

SANTA CRUZ COUNTY AVATAR INFORMATION NOTICE

TOPIC: LPHA Signature Workflow for SC MH Episodic Treatment Plan

NEW
FIELDS

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

Date 9/14/2018

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

Procedure Change As described previously, non-LPHA plan authors will continue to submit the SC MH Episodic Treatment Plan in draft (no finalizing). LPHA will then open plan, finalize and submit. **A few changes have been made to the plan to facilitate this process.**

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

As described previously, Non-LPHA authors will no longer finalize the SC MH Episodic Treatment Plan. Instead, non-LPHA authors will save plan in draft and notify LPHA. LPHA will open plan, finalize and submit. A few changes have been made to the plan to facilitate this process:

1. Plan Date is now the "LPHA Signature Date/Plan Start Date." This field is no longer required and it is enabled so that if the plan is accidentally finalized by the non-LPHA author, and needs to be returned to draft, the Start Date can be reentered. (Previously, reverting to draft caused the Start Date to clear, but because this field is disabled, no one, not even the LPHA could finalize the plan.)
2. You will see a new field, "First Edit Date by Plan Author," that is simply the first date that someone began to create the plan. This date will stay in the plan and cannot be changed.

Plan Name/Nombre del Plan
Initial

Plan Type/Tipo de Plan
Initial

[MH Treatment Plan Documentation/ Documentación del Plan de tratamiento de salud mental](#)

Last Updated/última actualización

Last updated by/actualizado por

First Edit Date by Plan Author / Primera
09/14/2018

PLAN DATES/FECHAS DEL PLAN

LPHA Signature Date / Plan Start Date / LPHA Fecha de Firma / Fecha de Inicio

Plan End Date / Fecha de Finalización
09/13/2019

Next Review Date/Siguiente fecha de revisión
08/14/2019

3. Signing and Document Routing has been turned off for this plan. We noticed that non-LPHA authors have continued to route the plan to LPHA's using document routing, which is not part of the new workflow. You will notice that you no longer can route the SC MH Episodic Treatment Plan at all. Simply click "submit" and the document automatically saves and closes. Behind the scenes Avatar will note who finalizes and saves the document.
4. Note that non-LPHA staff should continue to sign the plan using the signature button in the participants table.

	Role	Staff ID	Participant Name	Plan Author	Notification	Signature/Firma
1	STAFF (STAFF)	MAST,NANCY K (00..	MAST,NANCY	Yes (Y)	Yes (Y)	Sign
2	LPHA (LPHA)	(000559) ROGERS,...	ROGERS,CARL	No (N)	No (N)	Sign
3	CLIENT (CL)		LIT Favreau	No (N)	No (N)	Sign
4	PARENT / GU...		Leilani Favreau	No (N)	No (N)	Sign

For Questions or Additional Information

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.

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