Urgent Care Plan and Client Alert

Table of Contents

Urgent Care Plan and Client Alert

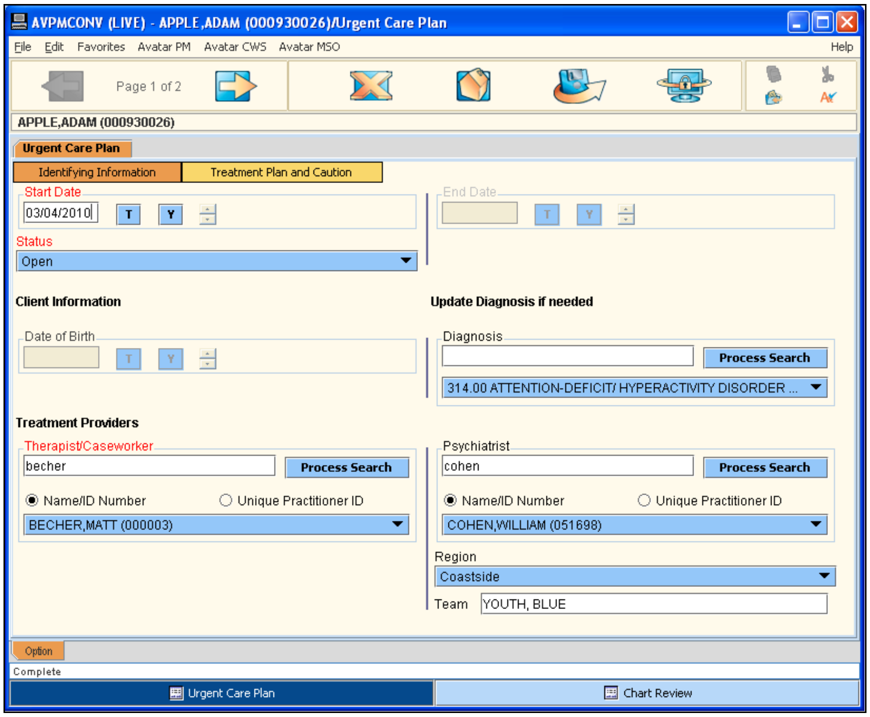
In this lesson you will learn to create an Urgent Care Plan and to turn on a high priority alert notifying staff to read the Urgent Care Plan.

Lesson Objectives

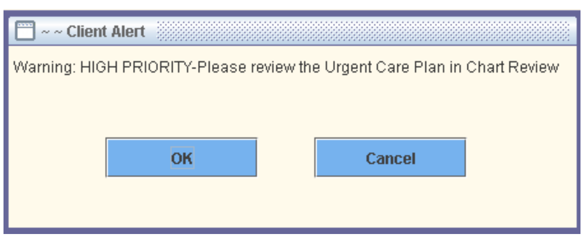
- Understand how to create an Urgent Care Plan
- Learn how to turn on an alert that notifies staff that an Urgent Care Plan is in effect
- Use the Urgent Care Plan bundle to access the Care Plan and the Client Alert at the same time

LESSON SCENARIO

Adam Apple is a client who abruptly left his last session against medical advice. He is at risk for self harm and harm to others, so his clinician, creates an Urgent Care Plan detailing this information for other staff members.



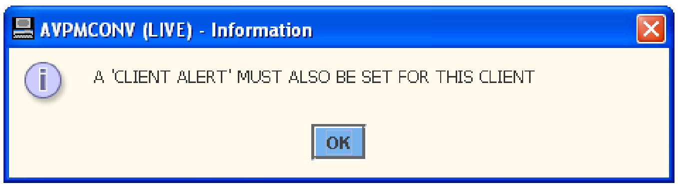
The clinician then turns on a Client Alert so that anyone who accesses Adam's electronic record will see a popup message appear on their screen.



Understanding Urgent Care Plan

You use the Urgent Care Plan to document urgent issues for a client. For example, if the client attends a therapy appointment, becomes suicidal, and flees the building. Once submitted, this item appears in Chart Review under Urgent Care Plan.

The feature that generates a popup message indicating that an Urgent Care Plan is in effect for a client is a Client Alert. Avatar displays the following message to remind you that an alert must be set up after you create the Urgent Care Plan.



The Urgent Care Plan Bundle combines the Urgent Care Plan window and the Client Alert window, where you set up the popup message to appear on other BHRS staff Avatar screens notifying them that an Urgent Care Plan is active for a client.

Who Can Perform This Function?

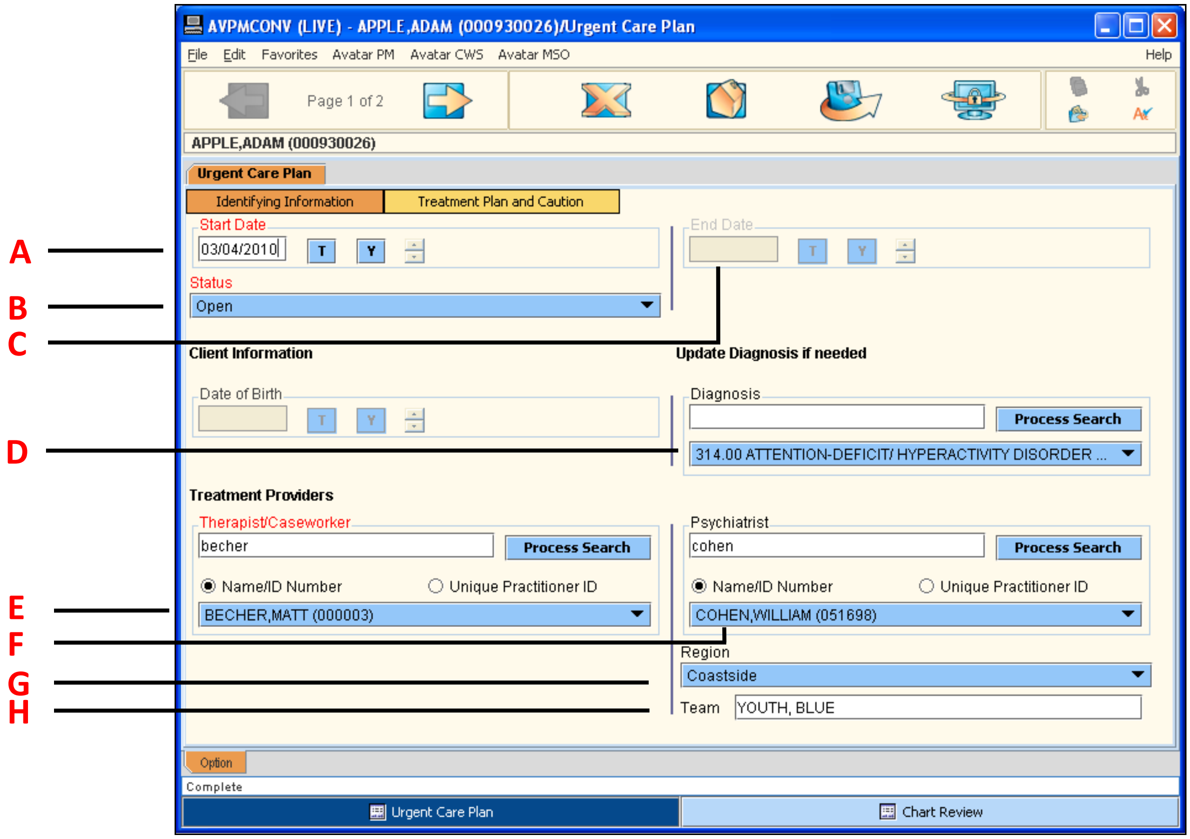
Only clinical staff can set up an Urgent Care Plan, but anyone can activate the Client Alert.

Menu Path

Avatar CWS→Other Chart Options→URGENT CARE PLAN Bundle

URGENT CARE PLAN TAB PAGE 1 (IDENTIFYING INFORMATION)

Use this page to document the status, therapist, diagnosis, psychiatrist, clinic, and team.

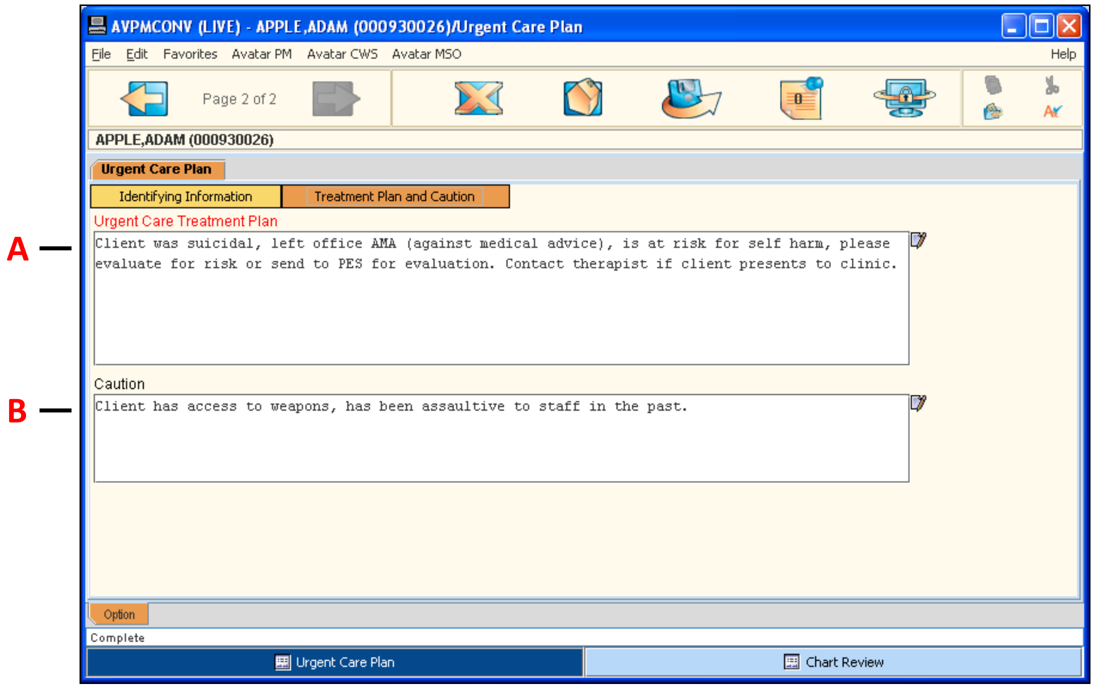


Field/Button	Description
A) Start Date	The date that the Urgent Care Plan went into effect.
B) Status	Document if this entry's status in the Urgent Care Plan is open or closed. If you are closing this plan, make sure to document the reason the plan is being closed in the Urgent Care Treatment Plan field on page 2.
C) End Date	If the status of the Urgent Care Plan is closed, document the date that it ended.
D) Diagnosis	The client's primary diagnosis automatically populates from the diagnosis assessment.
E) Therapist/ Caseworker	Document your name (the name of the clinician creating the Urgent Care Plan) in this field.
F) Psychiatrist	Document the client's psychiatrist if they have one assigned to them.
G) Region	Document the region where the Urgent Care Plan originated.

Field/Button	Description
H) Team	Some regions have teams, such as YOUTH or BLUE. If the client has been assigned to a team, document it here.

URGENT CARE PLAN TAB PAGE 2 (TREATMENT PLAN AND CAUTION)

Use this page to document specific information regarding the Urgent Care Plan, and any cautionary notes that other BHRS staff should be made aware of.

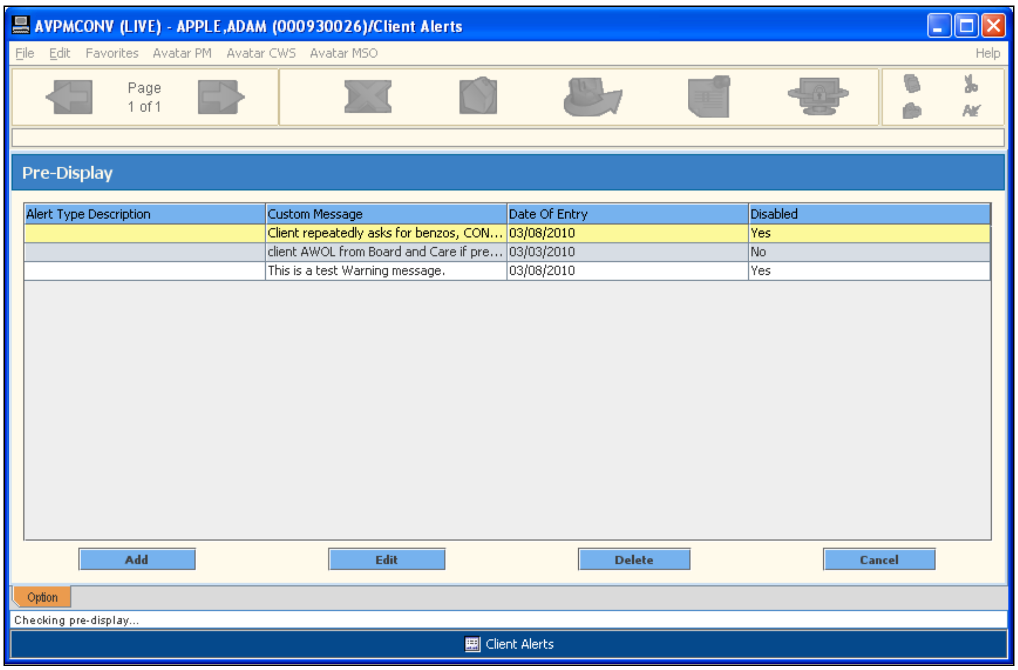


Field/Button	Description
A) Urgent Care Treatment Plan	Document a summary of what happened to generate the urgent care plan and the suggested course of action.
B) Caution	Document any concerns or dangers that BHRS staff should be aware of.

UNDERSTANDING CLIENT ALERTS

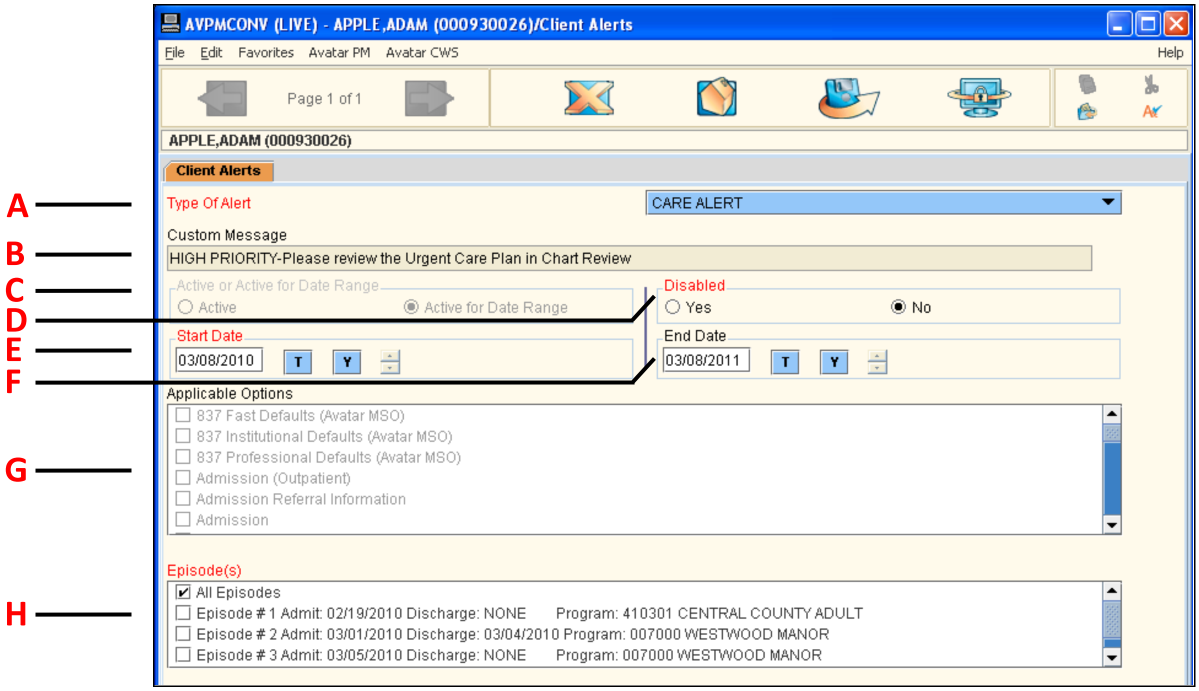
This feature allows you to notify any staff members in the BHRS system about some urgent issue with a client should the client appear at their location. It can also be programmed to only appear for a certain amount of time—for a week, month, or up to twelve months. This feature works as a complement to an Urgent Care Plan, but you can also use it for reminders such as an administrator's notice that a client's financial interview is due.

When you access Client Alerts, you may see a screen like the following figure if alerts have been created for the client in the past. Notice there is a Disabled column that lets you know if an alert is disabled or still active.



Client Alerts Tab

This tab allows you to designate the type of alert, how long it will last, and which options and episodes trigger the alert to appear.

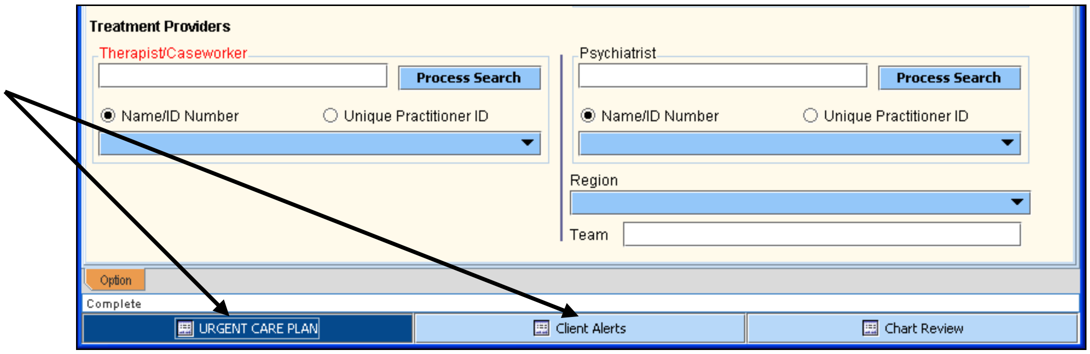


Field/Button	Description
A) Type of Alert	**Assignment of Benefits:** Creates an alert asking the clinician to print the Assignment of Benefits and have the client sign it. **Care Alert:** Generates an alert that prompts the staff member to look at the Urgent Care Plan for more details. This is a High Priority message. **Care Message:** Generates an alert that prompts the user to look at the Urgent Care Plan on file for more details. **Error (Custom):** BHRS does not use this option. **Financial Interview Due:** Creates an alert reminding the clinician to ask the client to arrange a financial interview with the administrator. **Insurance Application:** This is a reminder to submit PAP documents. **UMDAP/Financial Due:** This alert reminds the clinician to ask client to make an appointment for an UMDAP. **Update Client Demographics:** This choice requests that the clinician updates client data. **Warning (Custom):** BHRS does not use this option.

Field/Button	Description
B) Custom Message	This field displays the text of the message you choose from the Type of Alert dropdown list.
C) Active or Active for Date Range	Active for Date Range is selected and cannot be changed.
D) Disabled	Allows you to disable an alert without deleting it from the system.
E) Start Date	Document the date the alert should begin to appear.
F) End Date	Document the date the alert should stop appearing. This should never be more than 12 months from the Start Date.
G) Applicable Options	The default is All Options and cannot be changed.
H) Episode(s)	Select which episode(s) you want the client alert to appear in. By default, All Episodes is selected.

Understanding the Urgent Care Plan Bundle

The Urgent Care Plan bundle allows you to open the Urgent Care Plan and the Client Alerts windows at the same time, so you do not have to open them separately. Like any bundle in Avatar, you see each piece at the bottom of the window as shown in the following picture. When you complete the Urgent Care Plan window and click the Submit button the window saves and closes. Then the Client Alter window appears.



Viewing an Urgent Care Plan

If a popup alert message appears notifying you that there is an Urgent Care Plan on file, you can use Chart Review to view the plan following these steps:

1. Open any clinical window such as the BHRS Outpatient Progress Note.
2. Click the Chart Review button at the bottom of the window.
3. Double-click the URGENT CARE PLAN entry.

   All Urgent Care Plans on file for the client appear underneath.
4. Double-click an Urgent Care Plan entry to view the plan on file.
5. Click the Dismiss (Stop Sign) icon to close the alert.

Exercise 1 Write an Urgent Care Plan and Set Up a Client Alert

In this exercise you will write an Urgent Care Plan then set up a Client Alert that will appear when others access the client's chart.

Before You Begin: *Select a fictitious client using the Select Client icon. Adam Apple is the client in this example.*

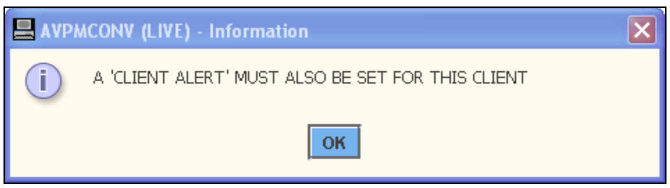
1. Choose Avatar CWS→Other Chart Entry→Urgent Care Plan Bundle from the Menu Frame.

   If previous Urgent Care Plans have been created, the Pre-Display screen appears listing the plans.

2. If necessary, click the Add button to create a new Urgent Care Plan.

3. In the Status field, select Open from the dropdown list.

   The following message appears.

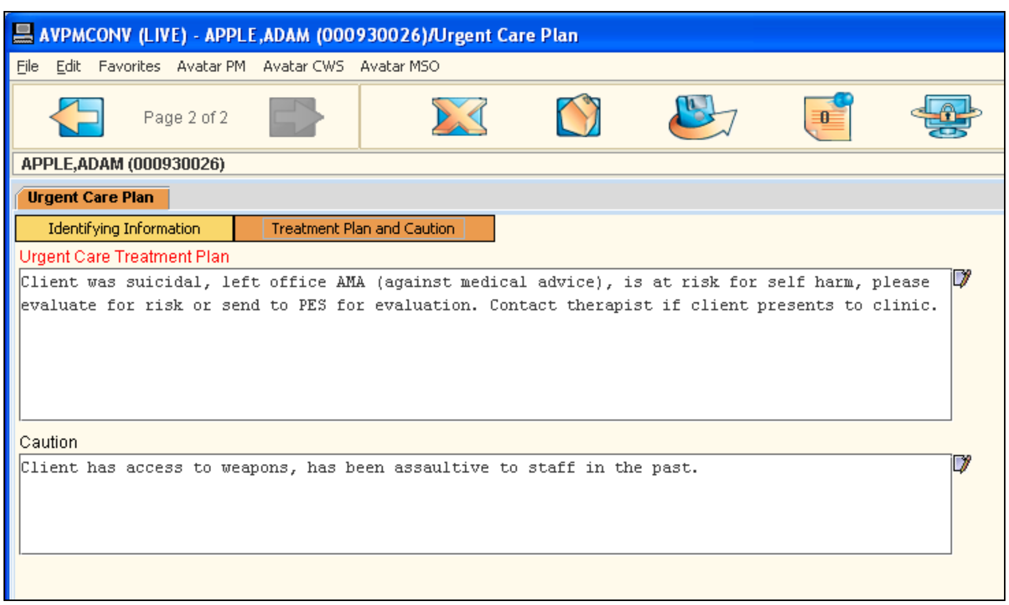


4. Click OK.

5. Enter your name in the Therapist/Caseworker field.

6. Click the Forward  icon on the Option toolbar to go page 2.

7. Complete the text fields as shown in the following illustration:



8. Click the Submit  icon to save the Urgent Care Plan.

The Client Alert window now appears.

If previous alerts exist, the Pre-Display screen shows a list of them. Any entry that has the Disabled field set to No is currently active.

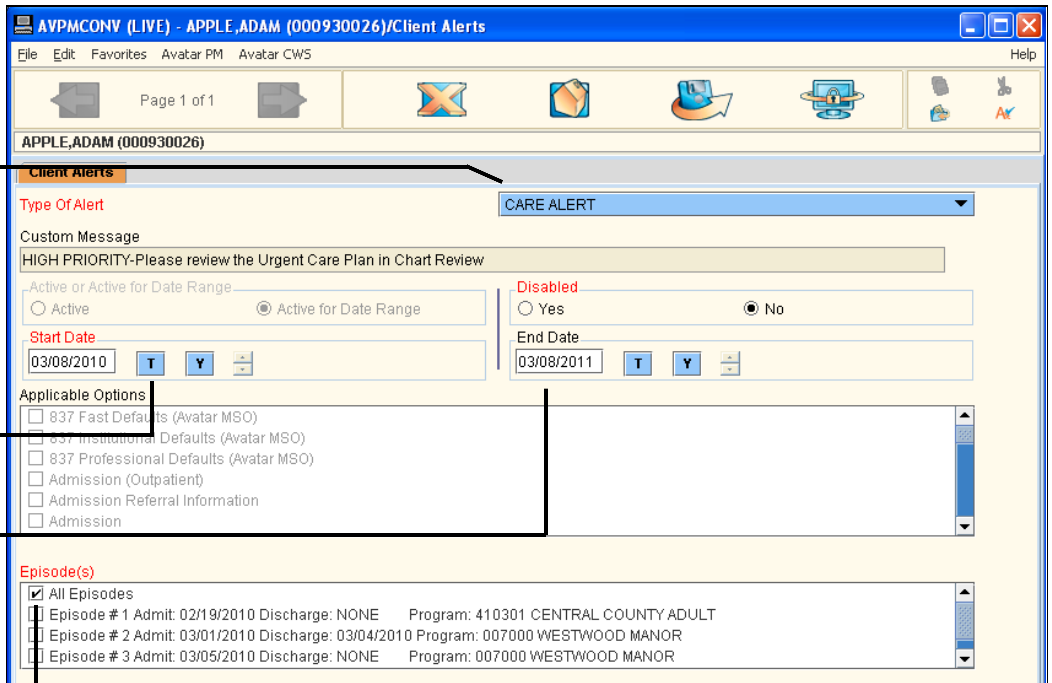
9. If necessary, click the Add button to create a new alert.

10. Follow these steps to set up a Client Alert:

A Select Care Alert from the dropdown list. The Custom Message field fills in automatically.

B Click the T button to fill in today's date for the Start Date.

C Type **T+365** in the End Date field to enter the date one year from now.



D Leave All Episodes checked.

11. Click the Submit  icon on the Option toolbar to turn on the Client Alert.

Concept Review: Urgent Care Plan and Client Alerts

See appendix for answers.

1. What are the two parts of the Urgent Care Plan Bundle?
2. What is the maximum amount of time that a Client Alert should be in effect?
3. True or False: You can disable a Client Alert without deleting it; thus it can be activated again in the future.
4. True or False: You can choose which episodes will display the Client Alert.

APPENDIX—CONCEPT REVIEW ANSWERS

1. The Urgent Care Plan and the Client Alert.
2. 12 months
3. True
4. True