

Avatar User Guide : Adult/Older Adult MH Treatment Plan of Care



February 11, 2016

Overview

- **Purpose:** The purpose of the manual is to walk you through the new Adult/Older Treatment Plan of Care in the Avatar EHR System.
- **Rational:** The reason for moving to a new version of the treatment plan is to bring us into alignment with optimizing our use of electronic records with a focus on being able to use standardized fields in order to communicate in a meaningful way across our system.
- **Menu Path:** Avatar CWS>Treatment Planning>**Adult/Older Adult MH Treatment Plan of Care**

The screenshot shows a search interface with the following elements:

- Search Forms:** A search bar containing the text "Adult/Older Adult M|".
- Table:** A table with two columns: "Name" and "Menu Path". The first row is highlighted in green and contains the text "Adult/Older Adult MH Treatment Plan of Care" under "Name" and "Avatar CWS / Treatment Planning" under "Menu Path".
- Navigation:** At the bottom, there are three buttons: "<= Previous 25", "1 through 1 of 1", and "Next 25 =>".

Starting the Adult/Older Adult MH Treatment Plan of Care

Chart > Adult/Older Adult MH Treatment Plan of Care

Adult/Older Adult MH Tre

Submit

Plan Effective Date: 05/15/2015

Will automatically populate with who last updated the plan

Last Updated: [Empty]

Last Updated By: [Empty]

Plan Type: Select "Initial" or "Update"

Treatment Plan Status: Draft Pending Approval Final

Team Member To Notify (for Pending Approval): [Empty]

Plan End Date: 5/15/16

Plan Effective and End Date are based on Episode Opening (Anniversary Date)

Client was linked to culture specific and/or linguistic services: Yes No

Client has been informed of the Grievance/Appeal process at least annually: Yes No

Client has been informed of the DPH Notice of HIPPA Privacy Practices at least annually: Yes No

Treatment Plan Problem List

The federal government, as part of Meaningful Use, have required that problems be listed in a standardized format. They have adopted the Standardized Nomenclature Of MEDicine (SNOMED) codes. You can push a diagnosis to the problem list from the Diagnosis screen. It is also possible to add Problem codes here or once you launch the plan.

Problems **Do not add to the Problem List here.**

	Include in this plan?	Problem	Other	Type	Date Identified	Date of Onset	Time Of Onset	Status	Severity	Chronicity
1	<input type="checkbox"/>	Chronic anxiet...				08/20/2015		Active (A)		
2	<input type="checkbox"/>	Homeless singl...				10/06/2014		Active (A)		
3	<input type="checkbox"/>	Posttraumatic ...				10/06/2015		Active (A)		
4	<input type="checkbox"/>	Geophagia (SN...				01/21/2016		Active (A)		
5	<input checked="" type="checkbox"/>	Masked depre...				01/27/2016		Active (A)		

New Row Delete Row

Diagnosis

The screenshot shows a web-based medical diagnosis form. On the left is a sidebar with a 'Diagnosis' header, a 'Submit' button, and several icons. The main form area includes:

- Type Of Diagnosis:** Radio buttons for Admission, Discharge, Onset, and Update.
- Date Of Diagnosis:** A date picker with fields for month, year, and day.
- Time Of Diagnosis:** A time picker with fields for hours, minutes, and AM/PM.
- Diagnoses Table:** A table with columns: Ranking, Description, Status, Estimated Onset, Classification, Resolved, Bill Order, ICD-9 Code, and ICD-10. Below the table are 'New Row' and 'Delete Row' buttons.
- Search and Filter Section:** Includes a 'Diagnosis Search' field, 'Status' (Active, Working, Rule-out, Resolved, Void), 'Estimated Onset Date', 'Resolved Date', 'Ranking' (Primary, Secondary, Tertiary), and 'Bill Order'.
- Additional Information Section:** Includes 'Code Crossmapping', 'Present On Admission Indicator', 'Classification', 'Diagnosing Practitioner', and 'Remarks'.
- Bottom Section:** An 'Add To Problem List' section with 'Yes' and 'No' radio buttons, which is circled in red.

Optional: Plan Participants

The Clinician would enter their name here in order to get a notification in their To Do Items, that a Treatment Plan is about to expire.

1. Double click in the Role box and then double click on the correct role.
2. You can search for Staff ID by entering staff ID or by last name, first.
3. Click Tab.
4. A list of matches will appear.
5. Double click on the Staff Name you would like to enter.
6. Yes or No
7. Yes, to receive a to do item No, if not

Role	Staff ID	Participant Name	Plan Author	Notification
1	hom,k			

Code	Description
2	Client
1	Clinician/Staff
3	Other

Code	Description
002775	002775 HOM,SHELLEY
003804	003804 HOM,JUDEE
003805	003805 HOM,KELLEE

New Row Delete Row

Optional: Plan Participants

- You can enter other participants, for example, other staff members, family members, etc.

Plan Participants

	Role	Staff ID	Participant Name	Plan Author	Notification
1	Clinician/Staff (1)	HOM,KELLEEE (00...	HOM,KELLEEE	Yes (Y)	Yes (Y)
2	Other (3)		<input type="text" value="t"/>	No (N)	No (N)


New Row Delete Row

Participant Name


Type Name Here|

Ok Cancel


Strengths, Impairments, and Plan for Discharge

Client Strengths 

▼

Impairments 

<input checked="" type="checkbox"/> Psychiatric Symptom Severity	<input type="checkbox"/> Current RISK
<input checked="" type="checkbox"/> Behavioral Issues	<input checked="" type="checkbox"/> Basic Needs
<input checked="" type="checkbox"/> Homeless/Housing	<input checked="" type="checkbox"/> Substance Abuse/Dependence
<input checked="" type="checkbox"/> Social/Family/Relationship/Role Stressor	<input type="checkbox"/> Medical/Health
<input checked="" type="checkbox"/> Language Barriers	<input type="checkbox"/> Legal Status/Criminal Involvement
<input checked="" type="checkbox"/> Employment/Education/Daily Activities	

Plan for Discharge or Step-Down 

Launch Plan

Treatment Plan – Problem

Chart **Adult/Older Adult MH Treatment Plan of Care**

Filters
 Age Group Gender
 Selected Programs

Search

Library

Adult/Older Adult MH Treatment Plan of Care: MINNIE TEST
Problem: Depressive disorder

Add New Problem Add New Goal Add New Objective Add New Intervention Delete Selected Item

Problem Code
Depressive disorder

Date of Onset
01/15/2016

Treatment Plan Problem Description
Depressive disorder

Date Problem Identified
02/05/2016

Date Closed

Other

Status (Problem List)
Active

Status
Active

Components of the Problem Section

- The following sections will populate the Problem List

The screenshot shows a form with four main sections:

- Problem Code:** A text input field with a search icon on the right.
- Other:** A larger text input field with a search icon on the right.
- Date of Onset:** A date picker field with 'T' and 'Y' buttons.
- Status (Problem List):** A dropdown menu with the following options: Active (highlighted in green), Inactive, Monitoring, Resolved, and Unresolved.

Problem Code (see next page)

Other only becomes active if the Problem Code is “Other”

Date of Onset can be date of assessment

Status if Inactive or Resolved are selected they will drop off the list in future TPOCs

Components of the Problem Section

- Problem Code: You can search by DSM IV, DSM 5, ICD 9, ICD 10 description or code. It will display a SNOMED code.

The screenshot shows a search interface for 'Problem Code'. The search input field contains '309.81'. Below the input is a table of results with two columns: 'Code' and 'Value'. The first row is highlighted in green.

Code	Value
SNOMED-192042008	(SNOMED-192042008) Acute post-trauma stress state
SNOMED-192061007	(SNOMED-192061007) Concentration camp syndrome
SNOMED-25944005	(SNOMED-25944005) Rape trauma syndrome: silent reaction
SNOMED-313182004	(SNOMED-313182004) Chronic post-traumatic stress disorder
SNOMED-317816007	(SNOMED-317816007) Stockholm syndrome
SNOMED-318784009	(SNOMED-318784009) Posttraumatic stress disorder, delayed onset
SNOMED-39093002	(SNOMED-39093002) Post-trauma response
SNOMED-443919007	(SNOMED-443919007) Complex posttraumatic stress disorder
SNOMED-446175003	(SNOMED-446175003) Acute posttraumatic stress disorder following military combat
SNOMED-446180007	(SNOMED-446180007) Delayed posttraumatic stress disorder following military combat
SNOMED-47505003	(SNOMED-47505003) Posttraumatic stress disorder
SNOMED-54231004	(SNOMED-54231004) Rape trauma syndrome
SNOMED-7397008	(SNOMED-7397008) Aggressor identification syndrome

Navigation controls at the bottom include: '<= Previous 25', '1 through 13 of 13', and 'Next 25 =>'.

Treatment Plan – Adding Additional Problems

Adult/Older Adult MH Treatment Plan of Care: SUMMARYONE TESTCLIENTAVATAR

- Problem: Symptoms of anxiety interfere with client's ADLs.
 - Goals
 - Reduce symptoms of anxiety.
 - Objectives
 - Client will decrease the number of times she has to leave group unexpectedly due to symptoms of anxiety from 3 times per week to 1 time per week.
 - Interventions
 - Individual therapy once per week with therapist in order to address trauma, Group therapy three times per week with group therapists in order to practice skills related to self regulation of anxiety.

Click the highlight the name of the Treatment Plan, then click "Add New Problem."

Add New Problem Add New Goal Add New Objective Add New Intervention Delete Selected Item

Treatment Plan - Adding a Goal

Adult/Older Adult MH Treatment Plan of Care: SUMMARYONE TESTCLIENTAVATAR

Problem: Symptoms of anxiety interfere with client's ADLs.

Goals

- Reduce symptoms of anxiety.

Add New Problem Add New Goal Add New Objective Add New Intervention Delete Selected Item

Goal related to Problem (Include Client's own words)

Reduce symptoms of anxiety.

If Resolved is selected, you will be asked to enter "Date Closed"

Date Identified: 08/17/2015

Date Closed:

Status: Active

- Active
- Inactive
- Resolved

Treatment Plan – Adding an Objective

The screenshot displays a software interface for creating a treatment plan. At the top, a tree view shows the following structure:

- Adult/Older Adult MH Treatment Plan of Care: SUMMARYONE TESTCLIENTAVATAR
 - Problem: Symptoms of anxiety interfere with client's ADLs.
 - Goals
 - Reduce symptoms of anxiety.
 - Objectives
 - Client will decrease the number of times she has to leave group unexpectedly due to symptoms of anxiety from 3 times per week to 1 time per week.

Below the tree view is a navigation bar with buttons: Add New Problem, Add New Goal, Add New Objective, Add New Intervention, and Delete Selected Item.

The main content area contains the following text:

The section should a)list specific quantifiable/observable outcomes, b)describe how the objective will be measured/demonstrated; c)relate to the mental health needs/symptoms/behaviors; and d)state the specific functional impairment.

Objective

Client will decrease the number of times she has to leave group unexpectedly due to symptoms of anxiety from 3 times per week to 1 time per week.

Below the objective text are two date input fields:

- Date Identified: 08/17/2015
- Date Met: (empty)

To the right of the Date Met field is a **Status** dropdown menu with the following options:

- Unmet (selected)
- Met
- Partially Met
- Unmet

A red callout box with a pink background contains the text: "If 'Met' is selected, you will be asked to enter Date Met." Two red arrows point from this box to the "Met" option in the status dropdown and the "Date Met" input field.

Treatment Plan – Adding an Intervention

Adult/Older Adult MH Treatment Plan of Care: SUMMARYONE TESTCLIENTAVATAR

- Problem: Symptoms of anxiety interfere with client's ADLs.
 - Goals
 - Reduce symptoms of anxiety.
 - Objectives
 - Client will decrease the number of times she has to leave group unexpectedly due to symptoms of anxiety from 3 times per week to 1 time per week.
 - Interventions
 - Individual therapy once per week with therapist in order to address trauma, Group therapy three times per week with group therapists in order to practice skills related to self regulation of anxiety.

Buttons: Add New Problem, Add New Goal, Add New Objective, Add New Intervention, Delete Selected Item

This section should describe the proposed treatment interventions including a) modality (individual, group, case management), b) proposed frequency, c) duration, d) and how they address the functional impairments.

Intervention

Individual therapy once per week with therapist in order to address trauma, Group therapy three times per week with group therapists in order to practice skills related to self regulation of anxiety.

Date Identified: 08/17/2015

Date Discontinued: [Empty]

Status: Continue (selected), Discontinue

If "Discontinue" selected, you will be used to enter Date Discontinued.

Treatment Plan – Editing Items

Adult/Older Adult MH Treatment Plan of Care: SUMMARYONE TESTCLIENTAVATAR

- Problem: Symptoms of anxiety interfere with client's ADLs.
 - Goals
 - Reduce symptoms of anxiety.
 - Objectives
 - Client will decrease the number of times she has to leave group unexpectedly due to symptoms of anxiety from 3 times per week to 1 time per week.
 - Interventions
 - Individual therapy once per week with therapist in order to address trauma, Group therapy three times per week with group therapists in order to practice skills related to self regulation of anxiety.

Click to highlight the item you would like to edit and change the text below.

Add New Problem Add New Goal Add New Objective Add New Intervention Delete Selected Item

This section should describe the proposed treatment interventions including a) modality (individual, group, case management), b) proposed frequency, c) duration, d) and how they address the functional impairments.

Intervention

Individual therapy once per week with therapist in order to address trauma, Group therapy three times per week with group therapists in order to practice skills related to self regulation of anxiety.

Date Identified: 08/17/2015

Date Discontinued:

Status: Continue

Treatment Plan – Deleting Items

Adult/Older Adult MH Treatment Plan of Care: SUMMARYONE TESTCLIENTAVATAR

- Problem: Symptoms of anxiety interfere with client's ADLs.
 - Goals
 - Reduce symptoms of anxiety.
 - Objectives
 - Client will decrease the number of times she has to leave group unexpectedly due to symptoms of anxiety from 3 times per week to 1 time per week.
 - Interventions
 - Individual therapy once per week with therapist in order to address trauma, Group therapy three times per week with group therapists in order to practice skills related to self regulation of anxiety.

You must delete starting from the bottom. In order to delete an objective, you must first delete the intervention that is attached to it.

Click to highlight the bottom level item and then select "Delete Selected Item"

Add New Problem Add New Goal Add New Objective Add New Intervention Delete Selected Item

This section should describe the proposed treatment interventions including a) modality (individual, group, case management), b) proposed frequency, c) duration, d) and how they address the functional impairments.

Intervention

Individual therapy once per week with therapist in order to address trauma, Group therapy three times per week with group therapists in order to practice skills related to self regulation of anxiety.

Date Identified: 08/17/2015 Status: Continue

Date Discontinued:

Treatment Plan – Submitting and Saving

Adult/Older Adult MH Treatment Plan of Care: MINNIE TEST

Add New Problem Add New Goal Add New Objective Add New Intervention Delete Selected Item

Problem Code
Depressive disorder

Date of Onset
01/15/2016

Treatment Plan Problem Description
Depressive disorder

Date Problem Identified
02/05/2016

Date Closed

Other

Status (Problem List)
Active

Status
Active

Back to Plan Page Exit to Home View

Treatment Plan – Submitting and Saving

The screenshot shows a software interface for managing a treatment plan. The main title is "Adult/Older Adult MH Treatment Plan of Care". On the left side, there is a sidebar with a "Submit" button and several icons (Facebook, email, speech bubble, error, globe, star). Below the sidebar is a section labeled "Online Documentation". The main content area contains the following fields and options:

- Plan Effective Date:** 02/05/2016, with "T" and "Y" buttons and a calendar icon.
- Plan Type:** Initial
- Plan End Date:** 02/04/2017, with "T" and "Y" buttons and a calendar icon.
- Client was linked to culture specific and/or:** Yes
- Client has been informed of the Grievance/** Yes


Printing the TPOC

Search Forms

adult m

Name	Menu Path
Adult/Older Adult MH Treatment Plan of Care	Avatar CWS / Treatment Planning
Adult/Older Adult MH POC Report	Avatar CWS / Treatment Planning

<= Previous 25 1 through 2 of 2 Next 25 =>

	San Francisco Department of Public Health Community Behavioral Health Services	Name: TESTCLIENTAVATAR,SUMMARYONE Client ID#: 999047242 Episode #: 1 Episode Opening Date: 1/10/2015 Episode Program: CBHS Pharmacy (38CXR) Print Date: 8/17/2015
	Adult/Older Adult MH Treatment Plan of Care	
Confidential Patient Information		
Date Treatment Plan Started: 8/12/2015	Plan Type: Initial	
Date Treatment Plan Finalized:	Plan Status: Draft	
Plan End Date: 8/12/2016	Discharge Date:	
Last Updated: 8/17/2015		

Progress Notes – Selecting TP item Note Addresses

Select T.P. Version

- Adult/Older Adult MH Treatment Plan of Care
- CYF 0-4 Treatment Plan Of Care
- CYF 0/18 Treatment Plan of Care
- CYF Treatment Plan of Care

Select T.P. Version

Adult/Older Adult MH Treatment Plan of Care

Select T.P. Item Note Addresses

Clear 'Note Addresses Which Treatment Plan Problem' Text.

Progress Notes – Selecting TP item Note Addresses (cont)

Progress Notes (Group and Individual)

Adult/Older Adult MH Treatment Plan of Care

- Adult/Older Adult MH Treatment Plan of Care - - Plan Effective Date: 07/16/2015 (Plan Type: 1 Submitted: 08/17/2015)
- Problems: Description of Problem here
- Problems: Senile dementia with depression
- Goals
 - Reduce Depression
- Objectives
 - reduce depression...
- Interventions
 - Intervention

Return

Progress Notes – Selecting TP item Note Addresses (cont)

Note Addresses Which Treatment Plan Problem

Problems-> Senile dementia with depression

Goals-> Reduce Depression

Objectives-> reduce depression...