



How does a User upload an Action Plan?

For Community and Group Editions

This article contains instructions on how Profile Owners (i.e., parents, adult club members, adult participants, employees, etc.) can upload an action plan in a Care Profile that already exists:


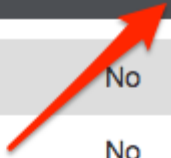
1. Adding an action plan while creating a **New** Medical Condition
2. Adding an action plan to an **Existing** Medical Condition

Adding an action plan while creating a New Medical Condition

1. Click the name of the profile.



2. Click the **Edit** button in the **Medical Conditions** section.

Medical Conditions		 Edit
Allergies (anaphylactic)	No	
Allergies (non-anaphylactic)	No	
Anorexia/Eating Disorders	No	
Asthma	No	
Blackouts/Dizziness/Fainting	No	
Bleeding Disorder	No	
Diabetes	No	
Dietary Requirements	No	
Eczema/Skin Condition	No	
Epilepsy/Seizures	No	
Hearing Impairment	No	
Heart Condition	No	
Joint/Muscle/Bone Problems	No	

3. Tick **Yes** on the medical condition that you'd like to add, and click **Save and Continue**.

MEDICAL CONDITIONS
 ⚠ 1 unfinished step

Dietary Requirements Further information will be required after saving

Dietary requirements* ☐ Yes ☒ No

Please indicate if Anna Smith has **any** dietary requirements. Indicate below if they pertain to any other medical condition.

Medical Conditions Further information will be required after saving

Allergies (Anaphylactic)*	<input checked="" type="radio"/> Yes <input type="radio"/> No	Hearing impairment*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Allergies (Non-Anaphylactic)*	<input type="radio"/> Yes <input checked="" type="radio"/> No	Heart condition*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Anorexia/Eating Disorder**	<input type="radio"/> Yes <input checked="" type="radio"/> No	Joint/Muscle/Bone Problem*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Asthma*	<input checked="" type="radio"/> Yes <input type="radio"/> No	Mental Health Issue*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Bleeding disorder**	<input type="radio"/> Yes <input checked="" type="radio"/> No	Migraines*	<input type="radio"/> Yes <input checked="" type="radio"/> No

4. Click **Choose File**, and find the action plan in your computer or smartphone.

ALLERGIES (ANAPHYLACTIC)
▲ 1 unfinished step ▼

Name*

Allergies (anaphylactic)

Description*

Test

☐ An EpiPen/Anapen is provided for this condition

☐ Medication required for this condition

☒ These are my approved care instructions*

Upload an attachment (PDF file or Picture)

Choose File

Sample Action Plan for Allergies.pdf

Review date/Expiry date for Action Plan

Update

Delete

Note: This screenshot is for *Allergies (anaphylactic)*. A screen similar to this will also show for *Asthma* and *other medical conditions*.

5. If the action plan needs to be updated after a specific date, please choose a **date** for the **Review Date/Expiry date for Action Plan**.

ALLERGIES (ANAPHYLACTIC)

⚠ 1 unfinished step ▾

Name*

Allergies (anaphylactic)

Description*

Test

☐ An Epipen/Anapen is provided for this condition☐ Medication required for this condition☒ These are my approved care instructions*

Upload an attachment (PDF file or Picture)

 Sample Action Plan for Allergies.pdf

Review date/Expiry date for Action Plan

◀

Mar ▾

2018 ▾

▶

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

5. Fill out the form completely as necessary and tick the "These are my approved care instructions" box. Then, click on the **Update** button.

ALLERGIES (ANAPHYLACTIC)
⚠ 1 unfinished step ▾

Name*
Allergies (anaphylactic)

Description*
Test

☐ An EpiPen/Anapen is provided for this condition
☐ Medication required for this condition
☒ These are my approved care instructions*

Upload an attachment (PDF file or Picture)
Choose File Sample Action Plan for Allergies.pdf

Review date/Expiry date for Action Plan
31 March, 2010

Update **Delete**

6. You will be taken to the **Consent** section. As a change has been made to the Care Profile, you will need to re-consent, confirm that the profile has been changed and that the medical information contained within is up-to-date.

Adding an action plan to an Existing Medical Condition

Please note that if you have a notification box on your homepage like the one below, you can click the **Update Profile** button and skip straight to step 4. The sample below is for updating the "Allergies (anaphylactic)" medical condition.



1. Click the name of the profile.



Greg Burns
Male, 6 years old
Asthma

Share

2. Click **Edit** in the **Safety Alerts** section.

Safety Alerts				
Name	Description	Risk level	Medication	Docs
Allergies (anaphylactic)	John is allergic to dust and pollens.	High	Please give the necessary medications as described in the attached action plan. Epipen/Anapen required. Expires on: 2016-12-30	

3. Click **Edit** on the right side of an existing record.

Safety Alerts				
Name	Description	Risk level	Medication	Docs
Allergies (anaphylactic)	John is allergic to dust and pollens.	High	Please give the necessary medications as described in the attached action plan. Epipen/Anapen required. Expires on: 2016-12-30	Edit Delete

4. Fill out the form completely as necessary and tick the "**These are my approved care instructions**" box. Click **Choose File** and find the action plan on your computer or smartphone.

You can select a date for **Review Date/Expiry date for Action Plan** if the action plan needs to be updated after a specific date. Then, click on the **Update** button.

Name*

Allergies (anaphylactic)

Description*

Allergic to peanuts

☒ An EpiPen/Anapen is provided for this condition

EpiPen/Anapen Expiry

20 March, 2019

☐ Medication required for this condition

☒ These are my approved care instructions*

Upload an attachment (PDF file or Picture)

Choose File Sample Action Plan for Allergies.pdf

Review date/Expiry date for Action Plan

31 March, 2010

5. You will be taken to the **Consent** section. As a change has been made to the Care Profile, you will need to re-consent, confirm that the profile has been changed and that the medical information contained within is up-to-date.

<https://desk.zoho.com/portal/caremonkey/kb/articles/how-does-a-user-upload-an-action-plan>