



**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.

AVPMCONV (LIVE) - LAVENDER, LUCY (000930154)/Client Alerts

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LAVENDER, LUCY (000930154)

Client Alerts

Type Of Alert: FINANCIAL INTERVIEW DUE

Custom Message: Ask Client to make appointment for a financial Interview

Active or Active for Date Range: Active Active for Date Range

Start Date: 09/22/2010

End Date: 10/06/2010

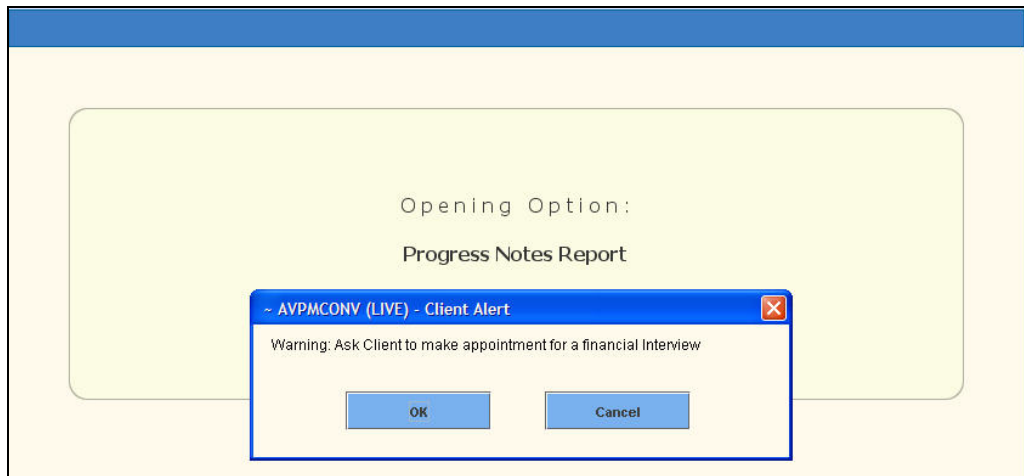
Disabled: Yes No

Applicable Options:

- 837 Fast Defaults (Avatar MSO)
- 837 Institutional Defaults (Avatar MSO)
- 837 Professional Defaults (Avatar MSO)
- Add Non-User Signature (Avatar CWS)
- Admission (Outpatient)
- Admission Referral Information

Episode(s): All Episodes

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.

AVPMCONV (LIVE) - CELERYSEED,CYNTHIA C (000930069)/Update Client Data

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CELERYSEED,CYNTHIA C (000930069)

Update Client Data

Client Name: CELERYSEED,CYNTHIA C

Client Last Name: CELERYSEED

Client First Name: CYNTHIA

Client's Middle Initial: C

Suffix: Sr Jr III IV V VI

Prefix: [Dropdown]

Sex: Female Male Unknown

Date Of Birth: 01/01/1964

Social Security Number: 999-99-9999

Facility Chart Number: [Field]

Client's Address - Street: 123 MAPLE ROAD

Client's Address - Street 2: [Field]

Client's Address - Zipcode: 94403

Client's Address - City: SAN MATEO

Client's Address - County: SAN MATEO

Client's Address - State: CALIFORNIA

Client's Home Phone: 650-555-1212

Client's Work Phone: [Field]

Primary Language (Access Only): [Dropdown]

Client Race (Access Only): [Dropdown]

Option: Complete

Update Client Data | Chart Review

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.

AVPMCONV (LIVE) - CELERYSEED,CYNTHIA C (000930069)/Update Client Data

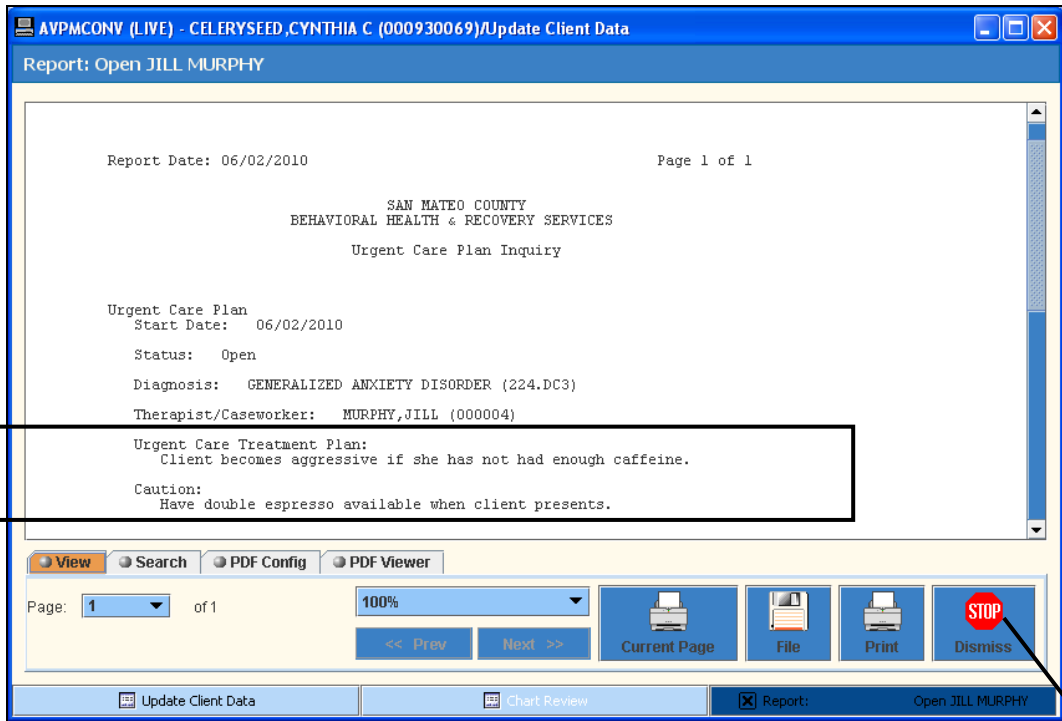
Chart Review

CELERYSEED,CYNTHIA C (000930069)

- Chart Review
- Abstracts
- To Do List
- BHRS Client Relationships
- CALOCUS
- ICI Contacts Note
- Initial Contact Screening (ICI)
- LOCUS
- MENTAL STATUS EXAM (Adult + PIN)
- Mental Status/Behavioral Observation (YOUTH)
- Substance Use Assessment
- Urgent Care Plan
- Episode # 1 Admit: 01/01/2010 Discharge: NONE Program: 416800 EAST BAYSHORE ADULT

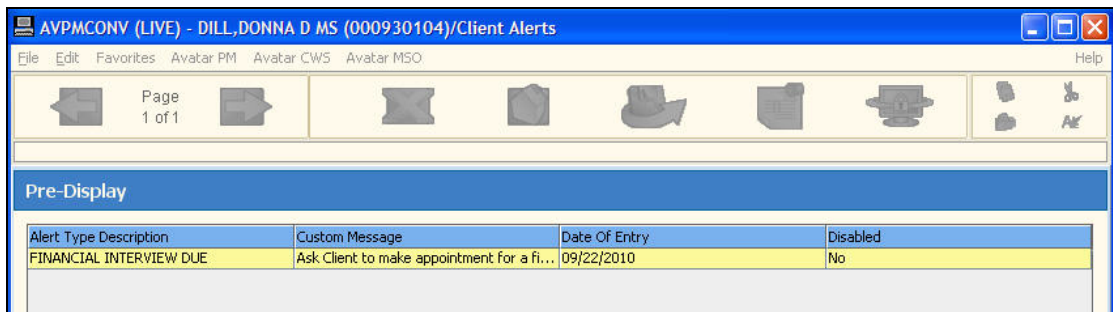
Open JILL MURPHY

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.

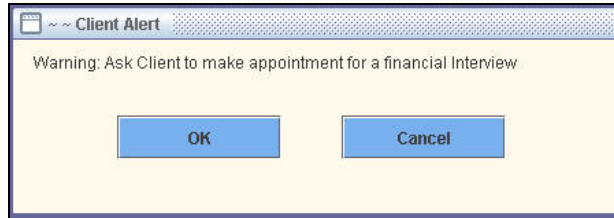
The screenshot shows the 'Client Alerts' window for client CELERYSEED, CYNTHIA C. (000930069). The window title is 'AVPMCONV (LIVE) - CELERYSEED, CYNTHIA C (000930069)/Client Alerts'. The 'Type Of Alert' dropdown is set to 'FINANCIAL INTERVIEW DUE'. The 'Custom Message' field contains 'Ask client to make appointment for Financial Interview.' The 'Start Date' is 06/02/2010 and the 'End Date' is 08/31/2010. The 'Applicable Options' section has several checkboxes, and the 'Episode(s)' section has 'All Episodes' checked. A 'Submit' icon is at the bottom right.

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.



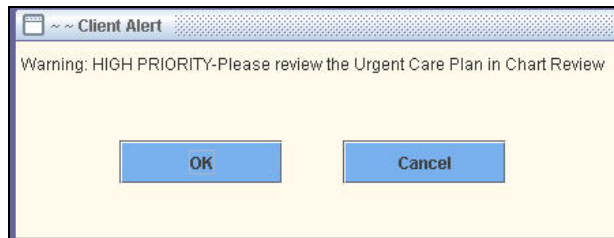
6. Click OK to close the message.

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.

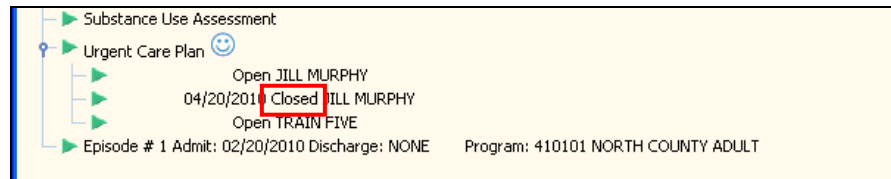
When you select a client with an Urgent Care Plan, the alert displays.




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 of 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

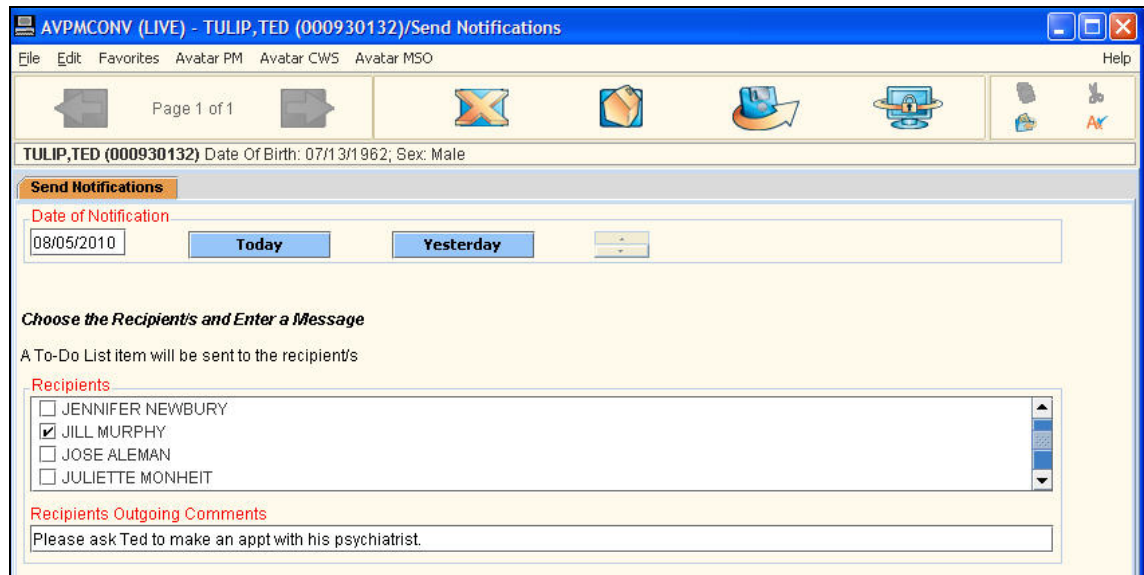
Send Notifications allows you to send a custom notification to another BHRS staff member. When you send the notification, a message appears on the recipient's screen notifying the recipient that there is a new To-Do item.

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



AVPMCONV (LIVE) - TULIP, TED (000930132)/Send Notifications

File Edit Favorites Avatar PM Avatar CWS Avatar MSO Help

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TULIP, TED (000930132) Date Of Birth: 07/13/1962, Sex: Male

Send Notifications

Date of Notification
08/05/2010 Today Yesterday

Choose the Recipient/s and Enter a Message

A To-Do List item will be sent to the recipient/s

Recipients

- JENNIFER NEWBURY
- JILL MURPHY
- JOSE ALEMAN
- JULIETTE MONHEIT

Recipients Outgoing Comments

Please ask Ted to make an appt with his psychiatrist.



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.

The screenshot shows the 'Send Notifications' form for client TULIP, TED (000930132). The 'Date of Notification' is set to 09/22/2010, and the 'Today' button is highlighted. The 'Choose the Recipient/s and Enter a Message' section shows a list of recipients: ALICE TONG, AMANDA VAUGHT, AMELIA LEVENI, and ARDATH (ARDIE) MCDERMOTT. The 'Recipients Outgoing Comments' field contains the text 'Ask Ted to make an appt with his psychiatrist.' The 'Submit' icon is located in the bottom right corner of the form.

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.

The screenshot shows the 'My To Do List' for the user. The list contains several notifications, with the most recent one being '10:28 AM Send Notifications TED TULIP (000930132) Ask Ted to make an appt with his psychiatrist. Sent By: JILL MURPHY'. An arrow points from the notification in the previous screenshot to this notification in the list.



CONCEPT REVIEW

See appendix for answers.

1. Which of the following types of alerts is *not* sent by an 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