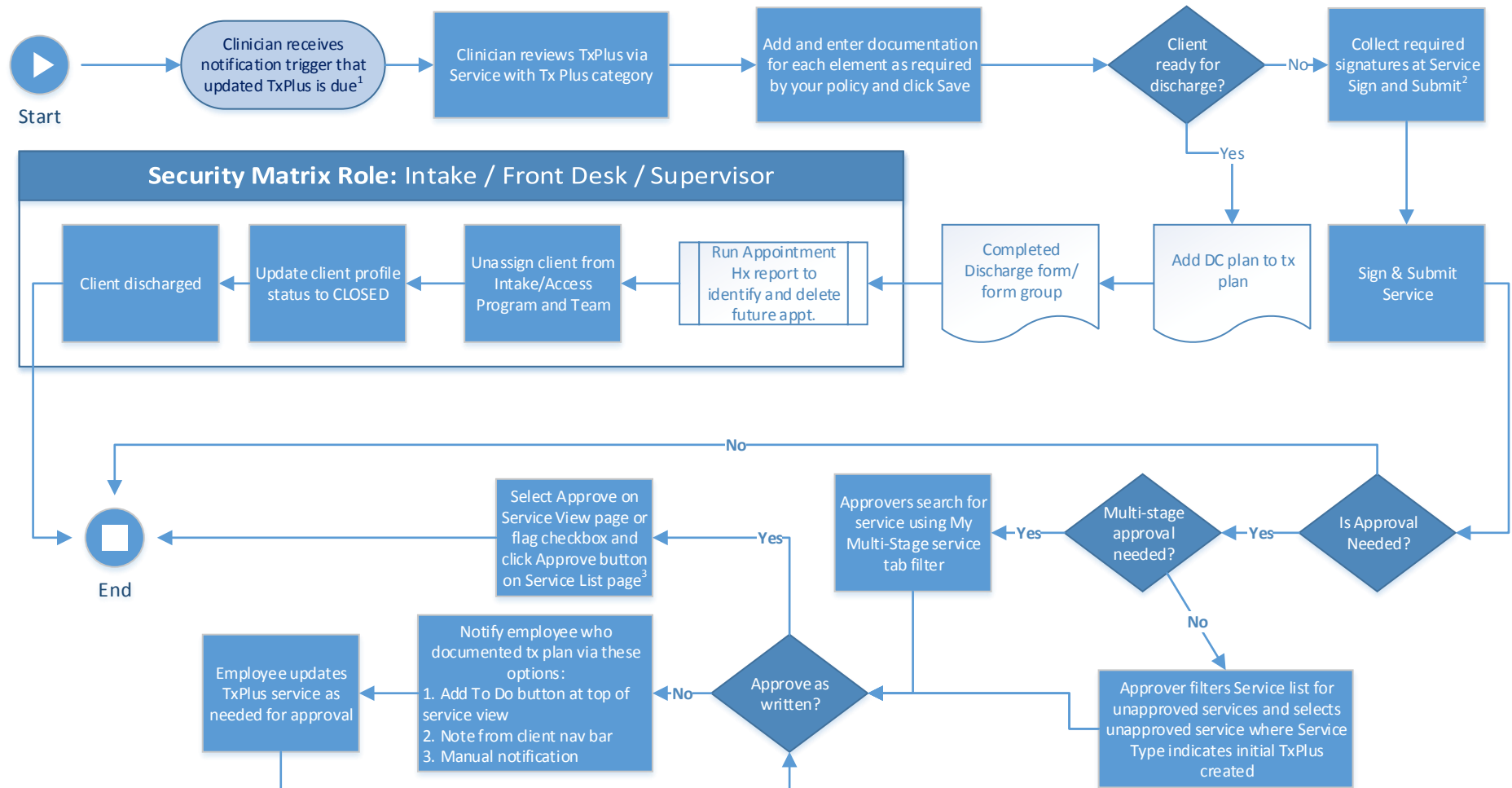# Clinical – Treatment Plan Update/Review

CREDIBLE

Team: TBD   **Program**: Outpatient / Inpatient / Community

Security Matrix Role: Clinician / Case Manager / Doctor / Supervisor

Start

Clinician receives notification trigger that updated TxPlus is due[1]

Clinician reviews TxPlus via Service with Tx Plus category

Add and enter documentation for each element as required by your policy and click Save

Client ready for discharge? — No →

Collect required signatures at Service Sign and Submit[2]

↓ Yes

Security Matrix Role: Intake / Front Desk / Supervisor

Client discharged ← Update client profile status to CLOSED ← Unassign client from Intake/Access Program and Team ← Run Appointment Hx report to identify and delete future appt. ← Completed Discharge form/ form group ← Add DC plan to tx plan

Sign & Submit Service

— No →

End

Select Approve on Service View page or flag checkbox and click Approve button on Service List page[3]

← Yes —

Approvers search for service using My Multi-Stage service tab filter

← Yes — Multi-stage approval needed? ← Yes — Is Approval Needed?

↓ No

Approver filters Service list for unapproved services and selects unapproved service where Service Type indicates initial TxPlus created

Employee updates TxPlus service as needed for approval ←

Notify employee who documented tx plan via these options:
1. Add To Do button at top of service view
2. Note from client nav bar
3. Manual notification

— No — Approve as written?

Legend

Process   Decision   Subprocess   Start/ End   Optional Process   Alert   Documents