![Munson Healthcare logo] **MUNSON HEALTHCARE**

Behavioral Health Office Treatment Plan for Behavioral Health Therapists

Summary: New Behavioral Health Office Treatment Plan workflow and note.
When: December 3, 2019
Why the change? To streamline the treatment plan process and to meet documentation requirements.
Support: For questions or support, please contact the Helpdesk at (231) 935-6053 or Ambulatory Informatics at (231) 392-0229.

Patient Intake Change:

- The treatment plan will no longer be completed in the BH OP Therapy visit intake form, as this section of the powerform will be removed and is being replaced by a new treatment plan note.

Workflow to Create Initial Treatment Plan Note:

1. **Create** and **sign** the BH Therapist Initial Office Note/BH Therapist Office Note.
2. **Navigate** to the Ambulatory Workflow page.
3. Ensure 'This Visit' diagnoses have been selected in the Problem List component.
   a. **Note:** This is a shared problem list; if you remove a chronic problem it removes it for all other providers that the patient may encounter.
4. **Navigate** to the Assessment and Plan component and enter the **.bh_tx_plan** auto text in the free text box.
5. **Edit** all fields in the auto text. The blue drop down arrow expands to provide either a blank free text option or an auto filled text.
6. **Click** on BH Office Treatment Plan note link from the Workflow page menu.
7. **Review** the information and **sign**.

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How to Add an Item within Recommendation Component:

Within the Ambulatory Workflow, the Recommendations component allows you to add a visual reminder for reviewing the treatment plan.

1. **Navigate** to the Recommendations component.

2. **Click** on the [+] symbol, located to the immediate right of the Recommendation title.

3. **Check** the box next to BH Treatment Plan Review in the Add Recommendations window.

4. In the Selected Expectations section, **enter** in the desired frequency and corresponding date for treatment plan review, as specified at your facility.

5. **Click** Save for the recommendation to populate into the Recommendations component.

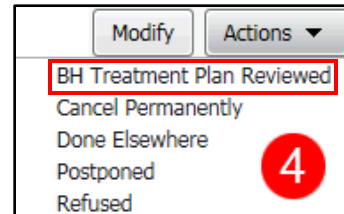## How to Filter an Item within Recommendation Component:

1. **Navigate** to the Recommendation component.

2. **Click** the filter symbol [≡▼] located to the far right of the Recommendation title.

3. A drop down menu will appear, then **select** Settings.

4. **Click** the Favorites tab.

5. **Check** the box next to BH Treatment Plan Review.

6. **Select** the right arrow. This will add that item to your Favorites section.

7. Then **click** Submit.

8. **Navigate** back to the [≡▼] symbol and **select** Show only favorites, this will filter all Recommendations to only show the BH Treatment Plan Review.

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Subsequent Visit:

1. At each visit, **complete** the BH OP Therapy Visit form, the BH Therapist Office Note, and sign.
2. **Navigate** to the Recommendation component, if plan is up for review (i.e. every 3 months, 6 months, or etc.).
3. **Click** on the BH Treatment Plan Review.
4. **Click** on the Actions button and **select** BH Treatment Plan Reviewed.
5. Complete a BH Office Treatment plan note.
   a. **Navigate** to the Documents component.
   b. **Open** the previous treatment plan note. **Tag** (copy/paste) the treatment plan to add to the current visit. Edit plan as needed.
   c. **Sign** after completing the BH Office Treatment Plan note.

Patient Signature:

If the patient's signature is required at your facility on the treatment plan, follow the steps below:

1. **Navigate** to the Documents component and **single click** the BH Office Treatment Plan note.
2. **Click** Print, located in the right upper corner.
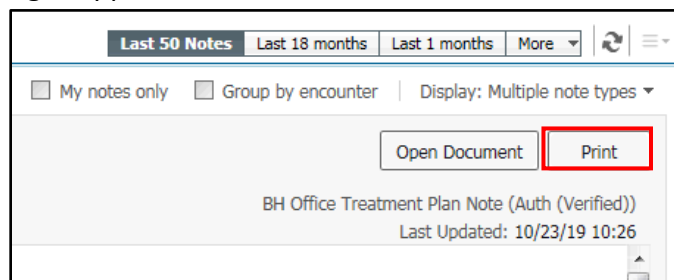
3. **Obtain** the patient's handwritten signature and date.
4. **Submit** the document to the office scanning/HIM personnel, who will scan it into the electronic health record.