Client Alerts/Urgent Care Plans/ Send Notifications

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Client Alerts/Urgent Care Plans/Send Notifications

In this lesson you will learn about client alerts. Some alerts are generated by clinicians and some are generated by administrators.

You will learn to send administrative alerts to remind clinicians of paperwork that is due for a client, such as financials, UMDAPs, and insurance applications.

You will also learn how to view an Urgent Care Plan if a clinician sends a High Priority Care Alert regarding a client.

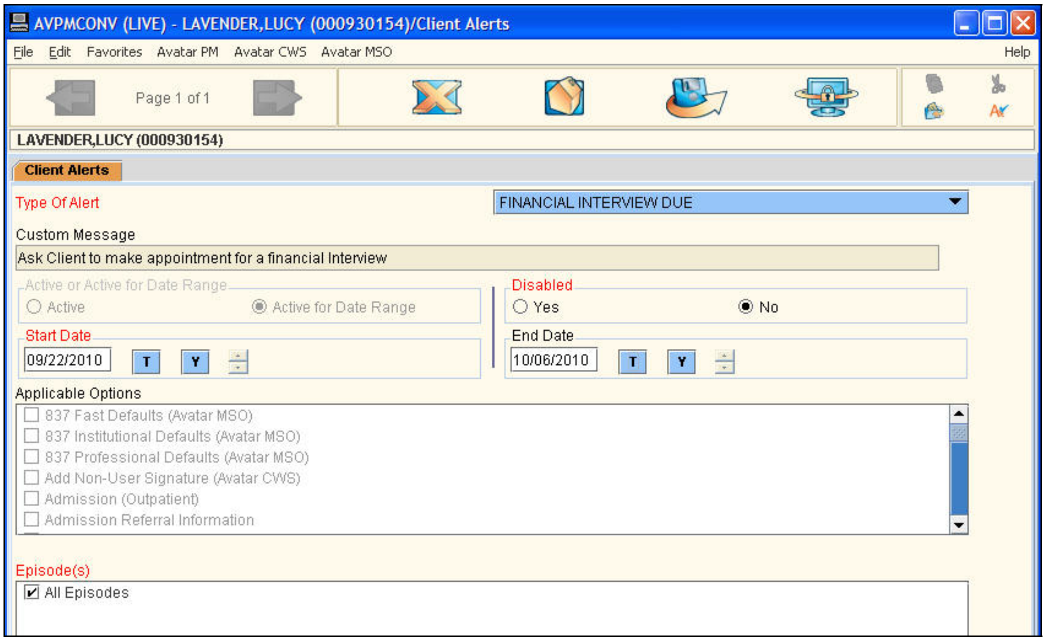
Finally, you will learn to use Send Notifications to place items in someone's To-Do list.

Lesson Objectives

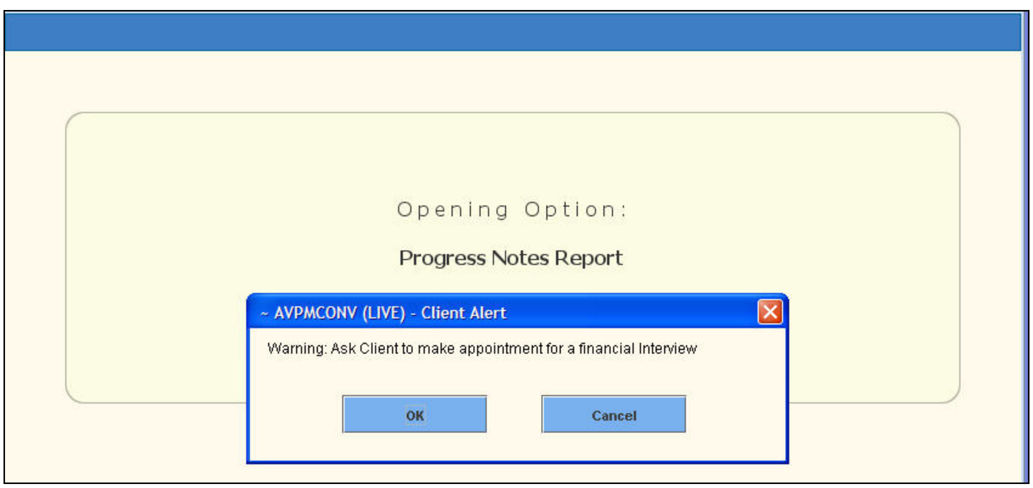
- Learn how to turn on an alert notifying clinicians about administrative items that are due for a client.
- Learn to view an Urgent Care Plan
- Use Send Notifications to create To-Do items

LESSON SCENARIO

Lucien Engle is an administrator in a BHRS clinic. One of the clients is due for a financial interview, so Lucien sends an alert to the clinician.



When the clinician accesses the client's progress note report, he sees the alert indicating that he should ask the client to set up an appointment with the administrator for a financial interview.



Understanding Client Alerts

This option allows you to notify anyone in the BHRS system about some issue with a client. The alert appears when you select the client or open a window for the client. You can set up an alert to display for a certain period of time, such as a week, month, or up to eighteen months.

Administrators can use alerts as reminders that administrative items are due for a client, such as a financial interview. Clinicians can use an alert as a complement to an Urgent Care Plan, notifying staff that there is an urgent situation regarding a client that they need to be aware of. Staff members should then read the client's Urgent Care Plan to learn about the urgent situation. (You will learn to view an Urgent Care Plan later in this lesson.)

Menu Path

Avatar PM→RADplus Utilities→Client Alert Management Urgent→Client Alerts

Alerts Enabled by Administrators

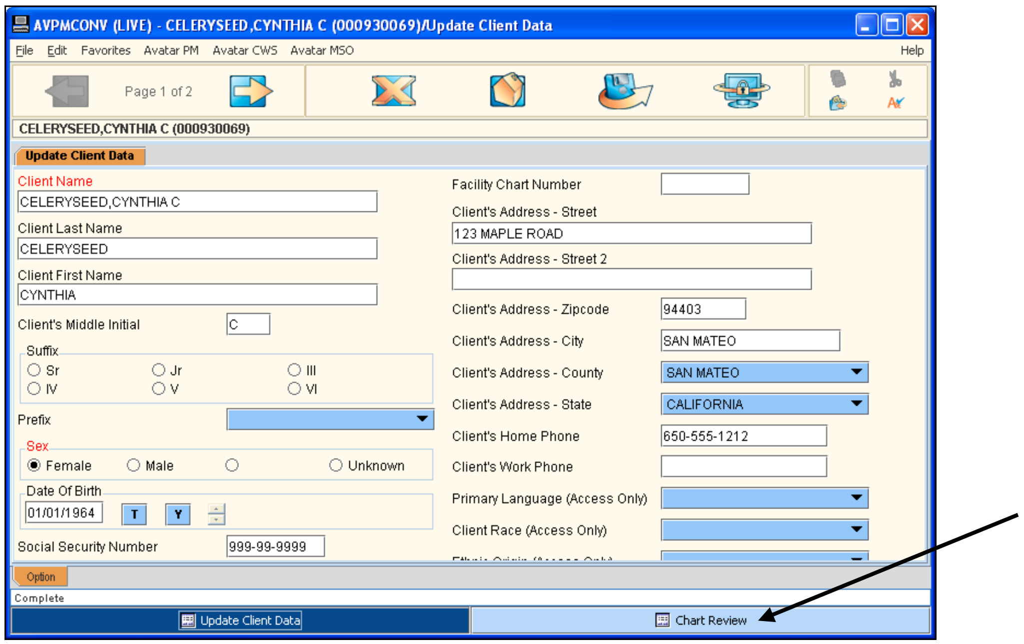
Type of Alert	Message
Assignment of Benefits Due	Please print and get client to sign
Error (Custom)	BHRS does not use this option
Financial Interview Due	Ask client to make appointment for financial interview
Insurance Application	Send client to adm. for followup
UMDAP/Financial Due	Ask client to complete or make an appointment for an UMDAP
Update Client Demographics	Update client demographics using "Update Client Data"
Warning (Custom)	BHRS does not use this option

Alerts Enabled by Clinicians

Type of Alert	Message	Action
Care Alert	HIGH PRIORITY-Please review the Urgent Care Plan in Chart Review	Administrators and clinicians should review the client's Urgent Care Plan immediately.
Care Message	Please review Urgent Care Plan in Chart Review for Information	Only clinicians need to respond to this alert.

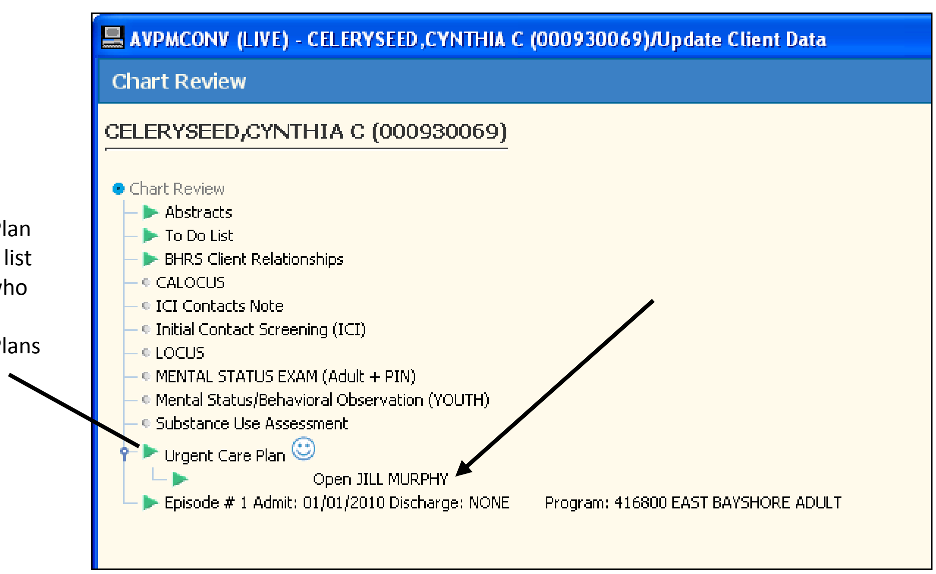
How to View an Urgent Care Plan

You view an Urgent Care Plan through Avatar's Chart Review feature. Chart Review is available through any Avatar window. All Avatar windows have a Chart Review button in the bottom-right corner of the window as shown in the following figure.

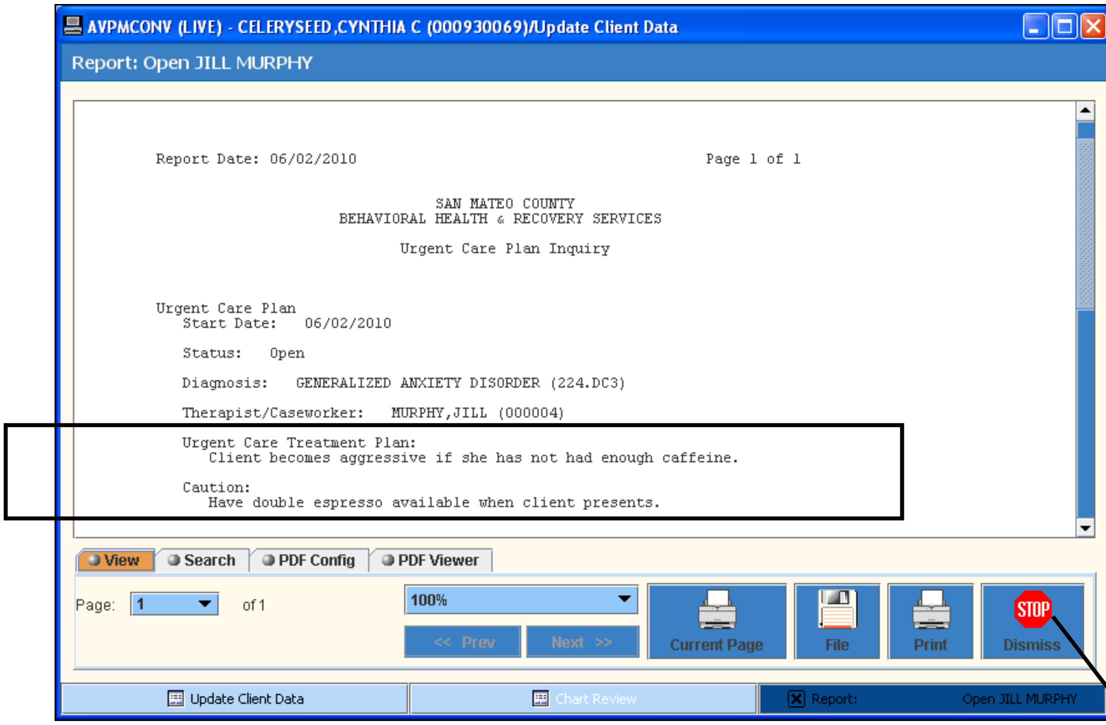


When you click the Chart Review button, the following window appears. You may see a list of names if there is more than one urgent care plans for the client. Double-clicking a clinician's name displays the alert. (The most recent alert is at the top of the list.)

Double-click Urgent Care Plan to display the list of clinicians who have created Urgent Care Plans for this client.

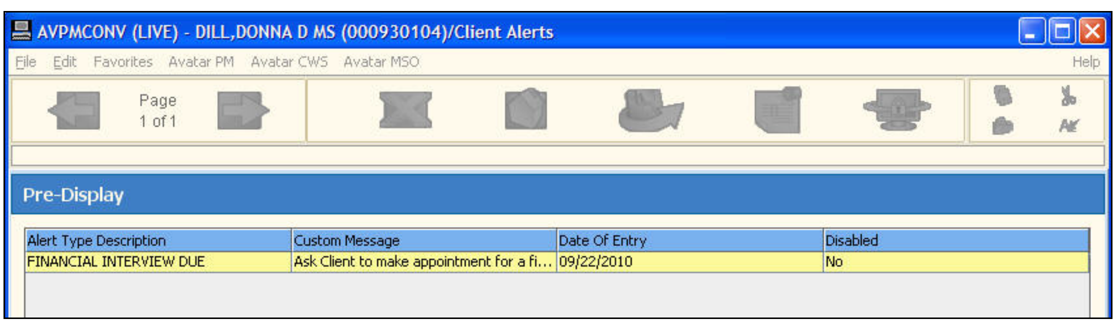


Following is an example of an urgent care screen.



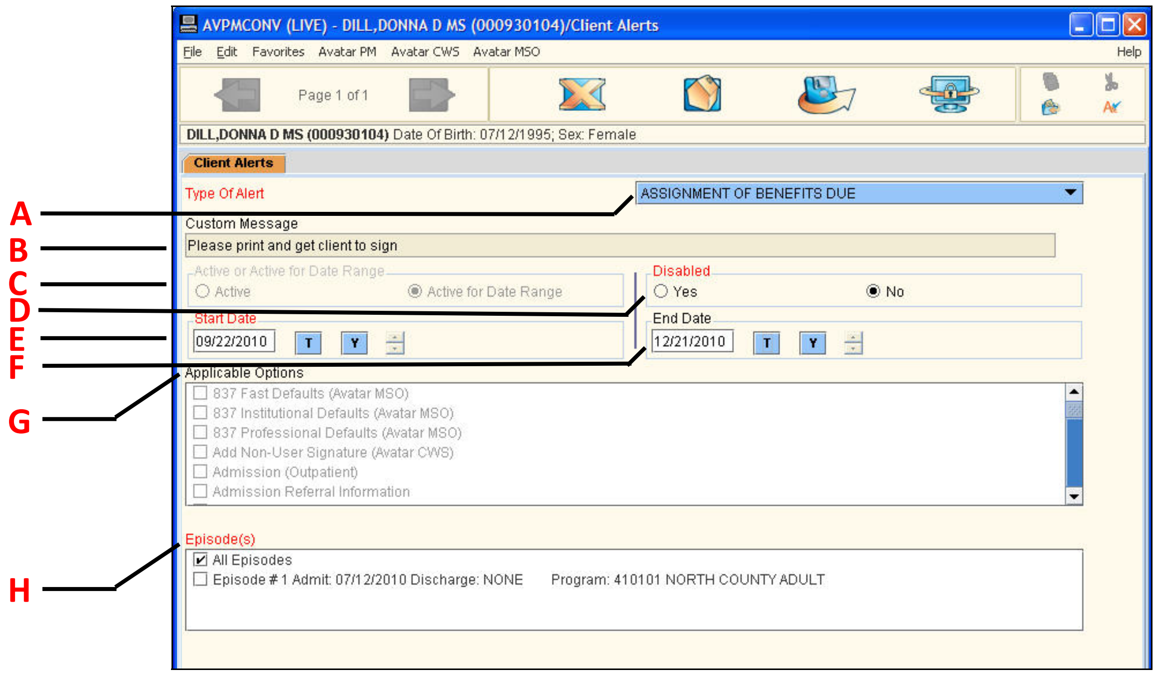
Close the Urgent Care Plan with this button.

When you access Client Alerts, you may see a screen like the figure below. This screen appears 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.



Client Alerts Tab

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



Field	Description
A) Type of Alert	Choose the alert you want to use from the dropdown list.
B) Custom Message	This field displays the text of the chosen Type of Alert.
C) Active or Active for Date Range	This field defaults to Active for Date Range and you cannot change it.
D) Disabled	Allows you to disable an alert without deleting it.
E) Start Date	Enter the date the alert should begin to appear.
F) End Date	Enter the date the alert should stop appearing. This should never be more than 18 months from the Start Date.
G) Applicable Options	This field is set to All Options so the alert will display for the first window that is opened, no matter what window that is.
H) Episode(s)	Select which episode(s) you want the client alert to appear in. By default, All Episodes is selected.

Exercise 1: Setting Up an Alert and Looking at an Urgent Care Plan

In this lesson you will set up an administrative alert for your client and view an Urgent Care Plan. Your instructor will provide you with the name of a client who has an Urgent Care Plan.

Before You Begin: *Make sure the client you set up an administrative alert for is active in your My Session Frame.*

Set up an Administrative Alert

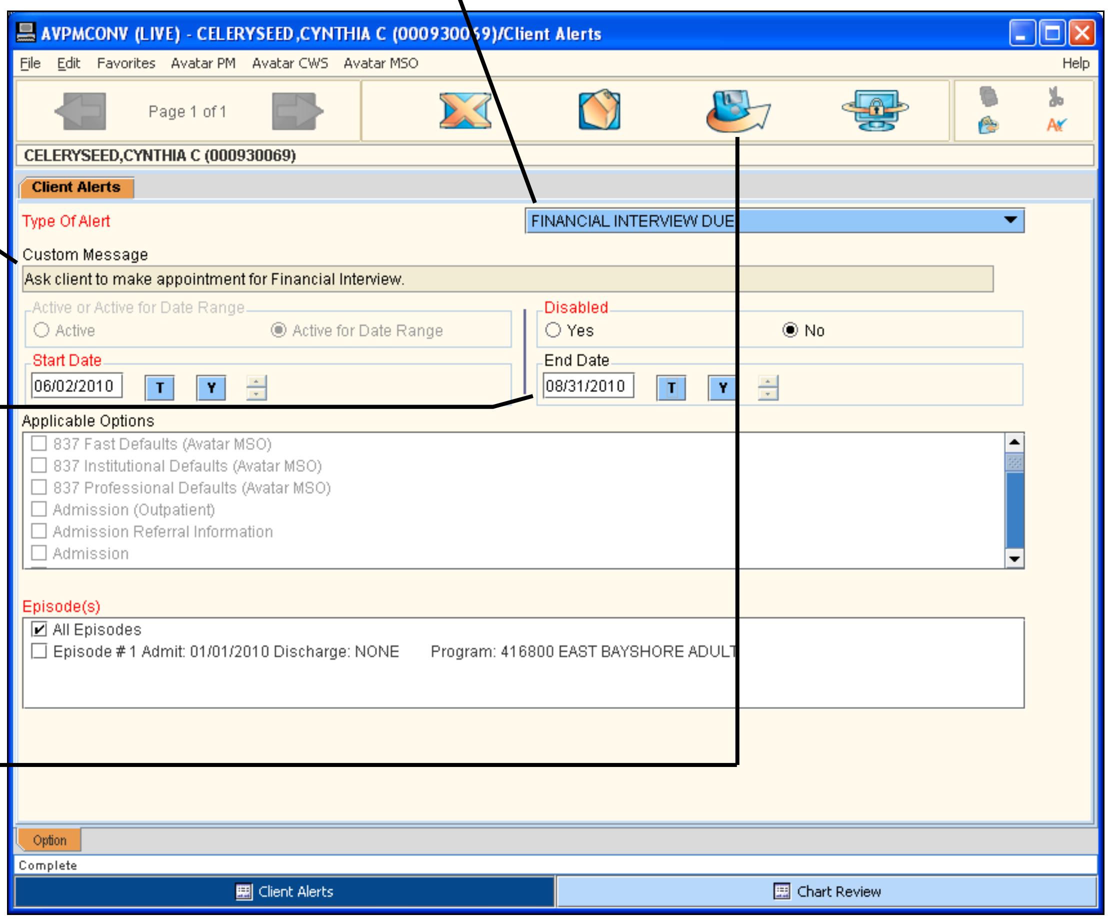
1. Choose Avatar PM→RADplus Utilities→Client Alert Management→Client Alerts from the Menu Frame.
2. Follow these steps to set up an administrative alert:

A Choose Financial Interview Due from this dropdown list.

B The custom message appears here.

C Set the End Date at 3 months from the Start Date.

D Click the Submit icon.

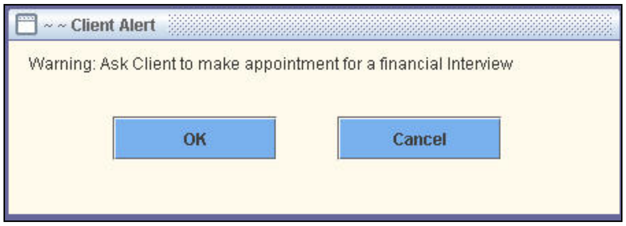


View the Administrative Alert

Next you will remove your client from the My Session Frame and then perform a Select Client lookup to place your client back in the My Session Frame, and when you do so, the alert will display.

3. Right-click your client's name in the My Session Frame and choose Remove from My Session from the popup menu.
4. Click the Select Client command and search for your client.
5. When you locate your client, click OK.

   The alert pops up in a message box.



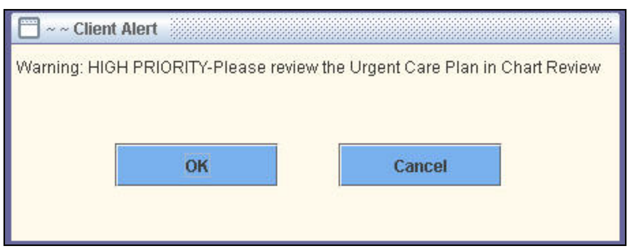
6. Click OK to close the message.

VIEW AN URGENT CARE PLAN

Next, your instructor will provide you with the name of a client who has an Urgent Care Plan.

7. Perform a Select Client lookup to place the client with the Urgent Care Plan in your My Session Frame.

   When you select a client with an Urgent Care Plan, the alert displays.



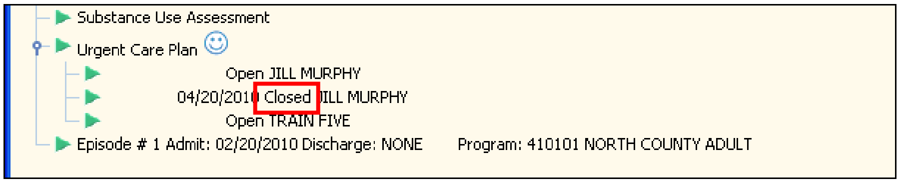
In this example, you will use Update Client Data as the window where you will access Chart Review and the Urgent Care Plan.

8. Choose Avatar PM→Client Management→Client Information→Update Client Data from the Menu Frame.
9. When the Update Client Data window opens, click the Chart Review button in the bottom-right corner or the window.

   You should see Urgent Care Plan listed in the Chart Review window.

10. Double-click the green triangle in front of Urgent Care Plan.

Urgent Care Plan expands. If the client has had more than one Urgent Care Plan, you see them listed. If a plan is closed, it is indicated with the word Closed as shown in the following figure. The most recent Urgent Care Plan is at the top of the list.



11. Double-click the plan at the top of the list.

    The Urgent Care Plan displays.

12. Read the plan then click the red STOP/Dismiss button in the bottom-right corner of the screen to return to the Update Client Data window.

13. Click the Close  icon on the Option toolbar to close the Update Client Data window.

14. When the message appears asking if you are sure, click Yes.

UNDERSTANDING SEND NOTIFICATIONS

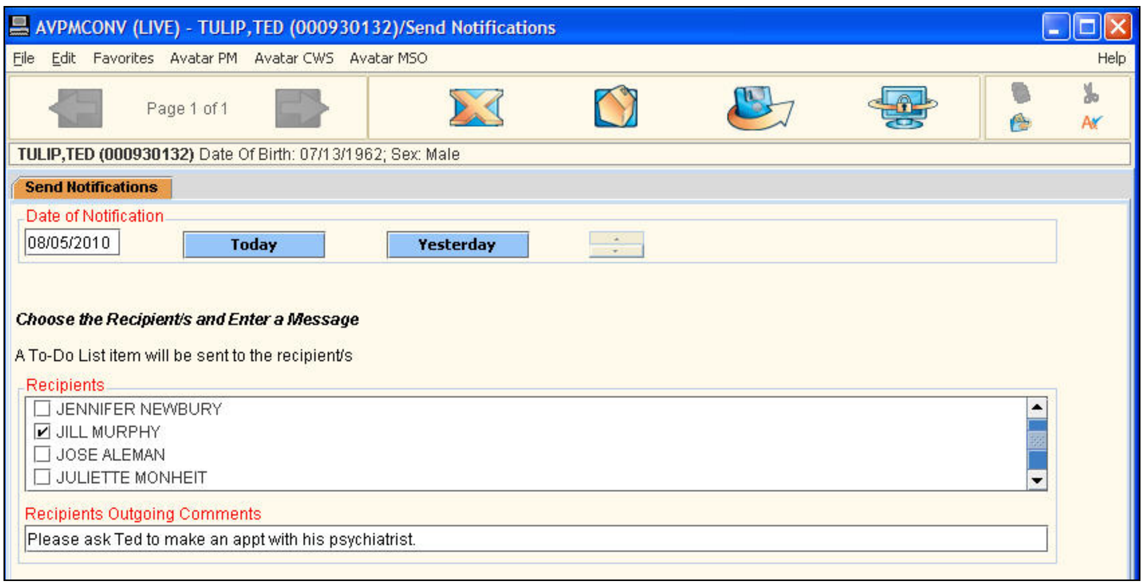
Send Notifications allows you to send a custom notification to another BHRS staff member. When you send the notification, a message appears on the recipient's screen notifying the recipient that there is a new To-Do item.

WHO CAN PERFORM THIS FUNCTION

Both administrators and clinicians have the ability to use Send Notifications.

MENU PATH

Avatar PM→Client Management→Episode Management→Send Notifications



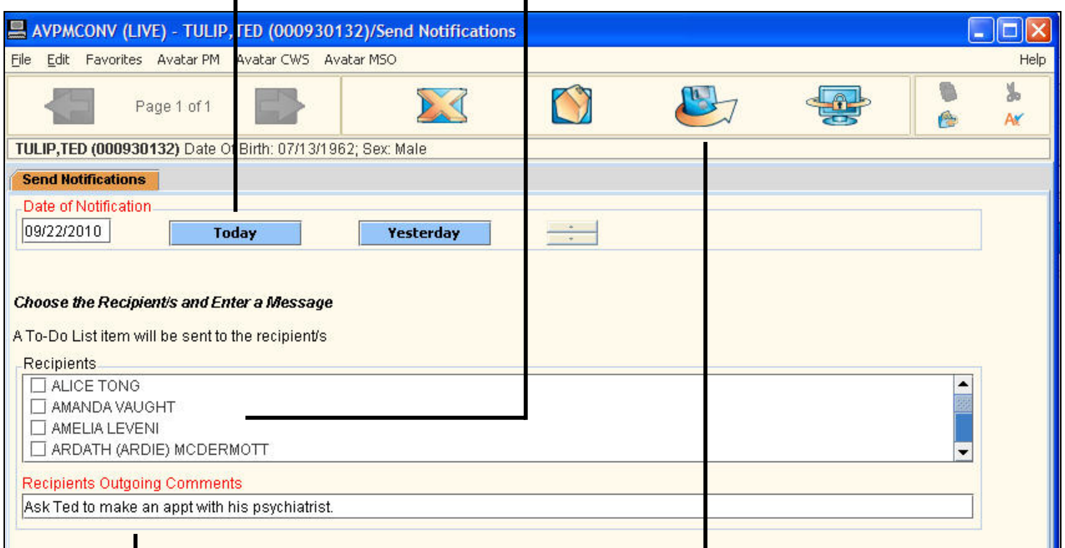
Exercise 2: Using Send Notifications

In this exercise you will create and send a notification to a staff member's To-Do list.
Before You Begin: *You should have a client in the My Session Frame.*

1. Choose Avatar PM→Client Management→Episode Management→Send Notifications from the Menu Frame.
2. If the Pre-Display screen appears, click the Add button to create a new notification.
3. Follow these steps to create the notification:

A Click the Today button to enter the current date.

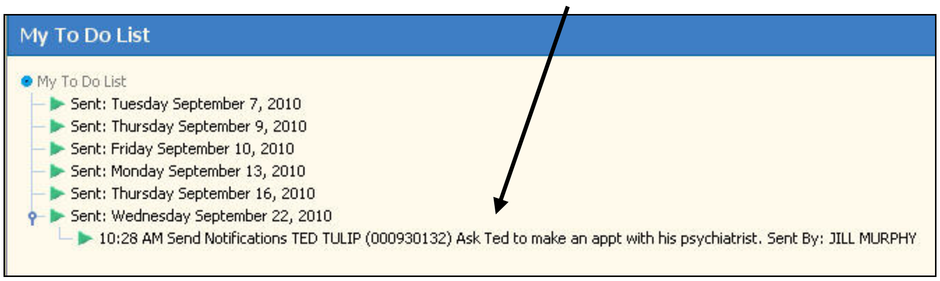
B Choose the recipient(s) for the To-Do item.



C Enter the text of the notification here.

D Click the Submit icon to send the notification.

The notification appears in the recipient's To Do list.



CONCEPT REVIEW

See appendix for answers.

1. Which of the following types of alerts is *not* sent by and administrator?
    a. Financial Interview Due
    b. Insurance Application
    c. Care Alert
    d. Update Client Demographics
2. You can view an Urgent Care Plan by clicking the Urgent Care Plan button in the bottom-right corner of an Avatar window.
    a. True
    b. False
3. You can disable a client alert without deleting it.
    a. True
    b. False
4. You can specify the episode where you want the client alert to appear.
    a. True
    b. False
5. An alert message appears when you select the client or open a window related to the client.
    a. True
    b. False
6. When you send a notification to a staff member, a message appears on the recipient's screen indicating that there is a new item in the To Do list.
    a. True
    b. False

APPENDIX—CONCEPT REVIEW ANSWERS

1. c
2. b
3. a
4. a
5. a
6. a