



Division of Public and Behavioral Health Policy

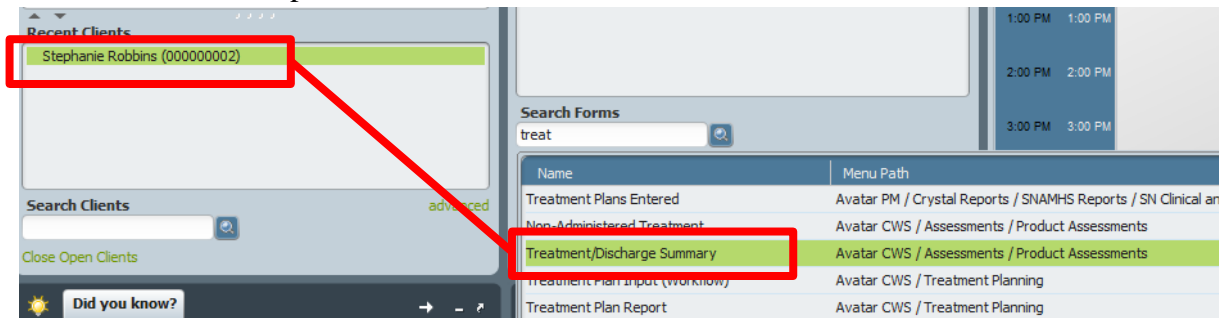
Control #	Rev.	Type	Title	Effective Date	Page
			Treatment/Discharge Summary	date	1 of 5

1.0 Policy

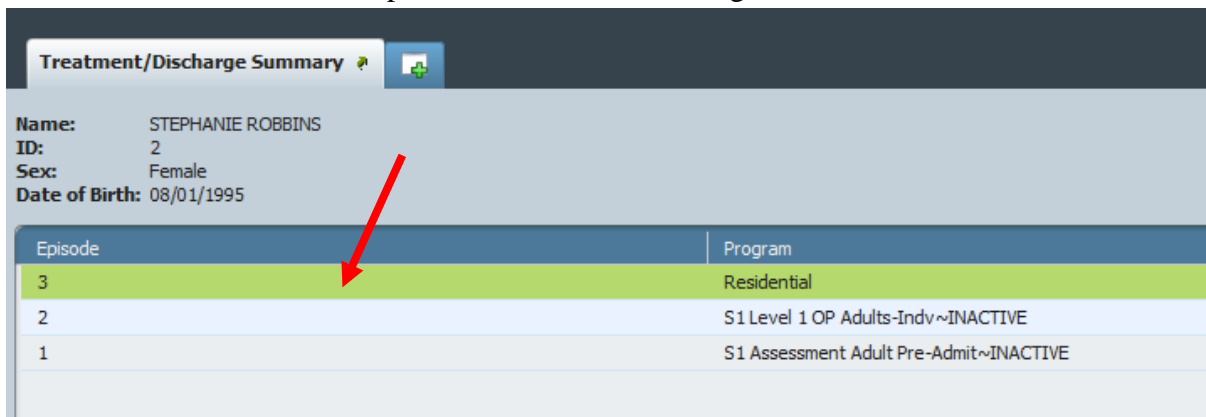
It is the Policy of the Division of Public and Behavioral Health (DPBH), Substance Abuse, Prevention, and Treatment Agency (SAPTA) that all providers, in accordance with 505 (a) of the Public Health Service Act (42 US code 290aa-4) which directs the Administrator of the Substance Abuse and Mental Health Services Administration (SAMHSA), to collect items including admission and discharge data.

2.0 Procedure

1. The **Treatment/Discharge Summary** form is used during the discharge process.
2. From the home screen in Avatar, choose the client by single-clicking the name in the “recent clients” widget or use the search client field to find the client by last name or ID.
3. With the client name highlighted in green, search for the **Treatment/Discharge Summary** form.
 - a. Double-click to open the form.



4. The episode selection screen will appear.
 - a. Double-click the correct episode that this form belongs to.



5. Enter the **Summary Date** – the date the form was completed.
 - a. Click T for today
 - b. Click Y for yesterday



Division of Public and Behavioral Health Policy

Control #	Rev.	Type	Title	Effective Date	Page
			Treatment/Discharge Summary	date	2 of 5

6. Enter the **Summary Time** – the time the form was completed.
 - a. Click Current for current time or
 - b. Enter the time in the field provided.

7. Choose the **Summary Type** from the drop-down field.
 - a. Medical
 - b. MH
 - c. Substance Abuse – most likely will always be the correct selection

8. Choose the **Summary Status**.
 - a. **Draft** – until the summary is marked as final.
 - b. **Final** – when the summary form is complete.

9. Choose the **Review Type** from the drop-down field.
 - a. This form is specifically designed for discharge; therefore, choose the **Discharge** selection in the drop-down.

10. Choose the **Reason for Discharge** from the drop-down field.
 - a. Against Medical/Agency Notice
 - b. Completed Treatment
 - c. Death
 - d. No Further Care Needed
 - e. Other
 - f. Reason Not Available
 - g. Transfer to Another Facility
 - h. Transferred

11. If **Other** was chosen on the previous field, enter in the reason in the free-text field provided.

Summary Date: 09/03/2015

Summary Time: 08:03 AM

Summary Type: Substance Abuse

Summary Status: Final

Review Type: Discharge

Reason For Discharge: Other

Other Reason For Discharge: Went to Jail

12. In the free-text field, document notes for the **Review of Client's Treatment**.



Division of Public and Behavioral Health Policy

Control #	Rev.	Type	Title	Effective Date	Page
			Treatment/Discharge Summary	date	3 of 5

Review Of Client's Treatment

A large, empty rectangular text area with a light gray border and a vertical scrollbar on the right side.

13. In the free-text field, document notes for the **Mental/Physical State At Review**.

Mental/Physical State At Review

A large, empty rectangular text area with a light gray border and a vertical scrollbar on the right side.

14. In the free-text field, document notes for the **Review/Discharge Plan For Care**.

Review/Discharge Plan For Care

A large, empty rectangular text area with a light gray border and a vertical scrollbar on the right side.

15. Complete the **Discharge Checklist**.

a. Notified Family/Sponsor of Discharge

- No
- N/A
- Yes
- Notification Comments

b. Transportation And Equipment Verified

- No
- N/A
- Yes
- Transportation Comments

c. Reviewed Aftercare Instructions And Orders

- No
- N/A



Division of Public and Behavioral Health Policy

Control #	Rev.	Type	Title	Effective Date	Page
			Treatment/Discharge Summary	date	4 of 5

- Yes

d. Reviewed Aftercare Resources And Insurance Coverage

- No
- N/A
- Yes
- Community Resources Comments

e. Follow Up Appointment Scheduled

- No
- N/A
- Yes
- Follow Up Comments
- If a follow up appointment was made, use the Date of Appointment field to document the next appointment.

The screenshot shows a 'Discharge Checklist' form with several sections. Red arrows point to the 'Yes' radio buttons for the following items: 'Notified Family/Sponsor Of Discharge', 'Reviewed Aftercare Resources And Insurance Coverage', 'Transportation And Equipment Verified', and 'Reviewed Aftercare Instructions And Orders'. A red box highlights the 'Date Of Appointment' field, which includes a date picker and 'T' and 'Y' buttons.

16. Complete the Summary Review Note.

a. Note Type

- Assessment – do not use
- Case Mgt - do not use
- Chart Note – most likely will be the choice
- Group – do not use a group note for this treatment/discharge summary
- Progress Note – this choice could be used as well

b. Review/Discharge Note

- Document notes in the free-text field provided.



Division of Public and Behavioral Health Policy

Control #	Rev.	Type	Title	Effective Date	Page
			Treatment/Discharge Summary	date	5 of 5

▼ Summary Review Note

Note Type
Chart Note

Review/Discharge Note
Everything is in order for this client to be discharged.

17. When the form is complete, click on submit in the top left hand corner. The form will save and close.

Chart Treatment/Di

- Treatment/Discharge S...
 - Summary And Review
 - Discharge Checklist
 - Summary Review Note
- Referral

Submit

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