



Sage Treatment Plan Form Listening Session

Substance Abuse Prevention and Control
County of Los Angeles Department of Public Health



Sage Provider Advisory Meeting: November 27, 2018



Overview

- **Purpose**: To review the current state of the treatment plan form and to receive provider feedback and suggestions on needed enhancements and functional improvements to the form and submit these as a whole to Netsmart for development.
- **Summary of enhancement ideas to date.**
 - Sources include:
 - Netsmart's User Experience Interviews with Providers.
 - Summary of treatment plan form enhancement items submitted to date.
 - Other functionality desired by SAPC.
- **Listening Session**: Solicitation of additional functionality & feedback desired by providers.



Sage Treatment Plan Form: Provider Concerns

➤ Primary Concerns from Provider Feedback:

There is no current mechanism for obtaining all needed signatures within the system.

- Must print, sign and scan every treatment plan, then upload to Sage
- There are no signature lines for Patient, Counselor and/or LPHA.
- Form does not identify who is signing/completing note.
- Form does not identify date when patient, counselor and/or LPHA signed form.
- LPHA doesn't have to sign for up to 15 days after the patient.
 - Client has to sign the finalized version, which prevents LPHA from entering review notes

Unable to add or update treatment goals once "Treatment Plan Form" is finalized.

- Cannot update treatment plan with additional goals unless you enter a new treatment plan even if adding a new goal to the current plan.
- "Complete date" field is present when creating a goal, but cannot actually enter a complete date once the form is finalized.



Sage Treatment Plan Form: Provider Concerns

➤ Primary Concerns from Provider Feedback:

- Unable to record Treatment Plan Reviews or Treatment Plan Updates on form once Finalized.**
 - When the Treatment Plan is reviewed, clinicians have to enter a new treatment plan from scratch and can't pull forward any of their prior goals, actions, etc. When a goal is completed, they have to re-enter all the information just to enter a Completion Date.
 - When entering an update or new goal, previous goals do not transfer to new treatment plan
- Unable to pull prior goals onto future treatment plan forms.**
 - Currently, if a provider is making any modifications to the treatment plan form, they must re-write the entire form from scratch.
 - No functionality for selecting goals that remain active or to pull them forward for editing.
- Unable to Save form in draft without filling out all required fields**
 - Providers have indicated that they would like to be able to save whatever progress they have made.
- Future date warning encountered when entering "Target Date" or "Completion Date" despite all of these dates required be in the future.**



Treatment Plan: Future State Summary of Approved Enhancements



1. Signature lines to be added to printed Treatment Plan
2. Client name to be printed at the bottom of the treatment plan
3. Signature pad for digital signatures
4. Automatically populate the diagnosis from the Provider Diagnosis (ICD-10) Form



Treatment Plan: Future State Enhancements in Development

5. Ability to amend/update treatment plan with additional goals without having to re-write whole treatment plan form.
6. Outcomes section with completion date availability after plan is finalized
7. Allow for saving in draft even when required fields are not completed.
 - Required fields will still be enabled before finalizing
8. Develop an Alert message when treatment plan is due
9. Target dates to have button that allows user to select 90 days from current date





Treatment Plan: Future State Items in the Queue

- Add level of care to the treatment plan
- Automatically populate the printed name of the counselor and LPHA who submitted and/or finalized the treatment plan and the date of e signatures.
- Include the ability to elect for goals to pull forward from the previous treatment plan when completing a treatment plan update or revision.





Future State: Additional Provider Feedback?

➤ What additional information or fields would be helpful to add to the form?

➤ What functionality would you like to have added?



➤ What recommendations should SAPC consider regarding treatment plan policies?