



Edwin M. Lee
Mayor

City and County of San Francisco
Department of Public Health
Community Behavioral Health Services

Ken Epstein, PhD, LCSW
Director
Children, Youth and Families System of Care
1380 Howard Street, 5th Floor
San Francisco, CA 94103
(415) 255-3439 - FAX (415) 255-3567
Email: Kenneth.epstein@sfdph.org

Avatar Bulletin

CYF Treatment Plan Due Reports and Widget

April 6, 2015

CBHS Policy for CYF Treatment Plans

According to CBHS policy and contracts performance objectives for Children, Youth and Families (CYF) services, all clients will have an updated and completed Treatment Plan of Care (TPOC) in Avatar within 12 months from the episode opening date. This means that the CYF TPOC is valid for one year from the date a client is admitted to a program; for example, if 2/1/2015 is entered as the "Admission Date" in the Avatar Admissions form, the "Next Treatment Plan of Care Due Date" is 2/1/2016 – one year after the Admission date.

CYF Treatment Plan of Care Reports and Widget Now Available

To assist you in tracking clients at your program that require creation or renewal of the CYF Treatment Plan of Care, three Avatar reports are now available. These reports will assist managers and clinicians with identifying the status of TPOC's for clients with an open admission at your program.

Report Location Avatar CWS / Treatment Planning
Widget Location Home View

1. CYF TPOC Due by Clinician Report

- Report is available to all clinical staff who provide services to CYF clients.
- Report includes all clients with an open admission as of the date report is requested.
- The report lists clients for whom the clinician is identified as the Admitting Practitioner in Avatar.
- Report includes client name/ID, age, admission date, date the last TPOC was finalized, date the next POC is due, and the most recent date of service.
- If clinician practices in multiple programs, the report separates clients by program.

2. CYF TPOC Due by Clinician/Supervisor Report

- Report is available to supervisors, who can run the report for one clinician, at one program.
- Same information is displayed as report above.

3. CYF TPOC Due by Program/Staff Report

- Report is available to clinic supervisors.
- Report lists all clients with an open admission/episode at a program, sorted by Primary/Admitting Practitioner.
- Same information displayed as report above.


4. CYF TPOC Due Widget

- Widget is available to all clinical staff who provide services to CYF clients.
- Widget includes all clients with an open admission.
- The Widget lists clients for whom the clinician is identified as the Admitting Practitioner in Avatar.
- Widget includes client name/ID, age, admission date, date the last TPOC was finalized, date the next POC is due.
- If clinician practices in multiple programs, all clients will be included.

Report Highlights

- A “Program Summary” appears on the last page of report to show the number and percentage of TPOC’s in these categories: Current, Expired, No POC created, Pending Approval, Draft.
- Extensive Notes appear on the last page to explain the contents, as well as definitions of data in each column.

Widget Highlights

Refresh Button → 

Client Name & Number	Age	Epi#	Admission	Last POC Finalized	Next POC Due	0-4	5-18
	10	8	11/14/2014	No Plan Created	N/A		Add New
	0	2	02/26/2015	No Plan Created	N/A	Add New	
	15	7	03/19/2014	05/14/2014	03/19/2015		Add New
	11	2	07/01/2009	07/17/2014	07/01/2015		Add New
	18	9	07/23/2014	09/25/2014	07/23/2015		Add New
	15	2	05/14/2010	10/29/2014	05/14/2015		Add New
	7	3	10/28/2013	10/29/2014	10/28/2015		Add New
	16	9	10/19/2010	11/24/2014	10/19/2015		Add New
	9	5	04/11/2013	12/15/2014	04/11/2015		Add New
	14	3	11/21/2013	01/05/2015	11/21/2015		Add New
	8	3	05/29/2013	02/04/2015	05/29/2015		Add New
	12	3	06/06/2013	02/09/2015	06/06/2015		Add New
	5	5	12/29/2014	02/27/2015	12/29/2015		Add New


Client Name and BIS # will be listed here

Plan Status (No POC, Draft, Pending Approval or Date Finalized) will be listed here.

If under 5, 'Add New' POC will


If 5-18 'Add New' POC will appear

- Both CYF TPOC and Adult TPOC Widgets are now available to clinical staff who provide services to CYF and Adult clients.

CYF TPOC DUE 

Client Name & Number	Age	Epi#	Admission	Last POC Finalized	Next POC Due	0-4	5-18
TEST,TWOSEVENTYONE (999026399)	33	1	07/01/2012	Draft	N/A		Add New
TESTCLIENT,SUMMARY (1)	34	1	07/01/2010	Draft	N/A		Add New
TEST,TWOSEVENTY (222222222)	33	1	07/01/2012	Pending Approval	07/01/2015		Add New

→ **CYF TPOC Due Widget**

MH ADULT TPOC Due 

Client Name & Number	Episode	Admission Date	Date POC Finalized	Next POC Due	Add New
TEST,TWOSEVENTY (222222222)	1	07/01/2012	No POC	POC not Completed	Add New
TEST,TWOSEVENTYONE (999026399)	1	07/01/2012	No POC	POC not Completed	Add New
TESTCLIENT,SUMMARY (1)	1	07/01/2010	Draft	POC not Completed	Add New

→ **MH Adult TPOC Due Widget**

Need Help?

- If you need assistance with reports, please contact the Avatar Help Desk at 415-255-3788 or via e-mail at avatarhelp@sfdph.org
- If you have questions about the CBHS policy, please contact Maximilian Rocha, LCSW, Deputy Director, CYF System of Care at 415-255-3692 or maximilian.rocha@sfdph.org.