



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.

The screenshot displays the EchoVantage interface for a client named Gale, Dorothy (GALD0000). The top navigation bar includes tabs for TIMELINE, PROFILE, CONTACT INFO, DOCUMENTS, EPISODES, ENROLLMENTS, DIAGNOSIS, SCHEDULE, FACE SHEET, PAYERS, and ACCOUNT. The main content area is divided into three columns: Outcomes, Encounters, and Treatment Plans. The Outcomes column shows a graph for Depression with a PHQ-9 Depression Score of Moderate and a 'NEW ENCOUNTER' button. The Encounters column lists several 'Incomplete Encounter' entries for Kelly Stepura and 'SOAPPN4' entries performed by Scott Taylor. The Treatment Plans column shows a draft plan for 'MH Outpatient Counseling' and a team of providers including Squires, Jack (SJ01) and Epstein, George (EG01).

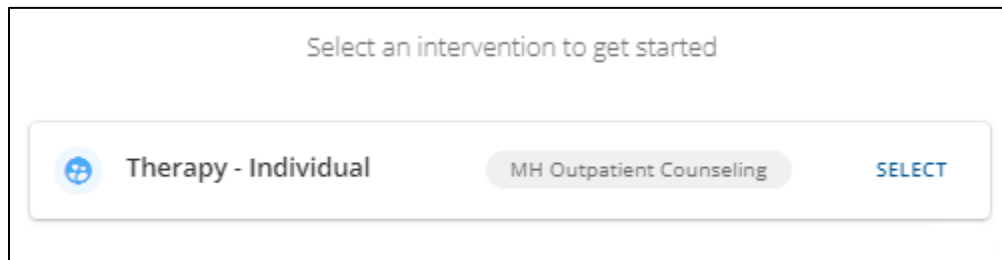
Within the left column of the Face Sheet labeled “Outcomes”, you will see any Problems that have been added to a Treatment Plan for the client. If this area is blank, that is because either no Treatment Plans have been added for the client or no Problems have been added to an existing Treatment Plan. 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.

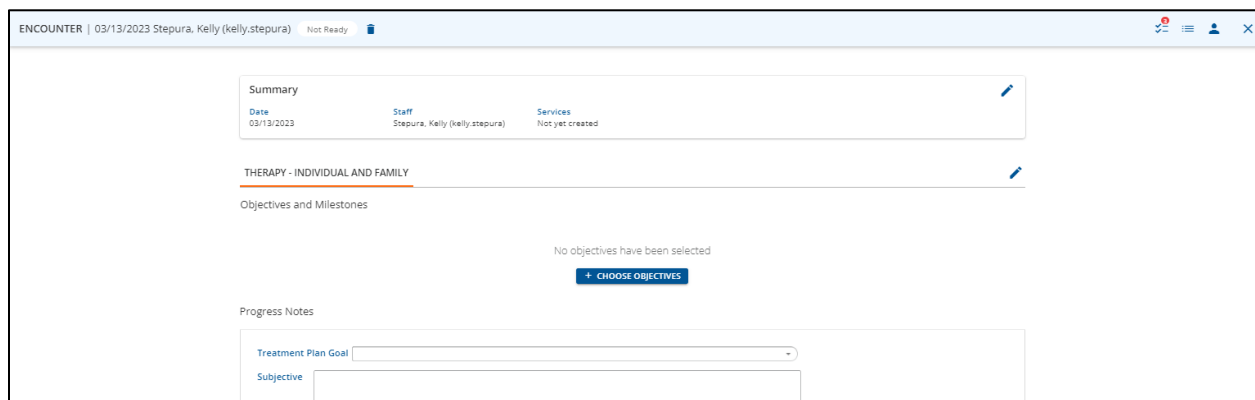
Second, if an appointment has been scheduled using the EchoVantage scheduler, you can choose the EVENTS button at the top of the middle column on the Face Sheet to find the scheduler appointment, choose it, and document it from there. If you choose this option, you will not be able to document progress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

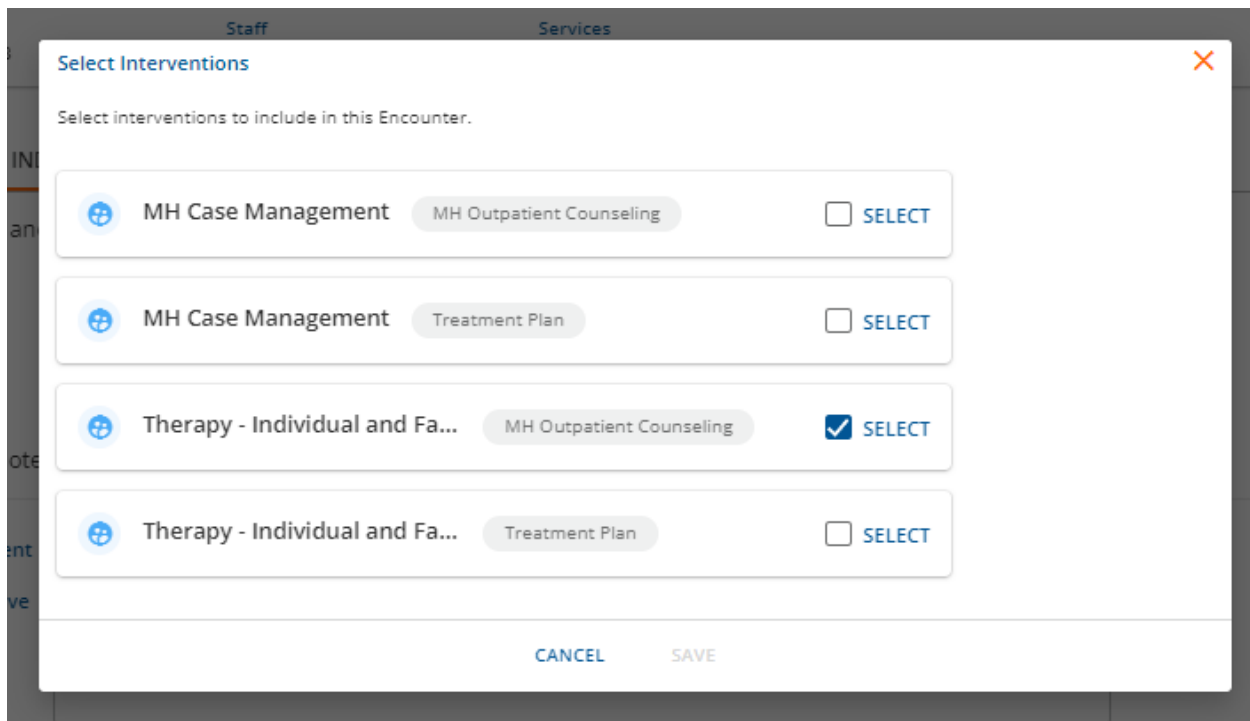


Also, at the top right of the screen, there are several icons. From left to right these icons allow you to:

	Sign the Treatment Plan or send it for other signatures
	View signatures associated with the Treatment Plan
	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

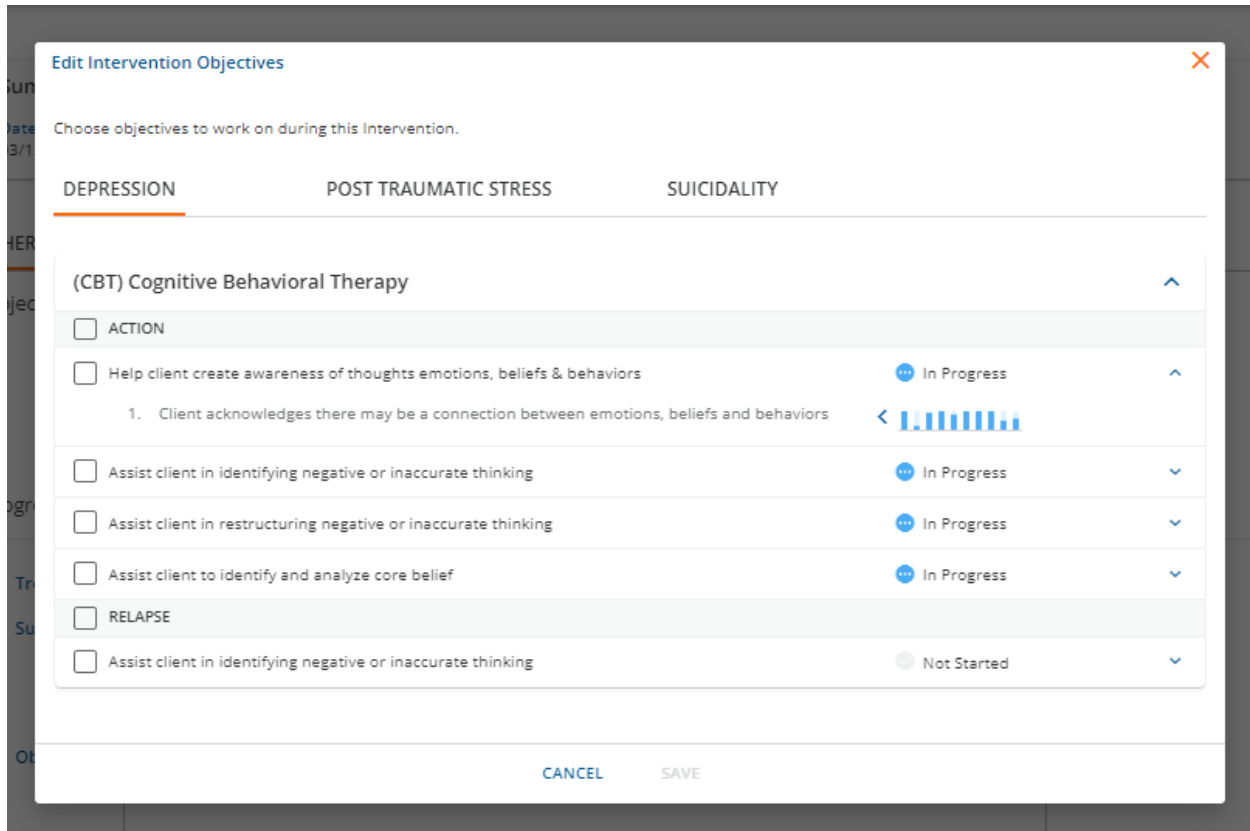
Note that at the bottom right of the screen, there is a blue “plus” icon. Clicking it gives you the ability to add information, like problems, interventions, assessments, diagnoses, and lab orders without leaving the treatment plan.

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.

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.

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

MH CASE MANAGEMENT THERAPY - INDIVIDUAL AND FAMILY

Objectives and Milestones

Help client create awareness of thoughts emotions, beliefs & behaviors Depression ✓ MARK COMPLETE ^

RECENT MILESTONE PROGRESS HISTORY TODAY

1. Client acknowledges there may be a connection between emotions, beliefs and behaviors

Help client create awareness of thoughts emotions, beliefs & behaviors Depression ✓ MARK COMPLETE ^

RECENT MILESTONE PROGRESS HISTORY TODAY

1. Client acknowledges there may be a connection between emotions, beliefs and behaviors

✓ Assist client in identifying negative or inaccurate thinking Depression CONTINUE WORKING ^

Marked complete 09/12/2022 by Stepura, Kelly (kelly.stepura) Details

No milestone progress recorded

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.

nt create awareness of thoughts emotions, beliefs & behaviors Depression

Mark Objective Complete

Marking an objective as complete will flag it for removal from the Treatment Plan.

Reason for Marking Complete *

Start typing to search...

Client Statement of Progress *

CANCEL SAVE

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.

The screenshot shows the top of a software interface. At the top left, it says 'ENCOUNTER | 03/13/2023 Stepura, Kelly (kelly.stepura) Ready to Sign'. On the right, there is a 'SIGN' button. Below this is a 'Summary' box containing a table with three columns: 'Date' (03/13/2023), 'Staff' (Stepura, Kelly (kelly.stepura)), and 'Services' (Not yet created). Below the summary box, there are two tabs: 'MH CASE MANAGEMENT' (which is selected) and 'THERAPY - INDIVIDUAL AND FAMILY'. There are also two edit icons (pencil icons) on the right side of the summary box and the tabs area.

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.

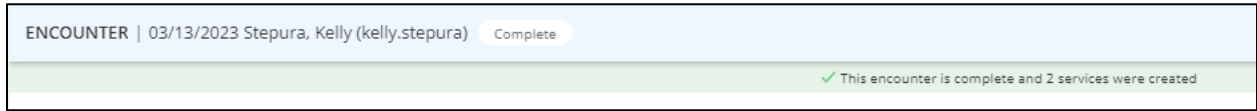
Signing the record will change the status to “Signed” and a yellow bar will appear, allowing you to create a Service for the Encounter.

This screenshot is similar to the previous one, but the status at the top left is now 'Signed'. A yellow bar has appeared at the bottom of the summary box, containing a warning icon and the text 'This note is signed and ready for a services to be created'. To the right of this bar is a button labeled 'CREATE SERVICES NOW'.

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

The screenshot shows a detailed form for defining a service. At the top, it says 'MH Case Management'. Below this are fields for 'Date *' (03/13/2023), 'Start *' (9:18 AM), 'End *', and 'Duration *'. There is a 'Scheduled Event' dropdown menu with 'Create New Event' selected. Under 'PARTICIPANTS', there are fields for 'Staff *' (Stepura, Kelly (kelly.stepura)) and 'Supervisor' (Start typing to search...). The 'SERVICE' section has a warning message: 'No Distinct Service Definition Found'. Below this are dropdown menus for 'Program *' (CM: Case Manage...), 'Location *' (CLINIC: Main Clinic), 'Activity *' (CM: Case Manage...), 'Attendance *' (Start typing to search...), and 'Recipient *' (ADULT: Adult Age >...). There is also a 'Credential' dropdown menu (Start typing to search...). Under 'DIAGNOSIS', there is a 'Client Diagnosis *' dropdown menu with 'F91.3: Oppositional defiant disorder (Primary)' selected, marked as 'Principal'. There are buttons for '+ ADD CLIENT DIAGNOSIS' and '+ ADD OTHER DIAGNOSIS'.

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.

