

## TREATMENT PLAN REVIEW

The Treatment Plan Review is utilized to capture the client's progress toward goals for problems that they are currently being treated for. The review is performed periodically during treatment and addresses the justification for continued stay at the current level of care or justification for a transfer to different level of care.

The client's current level of care will dictate when a Treatment Plan Review needs to be completed. This review needs to be completed on or before the days listed in the following guideline:

- Residential = 7 days
- Halfway House = 30 days
- IOP = 7 days
- EOP = 30 days
- Aftercare = 90 days

A Treatment Review can be done on either the Treatment Plan or the most current Treatment review, which ever was most recently completed.

For more detailed information on the screens and fields contained in the Treatment Plan Review module, please see Appendix B of the manual.

### **To complete a TPR:**

1. Go to the client's Activity List screen.
2. For a review from:
  - a. The Treatment Plan
    - i. Click on *Review* of the most recent Treatment Plan
    - ii. Click on *Perform Review* hyperlink in the Administrative Actions box.
  - b. Done from another Treatment Review-
    - i. Left menu bar click on Treatment.
    - ii. Left menu bar click on Tx Review.
    - iii. Click on *Add New Treatment Review Record* hyperlink.
3. Fill in appropriate dates for the 'Review Period From' and 'To' fields. This would be the date the Treatment Plan was done on (or 'To' date of the last review), to today's date.
4. The Date of Review field is automatically filled in with today's date.
5. Fill in "Documents Reviewed" with the treatment plan, review dates or Individual and Group notes for the period.

6. Fill in “Assessments Conducted During this Review Period” with None, unless one has been completed, then type in the Name and date.
7. Click “Save” and “Next”.
8. ASAM Screen- At the minimum you need to update the bottom Comment’s Box. This is to reflect where the client is at this point in time and to justify why the client is still appropriate for this level of care or if you are recommending a change in level of care why that is appropriate. Make any other necessary changes to the rest of the ASAM.
  - a. Click “Save” and then “Next”
9. Comments Screen- Answer the 4 yellow box questions. And fill out the comments boxes when applicable.
  - a. Was the client involved in the Review Process- whether you answer Yes or No to this question you still need to document in your Encounter Notes when you and the client worked on this review.
  - b. Click on “Save” and “Next”.
10. Review Team- Place a check mark in the box next to your Name and click on “Save” and “Next”.
11. Plan Outline. If you have changes to make to the Plan Outline then proceed on with the rest of step #11, if not then click on “Finish”.
  - a. Click on “Comments/Modify Plan” in the Outline Actions box if you have any changes to make to the Plan Outline.
  - b. Answer, “Yes” to “Are you sure that you want to .... Plan?”
    - i. Click on Comments blue hyperlink in either the Goal or Objective to add new comments about that area.
    - ii. Click on Modify blue hyperlink to modify the Treatment Plan or the Problem/Goal & Objective. Use Modify when client has completed a goal or objective.
      1. Click on “Modify”
      2. Objective Status dropdown box choose “Completed”
      3. Put in Resolution Date (Date Completed).
      4. Click on “Save”
      5. Click on “Finish”
    - iii. Click on Delete in the Problem/Goal & Objectives to remove an entry.
    - iv. Click on Add Objective in the Problem/Goal & Objectives to add in more objectives.
  - c. Once all comments/modifications are completed, click on “Finish”.
12. This takes you back to the Treatment Review List.
13. Click on “Review” for the Treatment Review you just created.

- a. If you made changes to the Plan Outline then click on “Apply Changes” (blue letters). If you did not make any changes to the Plan Outline then click on “Complete, No Changes to Tx Plan”.
- b. Answer “Yes” to question “Are You Sure .... Treatment plan?”
- c. Click on “Finish”

**Changes made to the Plan Outline:**

If you made any changes in to the Plan Outline then a new Treatment Plan was created by the ISmart system and is now an entry on the client’s Activity List screen. However it has the same plan name as the one before it and will now need to be signed off on.

**To rename the newly created Tx Plan:**

1. Click on Review of the newest Treatment Plan.
2. At the Treatment Plan Profile screen change the Plan name to the next number. (I.e.- if this is the first change made to the Plan Outline call it “1.1”, if this is the second call it “1.2”.)
3. Change the Next Review date to the appropriate date.
4. Make any other changes you feel necessary.
5. Click on the Sign Off hyperlink in the Administrative Actions box.
6. Click on “Save” and “Finish”

**You will need to print something for the client to sign:**

Since changes were made and a new plan was created you need to get the client’s signature. We are only printing the Plan Outline screen of the Treatment Plan.

1. At the client’s Treatment Plan go to the Plan Outline screen.
2. Click on Print View in the upper right hand corner.
3. From tool bar click on File/Print.
4. This page will need to be signed and dated by both you and the client.
5. Offer the client a copy and put the original in the client’s paper file.

**When Treatment Plan Reviews cannot be completed:**

On some occasions the TPR cannot be completed.

1. The client is not available (i.e. – an IOP client who is out of town for 2-3 weeks but wants to remain in tx, or a client has a short stay in jail [not to exceed 30 days] and wants to remain in tx.)
  - a. End the client’s current enrollment.
  - b. Post a Misc. Note thoroughly explaining the situation with the client and the date they are scheduled to return.
  - c. Once the client returns AND you verify they are still appropriate for the same level of care; enter in a new Program Enrollment

- d. Create a new treatment plan with new review dates. (You can go to the latest Treatment Review and utilize the *Create New Version* blue hyperlink. This will allow you to use the existing Problem/Goals & Objectives if they are still appropriate.
2. The TPR was conducted beyond the set requirements.
  - a. Post a Misc. Note explaining what happened
  - b. Continue on with the TPR.