WORKFLOW AND INSTRUCTIONS FOR LPHA SIGNING SC MH EPISODIC TREATMENT PLAN

Per state audit feedback, a plan is not valid and does not authorize services until it is signed and dated by an LPHA.

When the plan author is not an LPHA, it can be difficult to find the date that the LPHA signed the treatment plan. In order to make it easier to find this date we have a new workflow as described in this document.

IMPORTANT FACTS ABOUT THE NEW WORKFLOW

- **WE WILL NO LONGER USE DOCUMENT ROUTING FOR THE SC MH EPISODIC TREATMENT PLAN.**
- **NON-LPHA AUTHOR WILL CREATE A TO DO ITEM FOR THE LPHA THAT HAS A DIRECT LINK TO THE DRAFT PLAN.**
- **LPHA WILL OPEN THE COMPLETED DRAFT PLAN, FINALIZE AND SUBMIT THE PLAN, THUS SIGNING PLAN.** **(LPHA SIGNS PLAN AFTER CLIENT/FAMILY/GUARDIAN SIGNATURES HAVE BEEN OBTAINED BY THE NON-LPHA AUTHOR.)**
- **SUBMIT DATE BY THE LPHA WILL BECOME THE START DATE OF THE PLAN, USING AN AVATAR SETTING THAT DOES THIS.**

Once a treatment plan is finalized, submitted and signed (see pic at right), the signature/submit date is easily seen in the chart view. (see below)

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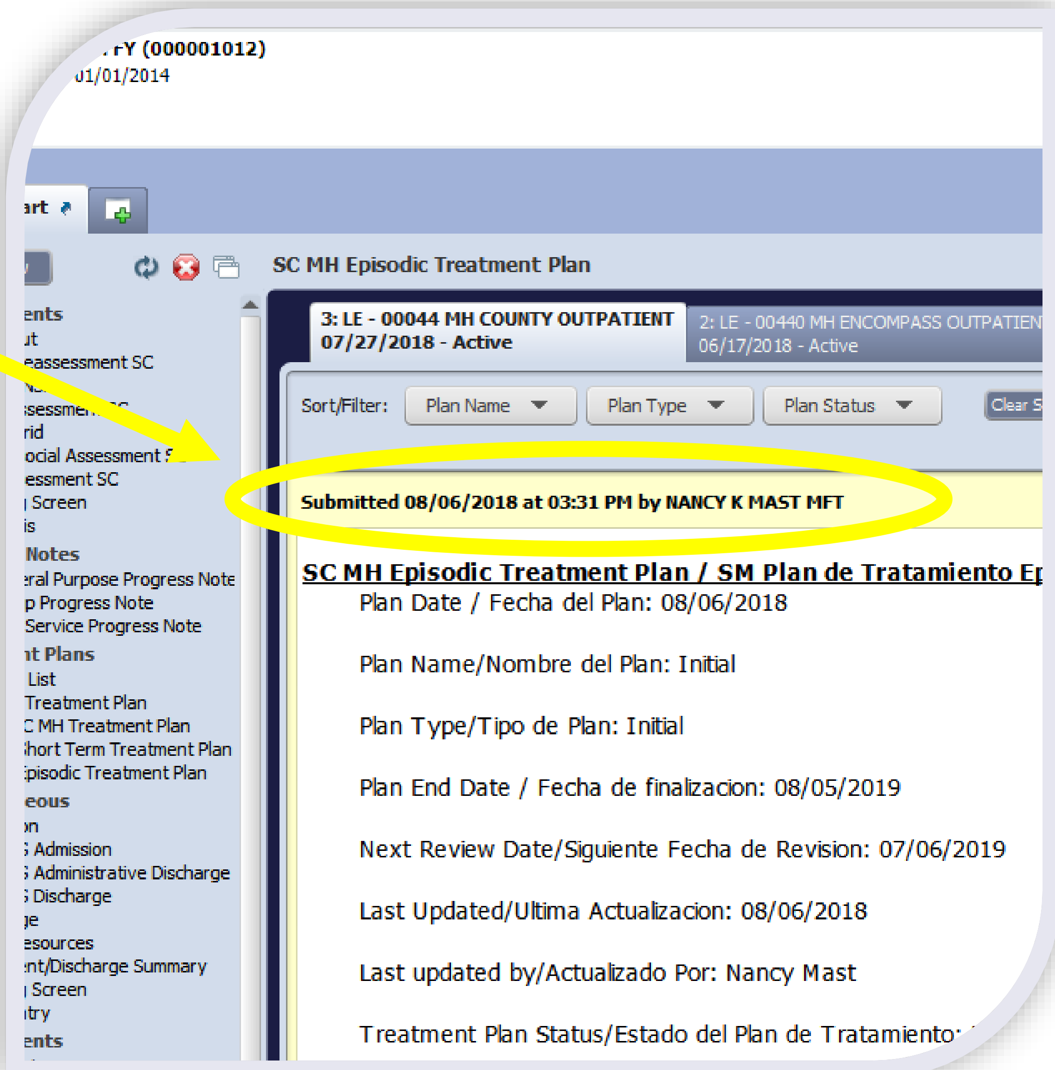
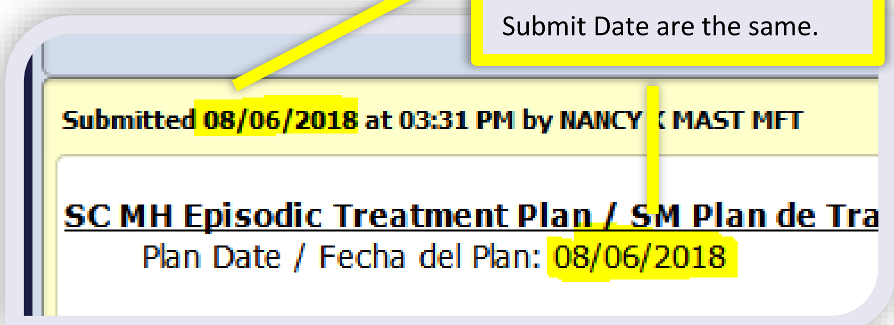
When the LPHA finalizes, signs and submits the plan, the submit date/signature date will be easily visible at the top of the plan in the chart view.

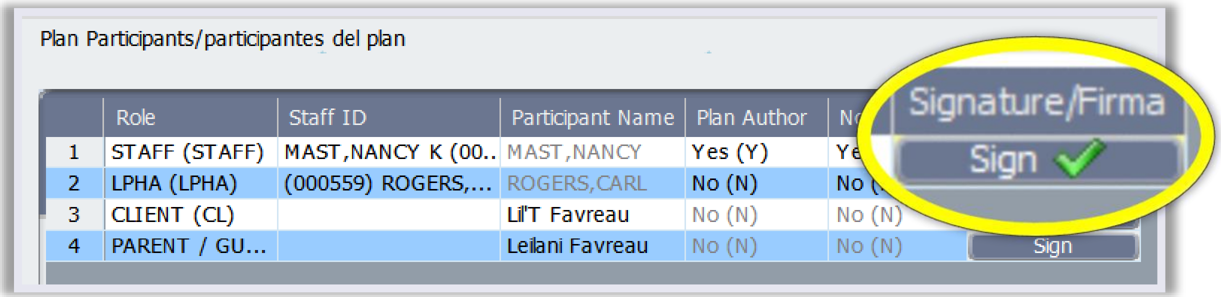


There is a setting in Avatar that will change the start date of a plan to the date when the plan was finalized and submitted. With this setting, the date the LPHA finalizes and submits the plan becomes the Plan Date or Start Date of the plan.

The Plan Date and the Submit Date are the same.

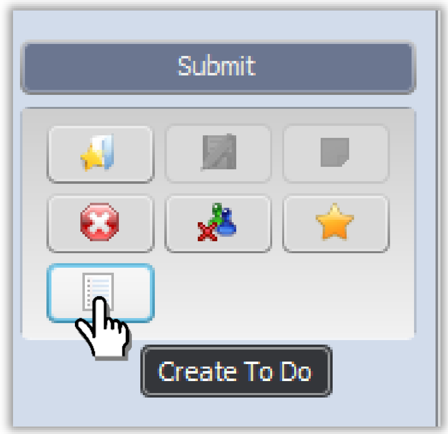


Because the non-LPHA/Author never submits the plan, she should use the signature pad or laptop touch pad to sign in the Plan Participants table.

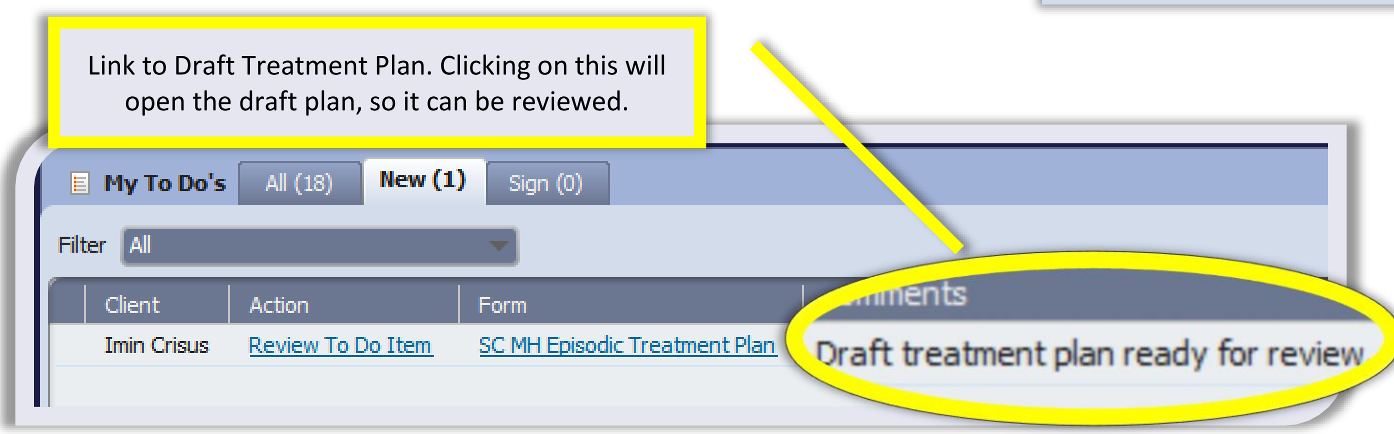


About Creation of To Do Items

If you open the SC MH Episodic Treatment Plan, you will see a new item on the icon menu box. If you hover over it, it will say, "Create To Do."



WHAT THE CREATE TO DO ICON DOES: The "Create To Do" icon, allows you to add an item to anyone's My To Do's. This To Do Item has a comment to explain why I was sent, and a link to the form. On this case, the Non-LPHA author uses the To Do Item to inform of the status of a treatment plan, the SC MH Episodic Treatment Plan.

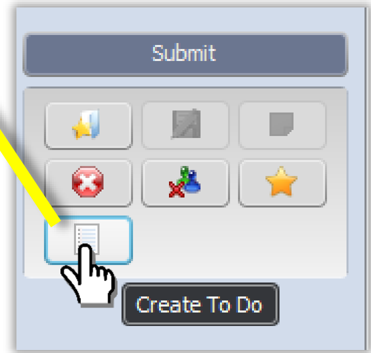


To Do Items vs. Document Routing

Document Routing sends a copy of the document for a co-signature. It compels the recipient (Supervisor/LPHA) to either co-sign the document or return it to draft for more editing. Creating a **To Do Item** simply sends a link to the document and a comment. There is no co-signature required. To Do Items can be used for a variety of purposes, such as sending a "heads up" to a client's doctor when a crisis intervention was done. A link to the crisis progress note can be sent to anyone for review and it does not compel a co-signature. In this case, the To Do Item notifies the LPHA that the treatment plan is ready for review or that the plan is ready for LPHA signature.

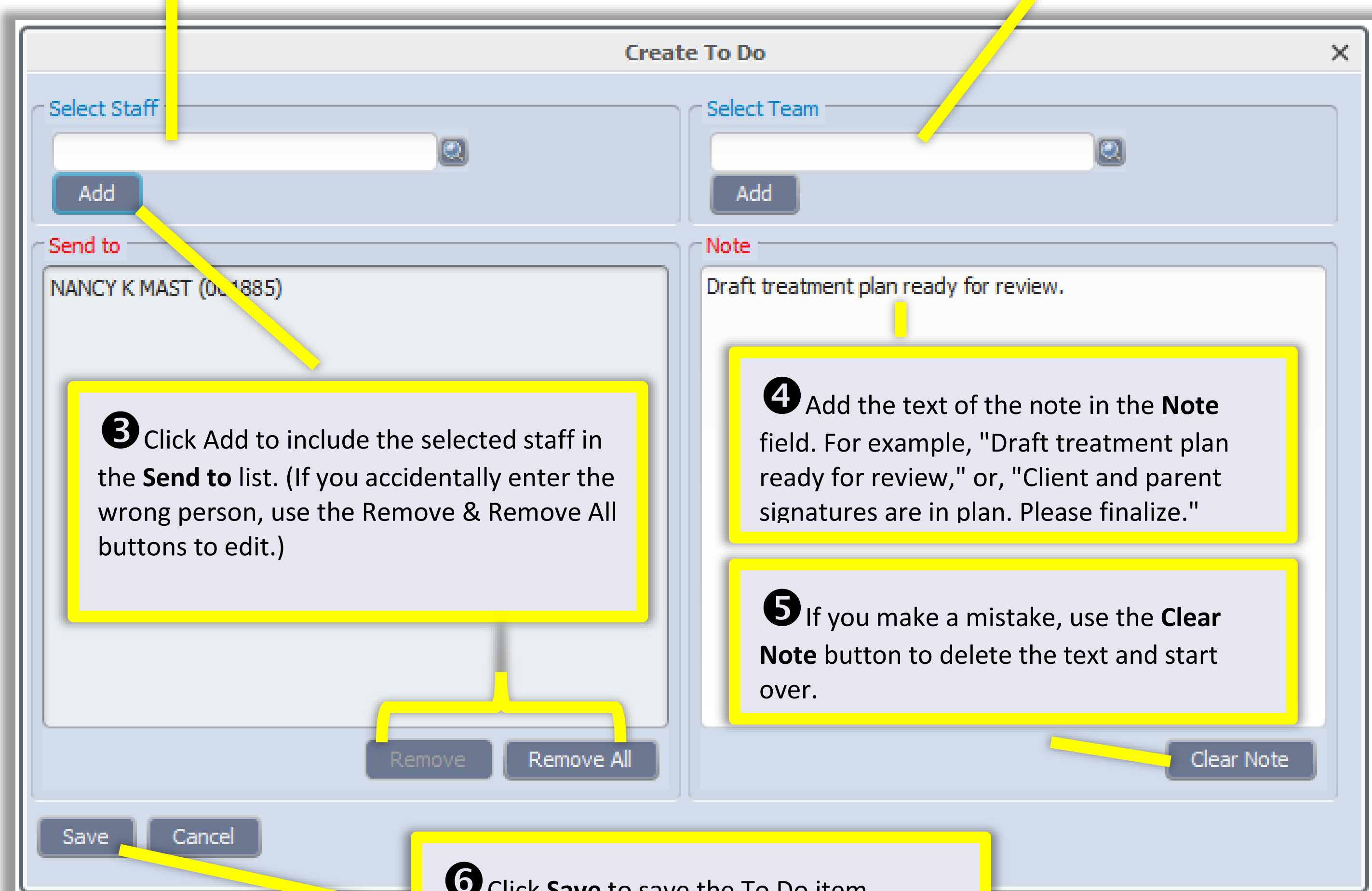
To Create a To Do Item, Follow the Steps Below

❶ Click the **Create To Do** icon to open up the Create To Do screen.



❷ Use the **Select Staff** field to search for and select the staff member you want to receive the To Do item. In this case, you only want to send a To Do Item to one person, the LPHA who signs the plan. (Skip the Select Team field.)

SKIP the Select Team field.



❸ Click Add to include the selected staff in the **Send to** list. (If you accidentally enter the wrong person, use the Remove & Remove All buttons to edit.)

❹ Add the text of the note in the **Note** field. For example, "Draft treatment plan ready for review," or, "Client and parent signatures are in plan. Please finalize."

❺ If you make a mistake, use the **Clear Note** button to delete the text and start over.

❻ Click **Save** to save the To Do item.

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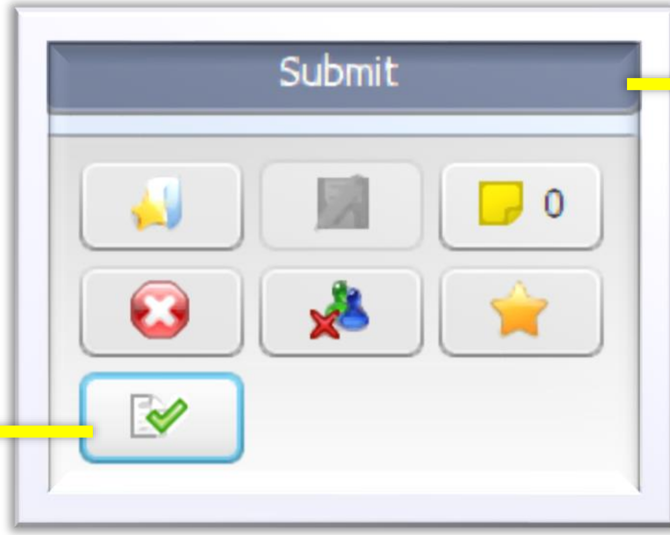
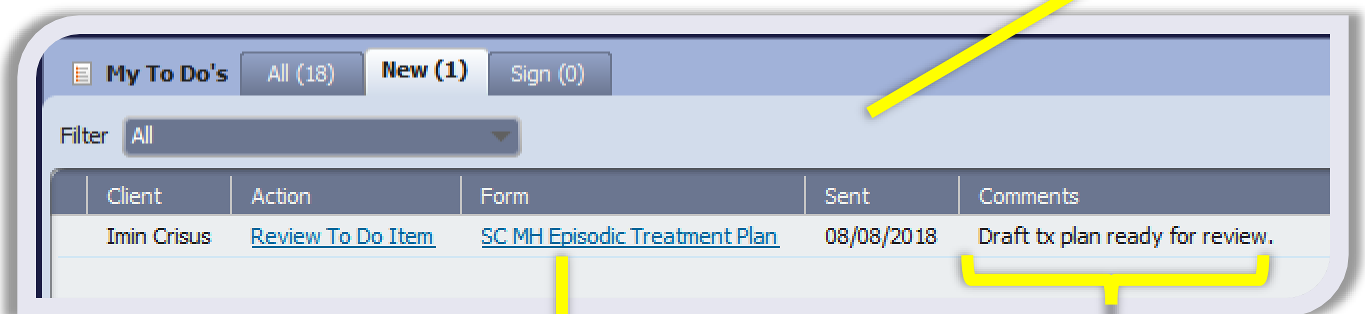
❼ Once you click "Save" in the Create To Do popup, a green check mark will appear over the **Create To Do** icon indicating that a To-Do item has been created.



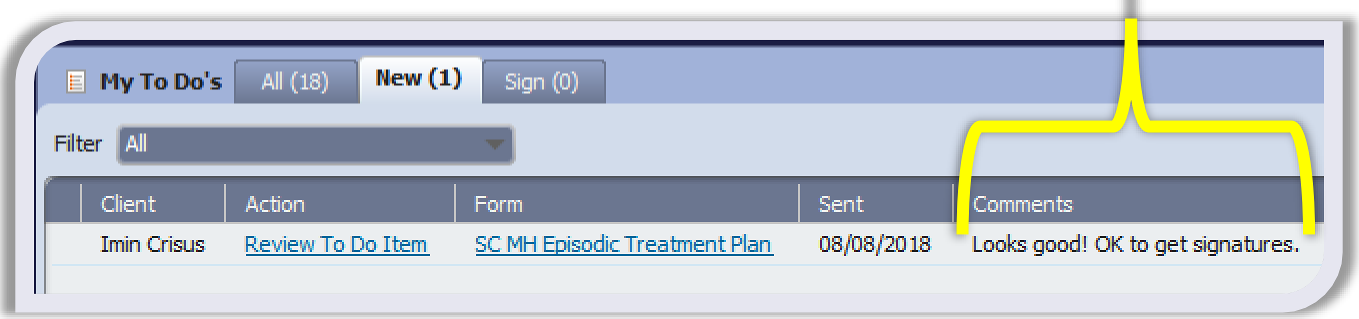
❽ When the plan is submitted, a To Do Item will be sent to the selected staff (LPHA).



❾ Clicking on the form name, SC MH Episodic Treatment Plan, launches/opens the form. Once the plan is reviewed, the LPHA simply submits it.

The comment tells the LPHA what action is needed. In this case, a review of the plan before the Author gets the client/legal guardian signature.

❿ AFTER REVIEWING THE PLAN, the LPHA may create another To Do Item for the Author informing that the plan can now be signed by the client/guardian.



WORKFLOW for LPHA Finalizing and Signing Treatment Plan

1. Before writing plan, Plan Author (non-LPHA) collaborates with client/family on potential treatment plan goals, etc...

2. In the first draft of the plan, the Plan Author creates a To Do Item that will notify the LPHA (usually the supervisor) that the plan is ready for review.

3. LPHA uses the link in the To Do Item from the Author to open the plan and review it.

   Plan DOES NOT meet standard.

   LPHA sends Author a My To Do with info about needed edits and/or meets with Author.

   Author makes edits to plan.

4. LPHA feels plan meets standard.

5. Before submitting a draft of the plan, the LPHA creates a To Do Item notifying the Author that it is OK to obtain signature(s).

6. Plan Author meets with client, guardian, etc…and gets signatures using the signature pad or laptop touchpad. Author signs plan using signature pad or laptop touchpad.

7. Plan Author adds date to "Copy offered..." question in plan.

8. Before resubmitting the draft plan, the Plan Author creates a To Do Item that notifies the LPHA that signatures are complete and that the plan is ready for LPHA signature.

9. LPHA opens plan in chart, using the To Do Item sent by the Author. LPHA finalizes and submits plan and when doing so, signs it.

Submit date is now the start date of the plan. (Plans have a setting that changes the Plan Date to the date the plan was finalized and submitted by the LPHA.)