

myAvatar™

Assign To/Remove from Caseload

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Assign To/Remove from Caseload

In this lesson, you will learn to assign treatment team members to and remove treatment team members from a client's treatment team. These team members are in addition to the Primary Therapist and Primary Psychiatrist.

Lesson Objectives

- Learn to assign additional members to a client's treatment team, including a Case Manager, Nurse, Family Partner, and Other Practitioner
- Remove an additional member from a treatment team

LESSON SCENARIO

Dolores Morales is an administrator at a BHRS clinic. A client's Primary Psychiatrist asks Dolores to assign the clinic's nurse to the treatment team since the psychiatrist has prescribed injections for the client.

Dolores finds Avatar's BHRS Assign to Caseload to be easy to work with. It clearly specifies the type of clinician being added to the team, and it provides the familiar Process Search feature for looking up clinicians.

The screenshot displays the 'BHRS Assign to Caseload' interface. At the top, there is a header with user information: 'OREGANO, OLIVER (000975456)', 'M, 52, 08/19/65', 'Ht: -, Wt: -, BMI: -'. To the right, it shows 'Ep: 1 : 410101 NORTH COUNTY ADULT', 'Problem P: -', 'DX P: -', 'Location: -', 'Attn. Pract.: -', and 'Adm. Pract.: MONTOYA, JORGE'. Below the header, there is a 'Chart' button and a 'BHRS Assign to Caseload' button. The main area is titled 'Caseload Assignment' and contains a 'Submit' button and a 'Notes' field. The form has several sections for assigning a clinician, each with a dropdown menu and a 'Notes' field. The dropdown menus are labeled: 'Case Manager/Other', 'Family Partner/Other', 'Nurse/Other', 'ARM Clinician/Other', 'Other Practitioner', and 'Other Practitioner'. A search results dropdown is visible at the bottom right, showing 'MARIANNE MANEJA (MMANEJ)' as the selected result. The interface also includes a 'Process Search' feature for looking up clinicians.

UNDERSTANDING BHRS ASSIGN TO CASELOAD

BHRS Assign to Caseload allows you to assign a clinician to a client's treatment team. This includes a Case Manager, Nurse, Family Partner, ARM Clinician, or Other Practitioner. These are team members who are assigned *in addition to* the Primary Therapist and the Primary Psychiatrist, who are assigned during the admission process.

WHO CAN PERFORM THIS FUNCTION?

Administrators and Unit Chiefs can perform this function. Typically, an administrator completes a caseload assignment at the direction of the Unit Chief.

MENU PATH

Avatar PM → Client Management → Episode Management → BHRS Assign to Caseload

CASELOAD ASSIGNMENT TAB PAGE 1

Use this tab to assign treatment team members, who are in addition to the Primary Therapist and Primary Psychiatrist. In the following example a nurse was assigned to the team to manage the client's medications.

The screenshot shows the 'BHRS Assign To Caseload' form for patient OREGANO, OLIVER (000975456). The form includes the following fields and content:

- Initial Assignment Date:** 08/06/2018
- Case Manager/Other:** (Empty field)
- Family Partner/Other:** ANNELYS GUIASOLA (AGUISA)
- Notes:** Assigned to the caseload on 08/06/2018 to follow up on medications. (This field is circled in red in the image)
- Nurse/Other:** (Empty field)
- ARM Clinician/Other:** (Empty field)
- Other Practitioner:** (Empty field)

Field	Description
Notes	Use the Notes fields to enter any explanation or comment about the assignment. It is suggested that you include the date of assignment in the note.

UNDERSTANDING REMOVING A CLIENT FROM A CLINICIAN'S CASELOAD

If team members in addition to the Primary Therapist and the Primary Psychiatrist, are assigned to a client and then later their services are no longer needed, you return to the BHRS Assign to Caseload window and use the [F5] key to remove the team member's name.

NOTE: If you want to change the Primary Therapist or the Primary Psychiatrist assigned during the admission process, return to Admission (Outpatient) or and make the change there.




Exercise 1: Assign to and Remove from Caseload

In this exercise, you will assign a nurse to the client's treatment team and then you will remove that person from the team when the client no longer needs injections.

ASSIGN AN ADDITIONAL TREATMENT TEAM MEMBER TO A CLIENT

1. Make sure your client is active in your My Session Frame.
2. Choose Avatar PM → Client Management → Episode Management → BHRS Assign to Caseload from the Menu Frame.
3. Follow these steps to add a nurse to the treatment team:
 - **A-** Enter all or part of the nurse's name here.
 - **B-** Click the Process Search button.
 - **C-** Choose the nurse's name from the dropdown list or click OK if the name appears in a message box.
 - **D-** Enter notes here.

The screenshot displays the 'BHRS Assign To Caseload' window for a client named OREGANO, OLIVER (000975456). The window is divided into several sections. At the top, there is a header with client information: 'Ep: 1 : 410101 NORTH COUNTY ADULT', 'Problem P: -', 'DX P: -', 'Location: -', 'Attn. Pract.: -', and 'Adm. Pract.: MONTOYA, JORGE'. Below this is a 'Caseload Assignment' section with a 'Submit' button and a 'Results' dropdown menu. The 'Initial Assignment Date' is set to 08/06/2018. The 'Nurse/Other' field contains 'MARIANNE MANEJA (MMANEJ)'. A red box labeled 'A' points to this field. A red box labeled 'B' points to the 'Process Search' button. A red box labeled 'C' points to the 'Results' dropdown menu, which shows 'MARIANNE MANEJA (MMANEJ)'. A red box labeled 'D' points to the 'Notes' field, which contains the text 'Nurse assigned to team to administer injections'. The 'Notes' field is highlighted in green. The 'Results' dropdown menu is also highlighted in green. The 'Notes' field is highlighted in green. The 'Results' dropdown menu is highlighted in green. The 'Notes' field is highlighted in green.

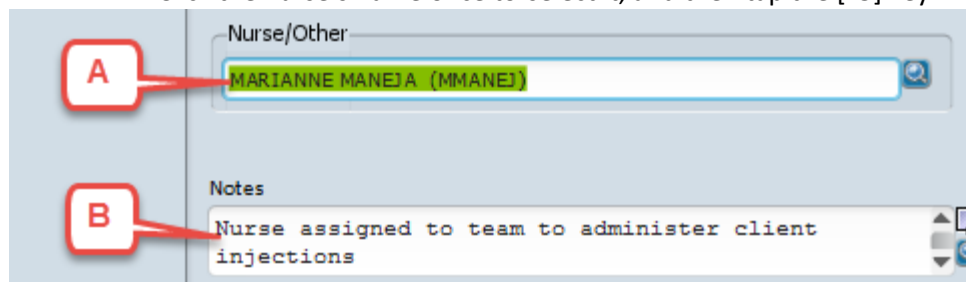
1. Click the  Submit icon on the Option toolbar to save the information.

REMOVE AN ADDITIONAL TREATMENT TEAM MEMBER FROM A CLIENT

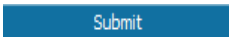
In this example, the client no longer needs injections, so you will remove the nurse from the treatment team.

2. Choose Avatar PM → Client Management → Episode Management → BHRS Assign to Caseload from the Menu Frame.
3. Follow these steps to remove the nurse from the treatment team:

- **A.** Click the nurse's name once to select it, and then tap the [F5] key.



- **B.** Delete the note.

4. Click the  Submit icon on the Option toolbar to save the change.



CONCEPT REVIEW

See appendix for answers.

1. You should use the BHRS Assign to Caseload feature to add which of the following types of staff members to a client's treatment team.
 - a. Family Partner
 - b. Primary Psychiatrist
 - c. Nurse
 - d. Primary Therapist
2. You remove an additional treatment team member from a client's treatment team using the Remove from Caseload feature.
 - a. True
 - b. False
3. The Primary Therapist is the only person who has permission to add a team member to a client's treatment team.
 - a. True
 - b. False
4. You remove the Primary Therapist from a treatment team using the Admission (Outpatient) window.
 - a. True
 - b. False

APPENDIX—CONCEPT REVIEW ANSWERS

1. a, c
2. b
3. b
4. a