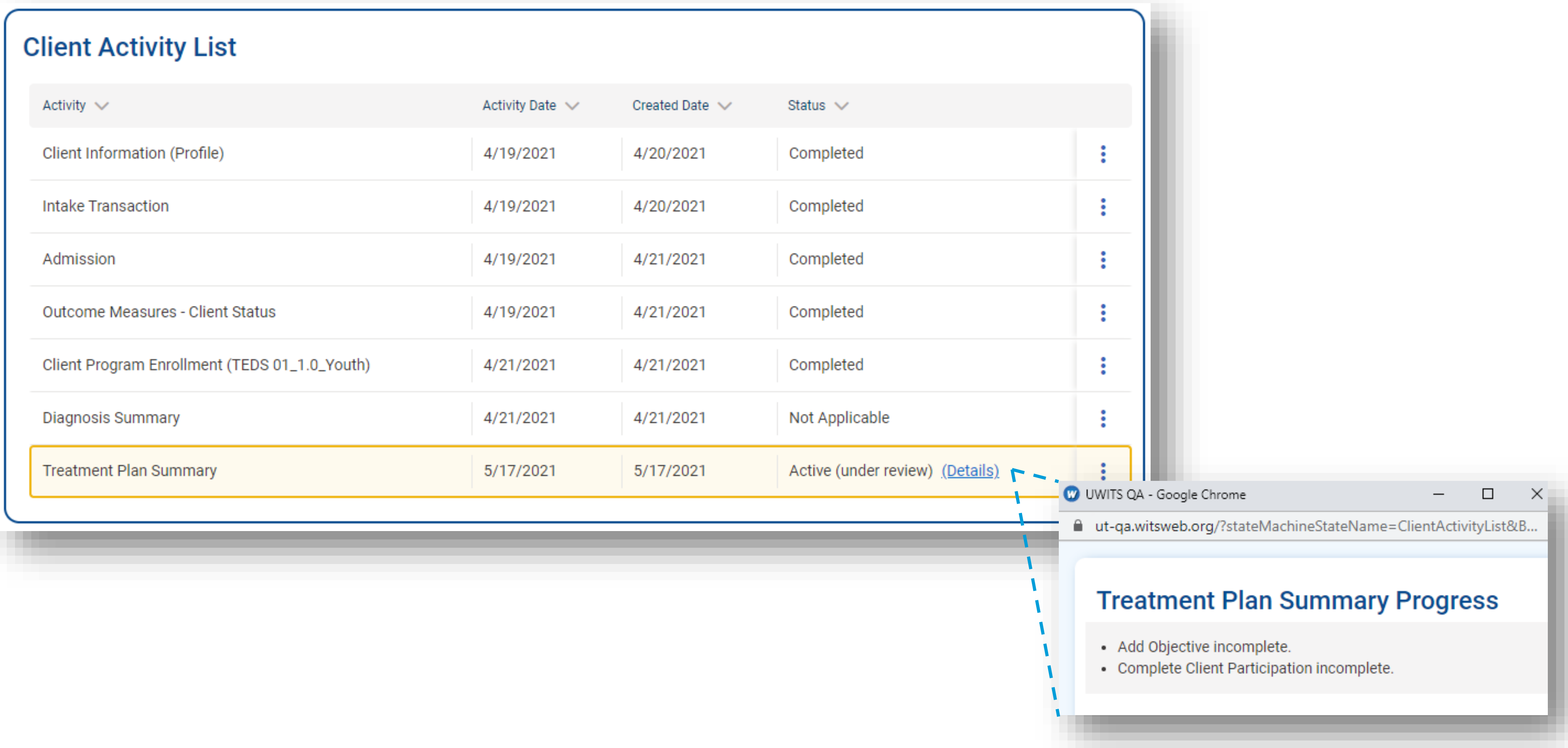
UWITS Treatment Plan Review Guide

This is a visual guide to the REVIEW functionality available in the EA 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.

Contents

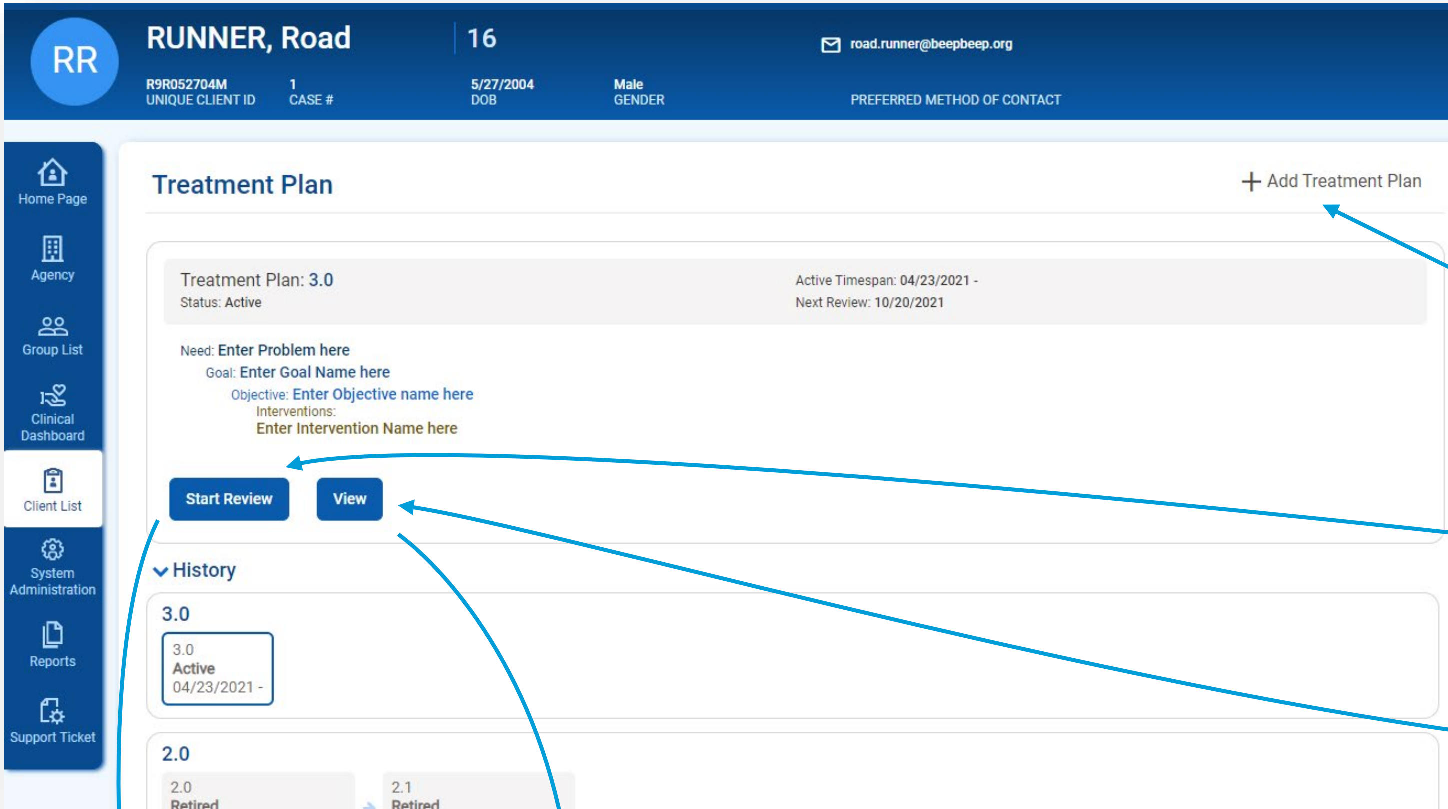
Overview

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.



Client Activity List

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)

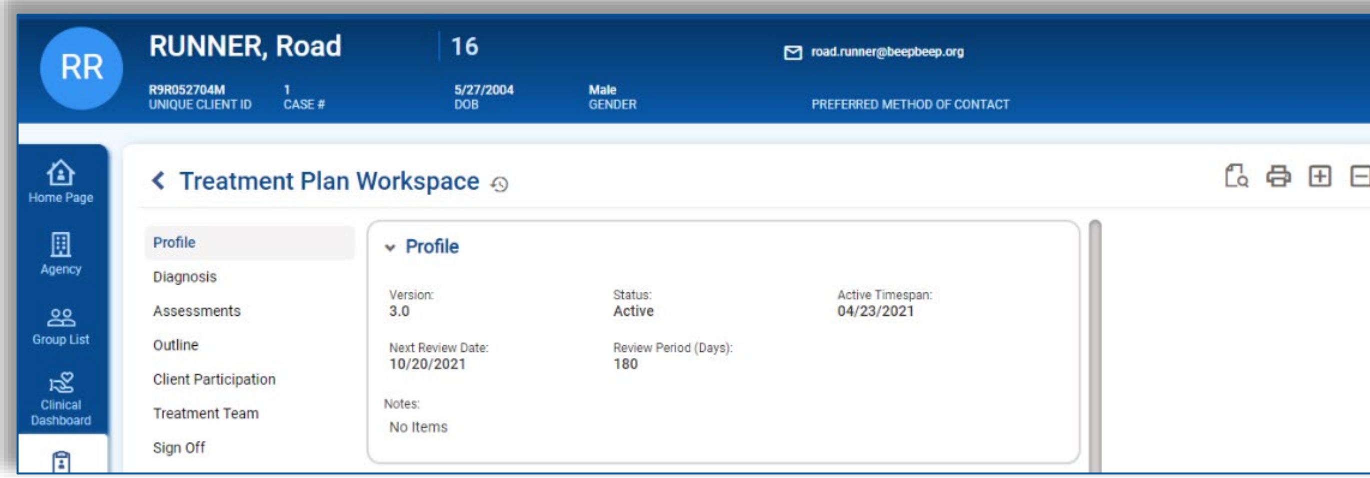


Creating a Treatment Plan Review

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.



Treatment Plan Workspace

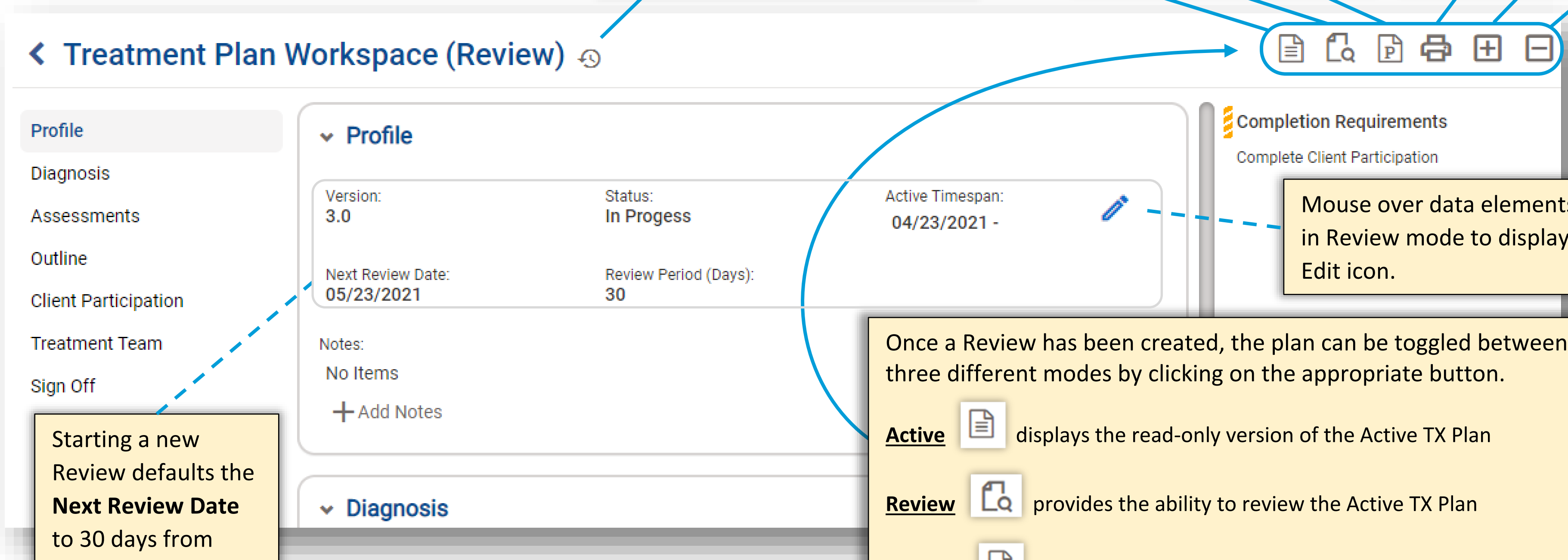
Profile

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



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

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

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.

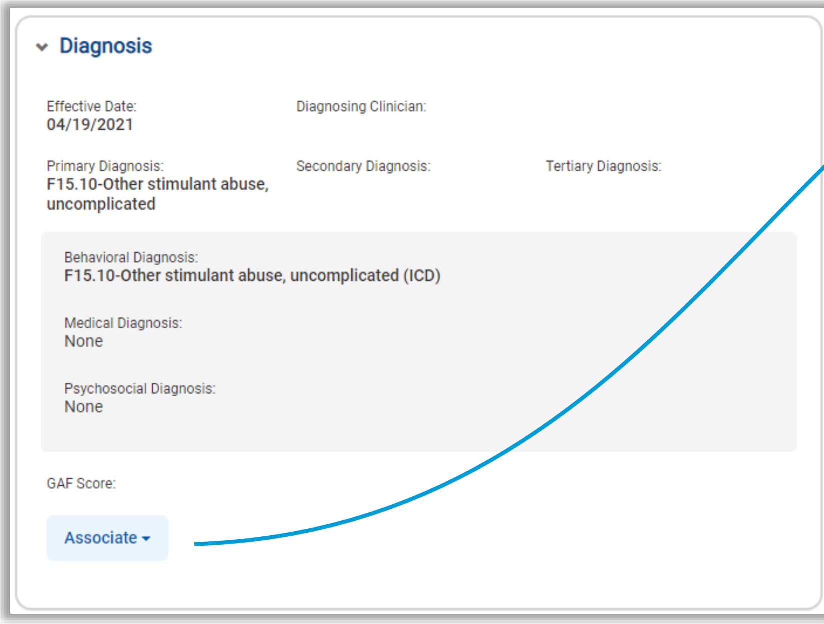
Updates to the Treatment Plan during a review…

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



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

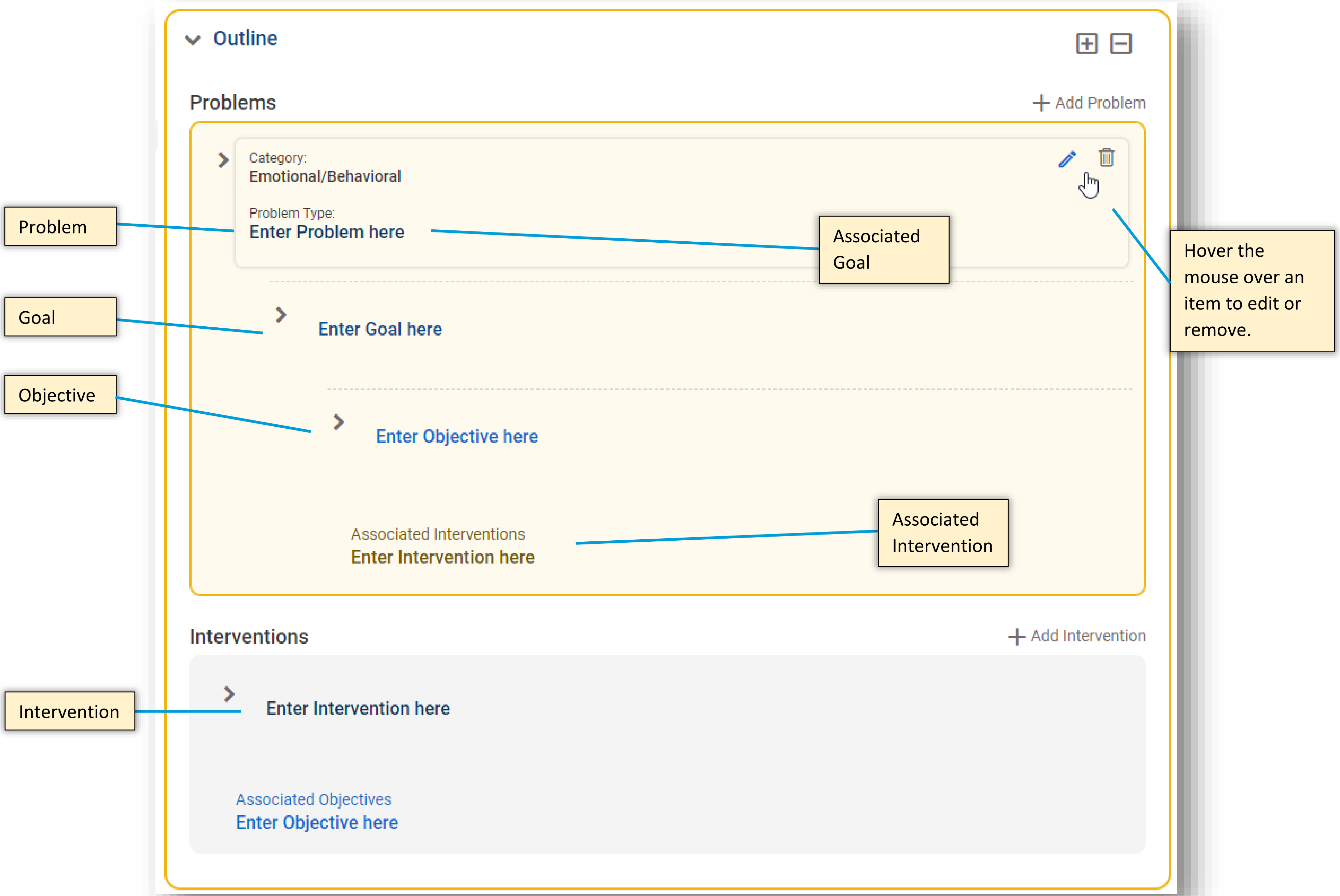
1. **Use Current** – This will pull the "current" Diagnosis listed for the client from the Diagnosis List.

OR

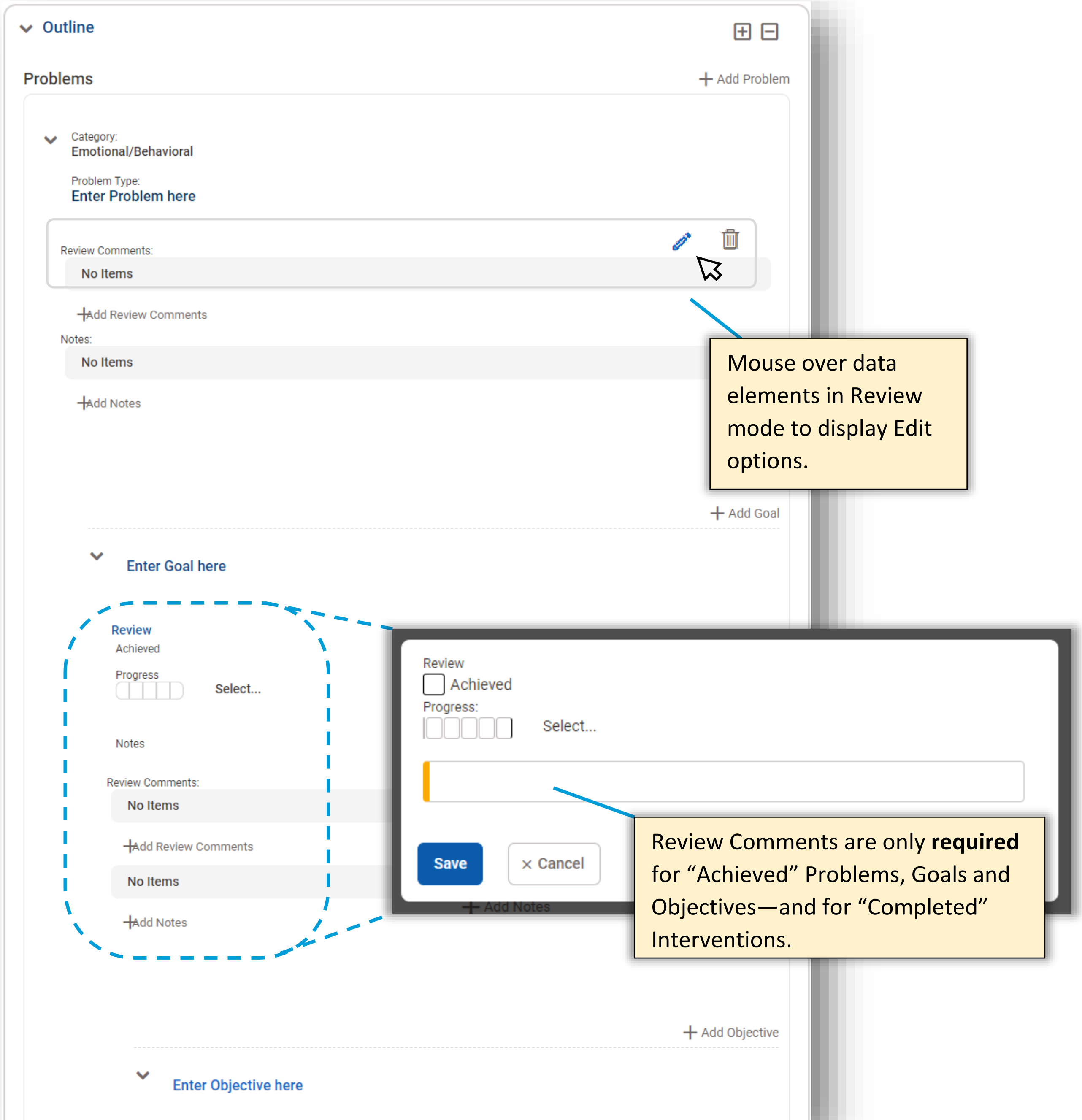
2. **Create New** – This will allow the user to enter Diagnoses under the Diagnosis list. *WARNING- This option will move you completely out of the Treatment Plan. It will save your work but you will have to navigate back manually.*

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

Outline - Collapsed View



Outline -Expanded View



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:

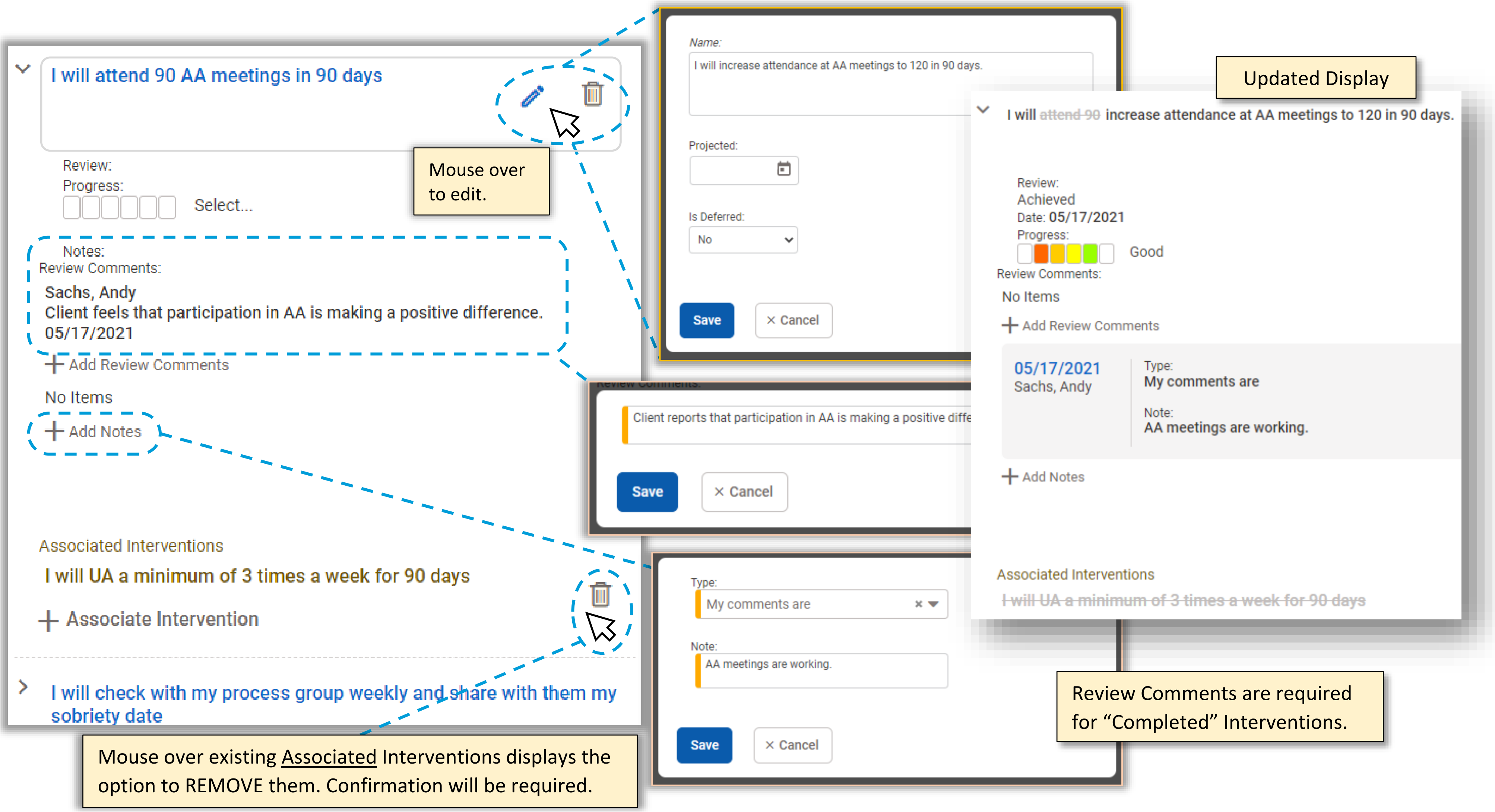
A. Completion Checkbox
B. Achieved Date (required if checkbox is marked)
C. Progress, on a Likert scale (required if checkbox is marked)
    1) No progress
    2) Fair progress
    3) Some progress
    4) Good progress
    5) Excellent progress
D. Review comments (required if checkbox is marked)

Achieved Items do not carry forward to the new plan.

Updates can be made to
-Deferred
-Projected dates
-Program Enrollment
-Responsible party
-Services

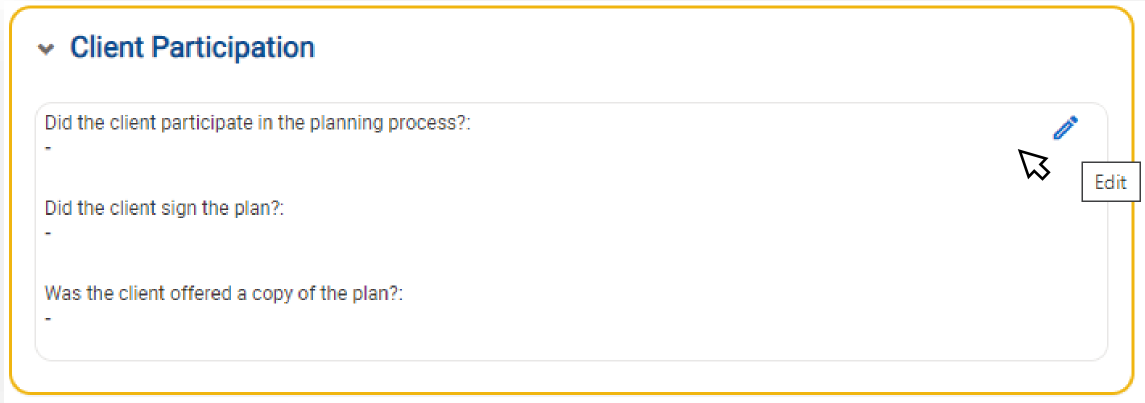
Outline Review

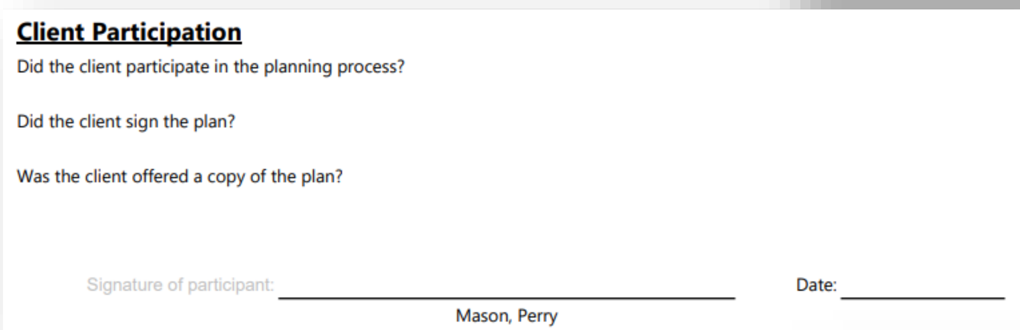
- Deleted Problems (and underlying goals, objectives, and interventions) do not carry forward to the new plan.
- Achieved or Deleted Goals (and their objectives) are not carried forward to the new plan. If only one goal exists and is either Achieved or Deleted, a new Goal must be added or the Problem 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.



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?

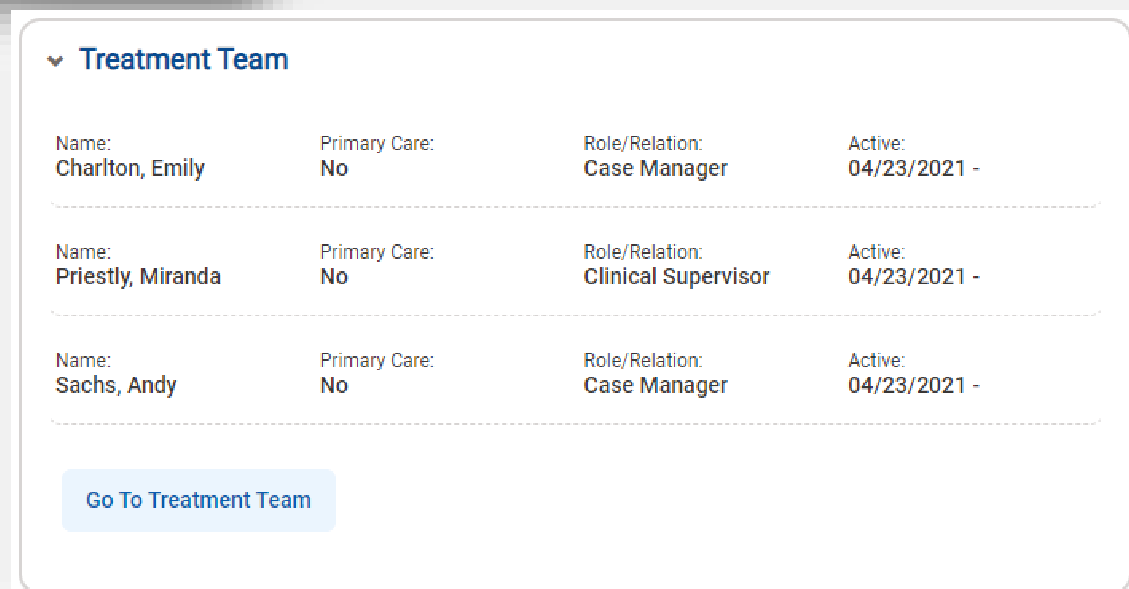
Signature of participant: ______________________ Date: __________

Mason, Perry

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 or a Treatment Team member. ***However***, navigation back to the Treatment plan is manual.



Sign Off

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

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

<u>Sign for</u>: 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.

<u>Sign and Finalize</u>: 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.

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 *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.