UWITS Treatment Plan Guide

This is a visual guide to the functionality available in the EA Treatment Plan. Creation of a Treatment Plan allows for tracking diagnosis, assessments, and status of Problems, Goals, Objectives and Interventions.

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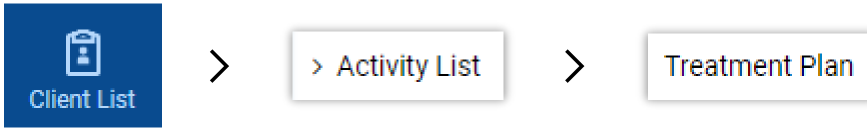
EA Treatment Plan Guide –



Overview: The EA Treatment Plan will be used primarily for Mental Health and co-occurring MH/SUD clients. This structure allows for the creation of a Treatment Plan with association to active Assessments, current Diagnosis and association of Goals, Objectives, and Interventions in the Mental Health Encounter notes.

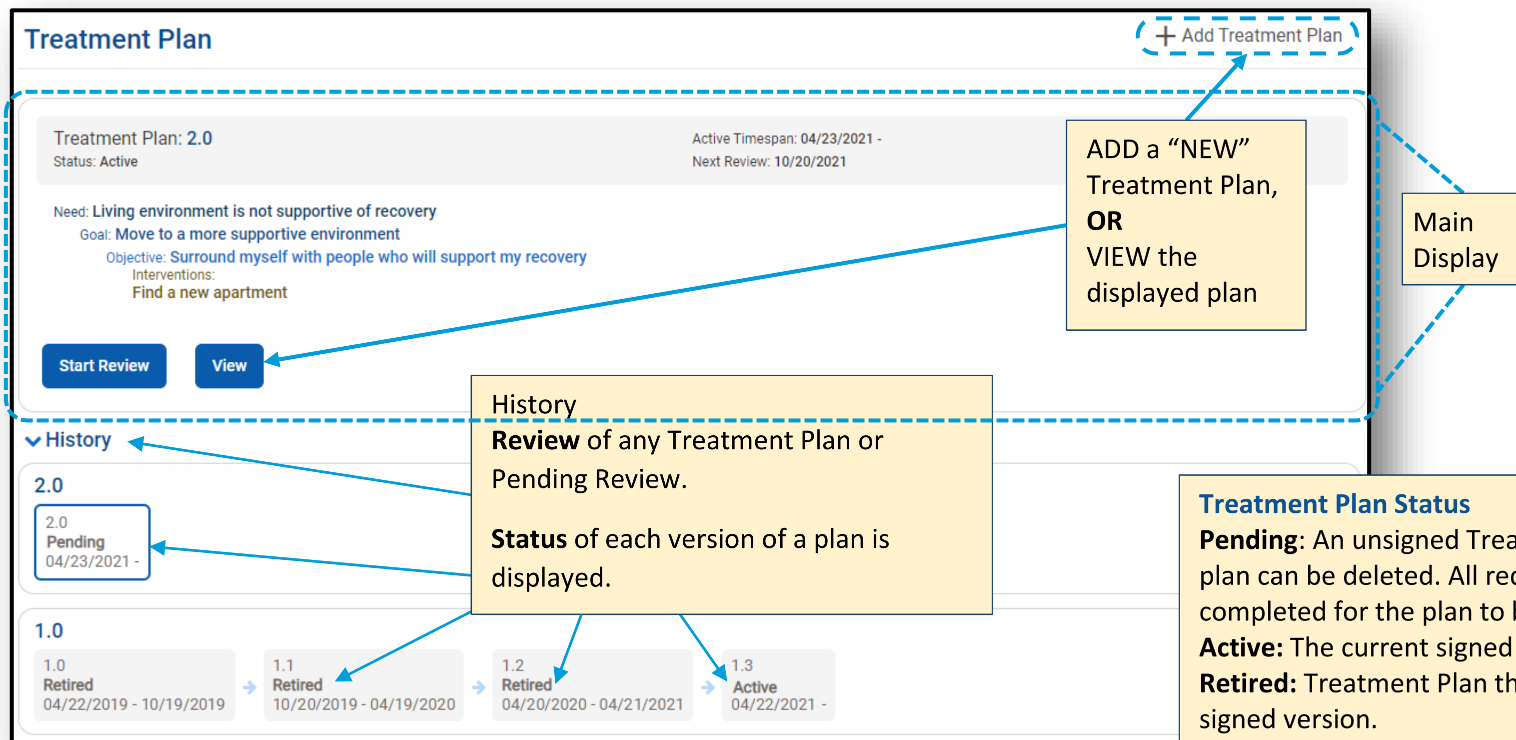
Caveat: Once a Treatment Plan has been signed, it can no longer be deleted. A new plan would have to be created.

Navigation: Once in a client's Open Episode, navigate to the new module, "Treatment Plan". The Treatment Plan main screen displays the **active plan** at the top and the plan history at the bottom.

Requirements:

1. To create a Treatment Plan the client must be **enrolled in a program**.
2. Rights must be granted to Treatment Team members to "Sign" or "Sign and Finalize" the Treatment Plan module.
3. At least one staff must be added to client's Treatment Team. A Treatment Team member must sign and finalize to make the plan active.
4. All plans must include at least one Problem with a Goal, Objective and associated Intervention.

MAIN DISPLAY



Main Screen Navigation Tips

Arrows allow for segments to be expanded or collapsed.

History

Selecting a plan from the HISTORY section will show an overview in the Main Display section.

Treatment Plan Status

Pending: An unsigned Treatment Plan. Only a Pending plan can be deleted. All required elements must be completed for the plan to be signed.
Active: The current signed Treatment Plan.
Retired: Treatment Plan that is superseded by a newer signed version.

Treatment Plan Workspace –

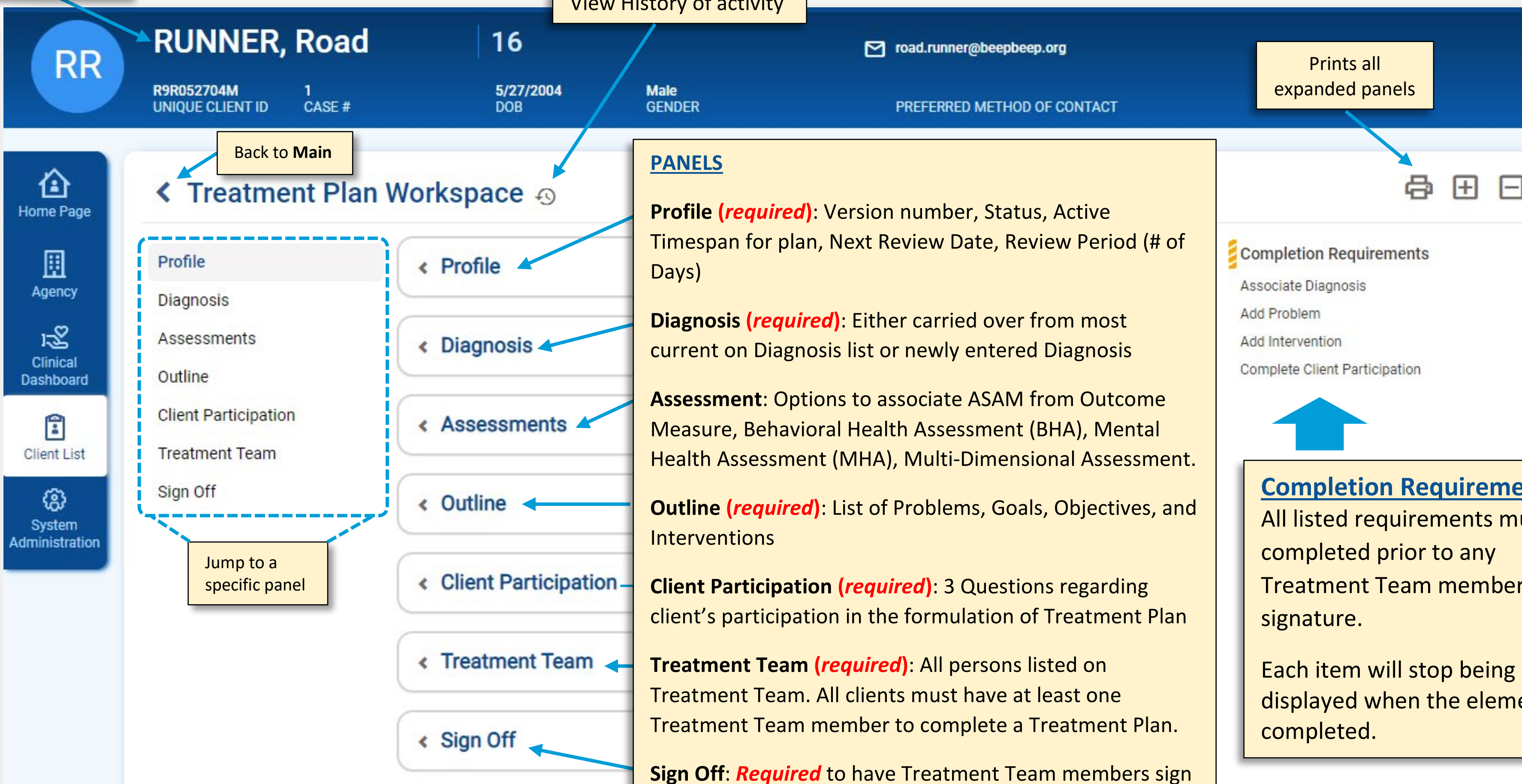
From within the Treatment plan the workspace is set up as follows:

Client information

View History of activity

Prints all expanded panels

Back to **Main**



Jump to a specific panel

PANELS

Profile ***(required)***: Version number, Status, Active Timespan for plan, Next Review Date, Review Period (# of Days)

Diagnosis ***(required)***: Either carried over from most current on Diagnosis list or newly entered Diagnosis

Assessment: Options to associate ASAM from Outcome Measure, Behavioral Health Assessment (BHA), Mental Health Assessment (MHA), Multi-Dimensional Assessment.

Outline ***(required)***: List of Problems, Goals, Objectives, and Interventions

Client Participation ***(required)***: 3 Questions regarding client's participation in the formulation of Treatment Plan

Treatment Team ***(required)***: All persons listed on Treatment Team. All clients must have at least one Treatment Team member to complete a Treatment Plan.

Sign Off: ***Required*** to have Treatment Team members sign off to activate the plan. ***Once a signature has been added all modification is disabled.***

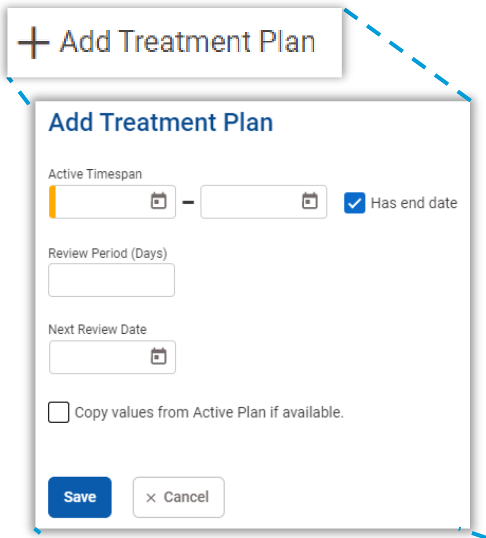
The plan is Active only when "Signed and Finalized".

Completion Requirements-
All listed requirements must be completed prior to any Treatment Team member signature.

Each item will stop being displayed when the element is completed.

Tip! The Profile, Diagnosis and Assessments panels can be completed in advance.

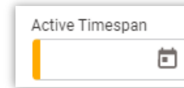
Adding a New Treatment Plan



After clicking on **+ Add Treatment Plan**, you will be presented with a window to enter dates for the new Plan. Information populated here will appear in the PROFILE panel.

<u>Active Timespan</u> requires a start date.

*Any field with a vertical colored or striped bar on the end is **required**.* →



<u>Has End Date</u> is optional.

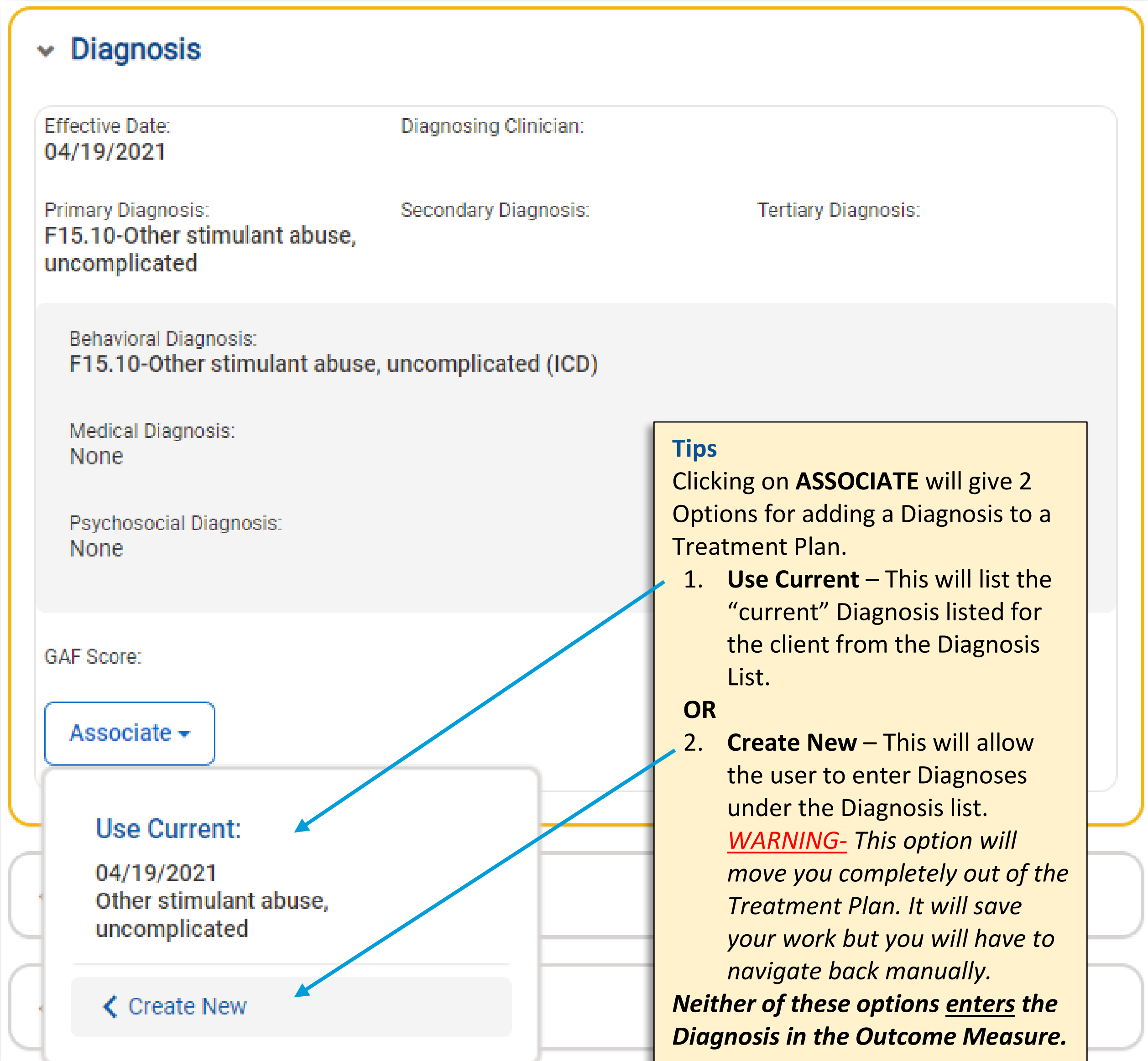
<u>Review Period (Days)</u> is optional. If entered the "Next Review Date" will be automatically calculated.

<u>Next Review Date</u> is optional. If entered the "Review Period (Days)" will be automatically calculated.

If neither the "Review Period (Days)" or the "Next Review Date" are populated a default of thirty (30) days will automatically be calculated from the Active Date for the Next Review Date.

<u>Upon **SAVE** the Treatment Plan Workspace will be opened in EDIT mode.</u>

Diagnosis



Tips

Clicking on **ASSOCIATE** will give 2 Options for adding a Diagnosis to a Treatment Plan.

1. **Use Current** – This will list the "current" Diagnosis listed for the client from the Diagnosis List.

OR

2. **Create New** – This will allow the user to enter Diagnoses under the Diagnosis list. *WARNING- This option will move you completely out of the Treatment Plan. It will save your work but you will have to navigate back manually.*

Neither of these options enters the Diagnosis in the Outcome Measure.

Assessments

Optional. Multiple assessments of any type will be listed from which to choose.

Only **completed** assessments are available to be added.

ASAM

Source Outcome Measure
Criteria Completed and signed ASAM
Results -Summary of each Dimension, -Recommend LOC, -Actual LOC, -Clinical Override, -Comments
-Signed by Staff name and Date signed

Behavioral Health Assessment

Source BHA module
Criteria Completed and signed
Results Includes Assessment Date, Created by Staff name, Summary

Mental Health Assessment

Source MHA Module
Criteria Completed and signed
Results Includes Assessment Date, Created by Staff name, Summary from the Clinical formulation section

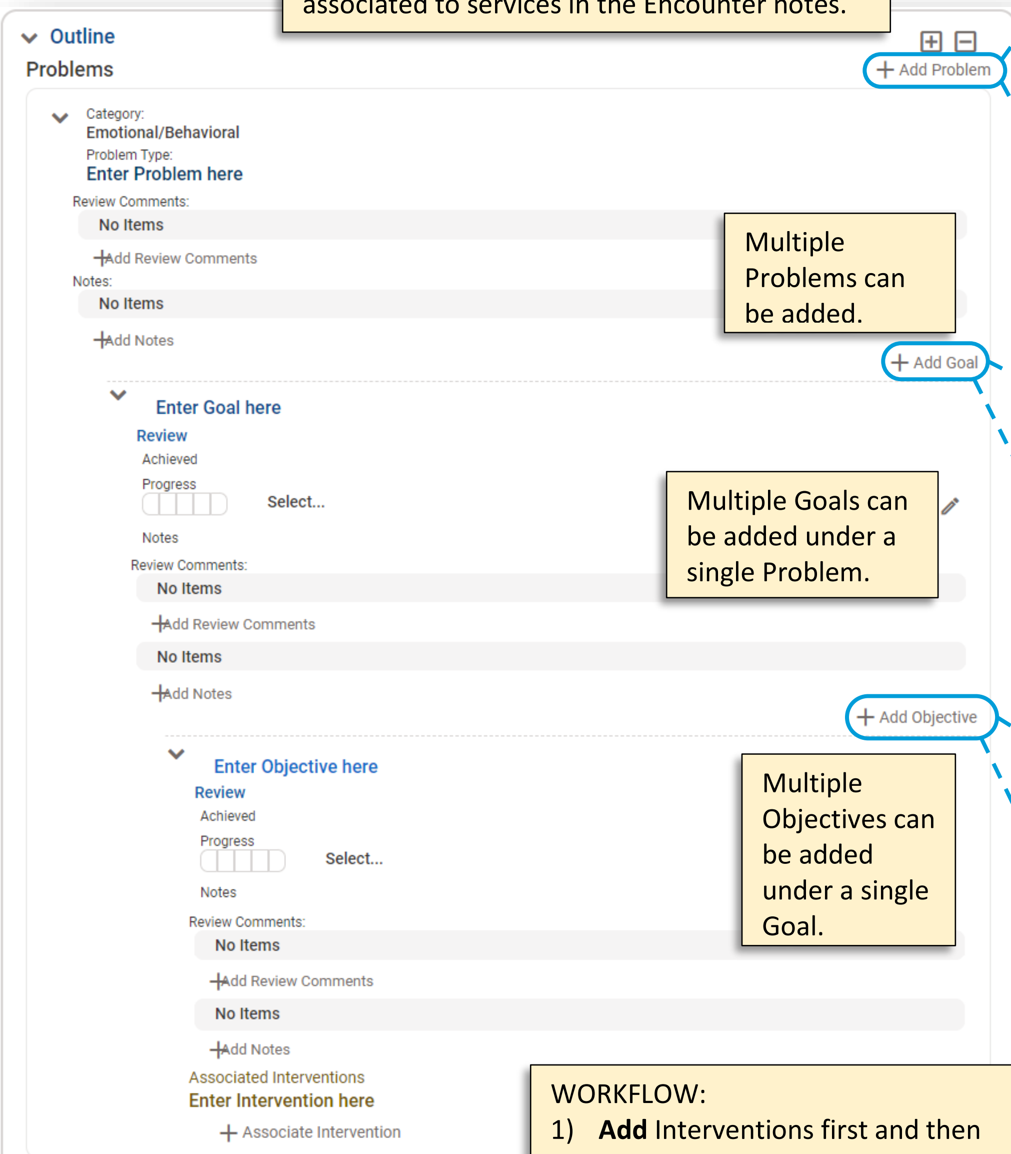
Multi-Dimensional Assessment

Source MDA module
Criteria Completed and signed
Results Includes Assessment Date, Created by Staff name, and all recommendations added

OUTLINE

Add Problem, Add Goal, Add Objective

Workflow: At least one Problem must be added to the Plan. *Each problem* must contain:
-At least one Goal which must contain:
-At least one Objective which must have:
-At least one Intervention associated.
Goals, Objectives and Interventions can be associated to services in the Encounter notes.

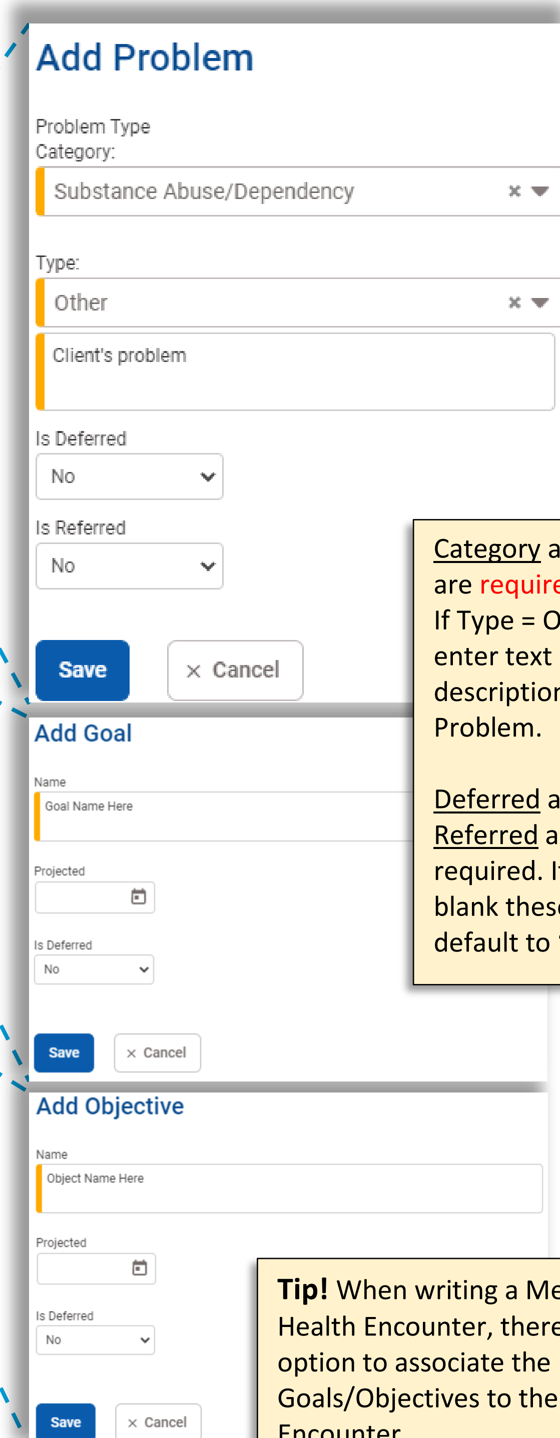


Multiple Problems can be added.

Multiple Goals can be added under a single Problem.

Multiple Objectives can be added under a single Goal.

WORKFLOW:
1) **Add** Interventions first and then
2) **Associate** to an existing Objective.



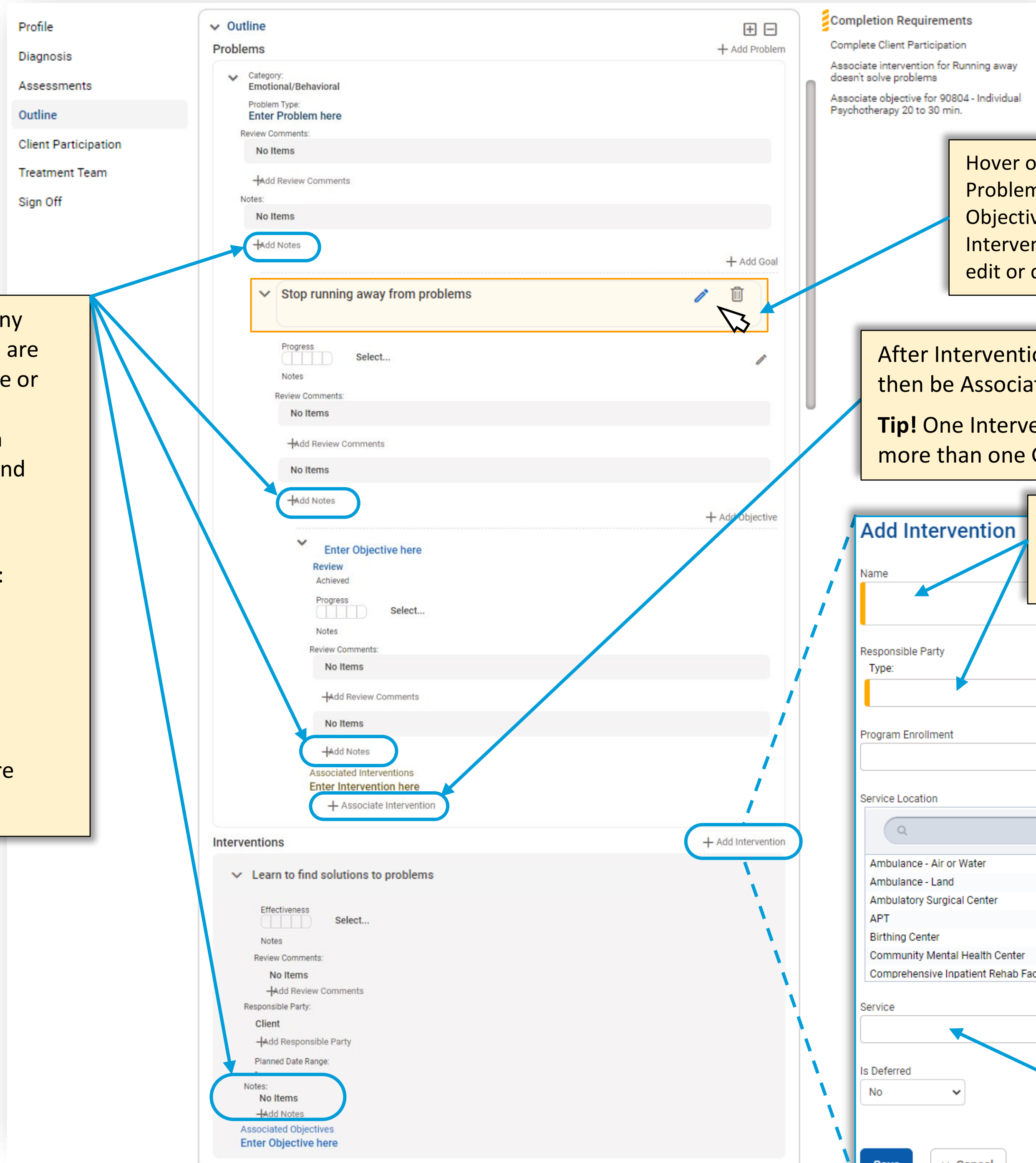
Category and Type are required.
If Type = OTHER, enter text description of the Problem.

Deferred and Referred are not required. If left blank these will default to "No".

Tip! When writing a Mental Health Encounter, there is the option to associate the Goals/Objectives to the Encounter.

Add Intervention

WORKFLOW: **Add** Interventions first and then **Associate** to an existing Objective.



Notes can be added to any section in Outline. Notes are based in the client's voice or the clinician's.
Notes will be added with username, credentials, and date/time stamp.

<u>Problem, Objective and Intervention Note Types</u>:
- Clinician Comments
- My comments are

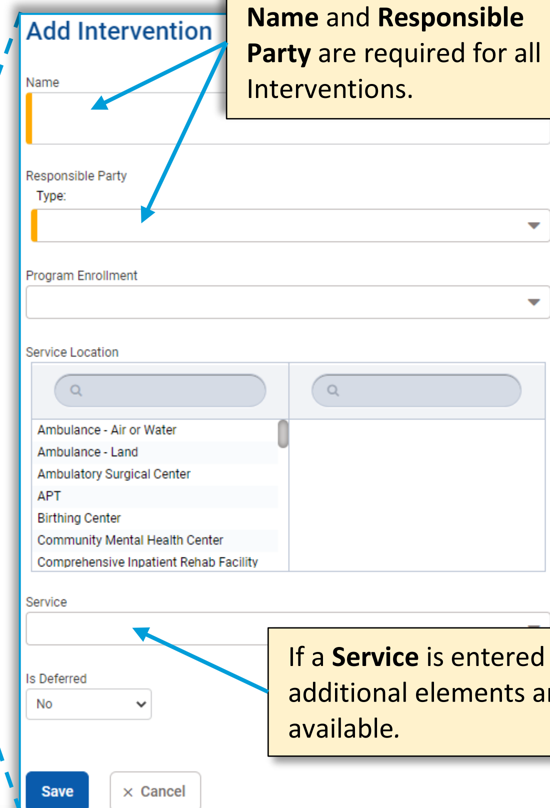
<u>Goal Note Types</u>:
- Clinician Comments
- My comments are
- My possible barriers are
- My strengths are

Tip! In Edit Mode, Mouse over data will display option to EDIT.

Hover over a Problem, Goal, Objective or Intervention to edit or delete.

After Interventions are added they must then be Associated to an Objective.

Tip! One Intervention can be associated to more than one Goal.

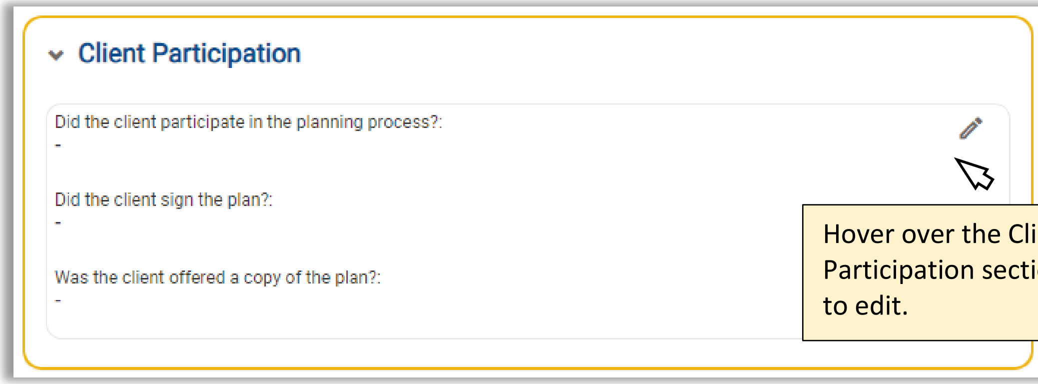


Name and **Responsible Party** are required for all Interventions.

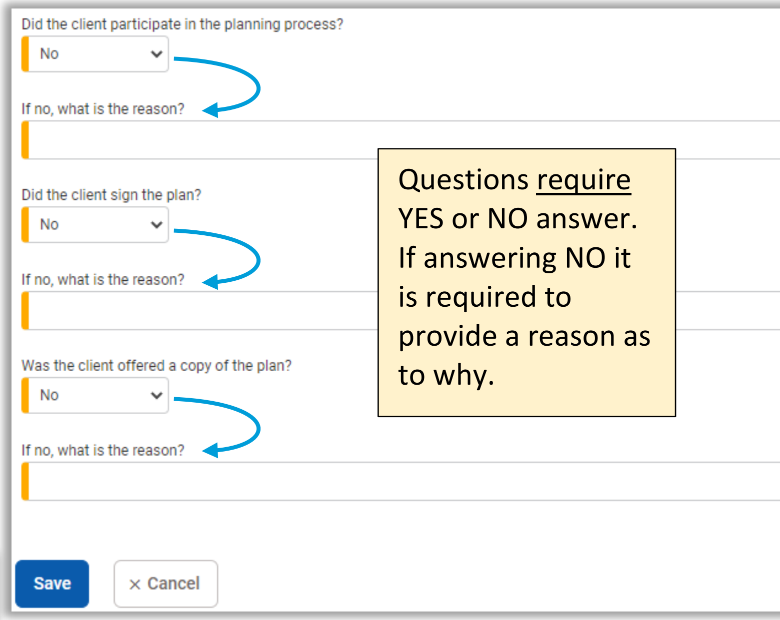
If a **Service** is entered additional elements are available.

Client Participation

All Treatment Plans require client participation be documented.

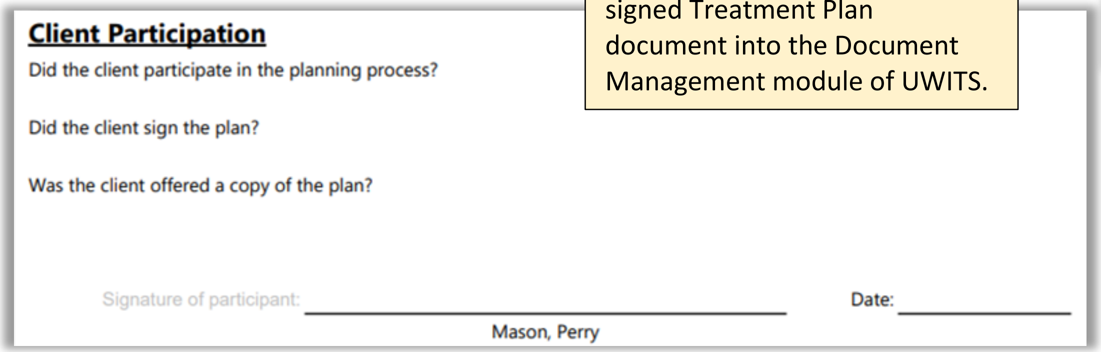


Hover over the Client Participation section to edit.



Questions require YES or NO answer. If answering NO it is required to provide a reason as to why.

Tip! You can upload the client-signed Treatment Plan document into the Document Management module of UWITS.



Using **Generate Report** to print out the Treatment Plan, the client will be able to sign.

Treatment Team

Active Treatment Team members at the time of creating the Treatment Plan will automatically be listed in this section. Treatment Team members can be added or modified at any time during a client's episode.

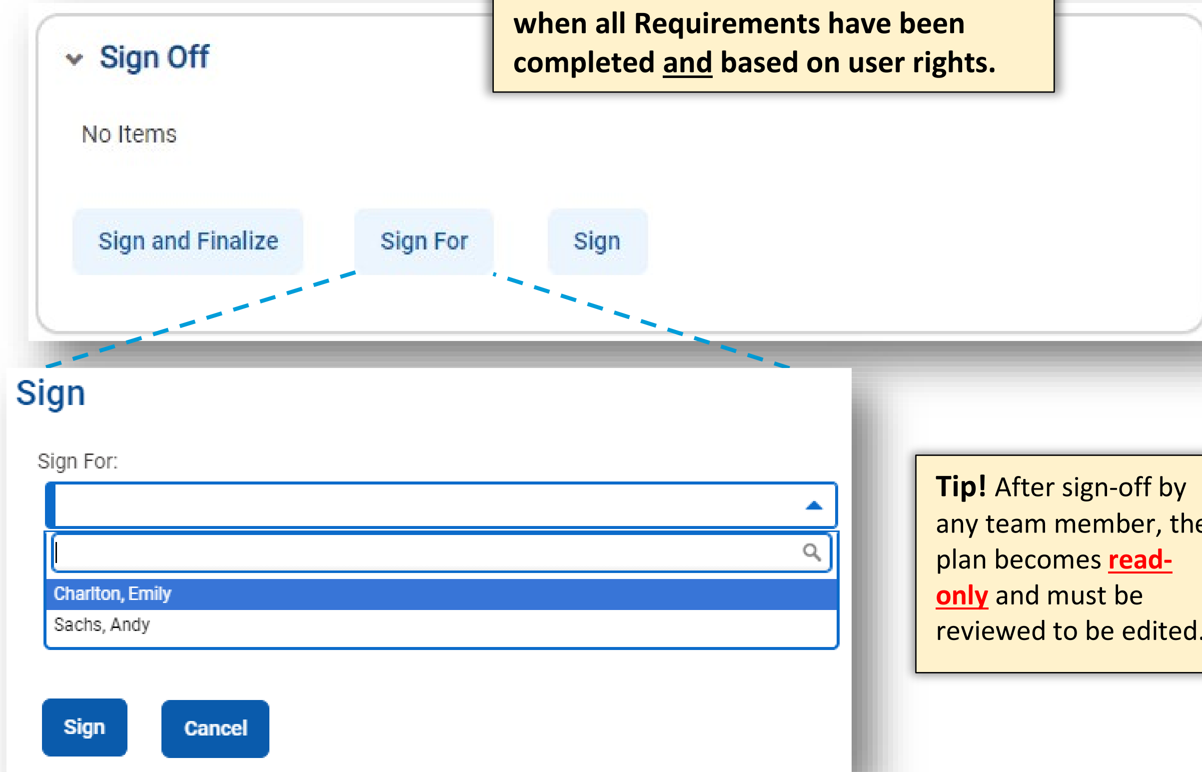
Navigating to the Treatment Team using the button will allow you to **edit** the Team list but requires that you navigate back to the plan manually.

Click on **+ Add Team Member** to add a staff member or click on **Assign Group** to add a Treatment Team Group.

At least one staff must be listed on the client's Treatment Team in order to sign the Treatment Plan. Staff must have the proper rights to "Sign and Finalize" the plan.

Sign Off - Staff must be granted user rights to sign a pending plan. Signatures are Time and Date stamped.
WARNING: **Signatures cannot be removed or deleted.**

Signature Buttons are available only when all Requirements have been completed and based on user rights.



Sign: Any Treatment Team Members can sign a Treatment Plan before it is finalized. (*User right is inherited by Clinical Full*). Licensed clinicians will not need to have this right if they will be signing off and finalizing the plan.

Sign for: Clinical supervisors can sign for their staff who are members of the team **OR** Staff members with a license to sign for other team members with the same credentials. Selecting "Sign for" will give you options of staff for which you have ability to sign.

Tip! After sign-off by any team member, the plan becomes **read-only** and must be reviewed to be edited.

Sign and Finalize: Users with this right can finalize the plan with or without any other TX Team member signatures. The plan is considered "Final" once member with these rights signs. Plan status changes to "Active". Prior active plan status changes to "Retired". With this right additional Treatment Team members do not need to have signed.

Tip! If a Treatment Team Member clicks on the Sign button to sign the plan (rather than the Sign and Finalize button) then that Treatment Team Member can no longer Sign and Finalize the Treatment Plan.

If there is only one Treatment Team Member for this client then another will need to be added before the Treatment Plan can be Finalized.

Treatment Team Groups

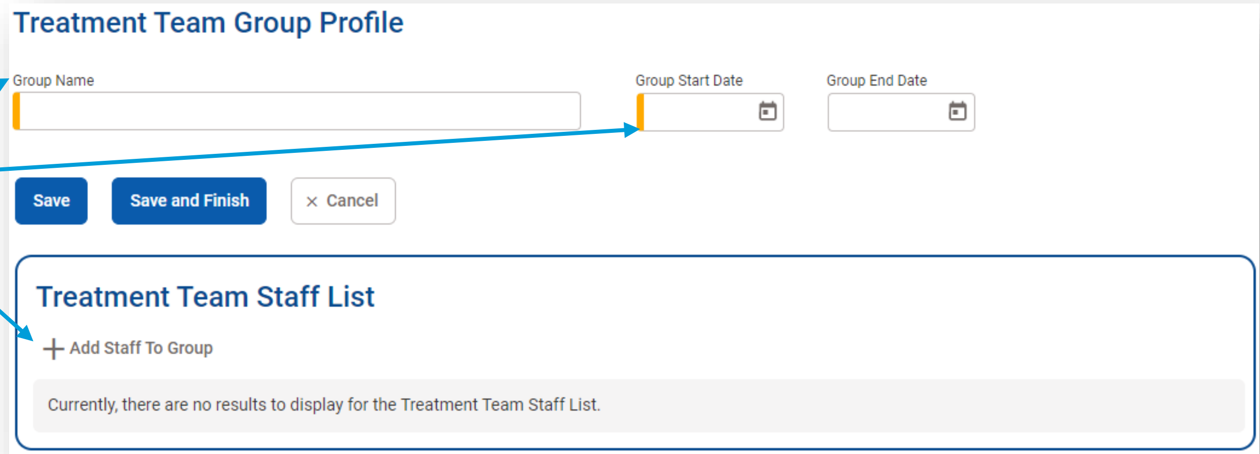
Add multiple Treatment Team members to a Treatment Plan in one step by using Treatment Team Groups. Begin by creating the Treatment Team Group in advance.

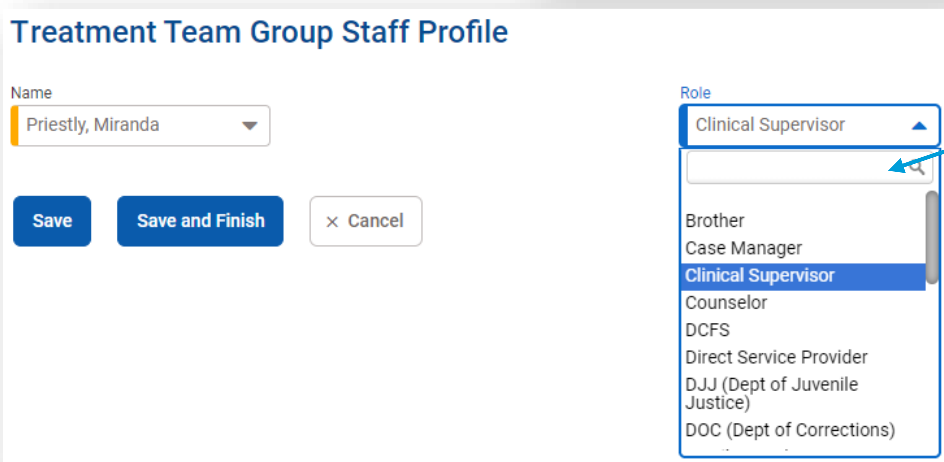
*The **Manage Treatment Team Groups** right is required.*

Navigation: Select **Agency** then **Tx Team Groups** from the Navigation bar. Click on the **+ Add Treatment Team Group Record** link to add a new group.

Name the group and add a Start Date.

Click on the **+ Add Staff to Group** link to add a new staff member to the group.

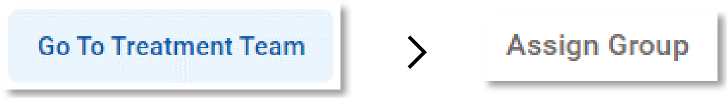




Select a Staff Member from the **Name** dropdown and select a role from the **Role** dropdown.

Tip! When a user's access ends, if they are a member of a **Treatment Team Group** then they will remain a member of that group until they have been deleted. To delete them from the group, navigate to the group, hover over the action button (⋮) for that user then select the **Delete** option.
In addition, when a user's access ends while they are listed as a Treatment Team Member, they will remain on the client's Treatment Team. To remove them, navigate to the client's Treatment Team, hover over the action button (⋮) then click Review then add an **End Date**.

Adding a Treatment Team Group to a Client’s Treatment Team

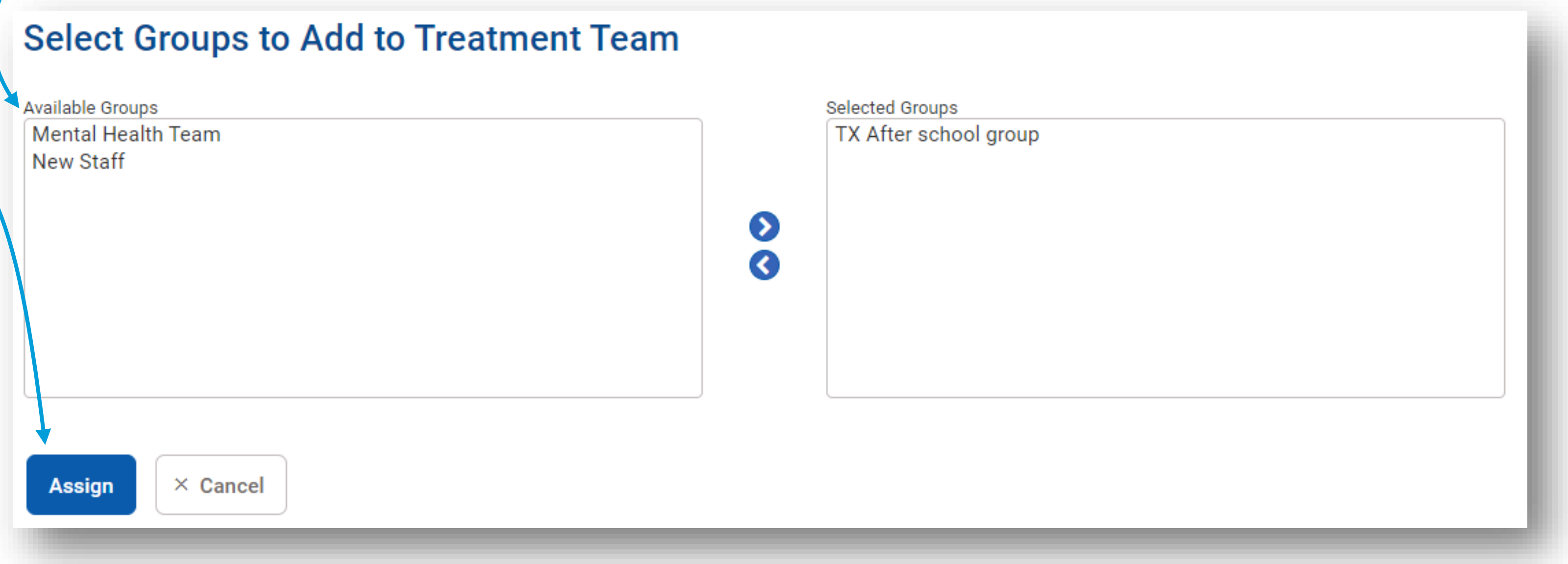


From the Treatment Plan Review screen, click on the **Go To Treatment Team** button and then click on the **Assign Group** button.

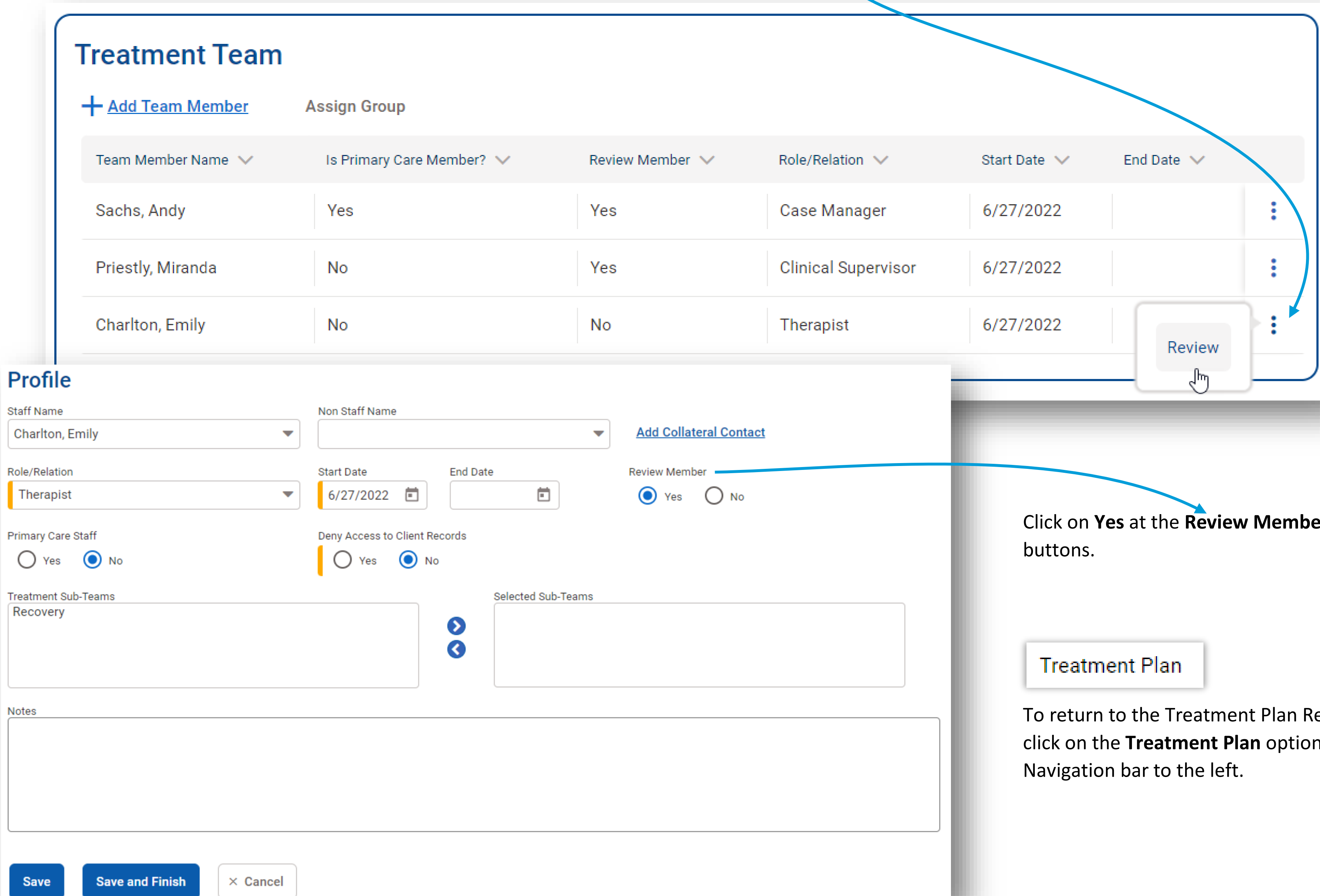
Click on one of the listings in the **Available Groups** box then click on the button to move to the **Selected Groups** box.

To add the members of the selected group to the Treatment Team, click on the **Assign** button.

At this point, all members of the selected group will be added to the client’s Treatment Team.



To mark a member of the Treatment Team as a Review Member, hover over the action button (⋮) then click on the **Review** option.



Click on **Yes** at the **Review Member** radio buttons.

Treatment Plan

To return to the Treatment Plan Review, click on the **Treatment Plan** option on the Navigation bar to the left.

Relevant UWITS Roles

Treatment Team members must have the necessary UWITS Roles added to their account. Here is a summary:

SignOff Treatment Plan	Allows staff member to sign but not finalize a Treatment Plan.
SignOffAndFinalizeTreatmentPlan	Allows staff member to both sign *and* finalize a Treatment Plan.
View Treatment Plan	View Treatment Plan
Treatment Plan Full Access	Treatment Plan (Full Access)
Manage Treatment Team Groups	This role gives the user access to the Tx Team Groups Menu item under Agency. It allows the user to create treatment team groups and add staff members to them.
SignOff Treatment Plan	Sign Off on a Treatment Plan
SignOffAndFinalizeTreatmentPlan	Sign off and finalize a treatment plan

Required to Sign and Finalize a Treatment Plan:

1. Treatment Plan Outline must include all required elements.
2. Client Participation must be completed.
3. Staff Member user account must have the correct UWITS Roles.
4. Staff Member must be listed on the Treatment Team as a Review Member.