to Help Patients Reach Their Goals

Easily manage health problems with goals and tasks that you assign to patients or caregivers so that patients stay on track and improve their health. Customizable care plans represent an action plan for improving a patient's health.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Create a Patient Care Plan
Customizable care plans help your patients take practical steps to improve their health on a day-to-day basis.

Add Problems and Goals
Problems and related goals create the basic structure for your patient's care plan. Access the care plan from the patient's primary tab.

Tasks
Tasks help you track and measure the activities associated with your patients. From the Health Cloud console, you can ask a caregiver to drive a patient to an appointment, remind yourself to follow up on a missed appointment, or assign a patient a pre-admission survey to complete.

Create a Patient Care Plan

Customizable care plans help your patients take practical steps to improve their health on a day-to-day basis.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

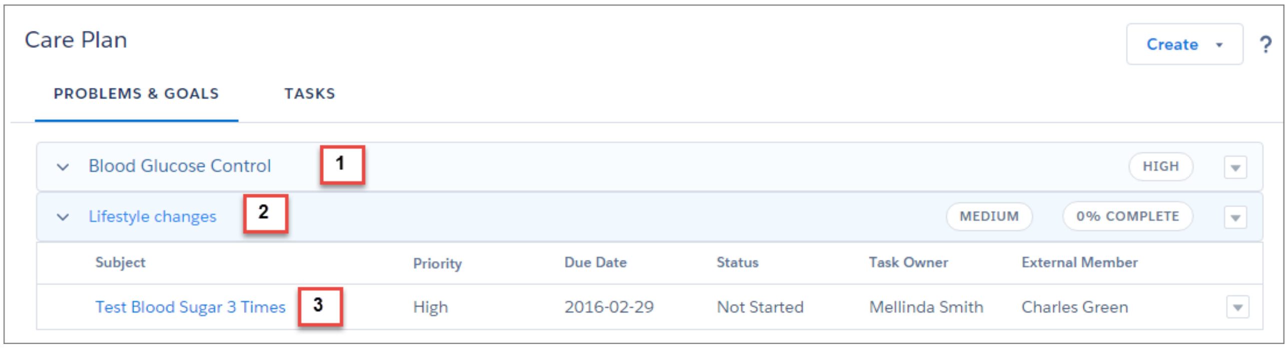
Watch a Demo: Use Care Plans to Help Patients Reach Their Goals

A care plan consists of clearly defined goals and tasks that help to mitigate or control health-related problems. A care plan gives the healthcare team a history of the patient and the progress or challenges related to the patient's health. A care plan can have any number of problems with associated goals and tasks that you can track from the patient's tab in the console. Problems are listed based on importance, with higher priority items listed first.

The patient care plan is made up of these components.

- **Problems** (1) are clinical or non-clinical health issues that range from a specific diagnosis to more general conditions. Problems are identified through many sources: the primary care physician, a lab test, an issue reported by the patient, a diagnosis, or a stage of a disease. A problem can be a specific diagnosis, such as chronic bronchitis. Problems can also include general issues, such as when a patient needs assistance with daily activities in the home. When you assign a priority to problems, they appear in order of priority.

- **Goals** (2) are the patient objectives that help achieve an improved outcome for a problem. You can only create a goal within the context of a problem. A problem can have several goals. For example, a patient with arthritis could have the goals to keep daily pain levels under 4/10 and to keep or increase range of motion. As the patient progresses toward the goal, make sure to update the status of the goal.
- **Tasks** (3) are specific measurable actions toward the goals to mitigate the associated problem. So the patient with arthritis whose goal is to keep or increase range of motion could have a task to attend physical therapy sessions. Tasks have fields that show priority, due date, status, and who the task is assigned to. When a task is accomplished, you update the percent complete in the associated goal.



Add Problems and Goals

Problems and related goals create the basic structure for your patient's care plan. Access the care plan from the patient's primary tab.

1. Navigate to the Care Plan tab.
2. Select **Create** and then **Problem**.
   a. Enter a problem name, such as `Basic self-care for diabetes needed`, and include a description.
   b. Optionally, select the priority for the problem.
      Problems appear in order of their priority.
   c. Click **Save**.
3. To create a goal for the problem, click the **Actions** button and select **Create Goal** from within the problem.
   a. Enter a name for the goal, such as `Proper foot care to prevent complications`, and a description.
   b. Optionally, select the priority for the goal.
      Goals appear in order of their priority.
   c. In the `% Progress` field, enter a percentage that represents progress toward achieving the goal.
   d. Click **Save**.
      You can create multiple goals for each problem.

For each goal, create tasks that help to meet the goal.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

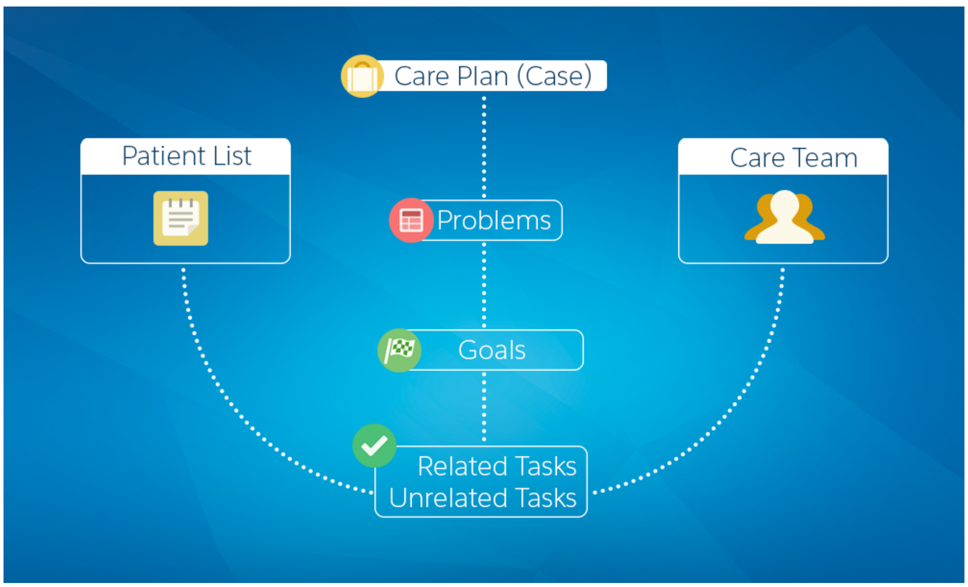
To create tasks:
- "Health Cloud Standard"

Tasks

Tasks help you track and measure the activities associated with your patients. From the Health Cloud console, you can ask a caregiver to drive a patient to an appointment, remind yourself to follow up on a missed appointment, or assign a patient a pre-admission survey to complete.

In Health Cloud, you can create a task from several places.

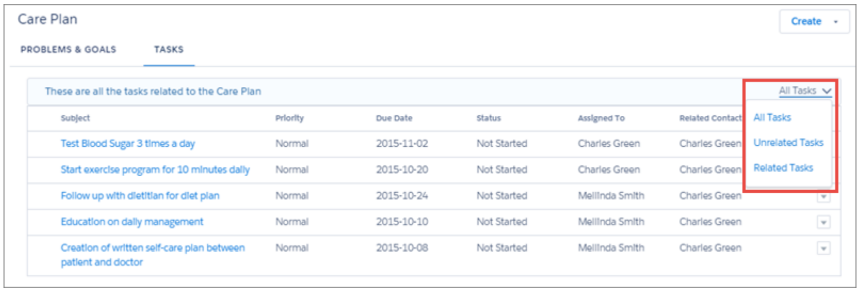
- Save time and effort by creating tasks for individual patients, groups of patients, or even yourself from the patient list. Select patients from your patient list, create the task, and you're done! It's quick and easy to track things like wellness surveys or followup questionnaires that go to a group of your patients with common conditions. You can also assign yourself a task related to a patient so that you can track important milestones.
- Create tasks for a patient or a caregiver from the patient's care plan. These tasks are specific measurable actions toward the goals that mitigate the associated problem. For example, create a task to attend weekly physical therapy sessions for an arthritis patient whose goal is to keep or increase range of motion.
- When a care team member is part of the community, assign tasks to care team members using a link in their profile. These tasks are not directly tied to the problems and goals associated with the care plan.



All tasks have fields for basic information, like description, due date, task type, who the task is assigned to, and who is responsible for performing the task. Tasks that are created from within the care plan also include fields to let you associate the task with a specific problem and goal.

When you create a task for a care team member, the task is always assigned to that member. When you create a task from the patient list, you have two choices for the performer of the task: yourself or the patient.

You can track tasks belonging to you and to any care team members from the care plan task list. Use filters to show all the tasks related to the patient, tasks that are related to the goals and problems in the care plan, or unrelated tasks that aren't specific to a goal or problem.



Patients see their tasks from within the community. Tasks you've assigned to yourself appear in your task list in the Salesforce Home tab, the Today page, and in the task list of the patient's care plan.

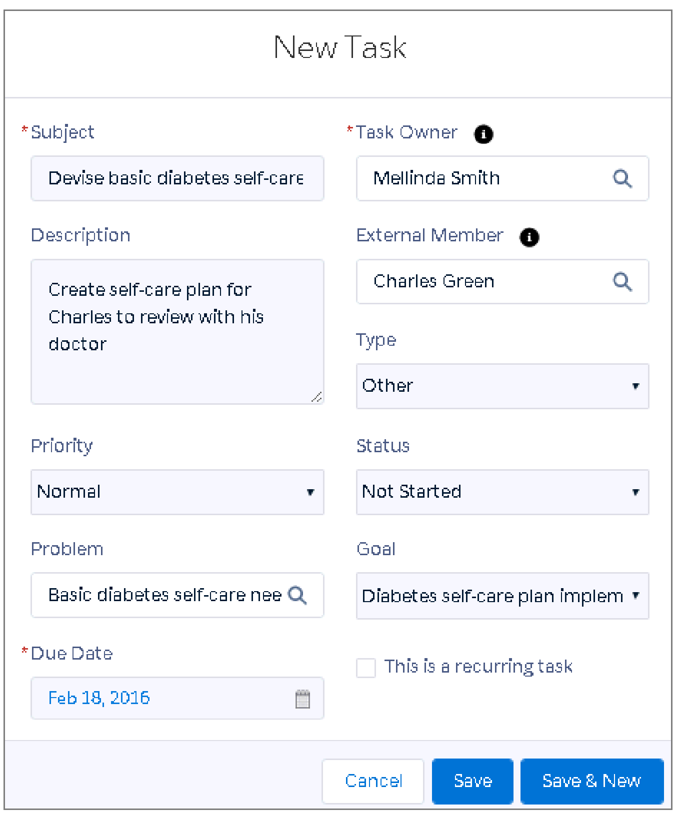
Create Tasks Related to Your Patients and Their Care

Creating tasks for your patients or their caregivers is an easy way to track and manage activities related to a care plan.

Create Tasks Related to Your Patients and Their Care

Creating tasks for your patients or their caregivers is an easy way to track and manage activities related to a care plan.

Note: Salesforce Communities provides the collaboration support for Health Cloud. Some of the collaborative features aren't available until you enable Salesforce Communities and create a private patient community.



EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To create tasks:

- "Health Cloud Standard"

When you create a task from the patient list or from the patient care team, the task isn't related to care plan problems or goals, so you don't see those fields. These tasks appear in the list of unrelated tasks or in the All Tasks list. Tasks created from the Care Plan appear in the list of related tasks.

1. Create a task from one of the following places in the console.
   - From the Patient List, select one or more patient names, click the **Action** menu, and select **Create Task**.
   - On the Care Plan page, select either the **Create** menu at the top of the care plan or the **Create Task** button within a care plan goal.
   - From the patient care team, click a member's picture and select **Create Task**. Care team members must be members of the community to be assigned a task.
2. Enter a subject and description for the task.

   Make sure to add a clear task name and a useful description.
3. In the Task Owner field, select the name of the person who is responsible for this task. The person can either oversee or perform the task. This field shows names of people who are either internal users or community members.

   Generally, when you create a task, the assignment defaults to your username, but you can select someone else. When you create a task for a care team member, the task is assigned to the selected member.
4. If the task is performed by an external member of the care team, select the name of the person to complete the task.
5. Choose the type of task you're creating.
6. Select the priority and status of the task.
7. When you create a task from within the care plan, select the problem and the goal that this task is related to.

   The goals that appear in the picklist are related to the problem you select.

   Note: Tasks created from the patient list or from the patient care team aren't related to care plan problems or goals. They appear in the list of unrelated tasks or in the All Tasks list.
8. Select a due date from the calendar.
9. Click **Save**.

Care Plan Templates Help Simplify Patient Onboarding

Take the "work" out of workflows with care plan templates that let care coordinators create customized patient care plans with just a few clicks. Coordinators can add problems, goals, and tasks in bulk to a patient's care plan. Predefined care plan templates reduce the time spent to create a care plan and enforce standards of care that improve healthcare outcomes.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Select Care Plan Templates
From within the Health Cloud console, you can search through your company's library of care plan templates and choose the ones that address your patient's conditions.

Customize the Care Plan Templates
Every patient's journey is different. Once you've selected care plan templates, you can customize them by selecting the problems, goals, and tasks that apply to your patient.

Apply the Care Plan Templates to Your Patient
Once you've selected the templates and removed the items that don't apply to your patient, review your work and you're done!

Select Care Plan Templates

From within the Health Cloud console, you can search through your company's library of care plan templates and choose the ones that address your patient's conditions.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

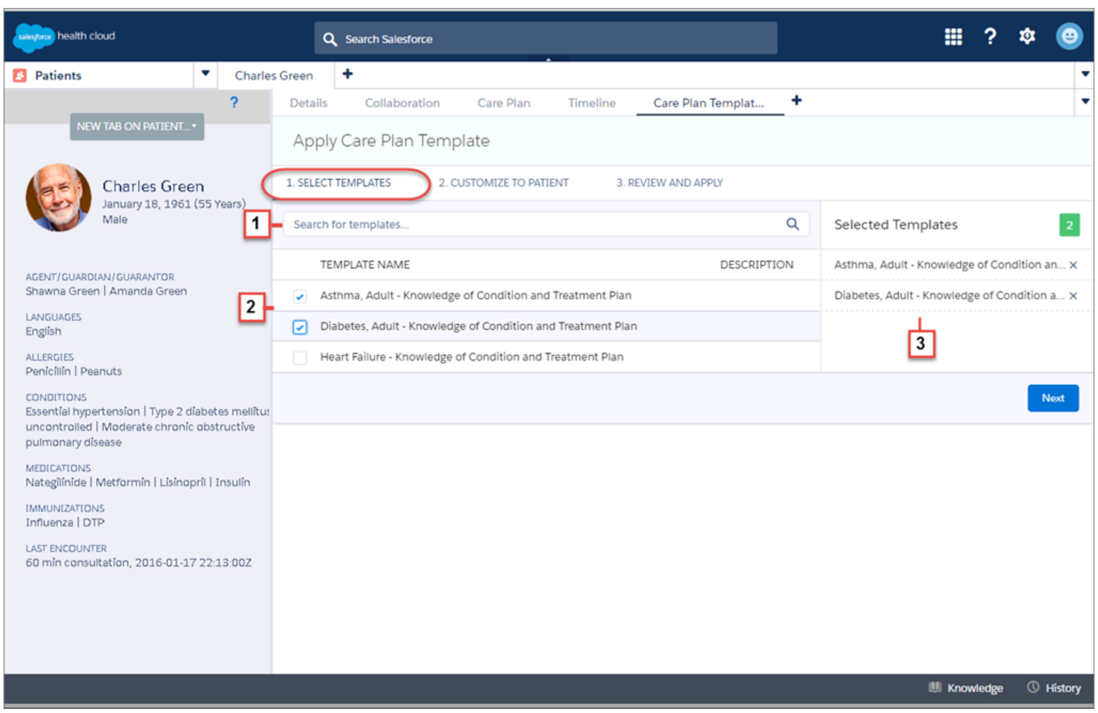
Note: A patient's care team must have at least one internal user in the care coordinator role so that tasks can be assigned to the care coordinator.

Use the Select Templates tab to select the templates to apply to a patient.

1. From the patient card navigation menu, select **Care Plan Templates** or click the **Care Plan Templates** subtab for that patient.
2. Search **(1)** for a template by typing its name in the text box and clicking the magnifying glass icon or pressing **Enter**.

   Type at least two characters in the text box to perform a search. You can view up to 500 templates at a time. If the template you're searching for isn't in the list, try narrowing your search criteria.
3. Select the templates **(2)** to apply to the patient. You can add as many as five templates per patient.

   A selected template remains in the list even if you move to another page or decide to perform another search for more templates.
4. The templates you select appear in the selected templates section **(3)**. You can remove a template from the list by clicking the **X** or by unchecking the box next to the template name.
5. Click **Next**.



Customize the Care Plan Templates

Every patient's journey is different. Once you've selected care plan templates, you can customize them by selecting the problems, goals, and tasks that apply to your patient.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Note: A patient must be a community user to have a task assigned. If the patient isn't a community user, patient tasks are assigned to the care coordinator.

The Customize to Patients tab is where you tailor the care plan to meet your patient's unique healthcare needs.

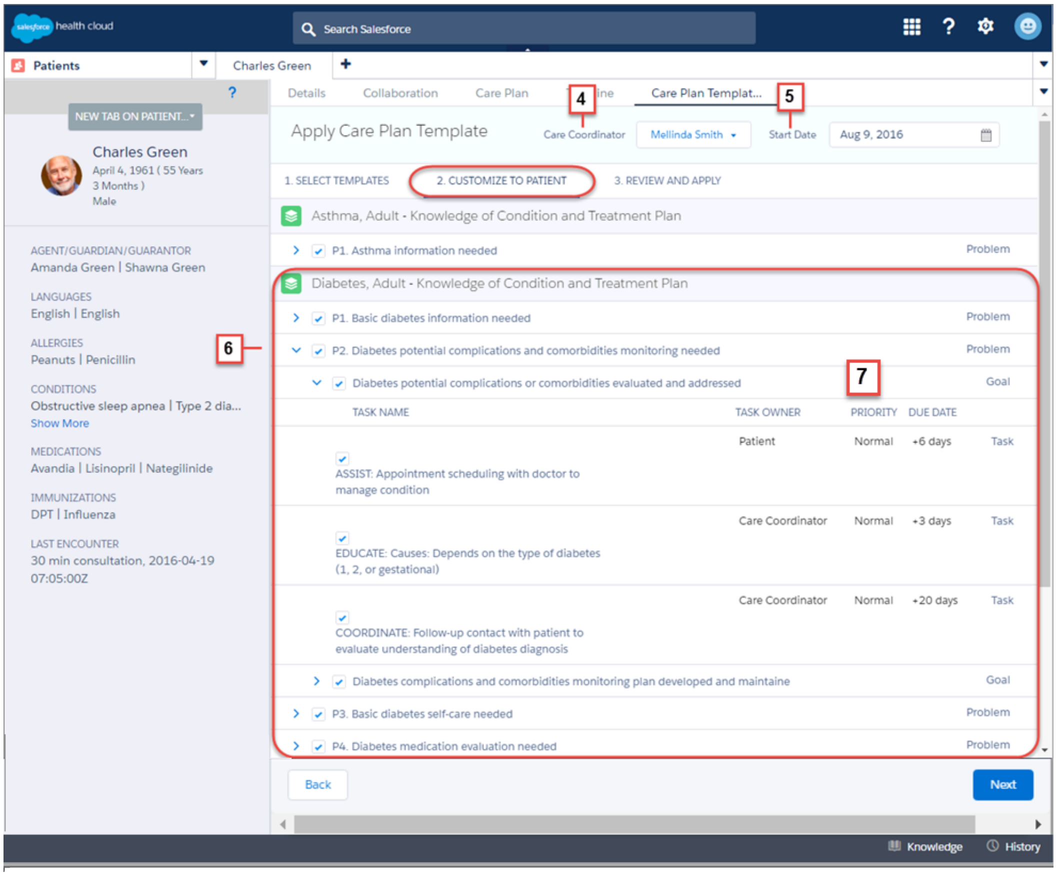
1. Select the name of the care coordinator **(4)** who is responsible for care coordination tasks, like scheduling appointments and making follow-up calls. If the patient isn't a community member and can't be assigned to a task, the care coordinator is assigned these tasks. Only care coordinators who are internal Salesforce users appear in the list.
2. Select the date **(5)** that the care plan starts for the patient.

   This date is the anchor date for the problems, goals, and tasks associated with the care plan. Tasks that have an offset date use this date as the starting point and add the assigned offset to the start date. For example, if the template start date is December 9 and a task offset is `+7 days`, the task's due date is December 16.
3. Remove any of the items that don't apply to your patient **(6)** by clearing the checkbox.

   Each care plan template appears with the associated problems selected by default. If a problem or goal doesn't apply to the patient, you can remove it and its child items from the care plan. For example, if a patient already has supplies for blood glucose control, you can remove the task for purchasing supplies. When you remove a problem, you remove the goals and tasks associated with it.
4. Expand individual sections of problems, goals, and tasks by clicking the triangles **(7)**.

   When you expand the list of tasks, you can see the owner, priority, and number of offset days.
5. Click **Next**.

Note: If you click the **Back** button, you lose your changes.



Apply the Care Plan Templates to Your Patient

Once you've selected the templates and removed the items that don't apply to your patient, review your work and you're done!

1. Review the care plan before you apply it to the patient.

   If you decide to add or remove an item to the care plan before you're finished, click `Back` and make your changes.

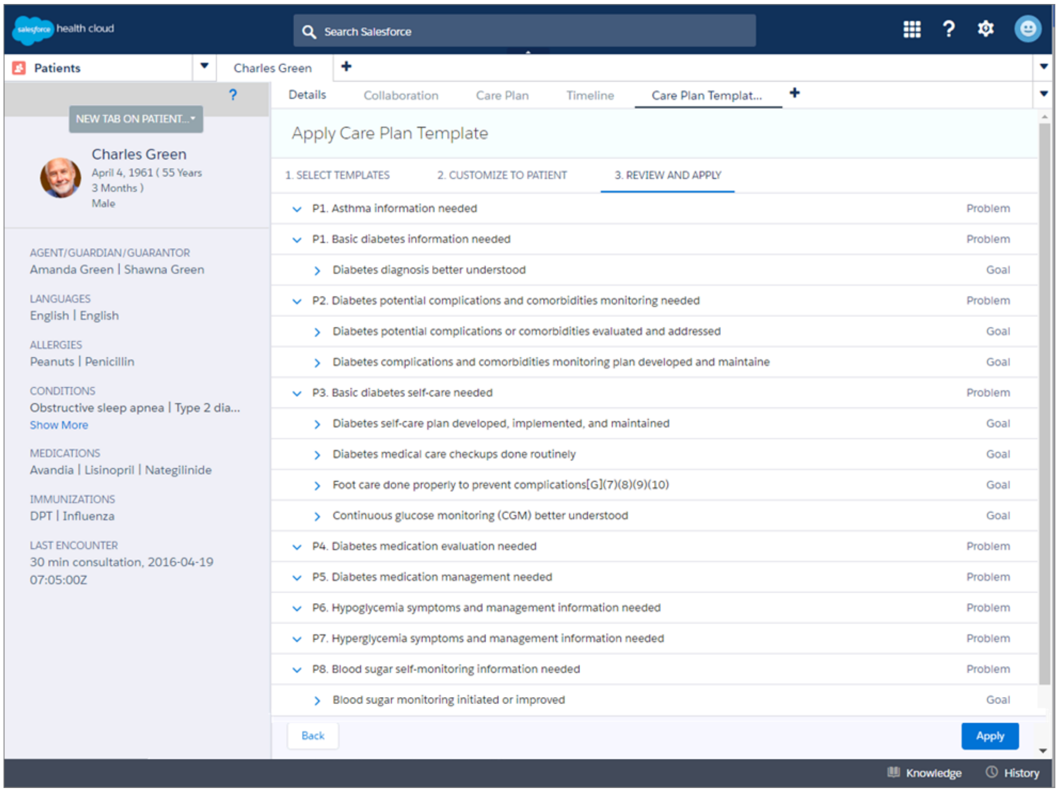
2. After you click **Apply**, the care plan, along with its problems, goals, and tasks are added to the Care Plan tab for the patient.

   When you add many problems, goals, and tasks to a care plan, you may not see your changes immediately. Refresh the Care Plan tab in a few minutes to see your additions to the care plan.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions



Monitor the Timeline of a Patient's Medical Events

The patient timeline gives you a snapshot of your patient's healthcare events and activities in chronological order.

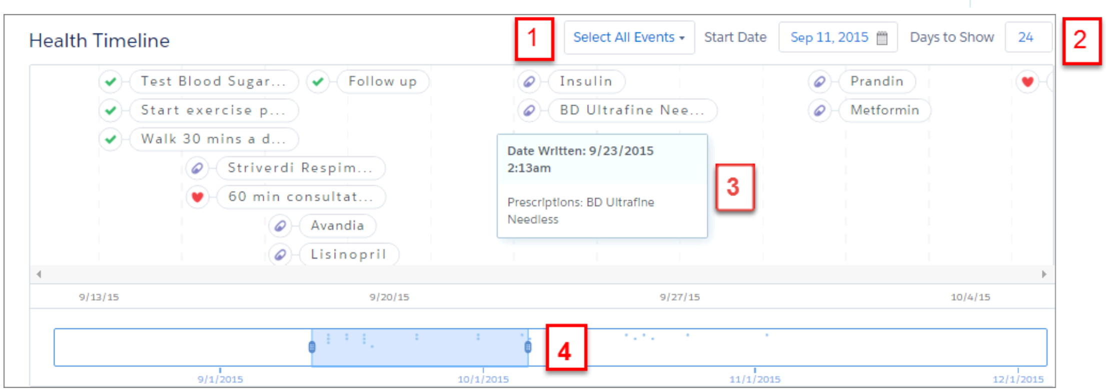
Watch a Demo: Use the Timeline to Monitor Patient Health History

Since the information displayed in the timeline is interactive, you can select any time scale and see all the important details of your patient's care or filter the events to see a targeted view. So now it's super easy to get a snapshot of your patient's prescriptions for the last 90 days or look at the upcoming medical events for the next six weeks.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions



You can filter the events **(1)** that appear on the timeline. View all health record and engagement events, or you can view just a few. Filter to show events such as messages from different medical practitioners, forms you've sent to the patient, diagnosed conditions, discharge dates, and other electronic health records.

To view the patient's upcoming medical activities **(2)**, select a start date and then how many days you'd like to see from that date into the future. You can narrow that amount of time or expand it up to 365 days, depending on the length of time you'd like to see.

When you hover your cursor over an event **(3)**, you can see the highlights for that event—for example, the name and the amount of a medication that was prescribed on a certain date.

Below the main timeline is a mini-map with a slider **(4)** that lets you quickly scroll through the timeline. To redefine the date range, drag the marker at the end of the slider. When you drag the slider, the Start Date and Days to Show fields change in response. Click a cluster of timeline events in the mini-map to set the start date or to drill in and investigate a cluster of events.

Engage Patients with the Private Patient Community

The care team is the hub of your patient's private community—it represents everyone working to make sure that your patient succeeds with his or her care plan. It includes healthcare professionals from inside and outside of your organization, and family members of the patient.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Manage the Extended Care Team

Patients with an invested team of professional and personal caretakers are more likely to manage their conditions successfully. Each member plays an important role in maintaining the health and ensuring the progress of the patient.

Add a Member to the Care Team

It's quick and easy to add people of various roles to the care team. People who work for your organization are considered internal members and have access to more information about the patient. External members, like family and outside providers, have restricted access to the patient's information based on the sharing rules set up by your admin.

Use the Chatter Feed to Collaborate with the Care Team

The Chatter feed on the Collaboration tab shows all the conversations with care team community members and activities related to the care plan.

Send a Private Message to a Care Team Member

Chatter messages let you have secure private conversations with other Chatter users who are also members of the care team. You can also use messages to notify people when a file has been shared with them. Messages don't appear in your feed, your profile, global search results, or any other part of Chatter that's publicly visible.

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EDITIONS

Health Cloud is available in Salesforce Classic

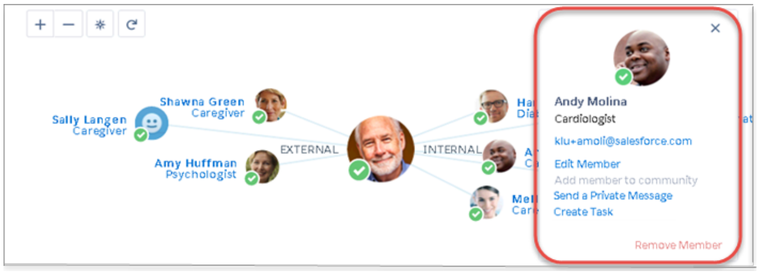
Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Watch a Demo: Manage the Patient Care Team

> **Note:** Salesforce Communities provides the collaboration support for Health Cloud. Some of the collaborative features aren't available until you enable Salesforce Communities and create a private patient community.

Your admin defines roles, which can include:

- Care coordinator
- Patient
- Caregiver
- Primary physician



Members of the community have a checkmark by their thumbnail photo and members without community access don't have a checkmark. Internal members, to the right of the patient, are people within your company who have access to Health Cloud. External member, to the left of the patient, are people from outside your company, like caregivers or medical professionals who work for other companies or agencies.

Click a care team member's profile picture in the care team view to see quick view options for interacting with that person. You can perform the following actions from the member's profile.

- **View the member's email address**. The member's profile shows their email address so that you can use an external email application to contact external members who don't have access to the community.
- **Edit a member's record**. You can edit the original record for each member of the team. When the member is an internal user or a member of the patient community, you can see and edit their user record. If the person is an external member without community access, you see the contact record.
- **Add the member to the community**. If the care team member isn't already a member of the community, select this link to add the person to the patient's community. Make sure that the contact record has an email address, because an email notification with login information for the community is sent. Internal users already have access to the community.
- **Send a private message**. You can send a private Chatter message to a care team member who is a part of the patient community. Members of the community have a checkmark by their thumbnail photo to let you know you can send a private message.

  Chatter messages let you have secure private conversations with other Chatter users. Use messages to send your patient a question privately or to communicate with a care team member when a discussion isn't relevant to everyone. Messages don't appear in your feed, your profile, global search results, or any other part of Chatter that's publicly visible.

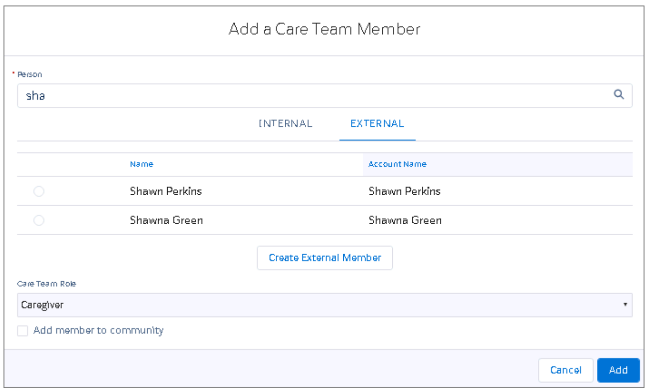
- **Create a task for the member**. When the member you're working with is part of the community, you can create a task that appears on the person's home page.
- **Remove a member**. What if your patient changes physicians, or a family member is no longer involved in the care team? You can remove a member from the team and from the patient's community. Be sure that the person doesn't have open tasks before you remove the member. It's a best practice to reassign those tasks to another member of the team so that you don't lose track of the task.

  Note: Because it's possible that someone like a respiratory therapist could be a member of several care teams, a person retains community access even when removed from a specific care team.

Add a Member to the Care Team

It's quick and easy to add people of various roles to the care team. People who work for your organization are considered internal members and have access to more information about the patient. External members, like family and outside providers, have restricted access to the patient's information based on the sharing rules set up by your admin.

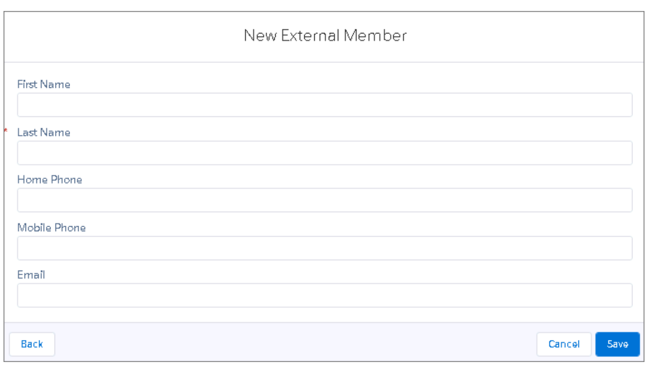
When you search for the name of the person you want to add, be sure to check both the internal and the external tabs in the middle of the page. The name you want may be on a tab that you're not currently viewing. If the person doesn't appear in the results, then you can add a person to Health Cloud by creating an external member on the fly.



1. Click **Add a Care Team Member**.
2. Type the name of the person and click the Search icon .

   Note: Make sure to check both the Internal and External tab for results.

3. If the person's name wasn't found, click **Create External Member** to add a new external member to the care team.

   a. Enter the person's name and contact information.

      Note: To add the new external member to the community, be sure to enter a unique email address for them. Community members can't share email address.

   b. Click **Save**.

4. Select the person's role in the care team.
5. To grant this person access to the patient community, select **Add member to community**. Members without access to the community can't use Chatter to collaborate around the patient's care.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To add a care team member:

- "Health Cloud Standard"

6. Click **Add**.
7. Click the Refresh button to refresh the care team and view the newly added member.

Use the Chatter Feed to Collaborate with the Care Team

EDITIONS

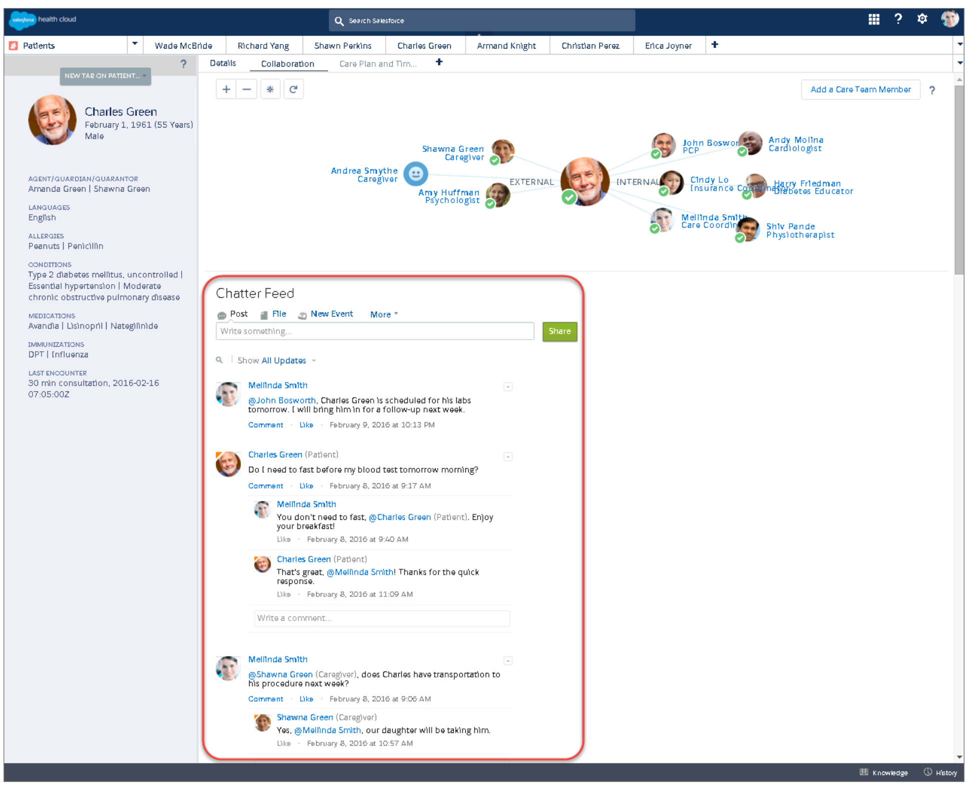
Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

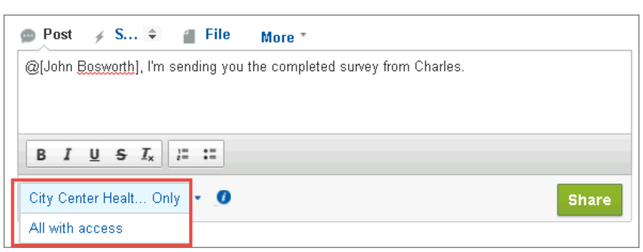
The Chatter feed on the Collaboration tab shows all the conversations with care team community members and activities related to the care plan.

The Chatter feed on the Collaboration tab is a more focused version of the What's Happening feed on the Today page. Chatter feeds show you posts and comments you and other people make, as well as record updates that are associated with the care plan. Remember that private messages sent from the care team profile don't appear in your feed, your profile, global search results, or any other part of Chatter that's publicly visible.

This feed is private to the care team community and only shows posts from members with access to the community. Posts from the care team do appear in your What's Happening feed on the Today page, but aren't seen by your company or users who aren't members of the care team community.



Use the @ character to mention a member so that they receive an email notification letting them know that they're mentioned in a post. Select the audience by posting only to internal care team members or allow any member with community access to see the post.



Track a post by clicking `Like` below a post or comment. You can also create a poll, thank someone, link to a website, and select other options that your admin configures.

Send a Private Message to a Care Team Member

Chatter messages let you have secure private conversations with other Chatter users who are also members of the care team. You can also use messages to notify people when a file has been shared with them. Messages don't appear in your feed, your profile, global search results, or any other part of Chatter that's publicly visible.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To create or send private messages:

- "Health Cloud Standard"

Note: Salesforce Communities provides the collaboration support for Health Cloud. Some of the collaborative features aren't available until you enable Salesforce Communities and create a private patient community.

Your messages are organized into conversations, with each conversation defined by the combination of people participating in it. For example, you send a message to Sally Smith. When Sally replies, her message continues your one-on-one conversation. Each new message you send to Sally—even if it's about a different topic—also continues the same conversation. Over time, you build a rich conversation history with Sally that contains every message you've exchanged with her.

1. Start the message from one of these locations.
   - Click **Private Message** on the care team member's profile card in the care team view.
   - Click a person's name anywhere in Chatter to view the profile, and then click **Send a message**.

   Sharing a file with people is another way to send a Chatter message. When you share a file, a message is sent to the recipients.

2. If you started in the Send a Message dialog box, you can add people's names to the recipient list. Type a name in the **To** field and click the name to select it. Add more people to the conversation by entering more names.

   If you're replying within a conversation or via email, the conversation participants can't be changed.

3. Write your message. Messages can be up to 10,000 characters.
4. Submit your message using the appropriate method.
   - In the Send a Message dialog box, click **Send**.
   - If you're replying within a conversation, click **Reply** (or **Reply All** if the conversation involves multiple recipients).
   - If you're replying via email, use the Send option in your email application.

Drive Learning with Protocols and Articles

Salesforce Knowledge lets you easily create and manage content and make it available to other healthcare professionals and to the patient and care team members. An article can contain the protocols you use to manage conditions or can hold educational materials you send to patients. You can write, edit, publish, and archive articles using the Articles Management tab or find and view published articles using the Articles tab.

Authors create articles by selecting an article type, writing content, and selecting where it should be published. You create both articles and protocols from the Article Management tab, but you select a different article type depending on the content you want to create.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To create articles:

- "Manage Articles"

  AND

  "Create" and "Read" on the article type

To edit draft articles:

- "Manage Articles"

  AND

  "Read" and "Edit" on the article type

To edit published or archived articles:

- "Manage Articles"

  AND

  "Create," "Read," and "Edit" on the article type

> Note: It's possible that not everyone in your organization will have the license type or permissions to create articles and protocols for your patients and care coordinators. Contact your Salesforce administrator for access to the Article Management tab. You can also make the Article Management tab visible to a user's profile.

1. On the Article Management tab, click **New**.
2. If your organization supports multiple languages, choose the language for the article.
3. Choose an article type, enter the article title, and click **OK**.
4. Edit the article's fields, and select a validation status. If your article contains a rich text area field, you can add some formatting such as bulleted lists, links, and images.
5. Optionally, if your organization uses data categories, select the categories to associate with your article:
   - Click **Edit** next to a category group to open the category selection dialog box.
   - In the `Available Categories` list, expand the category hierarchy to select a category.
   - Click **Add** to move a selected category to the `Selected Categories` list.

     > Note: You can't add both a category and its child categories to the `Selected Categories` list. When you add a category to an article:
     >
     > – Child categories in the `Available Categories` list are unavailable unless you remove the parent from the `Selected Categories` list.
     >
     > – Child categories in the `Selected Categories` list disappear from that list.
     >
     > Users searching for articles can find them by selecting an exact category or by selecting a parent or child category.

   - Click **OK**.
6. Select the audience you want to publish the article to:
   - Internal App: Salesforce communities users can access articles in the Articles tab depending on their role visibility.
   - Customer: Customers can access articles if the Articles tab is available in a community.. Customer users inherit the role visibility of the manager on the account. In a community, the article is available only to users with Customer Community licenses or Customer Community Plus licenses.
   - Partner: Partners can access articles if the Articles tab is available in a community. Partner users inherit the role visibility of the manager on the account. In a community, the article is available only to users with Partner Community licenses.

- Public Knowledge Base: Articles can be made available to anonymous users by creating a public knowledge base using the *Sample Public Knowledge Base for Salesforce Knowledge* app from the AppExchange.
- Your own website. Articles can be made available to users through your company website.

7. Click **Quick Save** to save your changes and remain on this page. Alternatively, click **Save** to save your changes, close the article, and go to the Article Management tab.
8. Click **Publish...** when the content is ready to be published.
9. Select `Publish article(s) now` or `Schedule publication on` to choose the date to publish the article.
10. If the article has previously been published, select the `Flag as new version` checkbox to make the new article icon ( ) display next to your article in the selected channels. Users from these channels can see that this article has been modified since the last time they've read it. This checkbox is not available when you publish an article for the first time, as the icon displays by default for new articles.
11. Click **OK**.

    Articles you scheduled for publication at a later date continue to appear in the Draft Articles filter, now with the pending icon ( ) next to the article title. Hover over the icon to see the publication date.

Health Cloud Console Keyboard Shortcuts

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Keyboard shortcuts let you quickly perform actions by pressing keys instead of using a mouse.

These shortcuts are available for the care console, and an administrator can customize them or turn them off.

Command	Description	Key
Enter keyboard shortcuts mode	Activates keyboard shortcuts in a browser displaying a console	ESC
Hide or show left sidebar	Toggles the appearance of the left sidebar and its components	SHIFT+LEFT ARROW
Hide or show right sidebar	Toggles the appearance of the right sidebar and its components	SHIFT+RIGHT ARROW
Move down	Moves the cursor down	DOWN ARROW
Move up	Moves the cursor up	UP ARROW
Hide or show top sidebar	Toggles the appearance of the top sidebar and its components	SHIFT+UP ARROW
Hide or show bottom sidebar	Toggles the appearance of the bottom sidebar and its components	SHIFT+DOWN ARROW
Open drop-down button on tabs	Opens the drop-down button on tabs to select more actions	D
Open tab	Opens a new tab	T
Zoom in or out on primary tabs	Zooms in or out on primary tabs by toggling the appearance of the header, footer, and pinned list	Z

Command	Description	Key
Close tab	Closes a selected tab	C

Health Cloud Limitations

Learn about display, access, and customization limitations for Health Cloud.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Display Limitations

Health Cloud is only available in Microsoft® Internet Explorer® 10, or 11; Microsoft® Edge; the most recent stable version of Mozilla® Firefox®; the most recent stable version of Apple® Safari®, and the most recent stable version of Google Chrome™.

Tip: For best performance, we recommend that console users adopt the Google Chrome™ browser and machines with 8 GB of RAM.

Platform Encryption Limitations

Encrypted fields can't be used as filter or sort criteria.

Encrypted data is unmasked and visible to Health Cloud users. We recommend using object-level security and field-level security to restrict the visibility of sensitive data.

Event monitoring doesn't log which patients appear on the Today page, the Patient List pages, or the Candidate Patients page. Event monitoring does log that a user went to those pages, but doesn't log the details on what is displayed on those pages. However, when you select a patient to view in the Health Cloud console, it logs the ID of that patient.

Behavior and Access Limitations

Health Cloud doesn't meet accessibility requirements.

When you add a task to the care plan, it doesn't appear on the Timeline until you refresh the Timeline. Refresh the Timeline by selecting the Timeline from the Patient Card tab switcher.

When you add a task to the care plan, it doesn't appear on the Today page until you refresh the Today page. You can refresh the Today page by refreshing your browser.

You can't sort a column in a list that is based on an encrypted field.

List view pages display up to 500 patients per page. Sort and search features apply to the data within a single page in the patient list.

Long text fields (such as description fields) and the Address field aren't supported as filter criteria when creating a patient list. To filter on an address, use sub-fields such as the Street field.

Localization Limitations

The column names in the Patient List aren't localized and in the language used to create them. So if the labels for column names were created in an English org, they only display in that language.

Users can edit the Patient List only when they have the same language and locale as the org in which the list was created. When a someone edits a list created in a language different from their own, they receive an error.

The delivered All Patients list appears in English only.

The Record Type Description field can't be translated.

The Category and Sub-Category fields in the Patient Card Menu can't be localized using the Translation Workbench. To display the labels in another language, deactivate or delete the delivered field configuration record. Then, create a different field record in the language for that org.

The Friendly Name field used as a display label in the Timeline and Patient Card can't be localized using the Translation Workbench. To display the labels in another language, create a different field record in the language for that org and set the language field to the new label's language.

Health Cloud Resources

In addition to online help, Salesforce creates video demos, guides, and tip sheets to help you learn about our features and successfully administer Salesforce.

Health Cloud

	For End Users	For Admins
Guides and Tip Sheets		
Getting Started with Salesforce Health Cloud	✓	
Health Cloud Implementation Guide		✓
Health Cloud Object Reference Guide		✓
Industries REST API Developer Guide		✓
Videos		
Collaborate with Patients and Colleagues Using Chatter	✓	
Manage Your Day with the Today Page	✓	
Get a Comprehensive View of Your Patient's Medical Records	✓	
Use the Timeline to Monitor Patient Health History	✓	
Create Patients in the Health Cloud Console	✓	
Create Customized Lists of Patients	✓	
Manage the Patient Care Team	✓	
Use Care Plans to Help Patients Reach Their Goals	✓	

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