



Treatment Plan Review Guide

This is a guide to the review functionality available in the Treatment Plan. A review of the active Treatment Plan allows for changes in diagnosis, association of new assessments, additions, deletions, modifications and status updates of Problems, Goals, Objectives and Interventions.

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Overview

Review of a current “active” Treatment Plan can be conducted at any time. From the client’s Activity List the “Treatment Plan Summary” is listed for the EA Treatment Plan. The Status shown will display as **ACTIVE** or **ACTIVE (under review) [Details](#)**, this is a review in-progress. The [Details](#) link will show what elements are currently missing from the required elements.

The screenshot displays a table titled "Client Activity List" with columns for Activity, Activity Date, Created Date, and Status. The "Treatment Plan Summary" row is highlighted in yellow and includes a "(Details)" link. A callout window titled "Treatment Plan Summary Progress" is shown, listing two incomplete items: "Add Objective incomplete" and "Complete Client Participation incomplete".

Activity	Activity Date	Created Date	Status
Client Information (Profile)	4/19/2021	4/20/2021	Completed
Intake Transaction	4/19/2021	4/20/2021	Completed
Admission	4/19/2021	4/21/2021	Completed
Outcome Measures - Client Status	4/19/2021	4/21/2021	Completed
Client Program Enrollment (TEDS 01_1.0_Youth)	4/21/2021	4/21/2021	Completed
Diagnosis Summary	4/21/2021	4/21/2021	Not Applicable
Treatment Plan Summary	5/17/2021	5/17/2021	Active (under review) Details

Treatment Plan Summary Progress

- Add Objective incomplete.
- Complete Client Participation incomplete.

RR RUNNER, Road 16
 R9R052704M UNIQUE CLIENT ID 1 CASE # 5/27/2004 DOB Male GENDER road.runner@beepbeep.org PREFERRED METHOD OF CONTACT

Treatment Plan + Add Treatment Plan

Treatment Plan: 3.0 Active Timespan: 04/23/2021 - Next Review: 10/20/2021
 Status: Active

Need: Enter Problem here
 Goal: Enter Goal Name here
 Objective: Enter Objective name here
 Interventions: Enter Intervention Name here

Start Review View

History

3.0
 3.0 Active 04/23/2021 -

2.0 Retired 2.1 Retired

Creating a Treatment Plan Review

From the current, active Treatment Plan there are **three** options:

1. **Add Treatment Plan.** This will give a blank plan without any carryforward of elements from the current plan.
2. **Start Review.** This will copy all elements from the current plan and allow the user to add, modify, or delete items.
3. **View.** This will show the Active Treatment Plan in the Treatment Plan workspace.

Once a review has begun, the **Start Review** button becomes **Continue Review** and will open the Treatment Plan Workspace to show the review in progress.

RR RUNNER, Road 16
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< Treatment Plan Workspace

Profile

Diagnosis

Assessments

Outline

Client Participation

Treatment Team

Sign Off

Profile

Version: 3.0 Status: Active Active Timespan: 04/23/2021
 Next Review Date: 10/20/2021 Review Period (Days): 180
 Notes: No Items

Treatment Plan Workspace

Profile

Starting a review a new Active Timespan will be set as Start Time and Next Review Date.

Click here to see a history of all activity on the Treatment Plan.

Active Review Preview Print Expand Collapse

Starting a new Review defaults the **Next Review Date** to 30 days from current date.

Mouse over data elements in Review mode to display Edit icon.

Once a Review has been created, the plan can be toggled between three different modes by clicking on the appropriate button.

- Active** displays the read-only version of the Active TX Plan
- Review** provides the ability to review the Active TX Plan
- Preview** displays a read-only version of the next TX Plan applying all changes made during the review and without the Review markup.
- Print** will print all panels expanded in a single document.

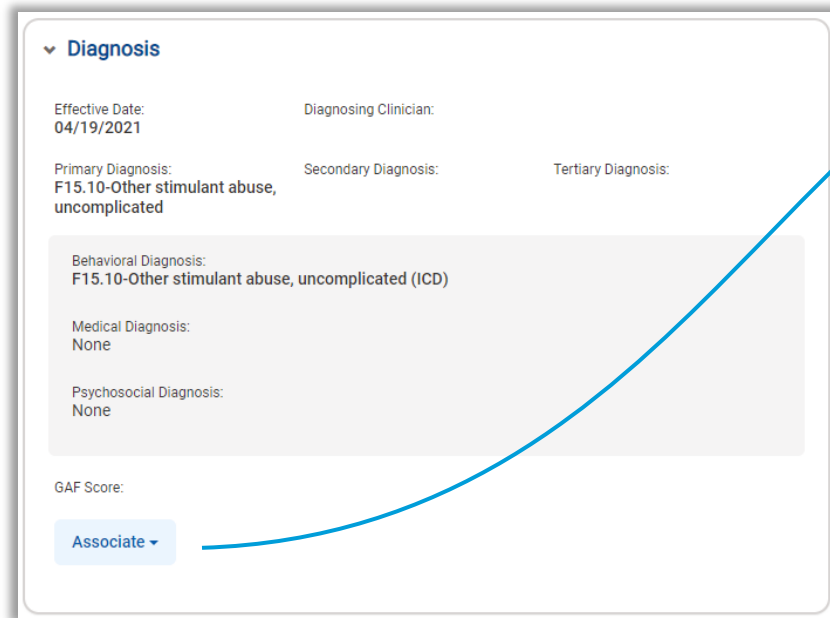
Updates to the Treatment Plan during a review...

Review element	Description	Example
ADDITION	Display in blue text with an underline	<u>Client will UA 2x a week for 6 weeks</u>
MODIFICATION	Display with a strike through the original and underline of the new in blue text.	Client's Problem <u>Client's SUD Problem</u>
DELETION	Display with a strike through	Client's Problem

Once a review is signed off all review markup and achieved goals or objectives and completed Interventions will not be shown in the final plan. Review elements can be seen on the Retired plans in the HISTORY section of the Main Display.

Diagnosis

Only Diagnosis updating from the existing current DX or creating a new one. Modifications to the listed DX is not possible.



The screenshot shows a 'Diagnosis' form with the following fields:

- Effective Date: 04/19/2021
- Diagnosing Clinician: (empty)
- Primary Diagnosis: F15.10-Other stimulant abuse, uncomplicated
- Secondary Diagnosis: (empty)
- Tertiary Diagnosis: (empty)
- Behavioral Diagnosis: F15.10-Other stimulant abuse, uncomplicated (ICD)
- Medical Diagnosis: None
- Psychosocial Diagnosis: None
- GAF Score: (empty)
- Associate button (highlighted with a blue arrow)

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

1. **Use Current** – This will pull 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.

Outline - Collapsed View

The screenshot displays a software interface for an 'Outline' in a collapsed view. The interface is organized into three main sections: 'Problems', 'Interventions', and 'Associated Interventions'. Each section contains input fields and a right-hand side area for editing or removing items. Callouts are used to identify specific elements:

- Problem:** Points to the 'Enter Problem here' field in the 'Problems' section.
- Goal:** Points to the 'Enter Goal here' field in the 'Problems' section.
- Objective:** Points to the 'Enter Objective here' field in the 'Problems' section.
- Associated Goal:** Points to the right-hand side area of the 'Problems' section, which contains edit and delete icons.
- Associated Intervention:** Points to the 'Enter Intervention here' field in the 'Associated Interventions' section.
- Intervention:** Points to the 'Enter Intervention here' field in the 'Interventions' section.

A separate callout box on the right side of the interface states: "Hover the mouse over an item to edit or remove." This callout points to the edit and delete icons in the 'Associated Goal' area.

Outline -Expanded View

The screenshot displays the 'Outline -Expanded View' interface. At the top, there is a 'Problems' section with a '+ Add Problem' button. Below this, a category 'Emotional/Behavioral' is selected, and a 'Problem Type' field is present with the text 'Enter Problem here'. A 'Review Comments' section shows 'No Items' with edit and delete icons. Below this are 'Add Review Comments' and 'Notes' sections, both showing 'No Items' and 'Add' buttons. A dashed blue circle highlights a 'Review' modal window. This modal contains a 'Review' section with an 'Achieved' checkbox, a 'Progress' section with a Likert scale (5 empty boxes) and a 'Select...' dropdown, and a 'Review Comments' text area. At the bottom of the modal are 'Save' and 'Cancel' buttons. The main interface also shows sections for 'Enter Goal here' and 'Enter Objective here', each with 'Add' buttons.

Mouse over data elements in Review mode to display Edit options.

Review Comments are only **required** for “Achieved” Problems, Goals and Objectives—and for “Completed” Interventions.

- New Problems, Goals, Objectives and Interventions can be added.
- Existing Problems, Goals, Objectives and Interventions can be Modified or Deleted.
- Deleted items do not carry forward to the new plan.
- Notes can be added, modified, or deleted from each section.
- During a review each Goal, Objective and Intervention can be evaluated using:
 - Completion Checkbox
 - Achieved Date (required if checkbox is marked)
 - Progress, on a Likert scale (required if checkbox is marked)
 - No progress
 - Fair progress
 - Some progress
 - Good progress
 - Excellent progress
 - Review comments (required if checkbox is marked)
- Achieved Items do not carry forward to the new plan.
- Updates can be made to
 - Deferred
 - Projected dates
 - Program Enrollment
 - Responsible party
 - Services

Outline Review

- Deleted Problems (and underlying goals, objectives, and interventions) do not carry forward to the new plan.
- Achieved or Deleted Goals (and their objectives) are not carried forward to the new plan. If only one goal exists and is either Achieved or Deleted, a new Goal must be added or the Problem needs to be deleted.
- Achieved Objectives are not carried forward to the new plan. Deleted Objectives (and underlying interventions) do not carry forward to the new plan.
- Completed Interventions do not move forward to the new plan. The Intervention's association to any objectives is removed. If this results in an objective without an associated Intervention, the completion requirement is displayed to associate an Intervention.

Mouse over to edit.

Updated Display

Mouse over existing Associated Interventions displays the option to REMOVE them. Confirmation will be required.

Review Comments are required for "Completed" Interventions.

Client Participation

All Treatment Plan Reviews require client participation be documented.

Questions require YES or NO answer.


If answering NO it is required to provide a reason as to why.

Client Participation

Did the client participate in the planning process?:
-

Did the client sign the plan?:
-

Was the client offered a copy of the plan?:
-

Edit

Client Participation

Did the client participate in the planning process?

Did the client sign the plan?

Was the client offered a copy of the plan?

Signature of participant: _____
Mason, Perry

Date: _____

Generate Report will have the following section with client's responses as well as area to sign.

Treatment Team

All current active Treatment Team members for the client will show in this section. A signature can be captured for each member. Navigating to the Treatment Team screen will allow for the adding or ending of a Treatment Team member. **However**, navigation back to the Treatment plan is manual.

Treatment Team

Name: Charlton, Emily	Primary Care: No	Role/Relation: Case Manager	Active: 04/23/2021 -
Name: Priestly, Miranda	Primary Care: No	Role/Relation: Clinical Supervisor	Active: 04/23/2021 -
Name: Sachs, Andy	Primary Care: No	Role/Relation: Case Manager	Active: 04/23/2021 -

[Go To Treatment Team](#)

Sign Off

WARNING: **Signatures cannot be removed or deleted.**

Sign: Any Treatment Team Members can sign a Treatment Plan before it can be finalized. (*User right is inherited by Clinical Full*)

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 present options of staff for which there is ability to sign.

Sign and Finalize: Users with this right can finalize the plan with or without any other Treatment 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.

Signature:	Role:	Signed:	
Sachs, Andy	Case Manager	05/17/2021 04:25 PM	
<hr/>			
Priestly, Miranda	Clinical Supervisor	05/17/2021 04:25 PM	Finalized

Goals, Objectives and **Interventions** will be available for association on the Mental Health Encounter notes only based on the Date of Service and date span of the Treatment Plan.

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 <i>and</i> 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.