Treatment Planning System User Guide:

Encounters

Adding an Encounter

An Encounter is a service or group of services that are documented through the Treatment Planning System. In order to add a new Encounter, the client must have a Treatment Plan that has at least one Problem associated with it. These Problems appear on the Face Sheet. To access the Face Sheet, click on the tab in EchoVantage labeled "Face Sheet". It may not be in the same place in relation to the other tabs that you see in the image below, but it will be found within that list of tabs.


Within the left column of the Face Sheet labeled "Outcomes", you will see any Problems that have been added to a Treatment Plan for the client. If this area is blank, that is because either no Treatment Plans have been added for the client or no Problems have been added to an existing Treatment Plan. For each Problem shown under Outcomes, you will see the problem, the current severity level of any assessments associated with the problem through Configuration, and a graph showing all of the client's scores for each associated assessment within the last 365 days. You will also see a "New Encounter" button for each Problem.

There are two ways to begin documenting an Encounter. First, you may click the New Encounter button under a Problem. You will be able to document services for any Problem associated with a client's treatment plan, regardless of which New Encounter button/Problem you choose.

Second, if an appointment has been scheduled using the EchoVantage scheduler, you can choose the EVENTS button at the top of the middle column on the Face Sheet to find the scheduler appointment, choose it, and document it from there. If you choose this option, you will not be able to document progress on Objectives and Milestones. Instead, you will be taken directly to the appointment to document the service.

Continuing with the first option of clicking the New Encounter button, choose an Intervention. You may have a list to choose from, or you may have just one Intervention listed. These Interventions are configured by your agency and the Interventions that you see are those that have been associated with the Problem you chose.
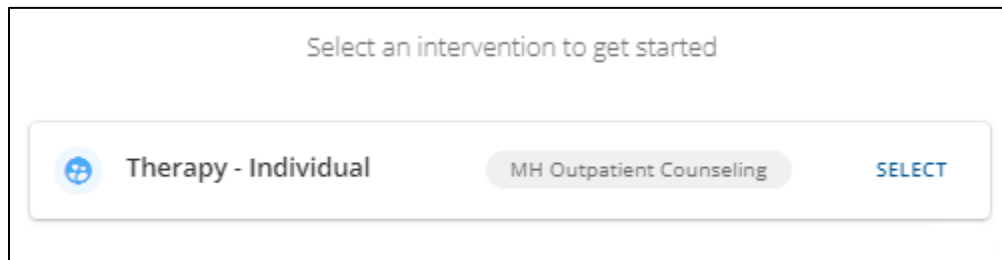
Once you click SELECT, you will begin entering your Encounter. Note that at the top left of the screen, the current status of the Encounter is shown, along with a trash can icon you can use to delete the Encounter.
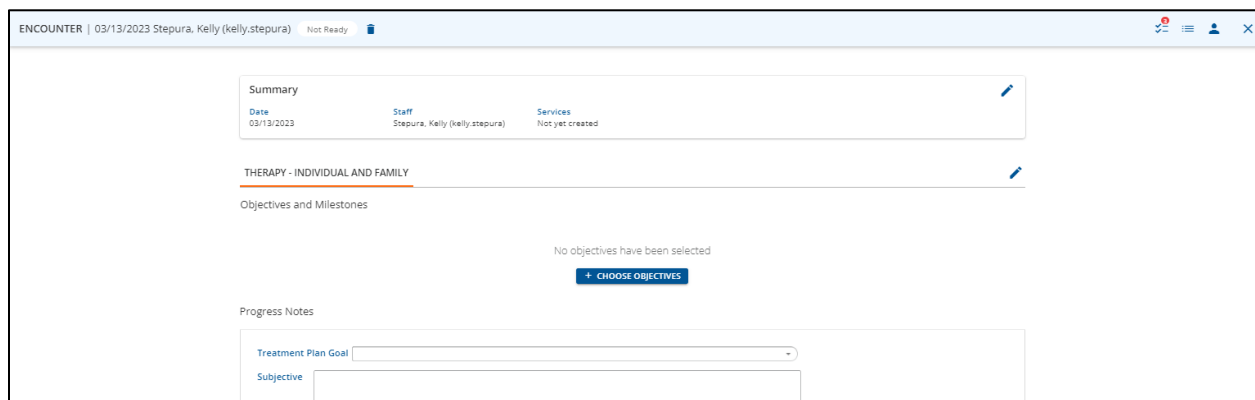

Also, at the top right of the screen, there are several icons. From left to right these icons allow you to:

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✍ SIGN	Sign the Treatment Plan or send it for other signatures
✍	View signatures associated with the Treatment Plan
✓① ✓—	View Tasks associated with the Encounter These are configured by your agency and may include reminders such as documentation deadlines or required fields on the Encounter itself that have not been completed.
☰	View the previous Activities from the middle column of the Face Sheet
👤	View treatment-related information from the Face Sheet, including treatment plans, treatment team, medications and diagnoses

Note that at the bottom right of the screen, there is a blue "plus" icon. Clicking it gives you the ability to add information, like problems, interventions, assessments, diagnoses, and lab orders without leaving the treatment plan.

Moving down the page, use the pencil icons on the right to edit the dates you've entered or to complete the Encounter Summary. The Progress Note that your agencies uses may be different than the one shown in the image above, and may be different depending on the type of service you are delivering. You may use the pencil icon next to the Intervention you've chosen to choose additional Interventions you will be performing during your Encounter.
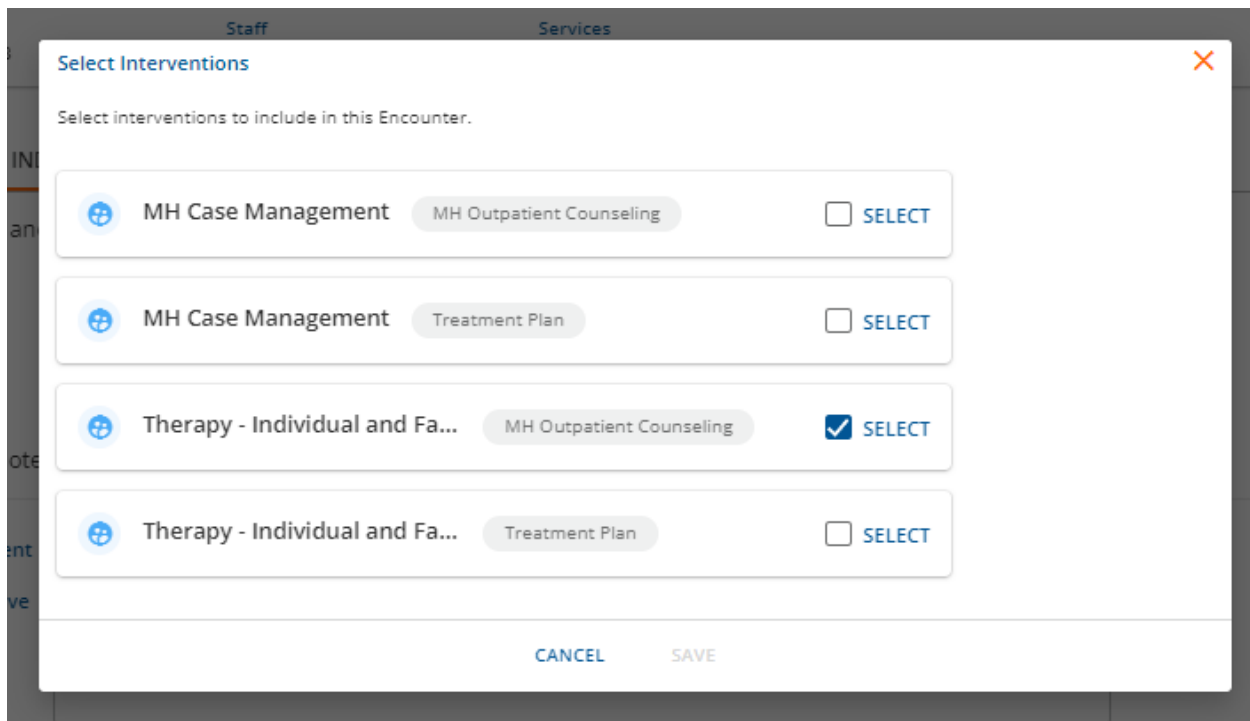
Additional Interventions will appear as tabs next to the original Intervention for entry purposes.

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Below each Intervention, you will see Objectives and Milestones. Choose the "CHOOSE OBJECTIVES" button to select Objectives that have been associated with the client's treatment plan in order to document progress on those Objectives for this Encounter.
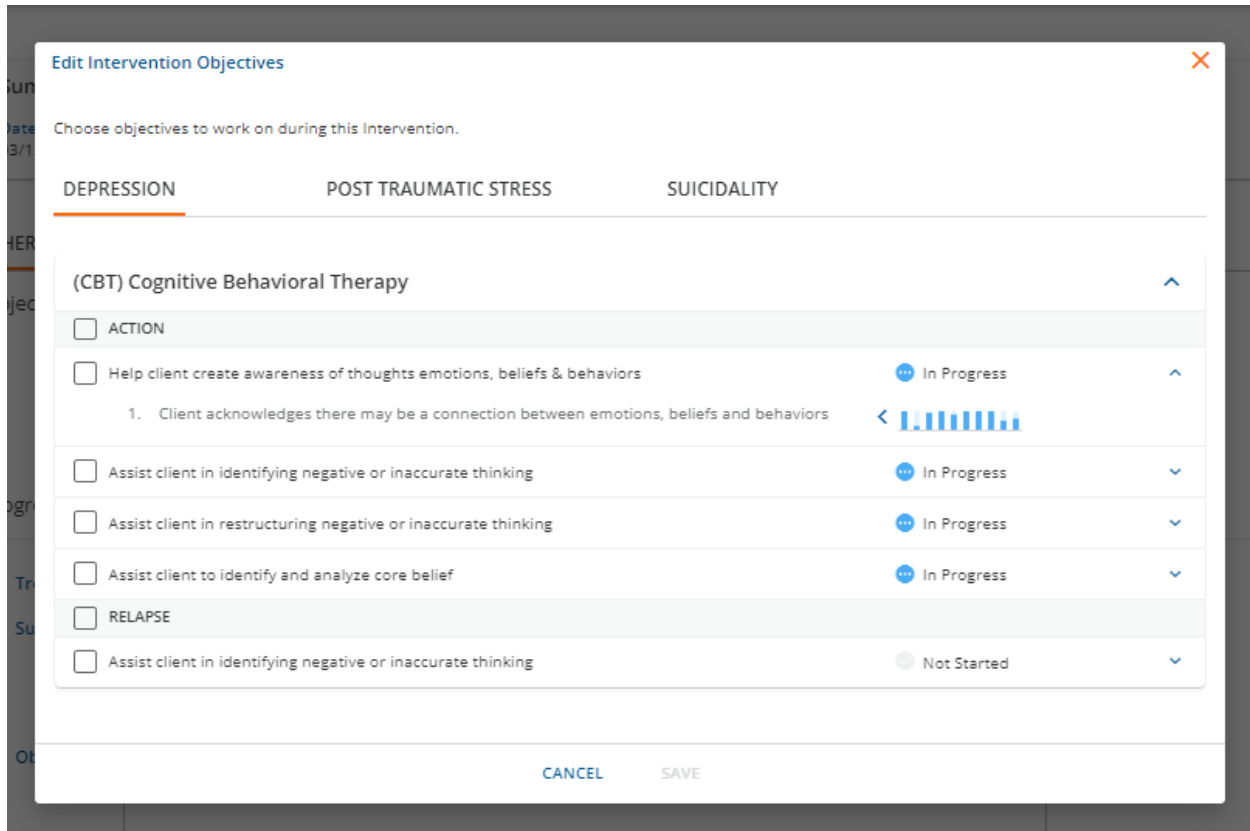
When choosing Objectives, you can see each Problem associated with the client's Treatment Plan as tabs across the top. You can choose Objectives associated with any of these Problems. For each Objective, you can see the status of the Objective. Also, you can use the down arrows on the right to view Milestones associated with each Objective and to view progress on these Milestones from previous Encounters.

Click the checkboxes to choose Objectives for this Encounter and click Save when done to return to the main Encounter screen. Note that the progress you document here in the Encounter will automatically update on your Treatment Plan and be displayed on the Treatment Plan as part of the history of work on Objectives and Milestones.

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Now you will see the Objectives you selected, along with their associated Milestones.

You can see the status of each Objective and can mark an Objective as Complete. If an Objective has been marked as complete it will have a green background and you can choose to "Continue Working" as well. You can also see the history of work that's been accomplished for each Milestone in the form of a bar chart. Your work today can be documented by checking the "Today" checkbox and moving the slider to indicate the amount of progress on that Milestone for this Encounter. Note that the History bar chart changes to include today's work as you do this.

When marking an Objective as complete, you will be required to choose a Reason and to document a Statement of Progress.

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Progress Notes

Once you have documented progress on Objectives and Milestones, scroll down to complete the Progress Note associated with this Encounter. The Progress Note has been configured by your agency and may include required fields. Once required fields are complete, you may Save the record.

Note that once the Encounter is saved, the status at the top left of the screen will change to "Ready to Sign" and a SIGN button will appear.

Signing the record will change the status to "Signed" and a yellow bar will appear, allowing you to create a Service for the Encounter.

For each of the Interventions associated with the Encounter, a form will appear so that the Service can be documented.

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Note that the Service Components (e.g., Program, Location) may already be filled in, depending on how your agency has configured the Intervention. Once you have completed all the required fields, a green bar will appear noting what documentation was saved, and you can Sign the documentation.
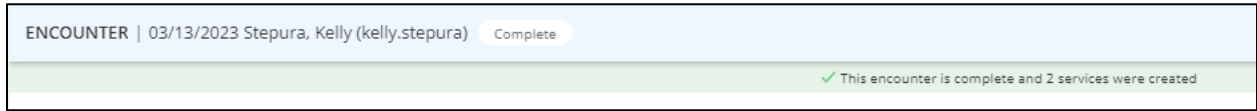
Incomplete Encounters

If documentation of an Encounter is not fully complete, the Encounter will appear on the Face Sheet with a blue background and can be chosen from there by clicking it to complete the Encounter.

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