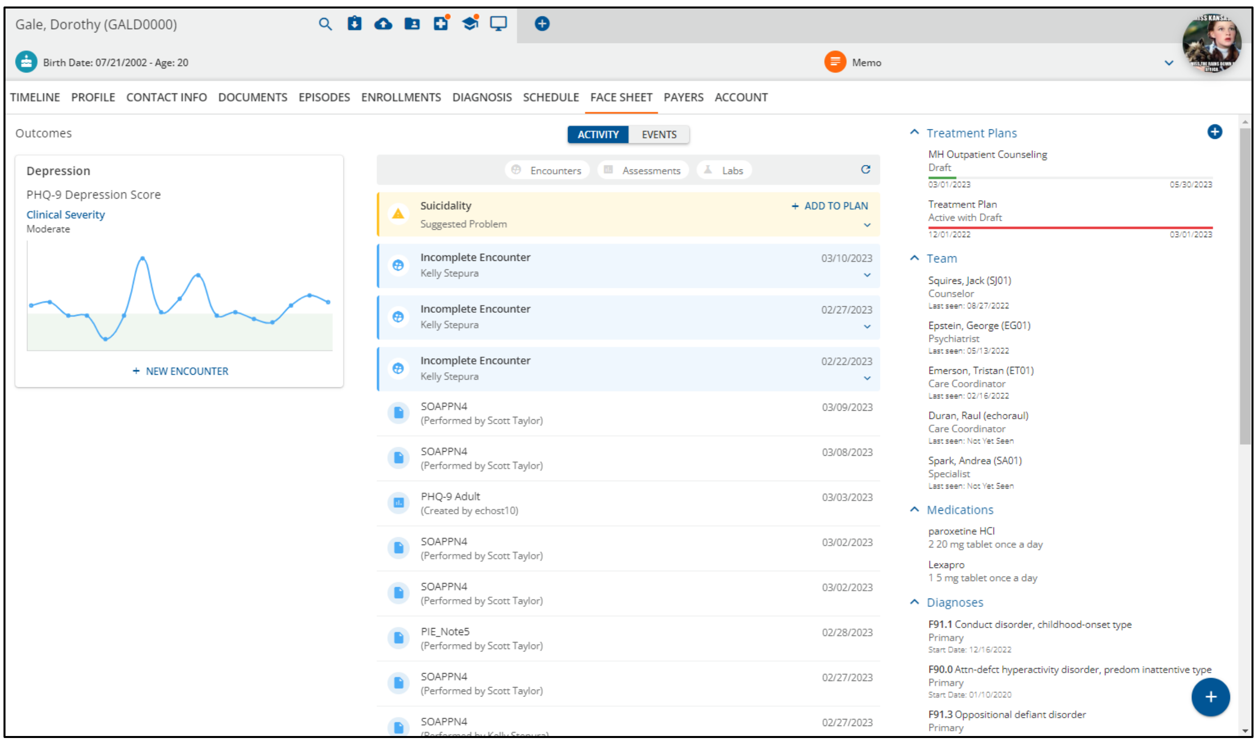
EchoVantage

Treatment Planning System User Guide:

Working with Treatment Plans

Face Sheet

The Face Sheet is the landing page for everything that you do within the Treatment Planning System. 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 which will be addressed in a separate guide.

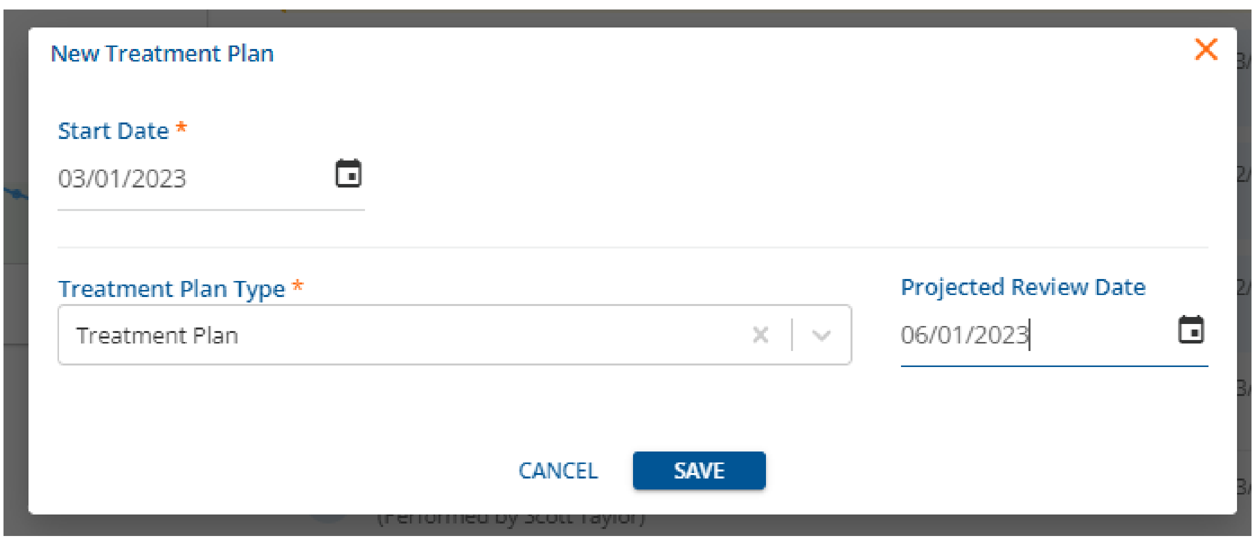
Within the middle column, you will see two tabs: Activity and Events. Activity displays events that have already occurred, such as previous appointments, assessments administered, and labs ordered. The three tabs under the Activity tab can be used for filtering. Events are appointments that have yet to occur. For both Activity and Events tabs, click on an item to view details about the record, or click the down error to the right of the item to view basic information.

Note that for some items, the background is colored. Light blue indicates that the record has not been completed, and yellow indicates a Suggested Problem. Problems are suggested based on Configuration, such that if the assessment results associated with a problem meet a certain criterion, it is suggested that a problem should be added to the treatment plan.

Within the right column, you'll find a list of existing Treatment Plans along with the ability to add a new Treatment Plan using the blue "plus" icon. For each Treatment Plan, the current status of the Plan is shown along with the start date and projected review date of the Plan. The colored line below the dates indicates the nearness of the projected review date. Below this, treatment team members are listed based on their inclusion on the client's Episode, and their name, role, and the date they last saw the client is shown. Below that are Medications and Diagnoses, which are entered elsewhere in EchoVantage.

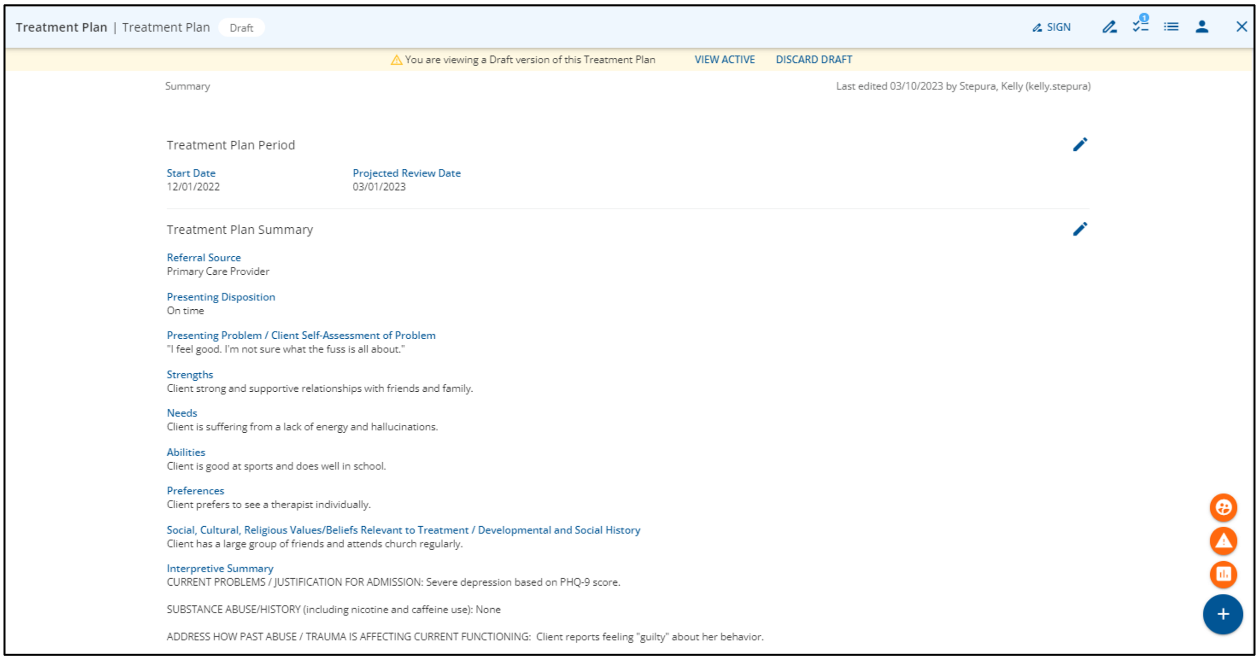
New Treatment Plan

To create a new treatment plan, click the blue "plus" icon at the top right of the screen, and enter the Start Date and Treatment Plan Type. Note that the Projected Review Date is entered for you based on the Configuration, but that you are able to adjust that as necessary.



Once you click Save, you will be returned to the Face Sheet. To continue creating the treatment plan, choose it from the list at the top right of the Face Sheet.

Note that at the top left of the screen, the Treatment Plan Name is shown and the current status of the Plan is shown to its right.



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

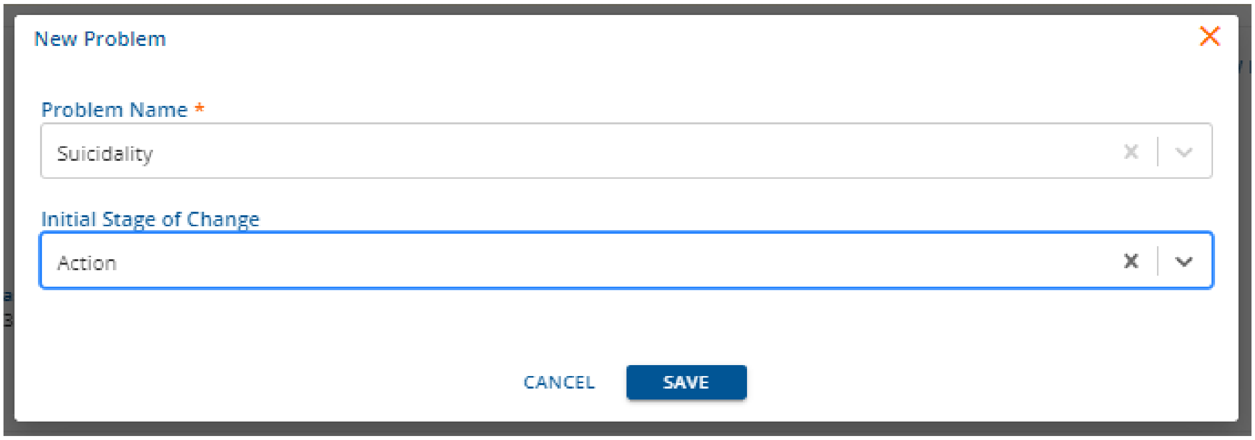
SIGN	Sign the Treatment Plan or send it for other signatures
	View signatures associated with the Treatment Plan
	View Tasks associated with the Treatment Plan These are configured by your agency and may include reminders such as documentation deadlines or required fields on the Treatment Plan itself 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.

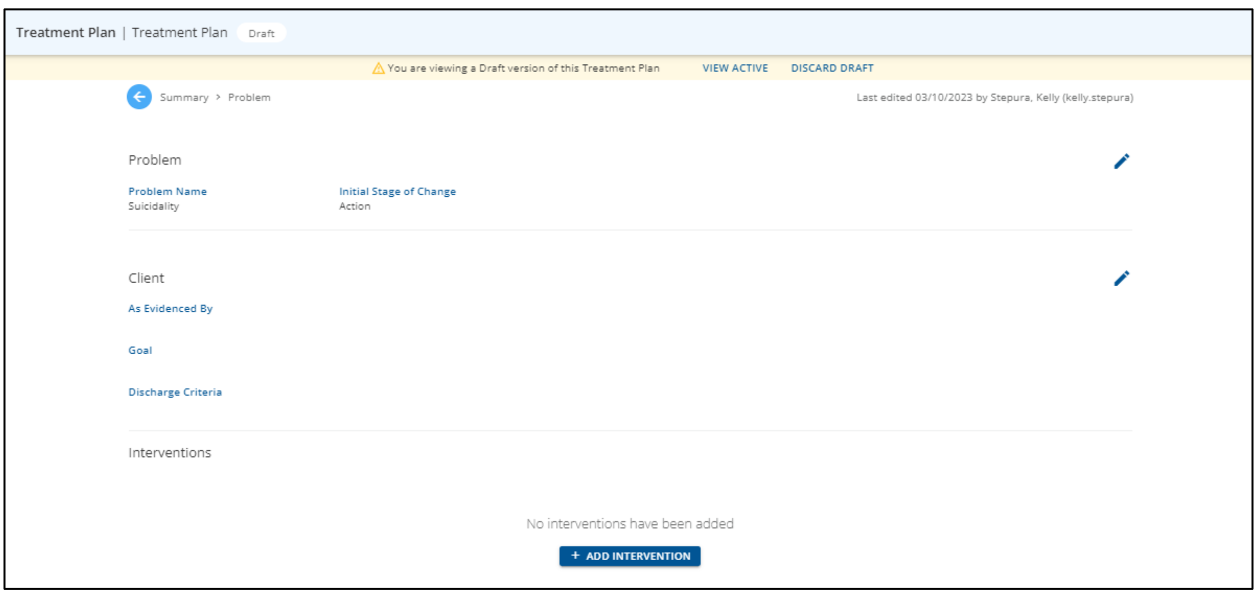
Moving down the Treatment Plan, use the pencil icons on the right to edit the dates you've entered or to complete the Treatment Plan Summary. The summary that your agencies uses may be different than the one shown in the image above. Once the summary information is complete, continue scrolling down to associate Problems with the Treatment Plan.

Adding Problems to a Treatment Plan

Setting up a Problem for a client's Treatment Plan includes associating Interventions, Treatment Methods, Objectives, and Milestones with the Problem. These have all been configured by your agency.



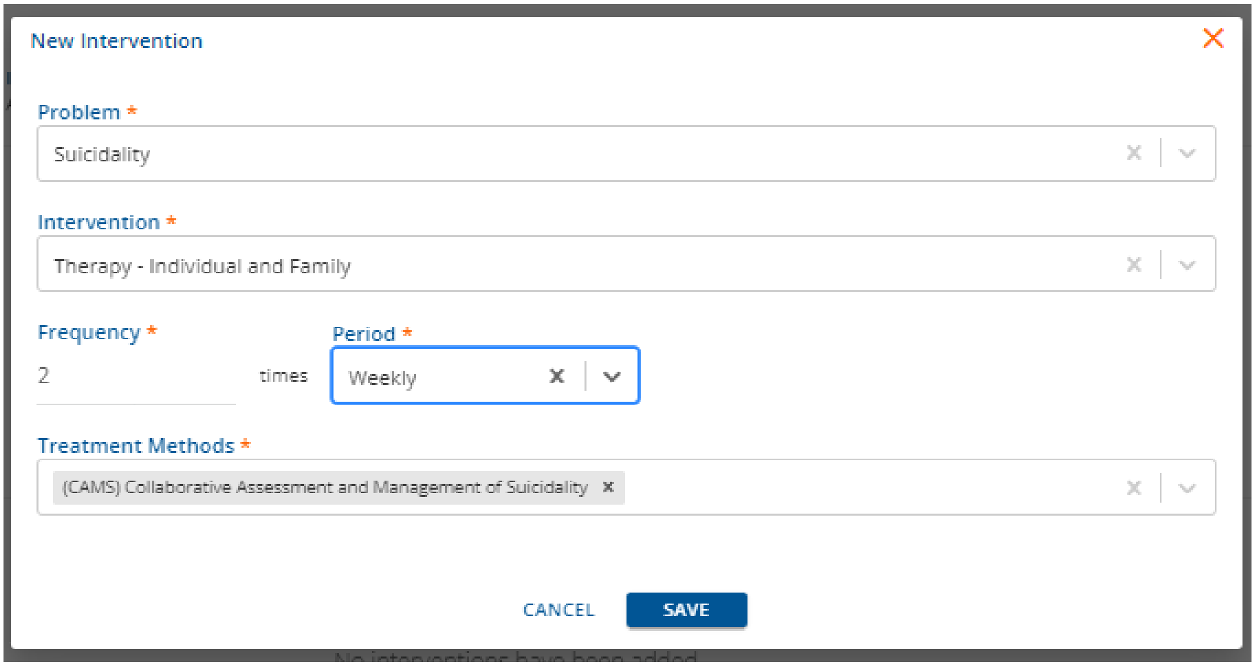
To add a new Problem, click the Add Problem button and enter the Problem name and Initial Stage of Change for the Problem.



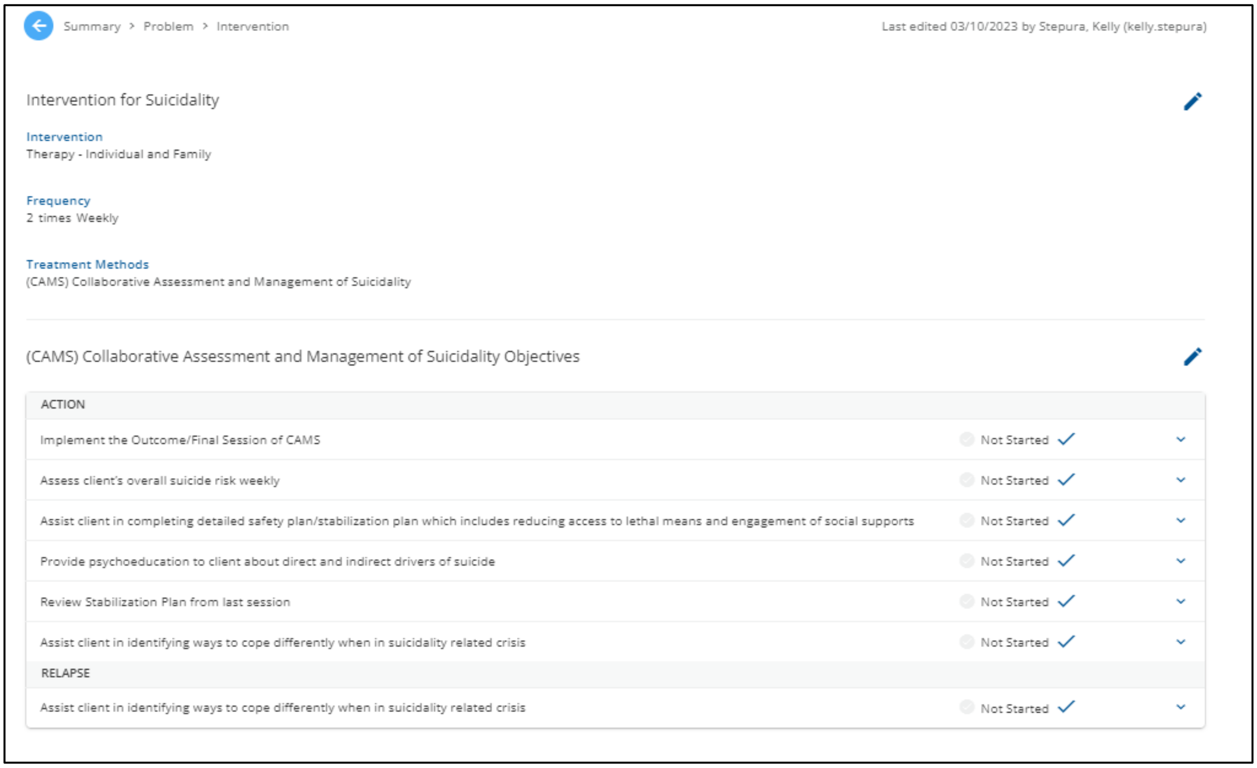
Use the pencil icons to the right to change the Problem/Stage of Change chosen, and to edit the Problem form information. The Problem form for your agency may look different than what you see in the image above. Once the Problem information is entered, click the Add Intervention button.

*Note that you can navigate within the Treatment Plan using the words next to the blue arrow at the top left of the screen.

Choose an Intervention for the Problem, along with a Frequency and Period for the Intervention. Choose as many Treatment Methods as are appropriate for the Problem and Intervention. The Interventions and the Treatment Methods are configured by your agency.

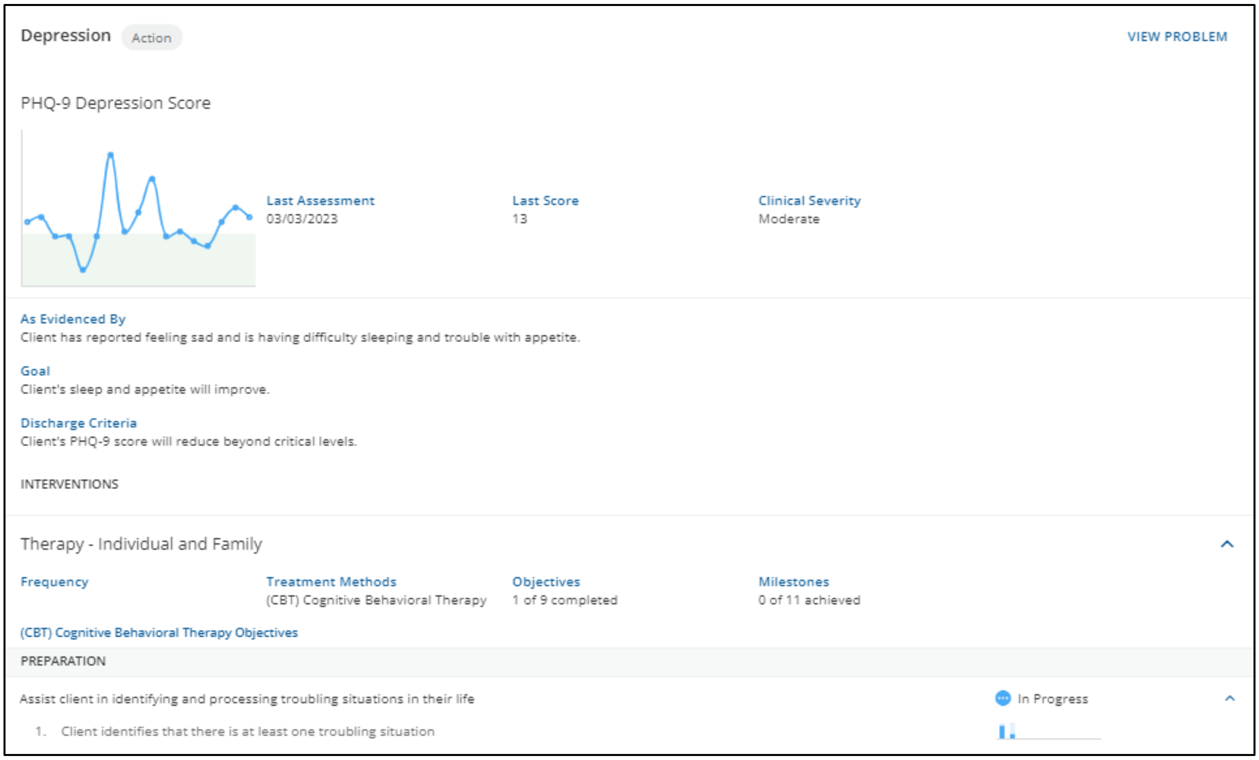


Depending on how your agency has configured the Treatment Method, the Objectives associated with the Treatment Method may automatically appear, or they may be displayed so that you can choose which Objectives you would like to associate with the Treatment Plan. Whatever Milestones are associated with an Objective through Configuration will automatically appear. As services are being documented, these Objectives and Milestones will be displayed so that progress can be documented. This progress will automatically be displayed on the Treatment Plan as well.



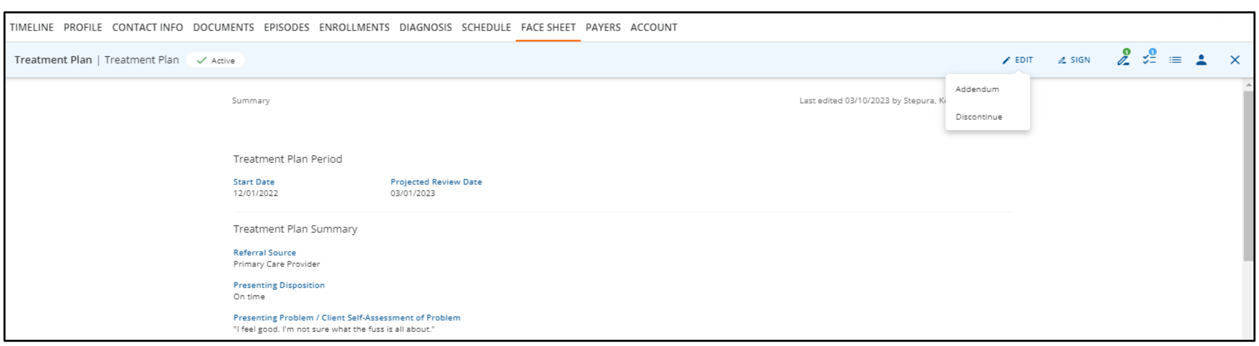
Return to the Summary by using the word "Summary" next to the blue arrow at the top left of the screen. This will return you to the main Treatment Plan page, where you can see any Problems that you have added.

Therapy Brands



Each Problem will display the Problem information you have entered, along with a graph for any associated assessments and the last assessment date and score. Additionally, the associated Treatment Method will be shown, along with a summary of the Objectives and Milestones achieved. And, for each Stage of Change, the associated Objectives (and their status) and Milestones will be shown along with a graph to the right showing Progress on Milestones for each day that the Milestone was addressed.

In order to finalize the Treatment Plan, click the Sign button at the top right of the screen and sign the Treatment Plan. Note that the Treatment Plan is now Active.

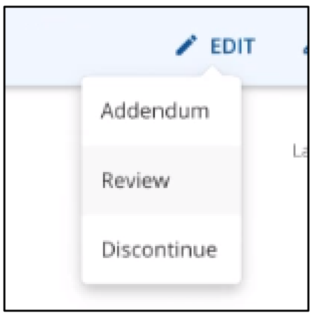


Editing a Treatment Plan

To make changes to an existing Treatment Plan, access the Treatment Plan from the top right of the Face Sheet. Then click the Edit button at the top right of the screen (image above). Choosing Addendum allows you to edit the Treatment Plan, requiring new signatures. You may also choose to Discontinue the Treatment Plan using the Edit button (see Reviewing a Treatment Plan below). You may navigate back to the Face Sheet using the "X" icon at the top right or by clicking the Face Sheet tab.

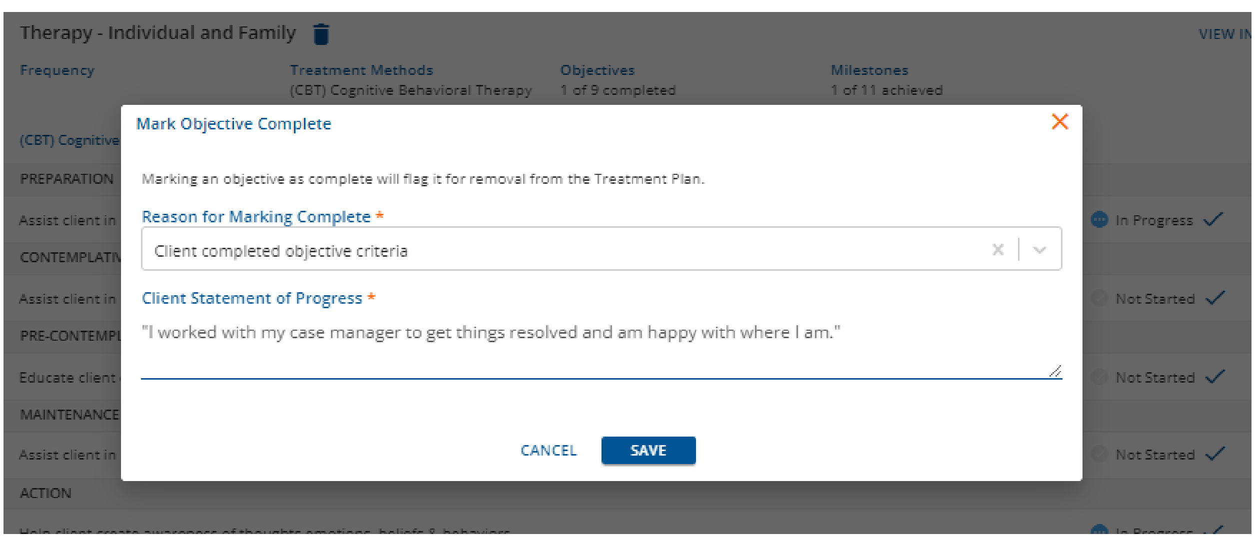
Reviewing a Treatment Plan

To Review a Treatment Plan, access the Treatment Plan from the top right of the Face Sheet. Choose the Edit button at the top right of the screen and choose Review.



Note that there are other options for Addendum (used to edit a treatment plan) and Discontinue (used when treatment is completed, for example).

After choosing "Review", use the pencil icon to change the Start Date and Projected Review Date as necessary. Note that all of the information from the original Plan has transferred forward. Make updates to the Plan and review as necessary. Note that you can review each Problem and Objective and easily determine whether work has begun, how many times a Milestone has been worked on, and how much progress has been made.



Update Objectives, marking them as "Complete" as appropriate. To complete an Objective, click the blue checkmark next to "In Progress". Then you will enter a Reason and a Client Statement of Progress.

You can also add new Objectives during a review by clicking View Problem and choosing the appropriate Intervention (or adding a new one).

From the Summary screen, you can sign the Treatment Plan when you're ready, have the client or other staff sign the Treatment Plan and send it to others to sign. You can send the Treatment Plan out for signature using MyCare or InForms, or you can use the Messaging functionality at the very top of the EchoVantage application to send a message to another staff member that the Treatment Plan is ready to be signed.