TREATMENT PLANS & REVIEWS

Treatment

- Treatment Plan
- Treatment Review
- Medications
Treatment

Treatment Plan
The Tx Plan is the document detailing the client’s agreement with the counselor and/or treatment team as to client problems and their rank, goals agreed upon, and the treatment process and resources to be utilized while the client is in treatment.

1. Getting here: Click on the main menu item Treatment which expands to multiple menu items, one of which is Tx Plan.

2. Treatment Plan List: This screen lists all active treatment plans for the active case. There can be only one active treatment plan at a time.

3. If no treatment plan exists, click on Add New Treatment Plan Record to create a new treatment plan. This will take you to the Treatment Plan Profile Screen.

4. An existing Treatment Plan can be reviewed by clicking the Review hyperlink in the Actions column of the Treatment Plan List.

Note: Once a treatment plan is completed and signed by the counselor/treatment team and client it cannot be changed in its original version. Any modifications can be made by creating a new version of the treatment plan. A new version creates a copy of the original plan only with a new version number. This new version can be modified until it is Signed Off by the client and treatment team. A Tx Review can also be conducted to review and update the Tx Plan. This also will create a new version of the Tx Plan.
Treatment

**Treatment Plan - Profile**

5. **Treatment Plan Profile:** This screen provides the basic information about the plan. The shaded area is read only information which is either carried forward from earlier modules or is created by the system.

6. **Plan name:** This is the name by which a plan is commonly known within an agency. Examples include Individual Program Plan (IPP), Individual Education Plan (IEP), etc.

7. **Plan Status:** When the status of the plan is Active – Signed Off or Inactive, it will not allow any updates. Updates can be made only to plans that are in ‘Active – Not Signed Off’ status.

8. **Create New Version** link allows you to create a new version which is a copy of the current plan so that you can modify it. Please use this only when you have a current active signed off plan or an inactive plan and need to make modifications to it.

9. If you click on the **Create New Version** link, it will bring up a confirmation screen asking you if you really want to create a new treatment plan. Click **Yes** if you want to make the current plan inactive and create a new version.
Treatment

**Treatment Plan - Treatment Plan Profile**

10. **Sign Off** link: When you click on this link it changes the status of the plan from ‘Active Not Signed Off’ to ‘Active Signed Off’ and you can no longer make any modifications to the plan.

11. A confirmation screen comes up asking if you really want to sign off on the plan. It also reminds you that you should get approval of the plan from both the client and all treatment team members. The paper version of the Tx Plan will have signature lines available for the client and any staff set up as Review Members in the Treatment Team module for this client.

12. Click **Yes** and it will bring you back to the plan with the status changed to ‘Active Signed Off’.

13. The **Treatment Team** section comes pre-populated.
Treatment

Treatment Plan - Overview

14. This screen allows you to document additional background information.

15. Presenting Problems: This is pre-populated based on Presenting Problems documented at Intake.

16. All the other fields are free text boxes which allow you to type unlimited information.
Treatment

**Treatment Plan - Diagnoses**

17. This screen displays the diagnoses that were documented in the Admission module.

18. **Select Primary Diagnosis:** If you know the diagnostic code, you can choose the appropriate diagnosis by clicking the drop down field. Then hold down the number of the code to scroll to the proper selection. For example, the client’s diagnosis is 303.90. Simply click on the field and hold the 3 key down until the desired selection scrolls into view. Select Secondary and Tertiary diagnoses in this same manner.

Note: If a diagnosis was entered in the Crisis or Placement Screening preceding this admission, it will not be brought forward to populate this screen.

19. To add diagnostic codes to the Axes, click the **Edit Axis Evaluation** hyperlink. This will open the Axis Evaluation screen. You can then choose the appropriate diagnosis to add to the axis. For example, Choosing Alcohol Dependence and clicking the **Add to Axis** hyperlink in the Axis I box adds this diagnosis to Axis I.

20. In this same way, you can continue adding to either Axis I or the other Axes as desired.

21. **Finish** will take you back to the Client Diagnosis screen with diagnoses added to each axis.
Treatment

**Treatment Plan – Problem/Goal List**

22. This is the first screen in a series of screens to document problems, goals, and objectives.

23. Click on **Add New Treatment Plan Problem / Goal Record** to add a new problem and goal.

24. All the problems and goals written in the treatment plan are listed here.

25. Click on **Review** if you want to review the details or revise the problems or goals.
Treatment

**Treatment Plan – Problem / Goal Profile**

26. The **Problem #** is created by the system.

27. The **Problem Date** is the date the problem is written. This defaults to the current date however can be changed if needed.

28. **Program Name**: Select the program under which the specific goal is being written. This list will consist of all the programs that are setup under your facility.

29. **Problem Category**: Once you select a problem category, the relevant problem, strength/resources, goals, and objectives, will become available in the drop-down boxes.

30. **Note**: You need to select items from the drop-down boxes for problem, strength/resources, goals, and objectives. In addition, you can write client unique statements in the **Comments** box attached to each of these fields.

31. **Note**: You can add only one goal under one problem. To write additional goals, you would need to click on **Add New Treatment Plan Problem / Goal Record** on the previous screen.

32. Click on **Save** to save the data entered so far.

33. Click **Add Objectives** to document objectives under this problem/goal. It will take you to the next screen.
Treatment

Treatment Plan – Objectives

34. The top part of this screen is shaded and read-only. It consists of information that was entered in the earlier parts of the treatment plan.

35. Objective # is created by the system.

36. Select the appropriate option from the drop-down for Objective and add other details in the Comments box if desired.

37. Objective Status is required. Expected Achieve Date and Resolution Date provide information on the status of the objectives.

38. Click on Save to save the data entered so far. Clicking on Finish will take you to the previous screen where you can click on Add Objectives to document more objectives for the same goal.

39. Clicking Finish on the Problem/Goal Profile screen will take you back to the Treatment Plan Problem/Goal List screen.
Treatment

Treatment Plan – Planned Services

40. On the Treatment Plan Problem/Goal screen click Next. Planned Services are specific services that are planned for the client. Examples would be individual counseling sessions, group therapy, etc.

41. Each planned service needs to be documented individually.

42. To document a planned service, click on Add New Planned Services Record which will take you to the next screen.

43. Select the appropriate options from the various drop-down boxes.

44. Type in the number of sessions planned. This goes hand in hand with the frequency. For example, 1 in the # of Sessions box and weekly in Frequency means the client will receive the planned service once a week.

45. Objectives from the treatment plan may be associated with the planned service to indicate what objectives will be addressed by this particular service. All the objectives written in the treatment plan will be listed here. To select the relevant objectives, highlight them by clicking on them in the left box and then click on the right pointing arrow in the middle. The selected objectives will move to the right box.

46. Clicking on Finish will not only save the data but also list this planned service on the previous screen for planned services list. You can add as many services as needed.
Treatment

**Treatment Plan – Plan Outline**

47. Next on the Planned Services screen will take you to the Treatment Plan Outline screen. This screen provides an outline view of the Tx Plan. You can make changes to the various items of the treatment plan by clicking on the hyperlinks next to the item.

48. For example to add an objective click the Add Objective hyperlink next to the appropriate Problem/Goal. This will take you to the Objective screen in the Tx plan. Once you have added the objective information click Finish and you will be returned to the Plan Outline screen. The new objective will appear on the outline screen as well as in the TX Plan Problem/Goal screen.

49. Click on Finish when you are done reviewing or adding to the Tx Plan using the outline screen. Finish will return you to the client’s Activity List. You will notice that the new treatment plan will have been added to the list.
Treatment

Treatment Review

Treatment Reviews are administrative actions in which clinicians can document reviews of clients’ treatment process. This is not necessarily a Tx Plan review, but can be. The Tx Review is designed to allow a treatment team to review the client file and recommend and document changes to the Tx Plan. The client can, but may not, be included in this review process.

50. Getting here: Click on the main menu item Treatment which expands to multiple menu items, one of which is Tx Review.

51. Treatment Review List: This screen lists all treatment reviews for the active case.

52. To enter a new review click on Add New Treatment Review Record.

53. Any previously entered Treatment Reviews can be reviewed by clicking the Review hyperlink in the Actions column of the Treatment Review List.

54. You can also start a new Treatment Review by clicking the Perform Review hyperlink on the Treatment Plan Profile screen of a active and signed off treatment plan.
55. **Identifying Info**: The Tx Review’s first screen includes basic Identifying Info, Review Period information, Review Status and space to update the documents used to supplement the review, if any.

56. **Actions**: The clinician can **Cancel the Review**, **Complete, No changes to Tx Plan**, and/or **Apply Changes**.
   - **Cancel the Review**: cancels the review with no changes to any portion of the client file.
   - **Complete, No changes to Tx Plan**: Allows the user to add comments and documentation to the client file concerning the Tx Review without changing any portion of the Tx Plan.
   - **Apply Changes**: Choosing this when the Tx Review is completed will update the client’s Tx Plan with any new Problems, Goals, Objectives or Comments chosen by the clinician.
   - **Note**: The client’s Tx Plan is not active until the client and clinician have agreed upon the new plan.

57. **Click Next**.

58. **ASAM**: This screen will populate with information from the latest ASAM for the client. This will either be Admission or a previous Treatment Review. This information can be updated as needed.

59. **Next** will open the Comments screen.
Treatment Review

60. **Recommendations and Changes**: Select the response from the drop down for the questions highlighted in yellow. Enter text in the text boxes for the other items. Any information entered on the previous **Tx Plan for Strengths/Resources** will be pulled forward by the system to this screen. It can be changed if desired.

61. Click **Next**.

62. **Available Treatment Team Members**: This list will display all members of a client’s treatment team that are indicated as review members.

63. To add a member of the team to this **Treatment Review Team** check the box next to the team member’s name and click the **Add to Review Team** hyperlink.
Treatment Review

64. The selected team members will appear in the Treatment Review Team list at the bottom of the screen.

65. To remove a Team Member click the Delete hyperlink under Actions. This will not remove the team member from the Treatment Team only from this Review Team.

66. To indicate that the team member has signed off on the current treatment review click the Sign-off hyperlink under Sign-off.

67. Click Save to save this information and then click Next.
This screen shows the active signed off Treatment Plan in an outline format and allows changes to be made.

To make modifications to the Treatment Plan click the Comment/Modify Plan hyperlink under Outline Actions.

You will receive a message asking if you are sure you want to modify the Treatment Plan. If you want to make any comments or changes click Yes. If not, click No. Both will return you to the Outline screen. If you clicked Yes you will see hyperlinks next to each item allowing you to add Comments, Modify the item, Delete or Add items to the treatment plan. If you clicked No, the screen will remain the same as above.
Treatment Review – Plan Outline

71. To add a Problem, Goal or Objective to the Treatment Plan click the Add Problem/Goal or Add Objective hyperlink. This will take you to the appropriate screen of the Treatment Plan. Enter the appropriate information and click Finish. This will take you back to the Outline screen and you will see the Problem, Goal or Objective you added highlighted in green text.
Treatment

Treatment Review – Plan Outline

72. To add comments to an item in the Treatment Plan click the Comments hyperlink next to the appropriate item. This will take you to the Review Comments screen.

73. Enter your comments and click Finish. This will take you back to the Outline screen and you will see the comments you added highlighted in yellow. These comments are for the review and will not appear in the treatment plan.
Treatment Review – Plan Outline

74. To delete a Problem, Goal or Objective to the Treatment Plan click the **Delete** hyperlink next to the appropriate item.

75. You will receive a warning message asking if you are sure you want to delete the item.

76. If you click **Yes** you will be returned to the Outline screen and you will see the item you deleted in blue text with a line through it.

77. If you are done with making changes and comments to the Treatment Plan click **Finish** at the top of the screen.
   • This will save all of your changes, however, it will not update the treatment plan. **Finish** will take you to the Treatment Review List screen.
Treatment

Treatment Review

78. The Treatment Review you entered will have a status of Pending until you apply the changes.

79. To apply the changes to the Treatment Plan from the treatment review click the Review hyperlink next to the appropriate Treatment Review.

80. This will take you to the Treatment Review Profile screen.
Treatment Review

81. To apply the changes to the Treatment Plan click the **Apply Changes** hyperlink.

82. You will receive a warning message asking if you are sure you want to apply the changes.

83. If you click yes, a new treatment plan will be created with the changes and the status of this Treatment Review will be **Completed (Changes Applied)**.

84. If you want to cancel the review, click the **Cancel Review** hyperlink.

85. You will receive a warning message asking if you are sure you want to cancel the review.

86. If you click yes, the status of this Treatment Review will be **Cancelled** and a new treatment plan will not be created based on this review.
Treatment

Treatment Review

87. **Apply Changes** will automatically update the existing **Treatment Plan** to include any changes made in the **Treatment Review**.

88. Notice that the **Treatment Review List** shows the **Status** as **Completed (Changes Applied)**.

89. A new treatment plan has been created and is now listed on the **Treatment Plan List** with a **Status** of **Active – Not Signed Off**.

90. In order to sign off on the new **Treatment Plan**, click the **Review** hyperlink.
   - This will take you to the **Treatment Plan Profile** screen where you can choose to **Sign Off** on the new plan. This will change the **Status** to **Active – Signed Off**.
Treatment

Medications

91. **Getting here**: Click on main menu item Treatment which expands to multiple menu items, one of which is Medications.

92. Clicking on Medications in the menu brings up the first screen which is divided into two parts. The top half is a list of medications that have been documented so far. It would be blank if nothing has been documented.

93. The lower half is where you can document the details of each medication which then gets saved at the top. Initially, this appears grayed out. Click on Add New Medication. This will make all the fields available for data entry.

94. Select the type of medication from the first drop-down next to Medication and then select the name of the medication from the second drop-down box for Medication.

95. Type the name of the physician and select appropriate item from other drop-down boxes.

96. Clicking on Save will save the information you just entered to the list at the top.

97. To add more medications to the list, click on Add New Medication link and follow the same steps.

98. Click on Finish when you have entered all the medications that the client is currently taking.

99. Discontinuing a medication can be done by clicking on Review next to that medication under Actions. This will bring the details of the medications to the lower half of the screen where you can make the changes and Save.