

SANTA CRUZ COUNTY AVATAR INFORMATION NOTICE

TOPIC: LPHA Signature Workflow for SC MH Episodic Treatment Plan

Avatar Form(s), Process and/or Users Affected

Date August 9, 2018

Avatar Form(s) **SC MH Episodic Treatment Plan**

Procedure Change Non-LPHA authors will submit the SC MH Episodic Treatment Plan in draft. LPHA will open plan, finalize and submit. This helps make the LPHA signature date clear and easy to find. The LPHA signature date is the start date of the plan.

Users Affected **MH Staff Only:**

1. Non-LPHA MH clinicians who write SC MH Episodic Treatment Plans
2. MH LPHAs who co-sign the SC MH Episodic Treatment Plan

LPHA staff who write and sign their own plans are not affected.

Summary/Introduction

Per recent state audit feedback, a treatment plan is not valid and does not authorize services until it is signed and dated by an LPHA. To facilitate this, we have:

1. Revised the workflow for getting LPHA co-signatures
2. Added a new feature "Create To Do," to the SC MH Episodic Treatment Plan

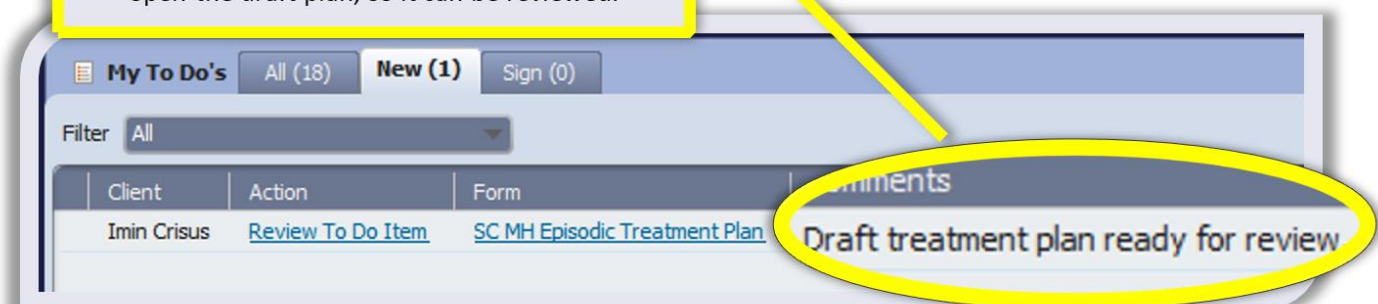
How "Create To Do" Works

In the SC MH Episodic Treatment Plan, you will see a new icon in the icon box on the left-hand side of the plan. If you hover over this item, you will see the label "Create To Do."

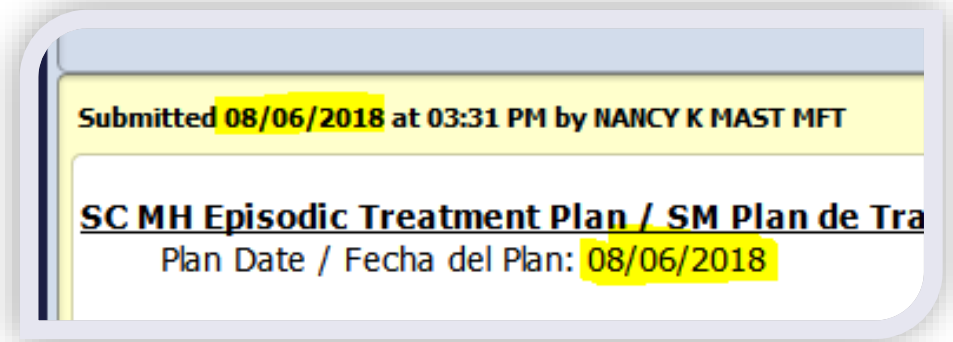
Using the "Create To Do," allows you to send a short message about a form along with a link to the form in anyone's My To Do's. For the SC MH Episodic Treatment Plan, plan authors who are not LPHA's, will use this function to send a message to the LPHA, notify them that the plan is ready for review, or that signatures have been obtained and the plan is ready to be finalized and submitted.



Link to Draft Treatment Plan. Clicking on this will open the draft plan, so it can be reviewed.



There is a setting in Avatar that changes 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.



Outline of New Workflow

See the document, "[Workflow and Instructions for LPHA Signing SC MH Episodic Tx Plan,](#)" for more detailed information.

1. Plan Author (non-LPHA) completes a draft of the SC MH Episodic Tx Plan.
2. Before submitting the draft, the 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.
4. If LPHA feels plan meets standard, the LPHA creates a To Do Item notifying the Author that it is OK to obtain signature(s).
5. Plan Author meets with client, guardian, etc...and gets signatures using the signature pad or laptop touchpad. Author also signs using signature pad or laptop touchpad.
6. Plan Author creates a To Do Item that notifies the LPHA that signatures are complete and that the plan is ready for LPHA signature.
7. LPHA opens plan in chart, using the link in the To Do Item sent by the Author. LPHA finalizes and submits plan and when doing so, signs it.
8. Submit date is now the start date of the plan.

For More Information Contact

The QI help desk at askqi@santacruzcounty.us

Resources

For more detailed instructions and information, see the document, "Workflow and Instructions for LPHA Signing SC MH Episodic Tx Plan," which has been posted on the Avatar Resource Web Page.

<http://www.santacruzhealth.org/hsahome/hsadivisions/behavioralhealth/avatarresources.aspx>

The easy way to get to the web page is to type Avatar into the Search Forms blank when you are in Avatar. Click on Avatar Resources and this will launch the web page.