Division of Public and Behavioral Health
Policy

Control #	Rev.	Type	Title	Effective Date	Page
			Treatment Plan & Treatment Plan Review (Interim)	12-18-15	1 of 12

1.0 Policy

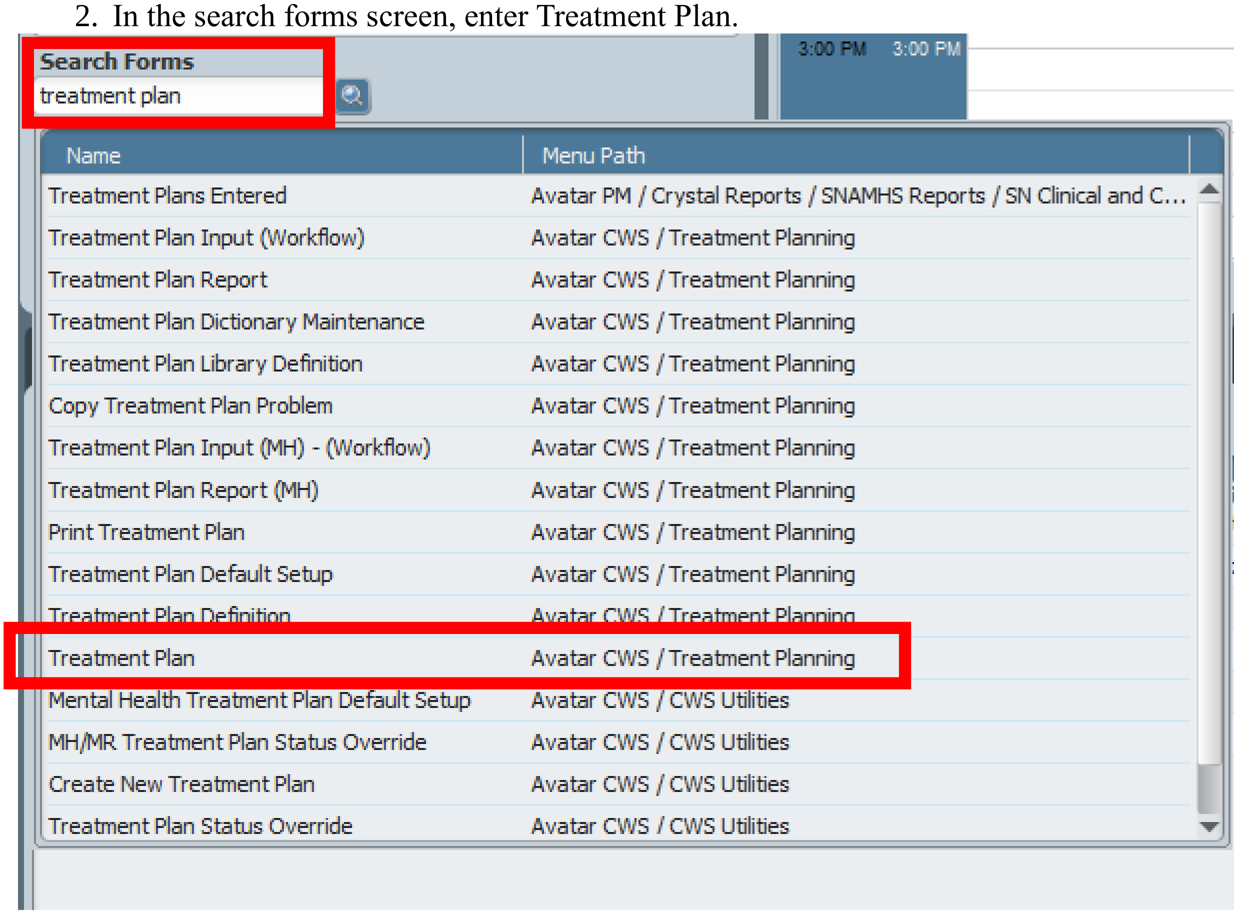
It is the Policy of the Division of Public and Behavioral Health (DPBH), Substance Abuse, Prevention, and Treatment Agency (SAPTA) that all providers, in accordance with 505 (a) of the Public Health Service Act (42 US code 290aa-4) which directs the Administrator of the Substance Abuse and Mental Health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

Residential treatment plans need to be reviewed and updated at least every 2 weeks.

Outpatient treatment plans (including IOP) need to be reviewed and updated at least every 30 days or whenever the condition of the client changes over the course of the treatment (per NAC 458.246).

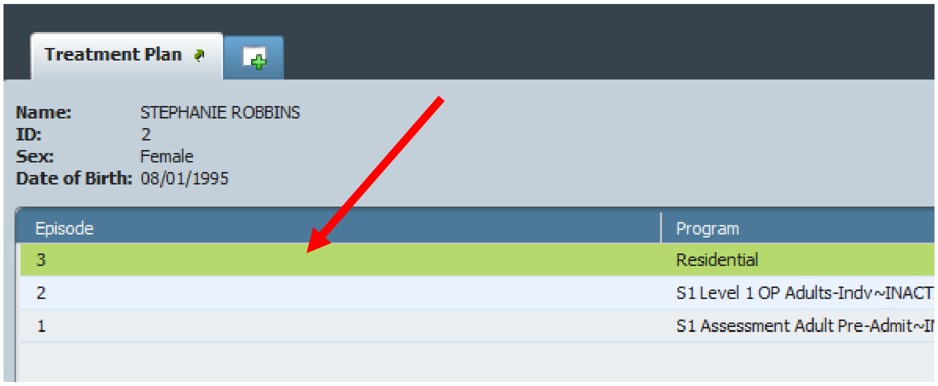
2.0 Procedure

1. In the Client widget on the home screen, enter the client ID or last name in the Client Name/ID field, click Select Client Name/ID Search. Click Ok.
2. In the search forms screen, enter Treatment Plan.

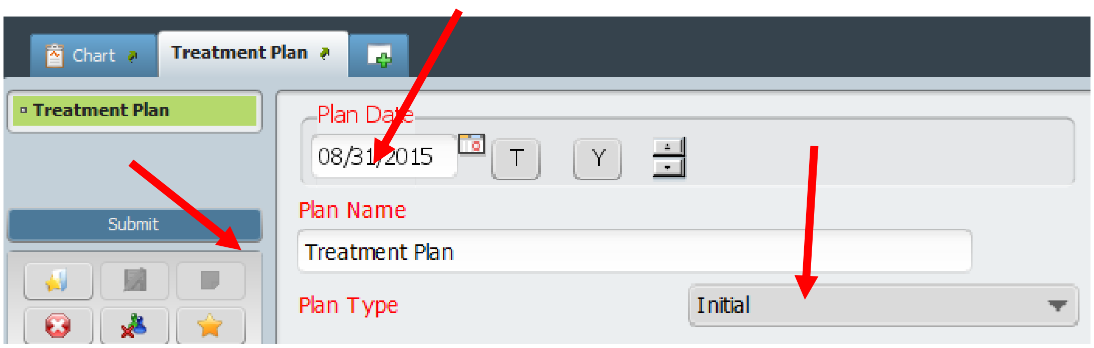


3. Double-click the Treatment Plan.
4. If the client has multiple episodes, the select client episode window will appear. Double-click the correct

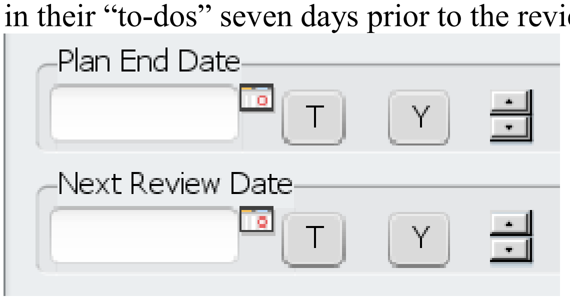
episode and click Ok.



5. In the Plan Date field, enter the treatment plan date.
   a. Click "T" for today
   b. Click "Y" for yesterday or
   c. Type in Date
6. In the Plan Name field, type the treatment plan name. (Ex: Treatment Plan)
7. In the Plan Type field, select the plan type. This will be a dropdown to choose the type of treatment plan.
   - Initial

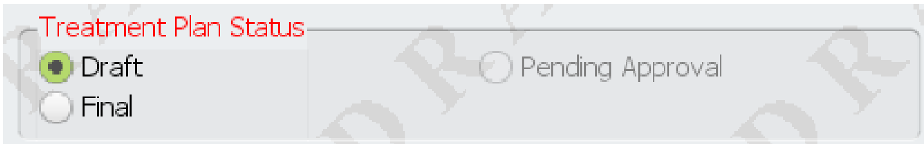


8. If a Plan End Date is appropriate, enter the date. This is not a mandatory field.
9. Enter the Next Review Date. If a date is entered into this field, it will send the practitioner a notification in their "to-dos" seven days prior to the review date.

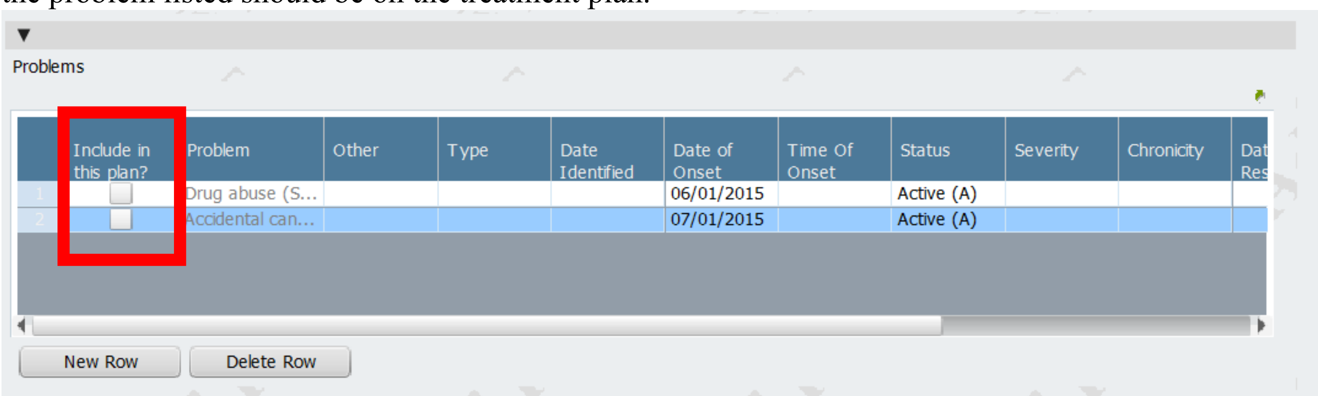


10. The Treatment Plan Status will be Draft until the plan has been finalized. Once the initial plan is

complete, with all elements added, choose the Final status. Once deemed Final, the plan cannot be edited.

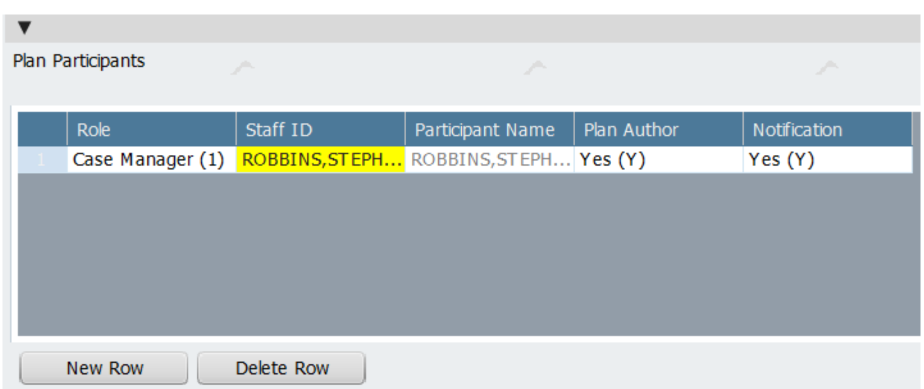


11. Enter the Team Member to Notify field, select which supervisor will approve or reject the plan.
12. Problems can be entered into the plan from this Problems box. Simply click "include in this plan" if the problem listed should be on the treatment plan.

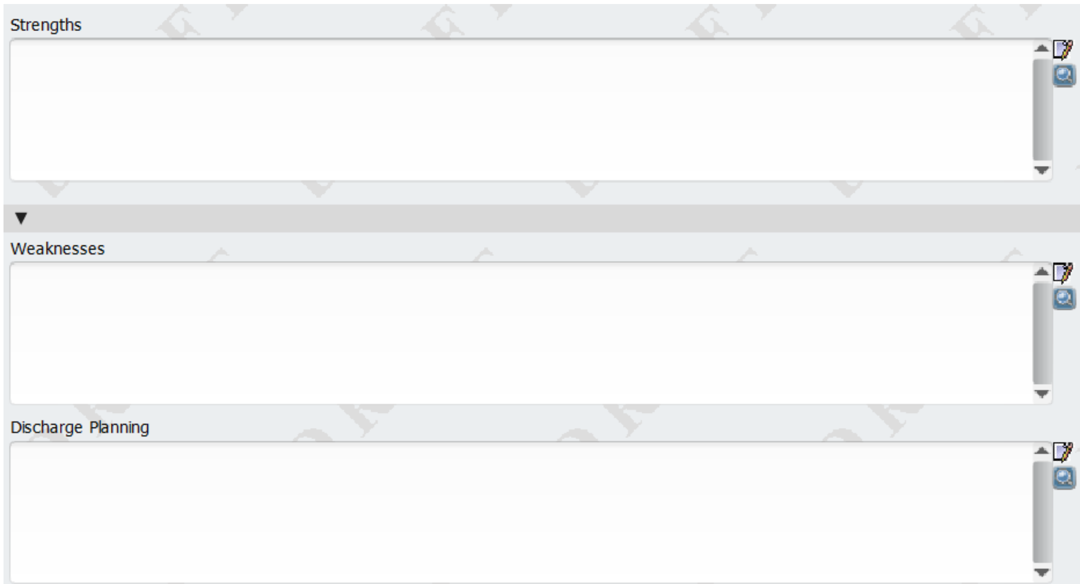


13. To add other staff members as participants in the plan,

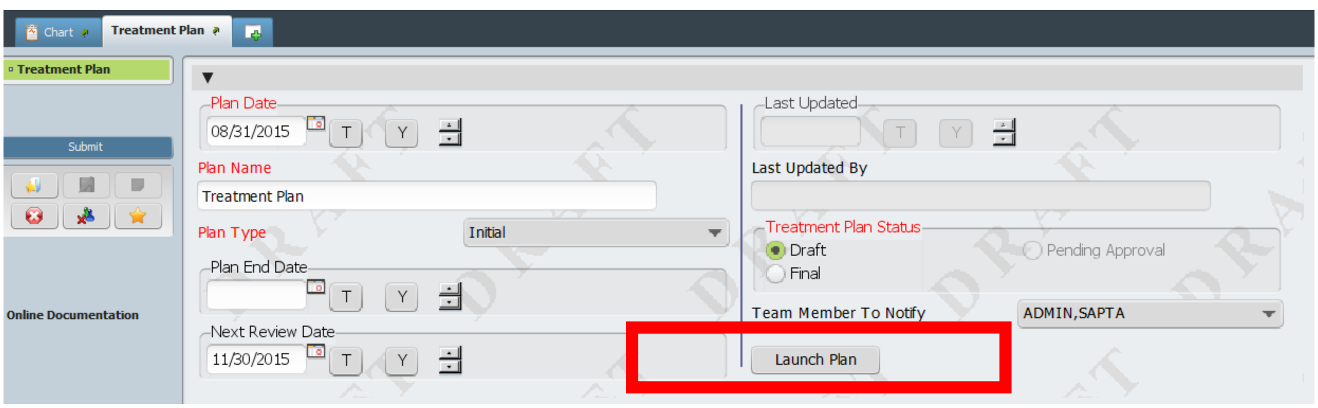
- enter the role – double click to see options
- staff ID – search by last name
- Participant Name – will auto-populate
- Plan Author – Y for yes, or N for no
- Notification – to send a notification to the other user(s) – Y for yes, or N for no
- Add "New Rows" as needed.
- "Delete Rows" as needed.



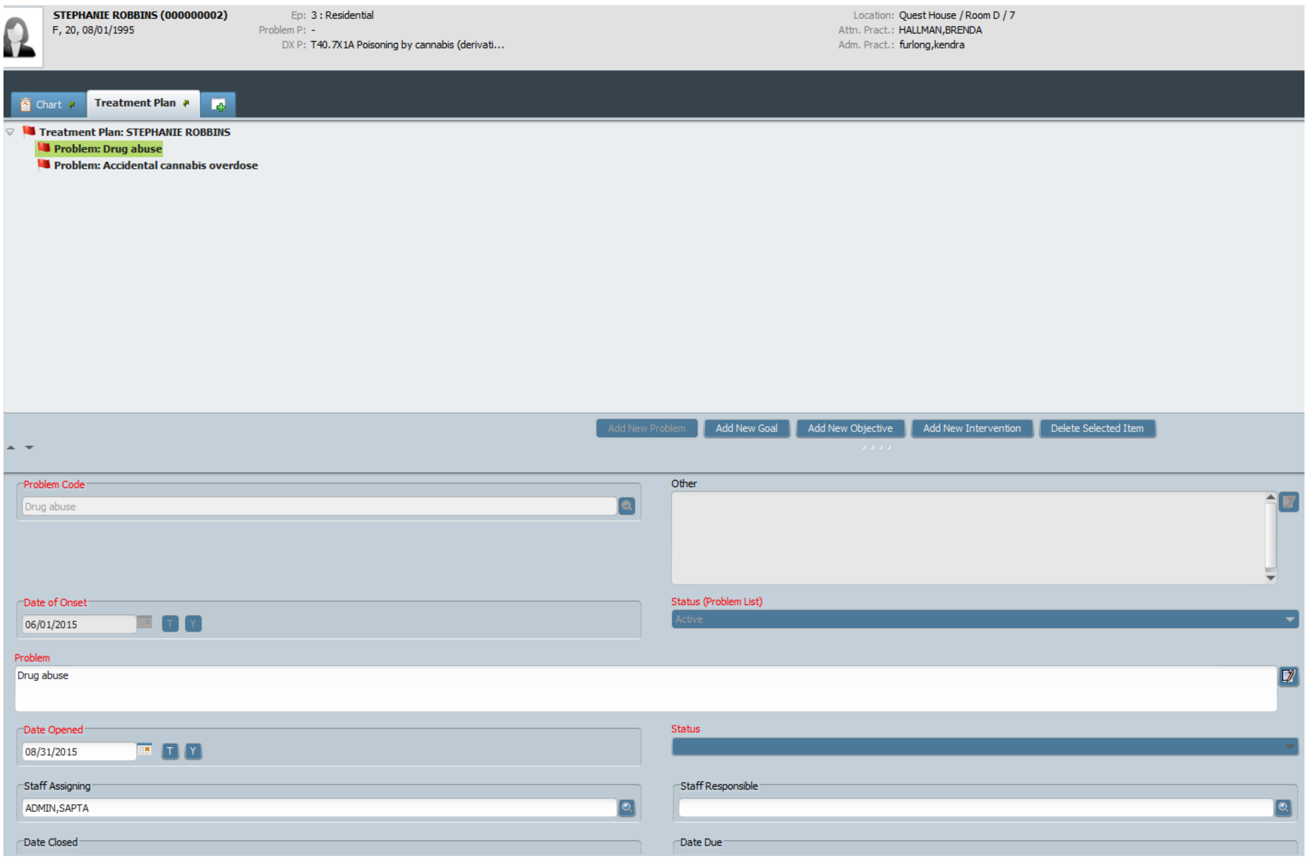
14. Document Strengths, Weaknesses, and Discharge Planning.



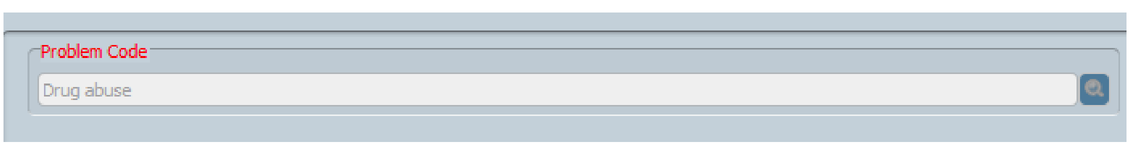
15. When completed with the first page, scroll up and click "Launch Plan".



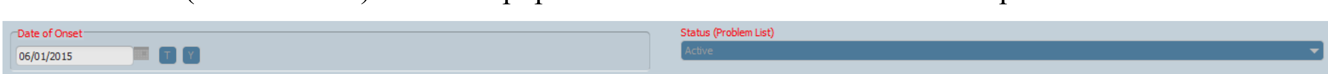
16. The Treatment Plan will display as follows:



17. The problems that were checked in the previous screen will carry over to the launched treatment plan.
18. The Problem Code will auto-populate from the previous screen.

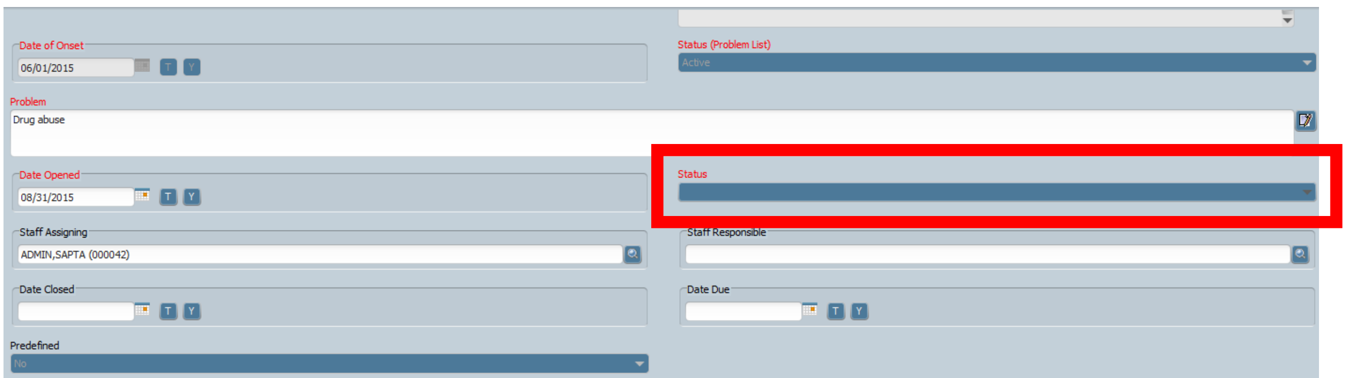


19. Date of Onset will auto-populate from the previous screen.
20. Status (Problem List) will auto-populate from the Problem List on the previous screen.



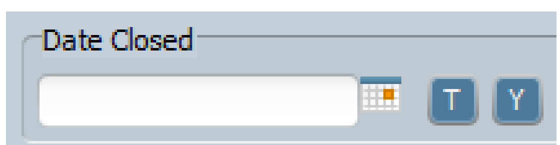
21. Date Opened auto-populates the current date.
22. Staff Assigning auto-populates the staff member.
23. Status is a mandatory field. You must choose an option from the dropdown.

- Discontinued
- Monitor
- Resolved
- Treat



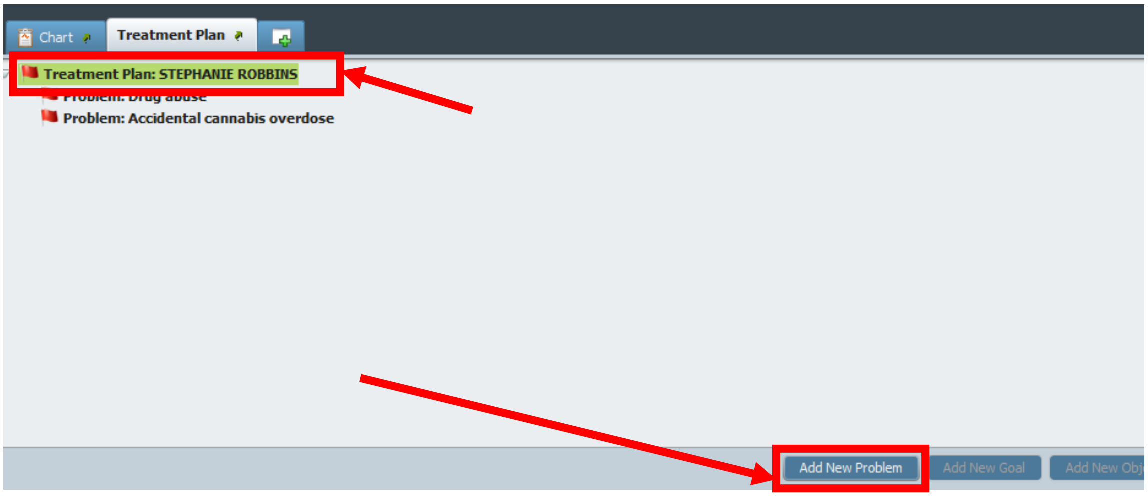
24. Staff Responsible is a field used if the supervisor is assigning this treatment plan to a specific staff member, instead of the staff member entering in their plan on their own. This is not a mandatory field.

25. Date Closed field is only used when that problem has been resolved. That will be used in future Treatment Plan Reviews.



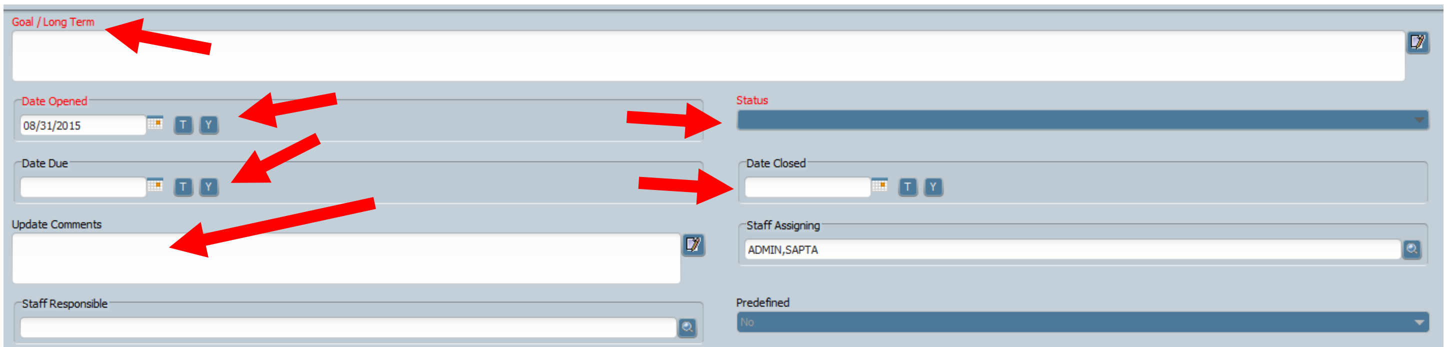
26. If there is a due date on the Problem, enter the date in the Date Due Field.

27. To add a new Problem, you must click on the top treatment plan title. This will open up the “Add New Problem” button for a new problem to be entered.

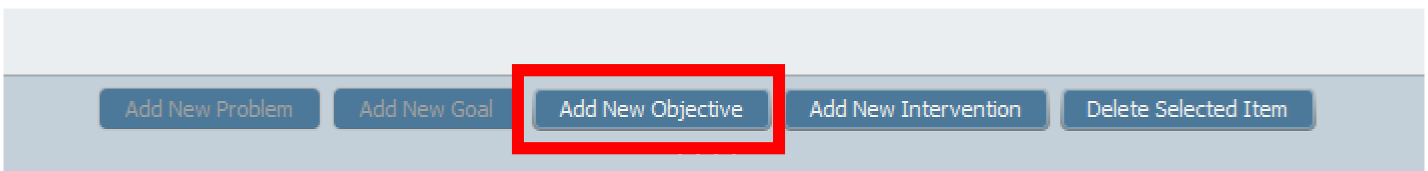


28. After the problem is entered, click on “Add New Goal” located in the middle of the launched treatment plan.

29. Type in the Goal/Long Term in the space provided.
30. Date Opened field will auto-populate with the current date.
31. Choose the status.
    - Achieved
    - Active
    - Discontinued
    - Revised
32. If applicable, choose a Date Due.
33. When the goal has been completed, the Date Closed field will be completed.
34. “Update Comments” is the field that will be used when a Treatment Plan Review is completed. Use this field if comments need to be added to the original goal that was documented.



35. Once the goal has been entered, click on "Add New Objective" in the middle of the screen.



36. Type in the objective in the box provided.

37. The Date Opened field will auto-populate.

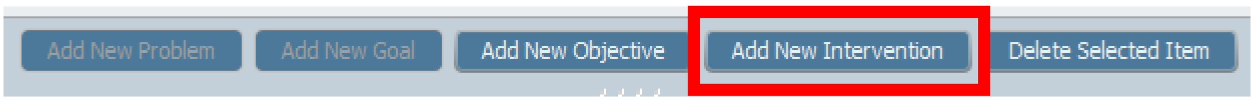
38. Choose the status of the objective.

- Active
- Discontinued
- Met/Achieved

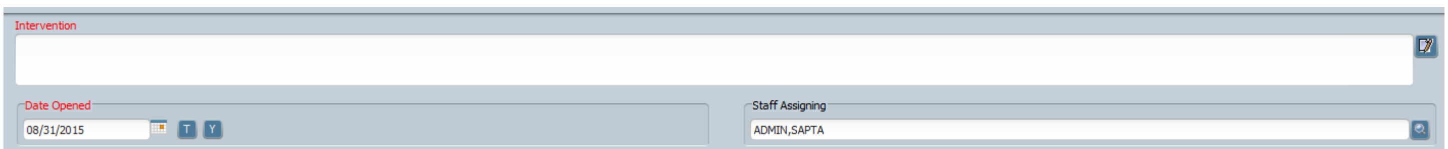
39. If applicable, choose a Date Due.

40. When the objective has been met/achieved, record a date in the Date Closed field. This field will remain blank until the objective has been met. Only close the Objective in the Treatment Plan Review that it was closed in.

41. When the Objective is complete, click “Add New Intervention”.



42. Enter the Intervention in the space provided.



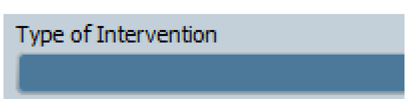
43. The Date Opened and Staff Assigning with auto-populate from previous screens.

44. Select the “Status”.

- Active
- Inactive

45. Choose the “Type of Intervention.”

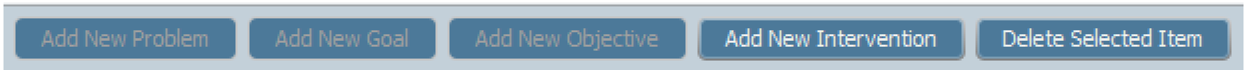
   - Clinician – most likely will be the choice the majority of the time
   - Consumer
   - Family – do not document family interventions in the Treatment Plan. Always document these interventions as a chart note associated with the correct episode.



46. When the intervention has been completed, record a date in the Date Closed field. This field will remain blank until the intervention has been met. Only close the intervention in the Treatment Plan Review that it was closed in.

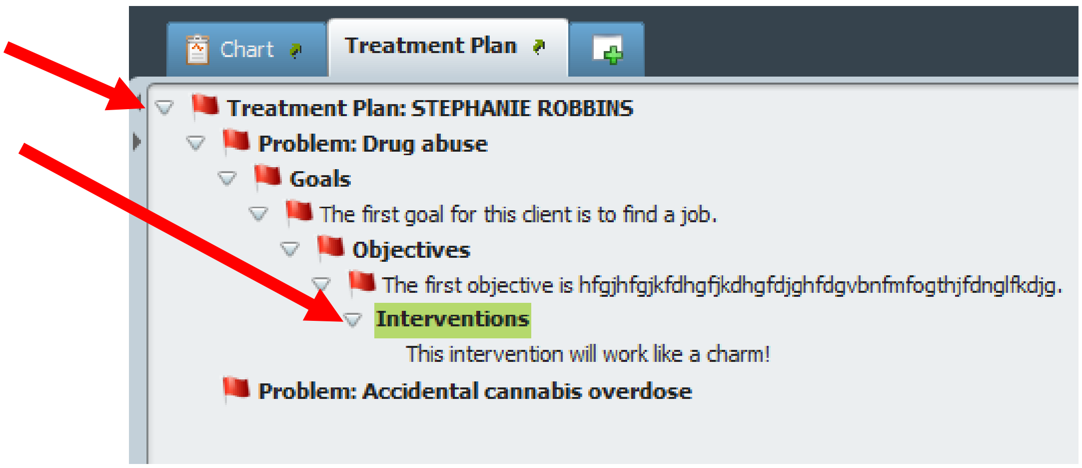
47. If applicable, enter the Date Due in the field provided.

48. The last tab on the Treatment Plan is “Delete Selected Items.” Use this option to delete line items on the Treatment Plan **before** the Treatment Plan is marked final.

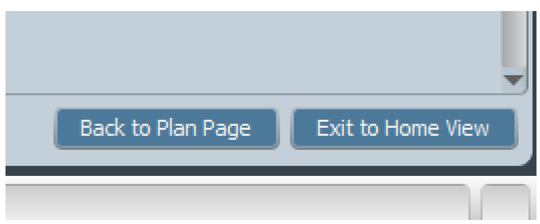


49. If any of the mandatory fields in the treatment plan are missing, the treatment plan view will display red flags. You must make these corrections.

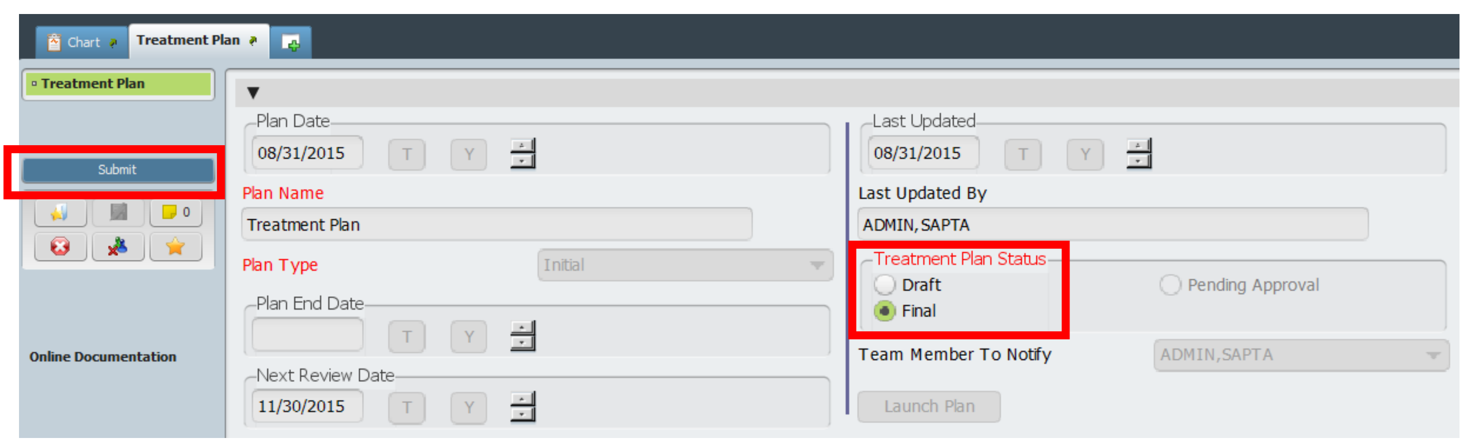
NOTE: Always start with the red flag at the bottom of the view.



50. When the treatment plan is complete with no errors, click on "Back to Plan Page" at the bottom right hand corner of the screen.



51. Upon returning to the screen shown below, if the treatment plan is complete, mark as final and then click "submit."

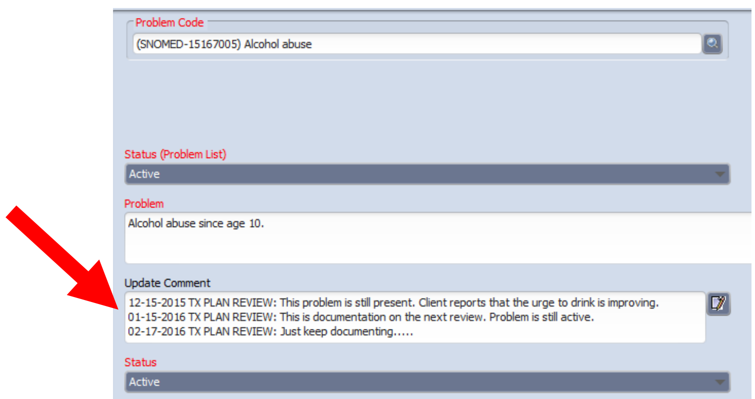


Treatment Plan Reviews : INTERIM PROCEDURE

In order to document a treatment plan review (in the interim while the full process is still being built), follow the steps below:

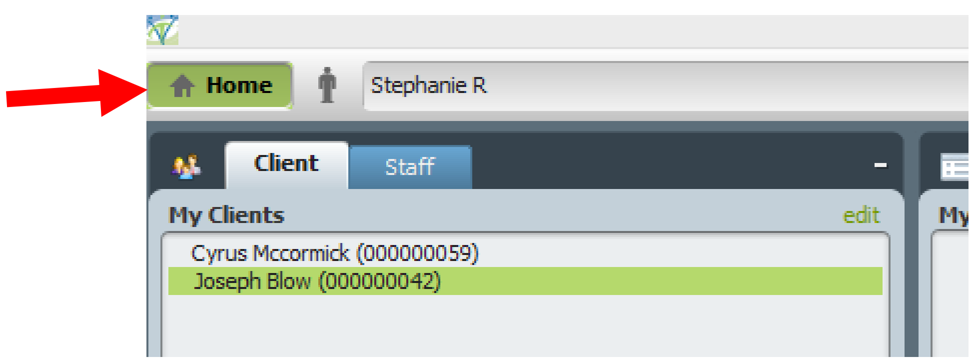
52. **Edit** the **Initial** treatment plan, use the **Update Comments** fields to document the review.

  a. Ensure the date is documented. Add review comments for problems, goals, objectives and interventions. Ensure you are closing out items that have been resolved using the **Date Closed** field.

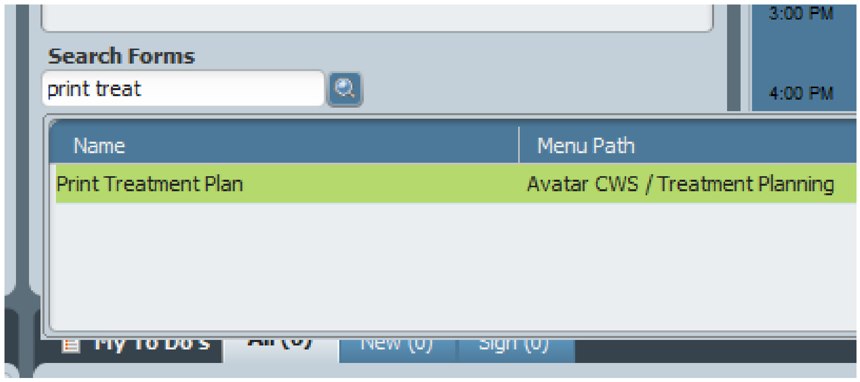


Print Treatment Plan

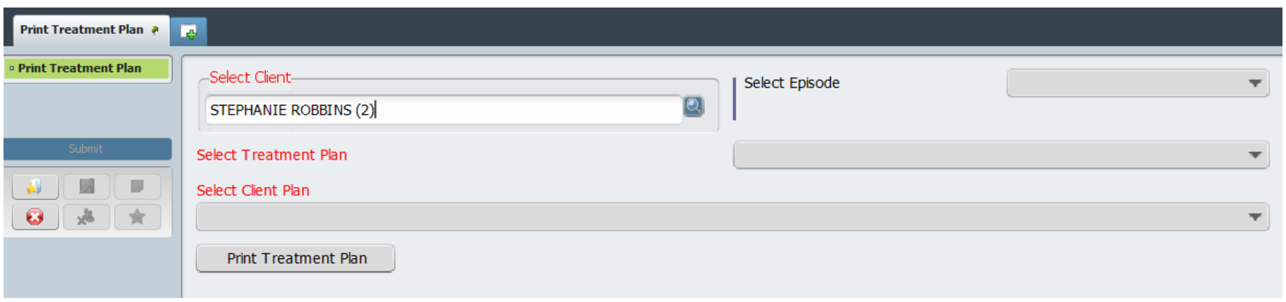
53. To print a treatment plan, return to the home screen by clicking on the HOME button on the top left hand corner of the Avatar screen.



54. In the Search Forms widget, type in Print Treatment Plan. Double-click to open.



55. In the Select Client field, search by Last Name or ID number. Double-click your selection.



56. Choose the Episode for the treatment that you'd like to print.
57. Select the Treatment Plan from the drop-down.
58. Select Client Plan from the drop-down.
59. Click "Print Treatment Plan".
60. A Crystal Report will display with the Treatment Plan, listing the Problems, Goals, Objectives, and Interventions. There will be a client signature line as well.