Clinical Dashboard

Provides an area for clinicians to quickly view their caseloads and for clinical supervisors to view the caseloads of those they supervise. In addition, supervisors may provide feedback for clinicians at the intake level. Feedback may be reviewed by the staff person, all feedback is stored and tracked over time.

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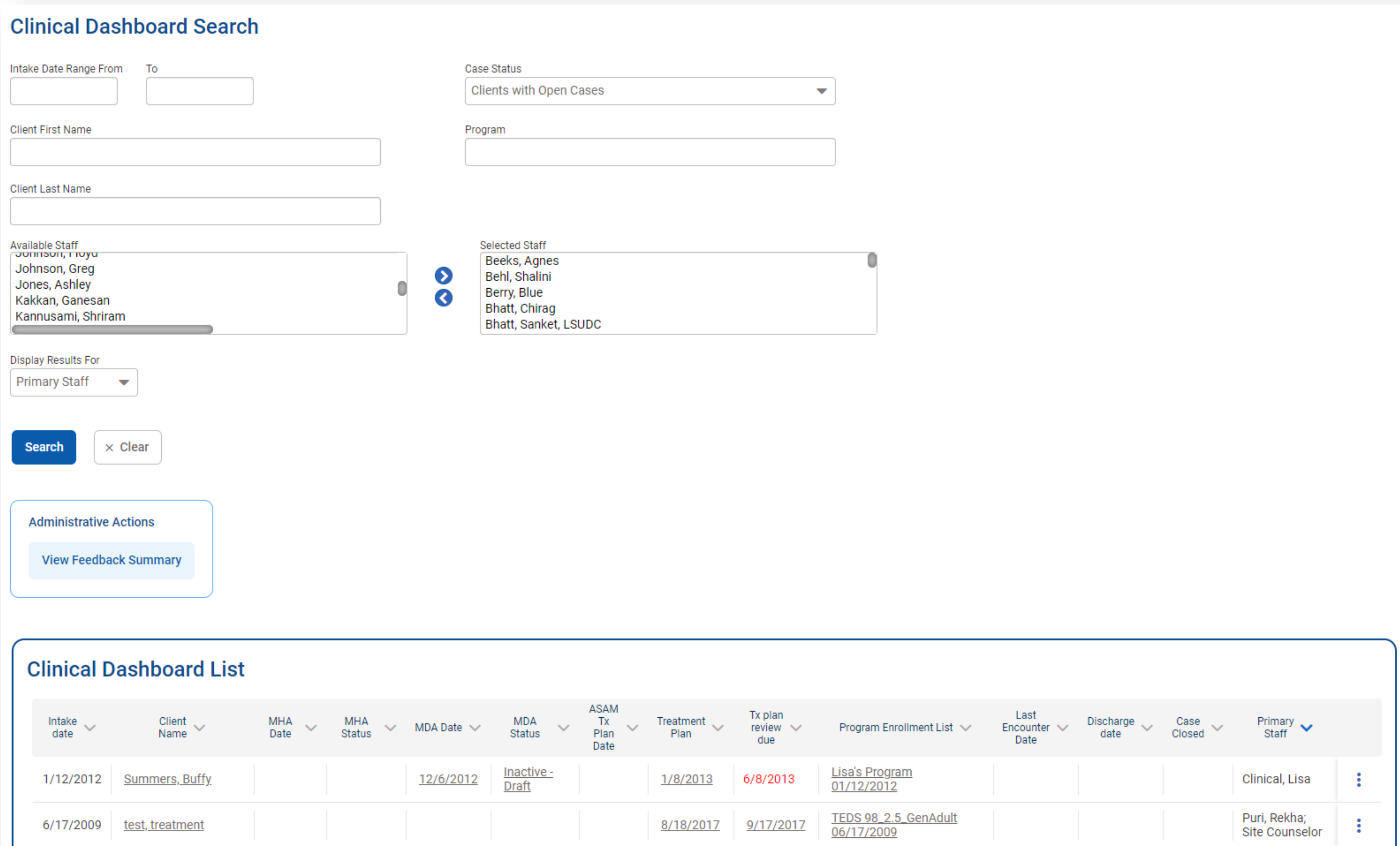
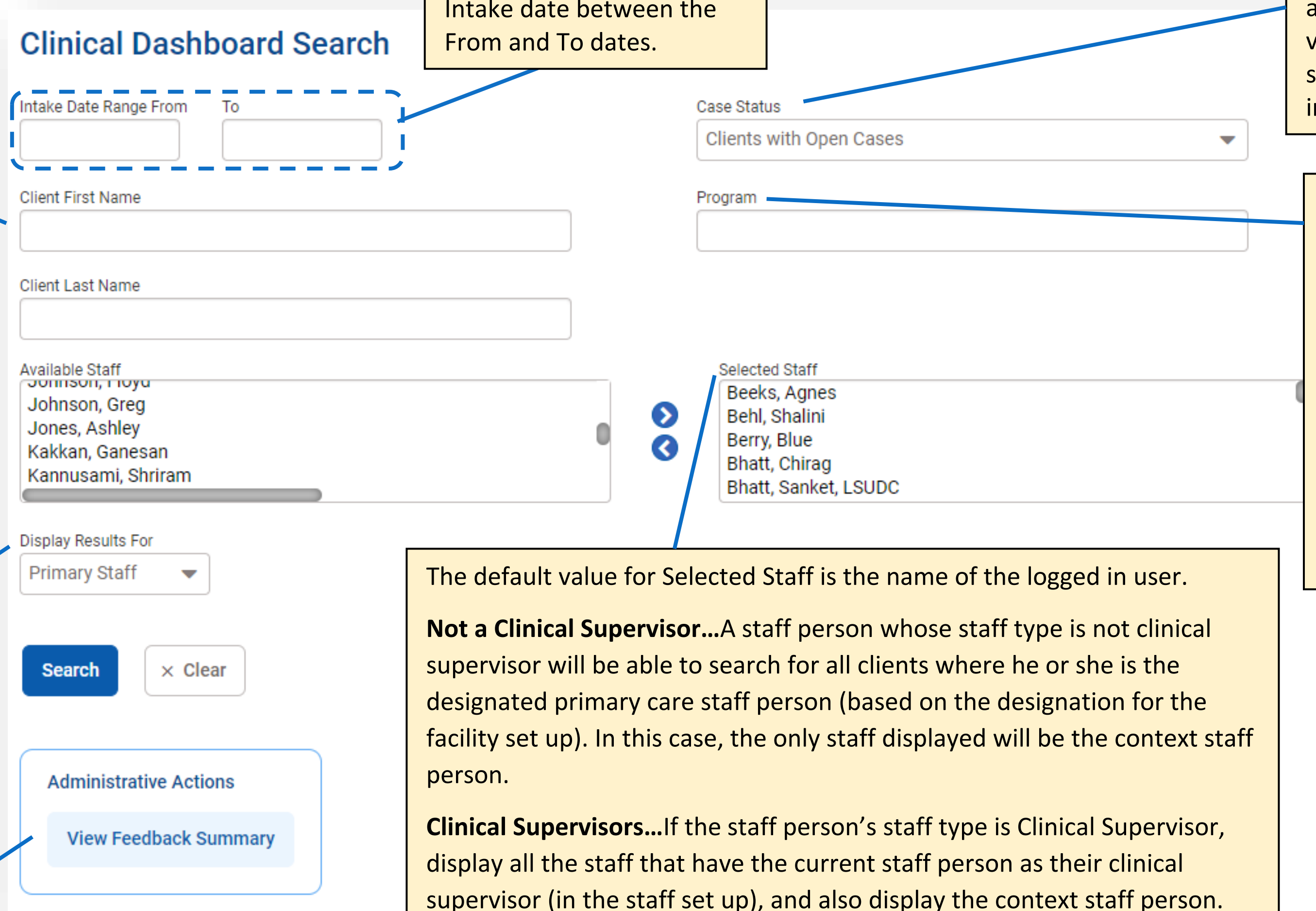


Clinical Dashboard Search

The Clinical Dashboard Search screen includes access to all clients in the agency and includes a number of filtering abilities which can be combined in a number of ways. The default search identifies clients with open cases where the logged in user is the designated primary care staff person.



Search for clients with an Intake date between the From and To dates.

Case status defaults to open cases; user may select closed cases or all case statuses (see values used on client search screen for the instance).

Search for a specific client by name.

Tip! You can use Wildcards in the name filters.

Search for Programs by name.

Tip! You can use wildcards in the Program filter.
For example, type *99* (or *34*) into the Program box to isolate by population.
Alternatively, type *2.1* to search by ASAM level.

Tip! Select the blank row in the **Display Results For** dropdown to remove this filter.

View a report of Feedback. Learn more about feedback on page 5.

The default value for Selected Staff is the name of the logged in user.

Not a Clinical Supervisor…A staff person whose staff type is not clinical supervisor will be able to search for all clients where he or she is the designated primary care staff person (based on the designation for the facility set up). In this case, the only staff displayed will be the context staff person.

Clinical Supervisors…If the staff person's staff type is Clinical Supervisor, display all the staff that have the current staff person as their clinical supervisor (in the staff set up), and also display the context staff person.

Tip! To select all staff in the Available Staff box, click on the box and then type Alt+A on the keyboard. Then click on the > button to select all Available Staff.

Clinical Dashboard

List screen

Primary filter for a row is on an intake. Based on the search parameters, there may be more than one intake, and there may be more than one row per intake. As you open the List screen, it is sorted by sort by client name then sub sorted by intake date. Want to try a new sort? Just click on any column heading to sort by that column. Click a second time to sort descending and click a third time to remove the sort. Please note: Whether sorting in ascending or descending order, the blanks are always at the bottom.

Date for the current, active intake. If there are two intakes then two rows appear.

Date and Status of the most recent Mental Health Assessment (MHA) or Multidimensional Assessment (MDA) within the intake for the row. Clicking on this date takes the user to the relevant assessment.

<u>SUD Treatment Plans:</u> Current ASAM Treatment Plan date. Clicking on the date takes the user to the most recent signed ASAM Treatment Plan.

<u>Treatment Plans (primarily MH):</u> Start date of current active treatment plan. Click on the date to go to the treatment plan profile.

Last encounter date within the intake for the row. Clicking on this link takes the user to the encounter list.

Open Program Enrollment(s).

Clicking on Discharge Date will go to the discharge.

If intake closed the date will show here. Open intakes show blank.

Clinical Dashboard List

Intake date	Client Name	MHA Date	MHA Status	MDA Date	MDA Status	ASAM Tx Plan Date	Treatment Plan	Tx plan review due	Program Enrollment List	Last Encounter Date	Discharge date	Case Closed	Primary Staff
1/12/2012	Summers, Buffy			12/6/2012	Inactive - Draft		1/8/2013	6/8/2013	Lisa's Program 01/12/2012				Clinical, Lisa
6/17/2009	test, treatment						8/18/2017	9/17/2017	TEDS 98_2.5_GenAdult 06/17/2009				Puri, Rekha; Site Counselor
12/1/2015	TheTime, TreatmentPlanA						1/1/2016	1/31/2016	Mental Health - correct 12/31/2015	1/13/2016			Puri, Rekha; Site Counselor
1/1/2017	abc, abc						7/1/2017	7/31/2017	SA Men's Club 01/01/2017	1/1/2017			Sokvary, Daniel
9/24/2015	Garrit, Jay						7/22/2020	8/21/2020	SA non TEDS 07/22/2020				Taneja, Vandana
7/25/2017	Paul, Chancelor						1/17/2019	2/16/2019	Mental Health - 2 07/25/2017				Taneja, Vandana
7/1/2018	Z, Happy								Substance Abuse 01/15/2019				Taneja, Vandana
1/10/2018	hyuuga, neji						1/18/2018	2/17/2018	Substance Abuse 01/16/2018				Thomas, Christine

Clicking on client name takes the user to the client profile.

Click on any linked value to go directly to the relevant screen.

Treatment Plan Review: This is the due date of the treatment plan review, as pulled from the active treatment plan. Appears in red if it is past due.

The staff member which is shown as the Primary Staff can be setup uniquely for each facility. Choices include: Case Assigned to staff; the Admission staff, or the current Treatment Review Case Manager or Treatment Team Primary Care staff member for the current intake for the row.

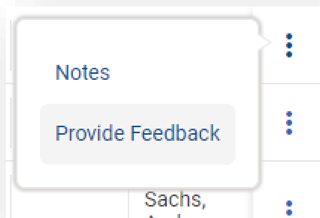
Feedback

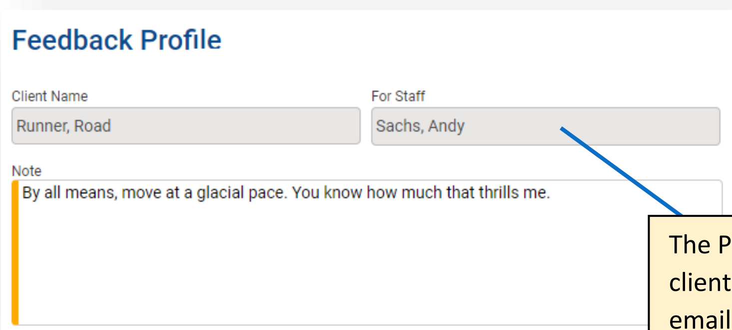
The Clinical Dashboard also facilitates feedback from Clinical Supervisors to their staff regarding specific clients. Please Note: You may only provide feedback via UWITS if you are listed as a Clinical Supervisor in UWITS.

Clinical Supervisor Perspective: Giving Feedback

Begin by navigating to the Clinical Dashboard and search as desired. If you wish to search for the caseload of a specific staff member, move their name to the Selected Staff box.

Hover over the action button (⋮) and click on **Provide Feedback**.





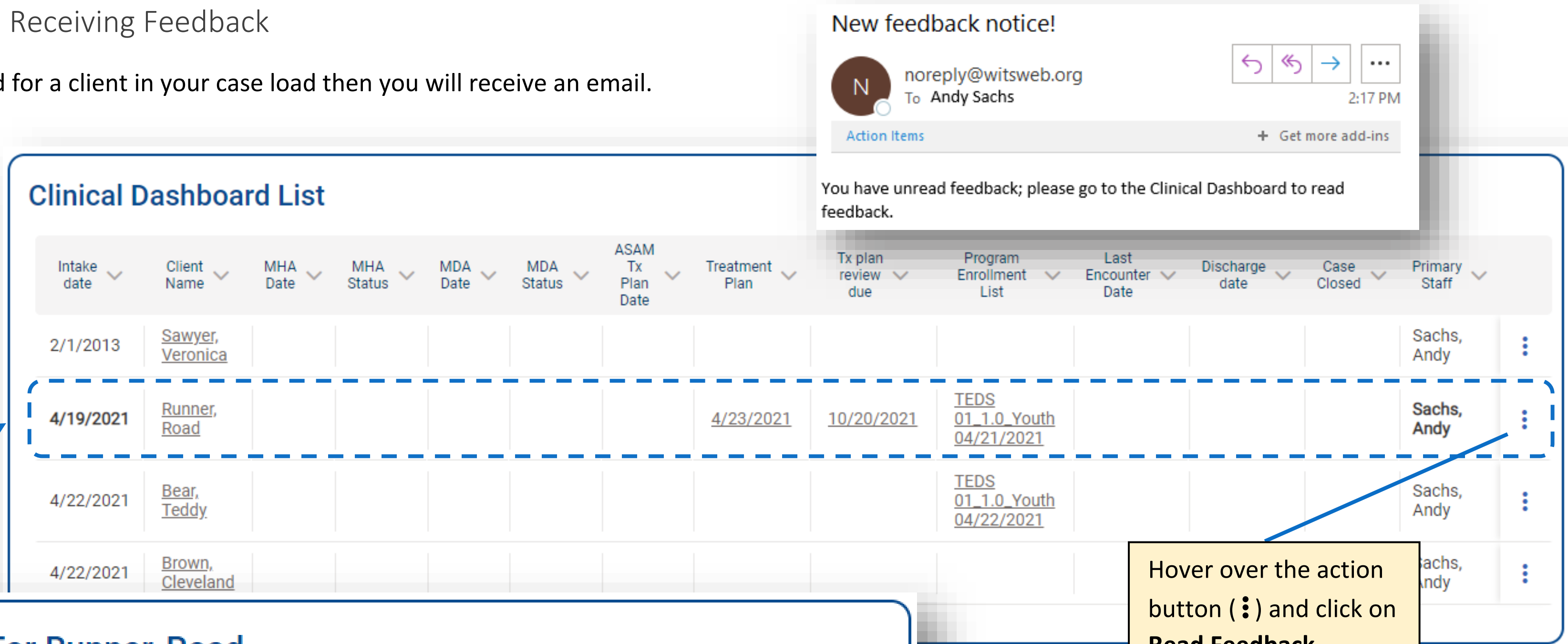
Enter feedback in the Note box and then click the **Save and Finish** button.

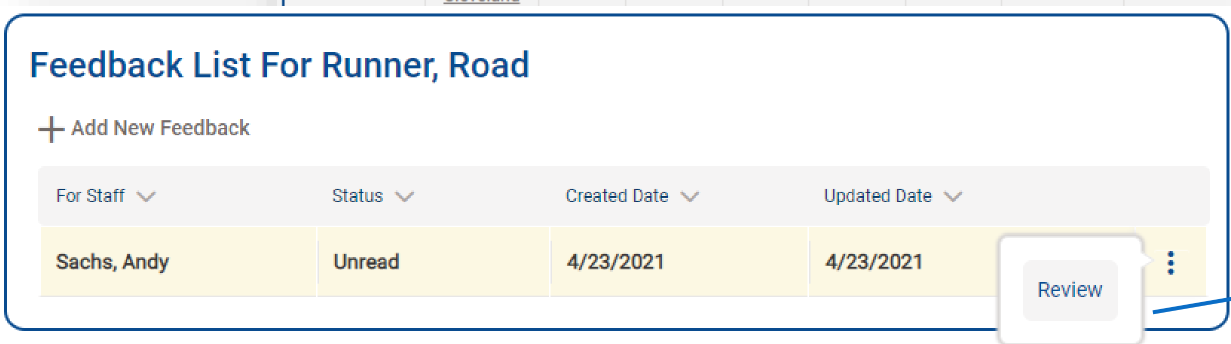
The Primary Staff for the client will receive an email notice that they have received feedback.

Clinician Perspective: Receiving Feedback

When feedback is entered for a client in your case load then you will receive an email.

To review that feedback, navigate to the Clinical Dashboard and search for your assigned clients. The clients with feedback will be noted by a bold Intake date and Primary Staff name.

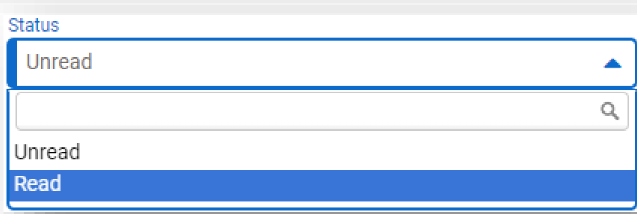




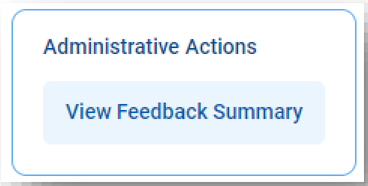
Hover over the action button (⋮) and click on **Read Feedback**.

From the Feedback List for the client, hover over the action button (⋮) and click on **Review**.

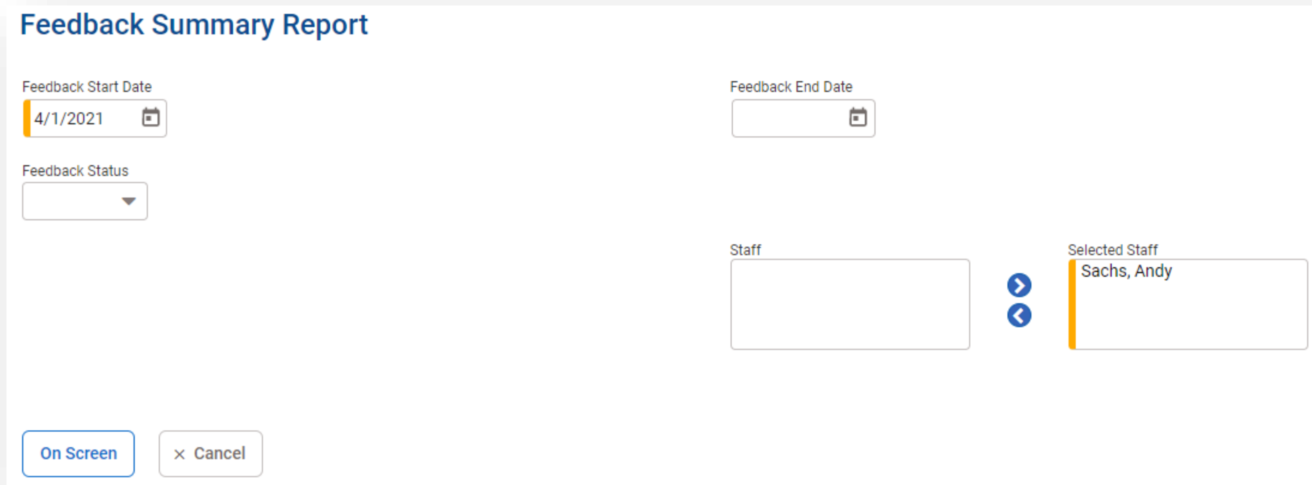
The feedback will continue to show as Unread until the Status is updated to Read.



Feedback Summary



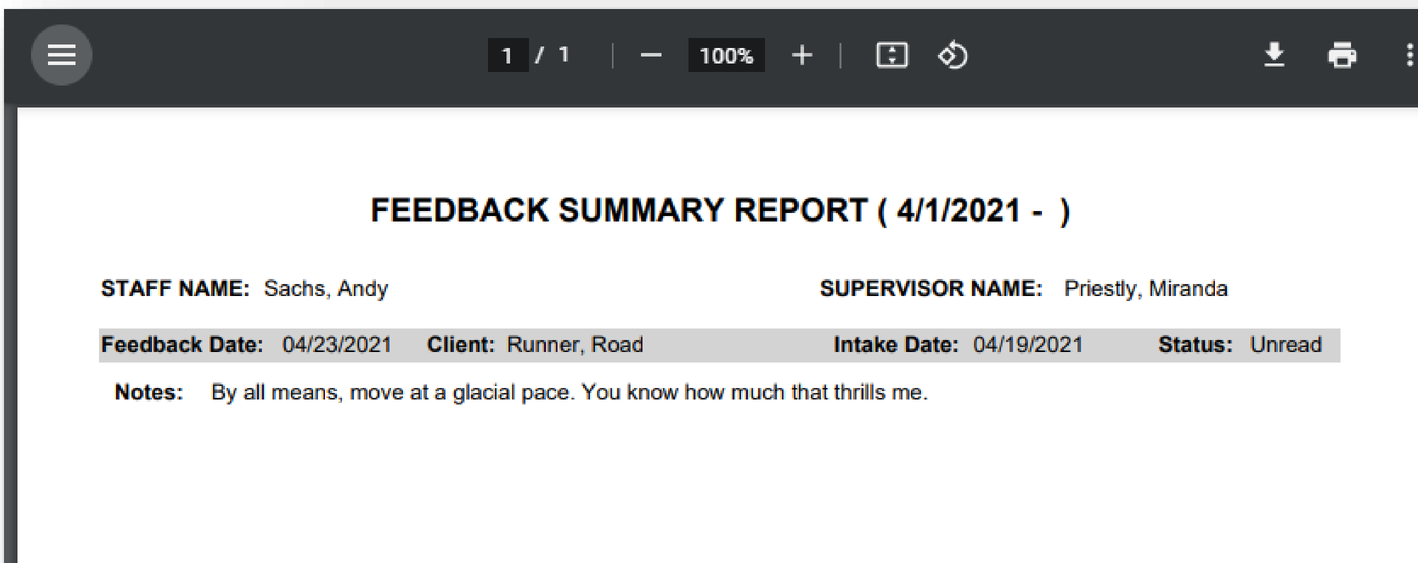
The Feedback Summary report is available to both Clinical Supervisors and Clinicians. Beginning at the Clinical Dashboard, click on the **View Feedback Summary** button in the **Administrative Actions** box near the bottom of the screen.



Select a Start Date. Clinical Supervisors will have to select a staff member; Clinicians will be selected by default.

Click the **On Screen** button to view the Feedback Summary.

Please note:
Enable Pop-ups to view the Feedback Summary.



Appendix: Clinical Dashboard Set-Up

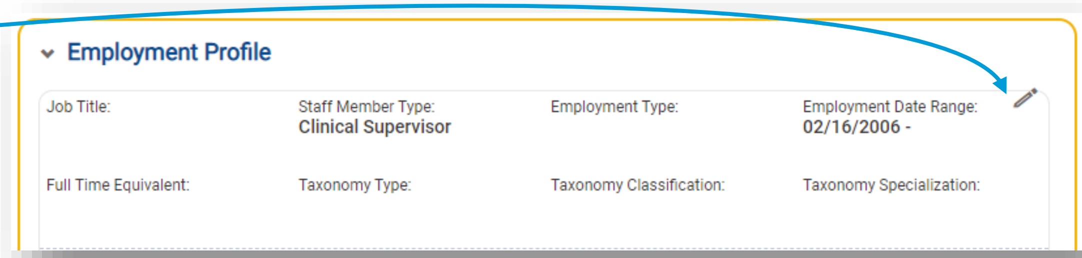
The Treatment Plan shown on the Clinical Dashboard is typically referred to as the “Mental Health” Treatment Plan (created using Activity List > Treatment > Tx Plan) – not the SUD Treatment Plan which is built into the SUD Encounter (SUD Treatment Plans are not currently shown on the Clinical Dashboard.)

Designate the Clinical Supervisors in UWITS (optional)

Agency > Staff Members > Search for a Clinical Supervisor by name > ⋮ > View Profile > Edit

Hover over the Employment Profile panel and click on the pencil icon to edit. Select Clinical Supervisor from the Staff Member Type dropdown.

Repeat for all Clinical Supervisors.



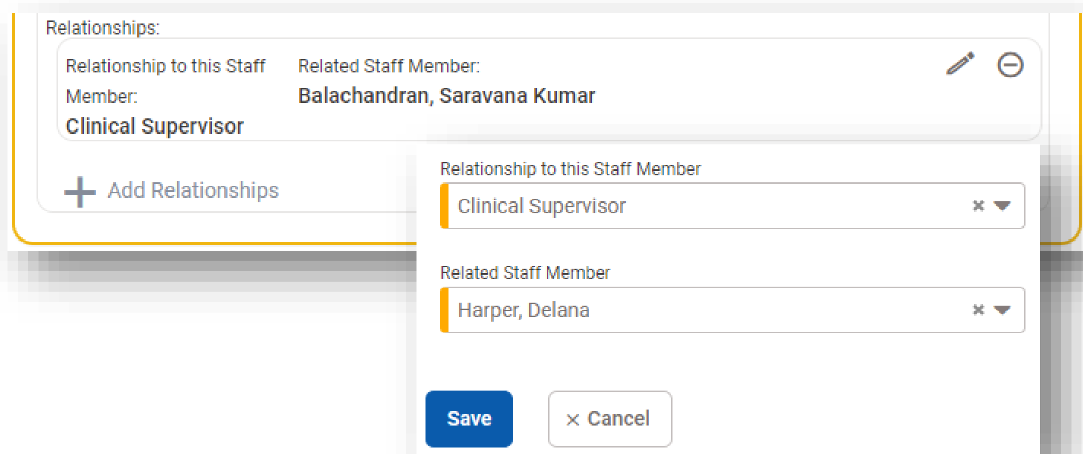
Assign a Clinical Supervisor to all Clinical Staff in UWITS (Optional)

Agency > Staff Members > Search for a Clinical Staff Member by name > ⋮ > View Profile > Edit

In the Employment Profile panel, click on **+ Add Relationships**.

Select **Clinical Supervisor** from the dropdown labeled **Relationship to this Staff Member** then select the appropriate name from the dropdown labeled **Related Staff Member**.

Repeat for all clinical staff.



Primary Staff Set Up for the Clinical Dashboard

For each Facility, select an option as the **Primary Value**, the **Secondary Value** and the **Tertiary Value**.

This set up will drive the view on the Clinical Dashboard screen. This means that the staff members listed on the client's Treatment Team, Intake or Admission who represent at least one selected value will be able to see that client on their Clinical Dashboard. For example, if **Treatment Team Case Manager** is one of the three selected values then the staff member listed on the client's Treatment Team who has a **Relationship** field equal to **Case Manager** will be able to see the client on their Clinical Dashboard screen. See the **Definitions** box on this page for more details.

Please note that when no one on the client's Treatment Team has a **Primary Care** field equal to **Yes** then the staff member available who represents the highest ranked value will be listed as Primary staff. For example, if the Primary, Secondary and Tertiary values are setup as in the graphic below—but the client does not have any Treatment Team members assigned yet then the staff member representing the **Case Assigned to** value (the person who did the intake or was assigned at Intake) would be noted as the Primary staff.

Setup each facility relevant to their operations. When all three values have been selected, click **Finish**.

Definitions

Admitted by: The staff person who admitted the client or assigned at Admission.

Case Assigned To: The staff person who did the intake or assigned at Intake.

Treatment Team Primary Care Member: The staff person on the client's treatment team where the "Primary care" indicator is set to Yes. When selected as one of the values, staff marked as a "Primary Care Member" on the client's Tx Team will now see the client listed in their clinical dashboard and will be listed as Primary staff for the client.

Treatment Team Case Manager: The staff person on the client's Treatment Team with the relationship of Case Manager.