Ohio RTIS

Knowledge Base Article

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Overview

This article describes how to create a Review Discharge Plan within the Ohio Residential Treatment Information System (RTIS). These records may be created after the Initial Discharge Plan has been approved for the purposes of a Monthly Review, Service Plan Review. Aftercare Updates or Closure.

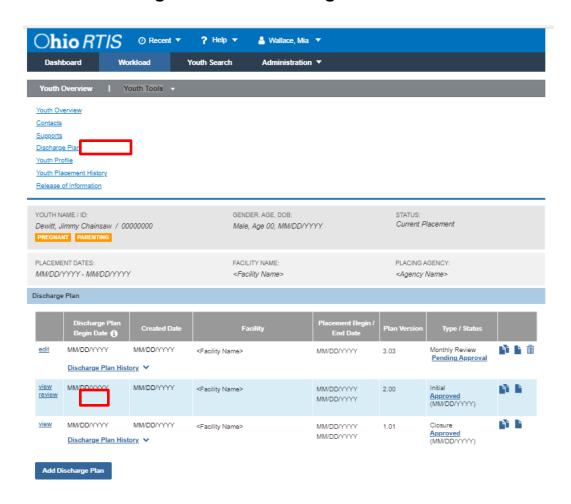
While there are many data elements contained in the Discharge Plan, it has been designed to allow congregate care facilities the flexibility to enter in information as it best suits their needs, with only a few required fields. Within this article, the data fields which require an entry will be notated. Otherwise, users may leave these areas blank or allow SACWIS-entered data only to display.

Important Tips

- 1. Reviews of the Discharge Plan should take place every 30 days and/or during every Service Plan review while the youth is in placement. This requirement no longer applies once the youth has left the QRTP facility.
- 2. The last Discharge Plan Review completed as part of a youth's placement will serve as the Discharge Summary. The same questions are found in all Review types.
- Do not complete a Closing Discharge Plan until you are certain no further updates are needed on the Discharge Plan. Once approved, a Closing Discharge Summary will prevent any further Discharge Plans from being created for this Placement Episode.
- 4. Aftercare Updates to the Discharge Plan should only be done if the youth experiences significant changes post-discharge, such as a change in home placement or service providers, and the caregivers require an updated copy of the Discharge Plan. Otherwise, all Aftercare notes should be housed in the Contacts, NOT in an Aftercare Update to the Discharge Plan.

Navigating to the Discharge Plan List Page

- Navigate to the Youth Overview by choosing the youth from the Assigned or Unassigned Workload screen, or perform a Youth Search for the individual whose Discharge Plan needs to be modified.
- 2. The most recent Discharge Plan will display the **Current Discharge Plan** grid. Users may choose the review hyperlink from this record to create a new copy for the purposes of review.
- 3. Alternatively, from the **Youth Tools**, choose **Discharge Plan**. The Discharge Plan List Page appears.



- 4. If the Discharge Plan Youth Tool was selected, the Discharge Plan List Page will appear.
- 5. Click the **review** link to create a new minor version of the existing approved Discharge Plan to create the review Discharge Plan record.

Note: The copy icon () can be used if the Youth has a new Residential Treatment Episode and requires an Initial Discharge Plan record. The system will create a new major numbered Initial version for use to document the new placement.

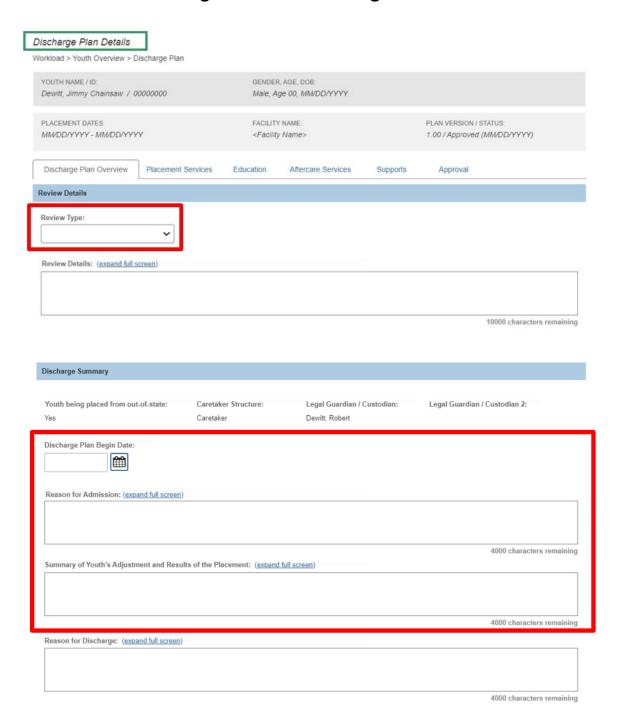


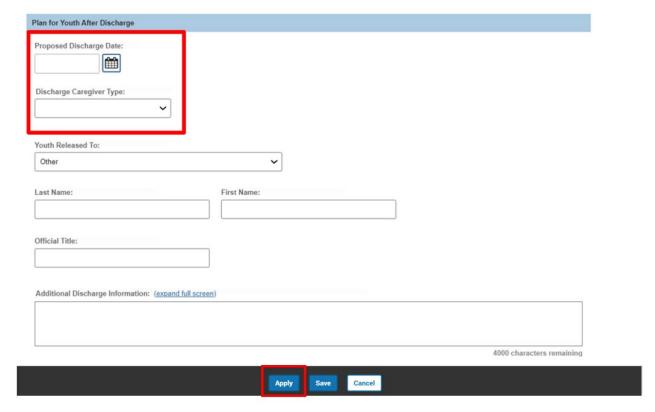
The **Discharge Plan Details** screen appears.

Completing the Review Discharge Plan Overview Tab

- 1. Choose the **Review Type** from the drop-down.
 - Note: If **Closure** is chosen, no other information is required to be entered, and users may go directly to the Approval tab if desired.
- Enter Review Details (not required).
- 3. Enter the **Discharge Plan Begin Date** or choose the date from the calendar icon (required).
- 4. Update the **Reason for Admission** in the text field, if applicable.
- 5. Enter Summary of Youth's Adjustment and Results of the Placement: (required).
- 6. Enter the **Proposed Discharge Date**, if applicable.
- 7. Enter **Reason for Discharge**, if applicable.
- 8. Choose the **Discharge Caregiver Type** from the drop-down menu (required). See sub-section below for more details **Completing Additional Information for Discharge Caregiver Type**.
- 9. Choose a value from **Youth Released To**, if applicable.
- 10. Enter any **Additional Discharge Information** in the text field.
- 11. Click Apply.







The **Discharge Plan Details** screen appears.

12. Click the **Placement Services** tab.



Completing Additional Information for Discharge Caregiver Type

Upon selection of Caregiver or Facility, the system will display additional information which requires attention.

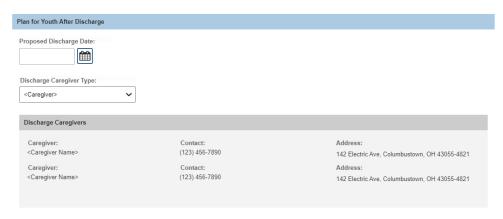
Caregiver Selection:

- The system will present the Discharge Caregivers grid.
- This information is derived from the Supports list for the youth. The individual(s) who have been designated as the Discharge Caregiver will appear in the grid. If no Discharge Caregiver is marked in the Supports, the system will display the message, No Discharge Caregiver has been identified.



 If the data in the grid is incorrect, please reference the Knowledge Base Article, <u>Entering RTIS Youth Supports</u>, to enter the correct Discharge Caregiver information to pull into the Discharge Plan.

View 1 - A Support record has been marked as Discharge Caregiver.



View 2 - No Support records have been marked as Discharge Caregiver -



Facility Selection:

The system will present the **Discharge Facility** grid.

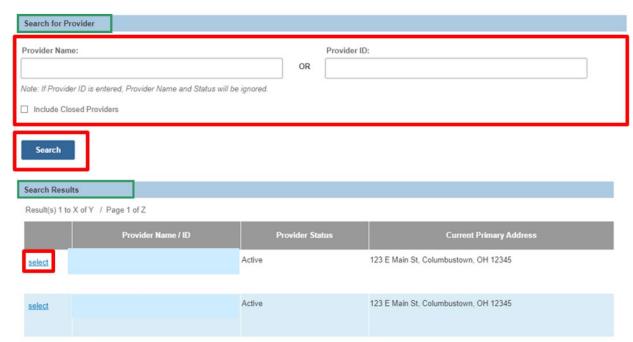
1. Click Link Provider. The Search for Provider screen appears.



- 2. Enter the **Provider Name** or the **Provider ID** (if known) for the facility to which the youth will be discharged.
- 3. Press, Search.

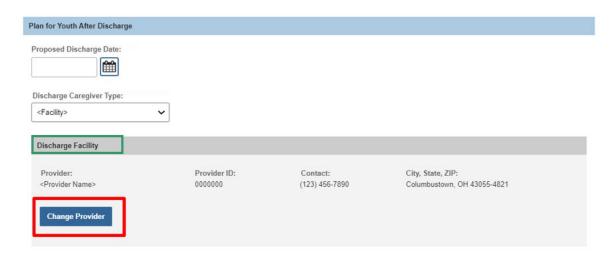
Note: The screen will expand to display the Search Results grid.

4. Click **select** next to the matching Provider (Facility) name.



The chosen Provider (Facility) information will display in the grid.

If the incorrect Provider (Facility) was selected, click **Change Provider** to return to the **Search for Provider** screen.

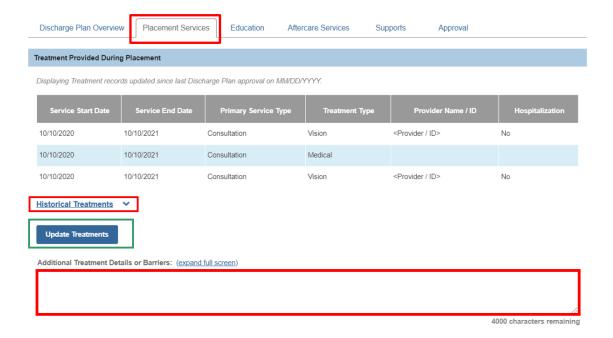


Completing the Placement Services Tab

Note: If the youth is in PCSA/IV-E Court custody, SACWIS will bring over information from the Youth's Person Profile and will automatically populate some areas of the Placement Services Tab. If the youth is a Direct Placement, RTIS will not display any SACWIS information in the Discharge Plan, even if it exists in the SACWIS database, unless a Release of Information has been entered. Congregate care facilities may choose to enter information in the Treatment, Medications, Diagnosed Conditions and Education tabs, but it is not required.

Reviewing/Entering Treatment Provided During Placement

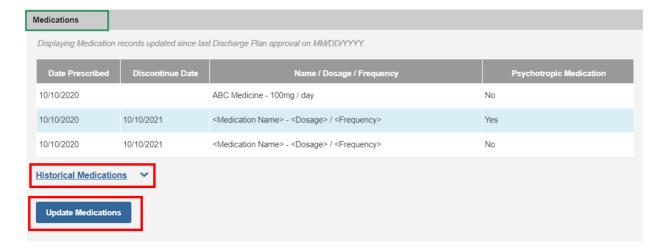
- Review any existing treatment records for accuracy. The system will display those treatment records which have been added and/or updated since the most recent Discharge Plan's approval.
- 2. Click the **Historical Treatments** drawer to view additional records.
- 3. If a Vision, Medical, Mental Health, Specialist or Dental appointment recently took place and needs to be documented, click the **Update Treatments** button. User is navigated to the **Manage Medical Information>Treatment History** screen, where the appropriate record can be added, as well as any new Providers treating the youth. Please see the Knowledge Base Article, **Managing Youth Medical Information**, for instructions on creating a new **Treatment** record.
- 4. Enter Additional Treatment Details or Barriers in the text field.



Reviewing/Entering Medications

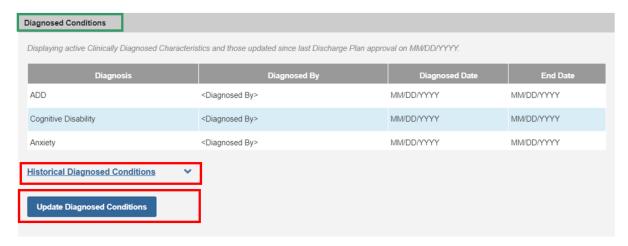
- Review any existing medication records for accuracy. The system will display any current medications the youth is prescribed and those that were discontinued since the last Discharge Plan was approved.
- Click the Historical Medications drawer to view additional records.
- 3. Click Update Medications to enter any new records. User is navigated to the Manage Medical Information>Medication screen, where records can be added. Please see the Knowledge Base Article, Managing Youth Medical Information for instructions on creating a new Medication record.

Important: If the youth is in PCSA/IV-Court custody, please check with the placing agency prior to creating medication records as they may wish to enter these records after providing authorization for the youth to begin the medication.



Reviewing/Entering Diagnosed Conditions

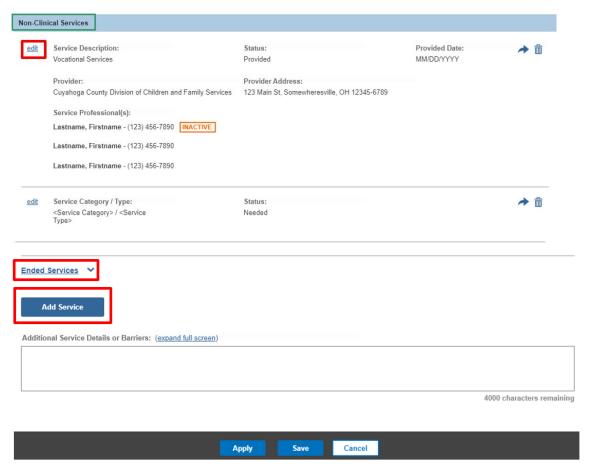
- Review any existing Diagnoses records for accuracy. The system will display any current Diagnoses which apply to the youth and those that were end-dated since the last Discharge Plan was approved.
- 2. Click on the Historical Diagnosed Conditions drawer to view additional records.
- Click Update Diagnosed Conditions to enter any new records. User is navigated to the Manage Person Profile>Characteristics screen, where records can be added. Please see the Knowledge Base Article, Managing Youth Medical Information, for instructions on creating a new Diagnosed Condition record.



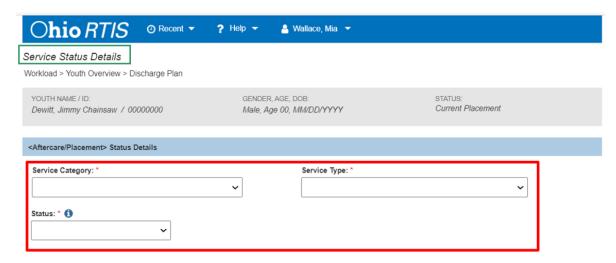
Entering Non-Clinical Services

Note: Non-Clinical Services refer to those activities a facility engages the youth in which would not fall into the categories listed above of treatment, medication, or diagnoses. These might include services such as Independent Living or Tutoring. Entry of these services is not required.

- 1. Review any existing **Non-Clinical Services** records for accuracy.
- 2. Click on the **Ended Services** drawer to view additional historical records.
- 3. Click **edit** next to any existing services to modify the information contained, or to add Non-Clinical Services, click the **Add Service** button. The **Service Status Details** page appears in both instances.



- 4. Choose the **Service Category** that most closely aligns with the non-clinical service being documented (required).
- 5. Based on the selection in **Service Category**, the applicable values will populate in the **Service Type** drop-down. Choose the **Service Type** that most closely aligns with the non-clinical service being documented (required).
 - **Note:** If a user enters the screen via the edit on an existing service, neither the Service Category nor the Service Type can be changed.
- Choose a Status of the service. These values include Needed, Scheduled, Referred or Provided (required).



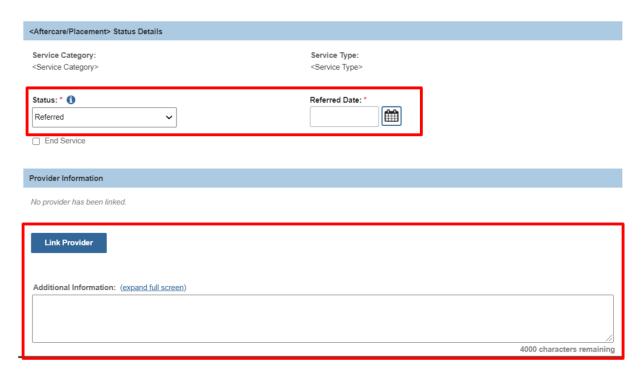
Based on the selection in the Status drop-down, additional data elements will appear on the screen:

 Needed = The Additional Information text box will appear. Any applicable information can be entered about the need for this service.

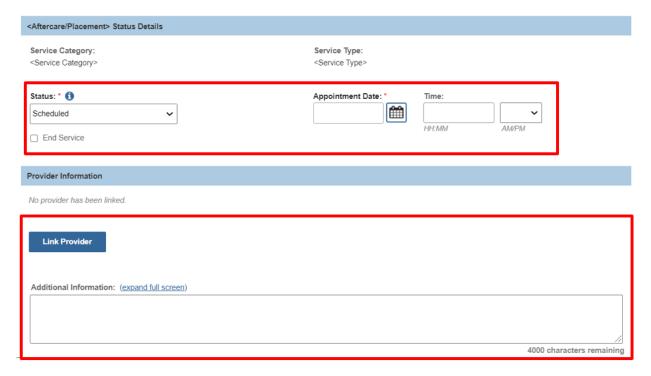
Note: At any time after creation of the Service, check the End Service box to indicate it is no longer needed.



 Referred = Referral Date field appears, along with the ability to link the Provider who the youth has been referred to (required). The Additional Information text box will appear. Any applicable information can be entered about the referral made for this service.

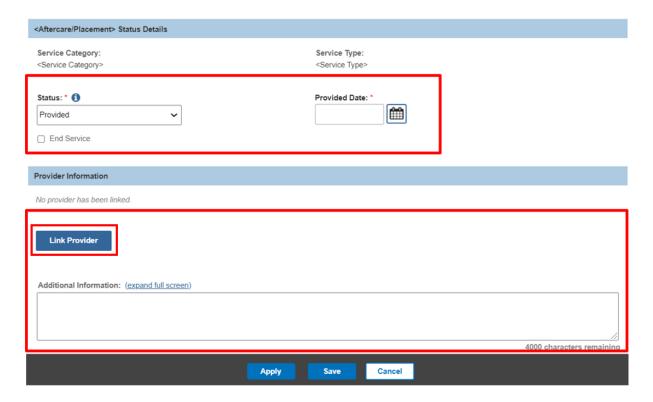


• Scheduled = Appointment Date and Time fields appear, along with the ability to link the Provider with whom the youth has an appointment (required). The Additional Information text box will appear. Any applicable information can be entered about the scheduled appointment for this service.



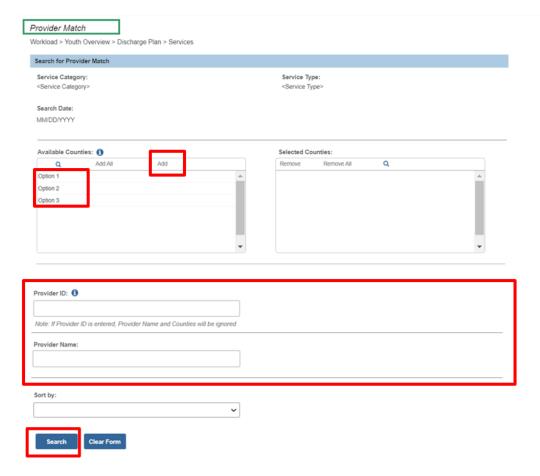
- Provided = Provided Date field appears, along with the ability to link the
 Provider with whom the youth has an appointment (required). The Additional
 Information text box will appear. Any applicable information can be entered
 about the provided service.
- If the Status of Referred, Scheduled or Provided was selected, a Provider should be linked to the service (required). Click the Link Provider button. The Provider Match screen appears.

Note: The system will automatically pull forward the **Service Category** and **Service Type** that was chosen on the **Service Status Details** page, as well as the current date in the **Search Date** field.



- 8. Select **Available Counties** values to narrow the search for Providers located only within those areas, if desired. Click on each County name, and then click **Add** to move those values to the **Selected Counties** box (or **Add All** to pull over all counties in the State of Ohio). If a County is chosen in error, select the value to delete and then click **Remove** (or **Remove All** to clear the Selected Counties list).
- Enter the Provider ID, if known. If this value is entered, there is no need to enter Available Counties or Provider Name, the system will ignore any other search criteria (If Provider ID is not entered, type in the Provider Name).
- 10. Choose a **Sort by:** option if desired, to order the results set.
- 11. Click **Search** to perform the **Search for Provider Match**.





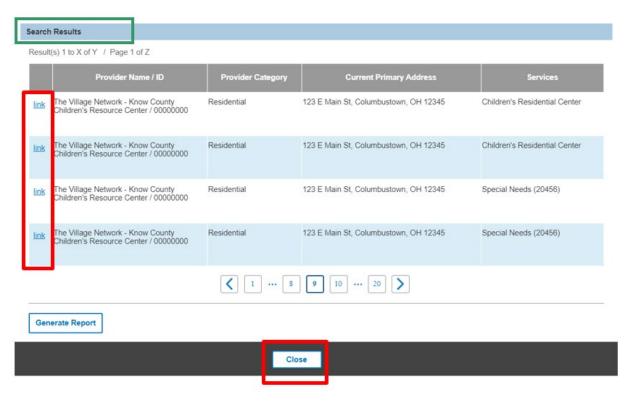
The **Search Results** grid will appear.

- Click link next to the Provider Name / ID that matches the desired service provider. This will return the user to the Service Status Details page with the selected provider's information populated, OR
- Click the Close button at any time to return to the Service Status Details page with no Provider information selected.

Note: The resulting list of Provider Names comes from entries made in the SACWIS database which match the Service Category and Service Type selected. The following are some tips for search and selection:

- If the desired Provider is not found, modify the search criteria to widen the search or enter a '%' sign at the end of the Provider Name to allow for name variations.
- 2. If the Provider still does not display in the search results, the user may request creation of a new entry for use by the RTIS system by submitting a request to the SACWIS Help Desk.
- 3. When results appear with both the category of Non-ODJFS and Agency Contract, choose the Agency Contract category Provider ID.

4. The same Provider listed with the same Provider ID may display multiple times in the result set. This is anticipated given the duplication of services in SACWIS. You may select any of the duplicate Provider/Provider IDs which match your search criteria, it will return back into the Discharge Plan correctly.



12. Upon return to the **Service Status Details** page with a Provider ID selected, choose from the **Available Service Professionals** pusher box. This pusher box will contain a list of employees that have been associated with the Provider ID. Click on the name(s) to select, then choose **Add** which populates the name(s) in the **Selected Service Professionals** pusher box (or **Add All** to pull all listed names into the **Selected Service Professionals** pusher box). If the incorrect individual(s) are chosen, click their name(s) and select **Remove** (or **Remove All** to clear the **Selected Service Professionals** pusher box).

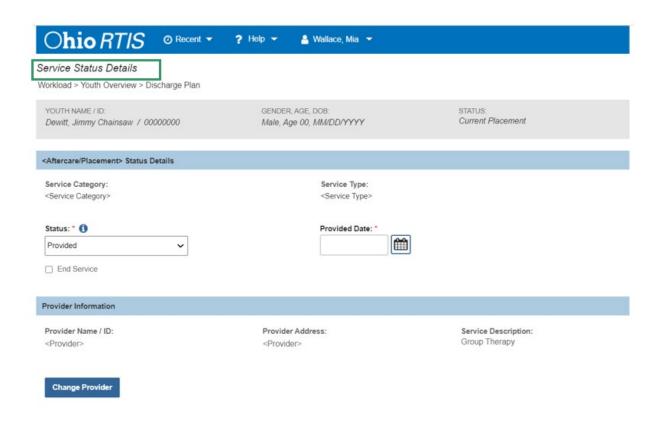
Note: If the desired Service Professional is not present to select, they may be added to the available list. Click on **Add Service Professional** button to create a new individual associated to this Provider ID. Users may also select **Manage Service Professionals**, which will navigate to the entire list of Service Professionals associated to this Provider ID and can be activated or de-activated if necessary. Please see the Knowledge Base Article <u>Managing Service Professionals in Ohio RTIS</u> for more information on this functionality and instructions on how to perform these tasks.

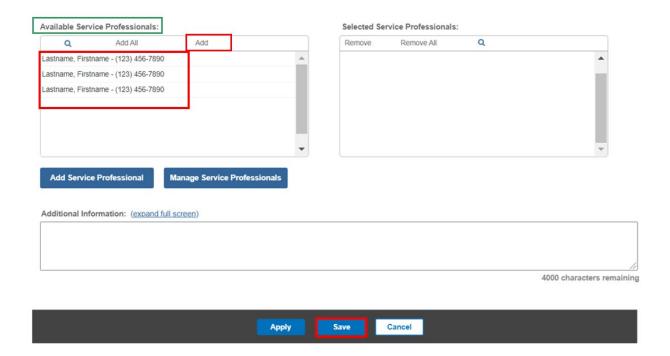
Note: It may be that duplicate Provider IDs exist for the same Agency and the Service Professional has been added to a different Provider ID. During the **Search for Provider Match** process, if it was identified there were identical entries of the same Provider, users may choose the **Change Provider** button which will relaunch the **Search for Provider Match** page (This button may also be utilized if it is determined the incorrect Provider ID was returned to the **Service Status Details** page). Choose a different Provider ID to determine if the desired **Service Professional** was entered on the duplicate Provider ID.

Important: If users identify duplicate Provider IDs for the same agency during the search process, they may a request to the SACWIS Help Desk. State users may merge the duplicates, which will then allow all Service Professionals employed by this agency to remain on one distinct Provider record.

Tip: If the same Provider ID is frequently linked to Discharge Plan Services, it may be advisable to record this ID for use in subsequent searches.

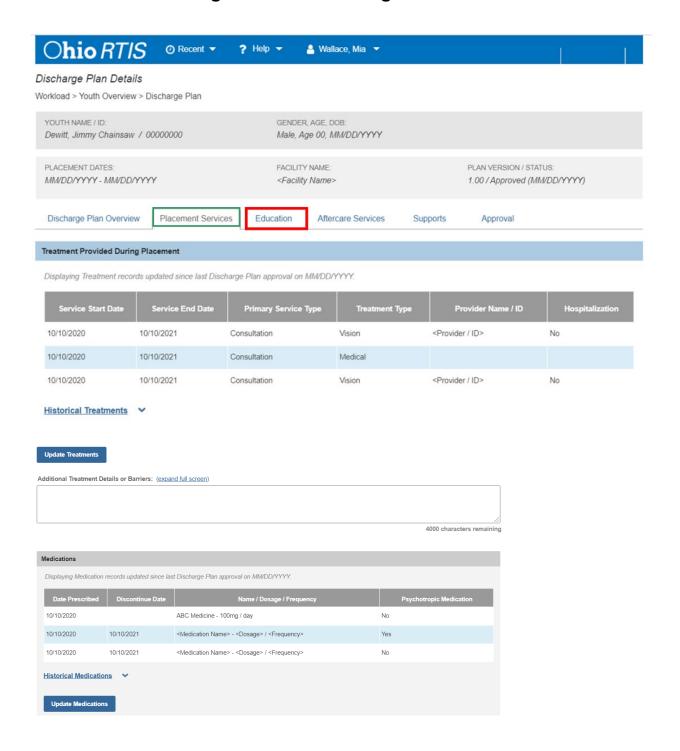
13. Click Save to retain the entered information and return to the Placement Services tab with the new Non-Clinical Service record present, or repeat the process to add additional Non-Clinical Services as desired.

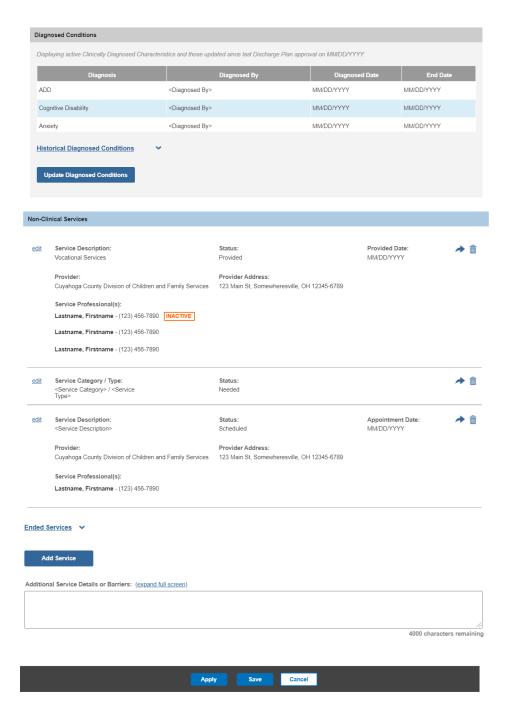




The **Discharge Plan Details** screen appears.

- 14. When finished, review the entirety of the Placement Services screen and make any necessary additions or edits.
- 15. Click the **Education** tab.





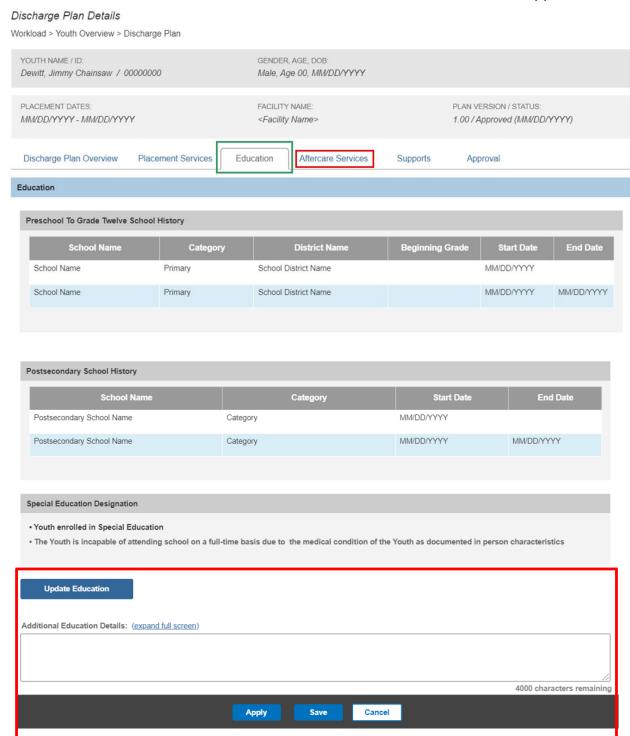
Completing the Education Tab

- 1. Review any existing **Education** records for accuracy.
- 2. To add Education records, click the **Update Education** button. The **Manage Education Information>School Profile** page appears. Please see the Knowledge Base Article, <u>Maintaining Youth Education Information in Ohio RTIS</u> for instructions on creating Education records.

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3. Enter Additional Education Details in the text field.

- 4. Click **Save** to retain the entered information and return to the **Discharge Plan Details** page.
- 5. Click the **Aftercare Services** tab. The **Aftercare Services** screen appears.

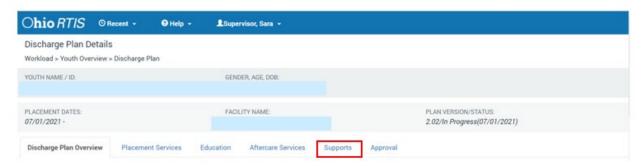


Completing the Aftercare Services Tab

Aftercare Services are those services which will be recommended or set up for a youth when they leave the facility. The process to add Aftercare Services will mirror that of adding Non-Clinical Services. Please refer to the section Entering RTIS Youth Supports for details.

Completing the Supports Tab

1. Click the **Supports** tab.

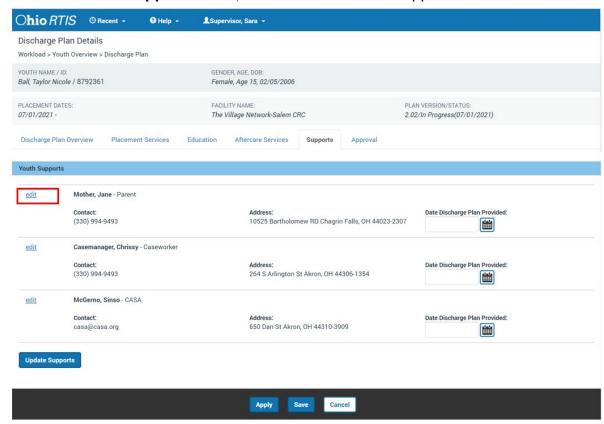


The **Supports** tab page appears.

Completing Supports Tab

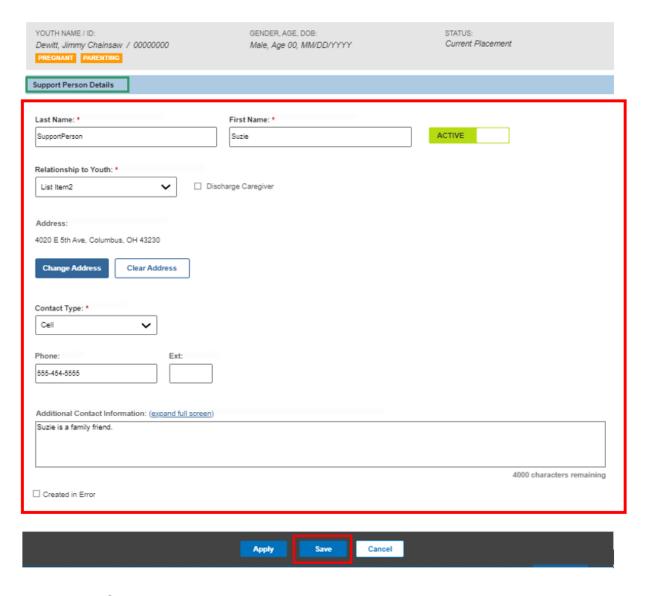
The system will automatically pull forward all **Active Supports** as entered in the **Supports** Youth Tool. Please reference the Knowledge Base Article, <u>Entering RTIS Youth Supports</u> for further details on completing and maintaining these records.

2. To edit a Youth Support record, click edit next to the Support's Name.



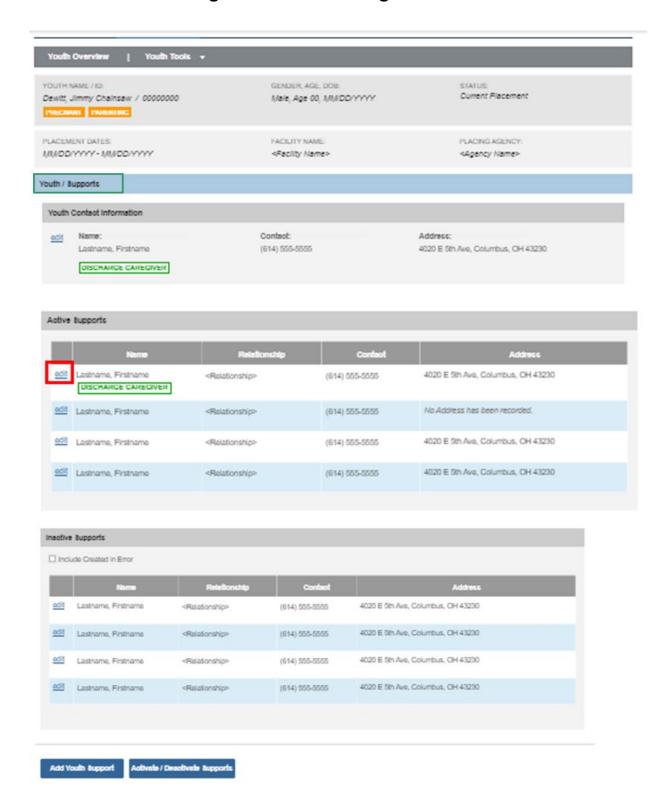
The **Support Person Details** screen appears.

- 3. Modify the Support Person Details record as needed. When finished,
- Click Save to retain the entered information and return to the Youth Supports tab with the modified Youth Support record present, OR
- 5. If applicable, enter the **Date Discharge Plan Provided** or choose date from the calendar icon.
- 6. To add additional Youth Support records to the Discharge Plan, click the **Update Supports** button.



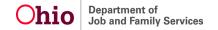
The **Youth / Supports** list page appears.

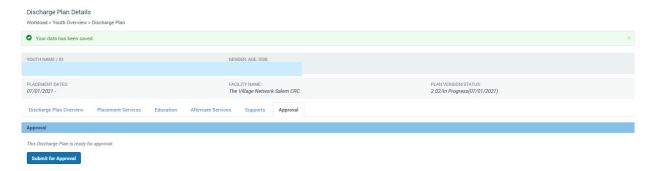
7. Referencing the Knowledge Base Article <u>Entering RTIS Youth Supports</u>, make any needed additions or edits within the Youth / Supports Tool to reflect the youth's current support network.



Routing/Approving the Discharge Plan

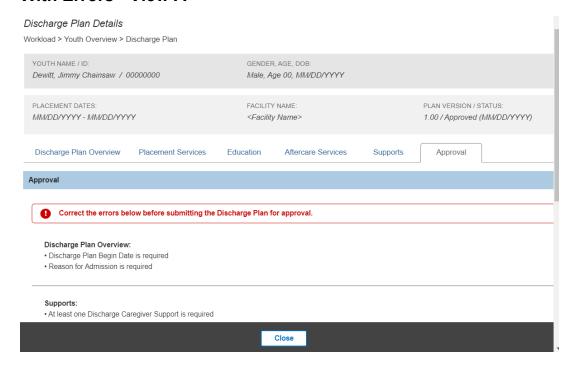
1. Select the **Approval** tab. The **Discharge Plan Approval** grid appears.





- 2. The Approval header will contain either a list of required tasks needing to be completed before approval can be processed (View A), or a message *This Discharge Plan is ready for approval.* (View B).
- 3. If errors are present, return to the applicable tab of the Discharge Plan and correct the data. Continue this process until View B is obtained.

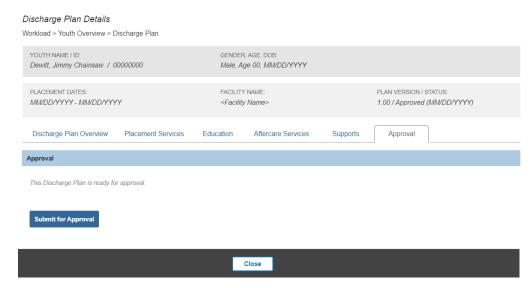
With Errors - View A



Ready for Approval - View B

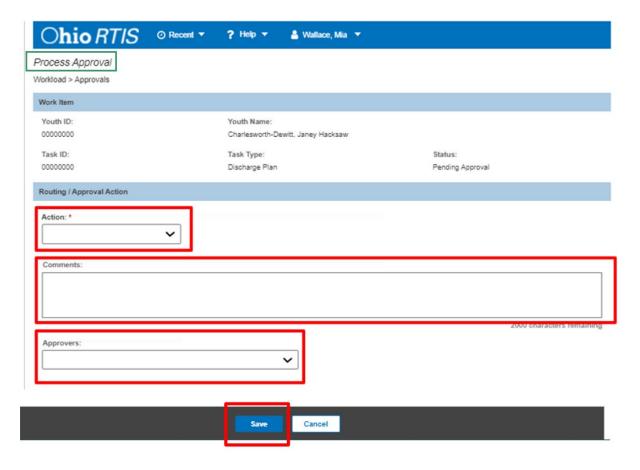
4. Click, Submit for Approval.

The **Submit for Approval** button will be present when all Discharge Plan requirements have been satisfied.



The **Process Approval** screen appears.

- 5. Using the **Action** drop-down menu, Select, **Approved-Final the Discharge Plan** if proper security is granted, or choose **Route** if final approval is granted by a supervisor.
- 6. Select the applicable person from the **Approvers** list. Choose the supervisors name to send the plan for final approval, or choose your own name if you have security to complete the final approval.
- 7. **Comments** may be entered as applicable.
- 8. Click **Save** to confirm the Action selected, or click **Cancel** to return to the Discharge Plan list page with no approval action taken.



Reviewing Discharge Plan List Page Actions

The following actions can be performed on the Discharge Plan list page:

- 1. To create a new Initial version of an existing Discharge Plan, click the copy icon. This copy can be used as the Initial Discharge Plan for a new Residential Treatment Episode. On click, the Discharge Plan Overview Review Details screen of the new record will appear.
- 2. To print a discharge plan report, click the Discharge Plan report will appear.
- 3. If a Discharge Plan record is in draft status and the user wishes to delete it, click the icon. On click, the record will be deleted.

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If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at <u>SACWIS HELP DESK@jfs.ohio.gov</u>.