



## **Integrated Clinical Summary in the TIER® Workflow®**

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### **Discussion**

The Integrated Clinical Summary is an important form within TIER®. The purpose of the Summary is to facilitate development of the master (comprehensive) treatment plan based on review and analysis of key assessment findings and client – family – staff input on prioritized problems or needs that will be carried forward to the treatment plan versus deferred to later in treatment or discharge/continuing care planning. An underlying principle of the Summary is derived from the JCAHO requirement that not all problems or needs identified in assessments must be carried forward to the treatment plan provided that there is justification in the Summary to support why problems/needs are deferred. The TIER Summary form includes a scale to categorize the status of problems. The scale documents whether problems are; carried to the treatment plan; deferred to later in treatment; or deferred to discharge/continuing care

The Integrated Clinical Summary is not meant to be an extensive document or a replication of information already documented in the treatment team assessments. Rather, it is meant to be a formulation of the following elements as a “bridge” or “crosswalk” to the master treatment plan:

- A thorough description of the prioritized core problems/needs including those to be addressed during primary treatment versus deferred for discharge/continuing care planning.
- Intensity versus severity of core problems/needs and their implications for treatment including special alerts and precautions.
- Expectations of treatment and ability of patient/client to meaningfully participate and gain from involvement in treatment.
- (For Chemical Dependency) Patient motivation toward recovery, relapse potential and specific relapse prevention triggers.
- Expectations of treatment and nature of family participation in treatment.
- Assessment of obstacles toward discharge.
- Assessment of patient/client strengths/resources that can be maximized during treatment.

- Clinical strategies and/or rationale for development of the master treatment plan.
- Full DSM-IV diagnosis with all five axes.
- Beginning development of discharge criteria and continuing care plan.

The above elements are attached to the Summary form in TIER<sup>®</sup> as a practice guideline.

Typically, the primary clinician prepares the Summary after completion of the treatment team assessment process and appropriate case staffing. An Integrated Clinical Summary is not generally needed for short stay (Level 1) patients. In addition, the Summary for intermediate (Level 2) or long- term (Level 3) outpatients can be incorporated as part of the psychosocial assessment or equivalent comprehensive assessment used by the organization.

Research supports that if patient, family and team are in agreement as to treatment goals, there is a greater potential for successful treatment outcomes. Therefore, it is important to document patient and family expectations and participation in the Summary along with strategies that can be used to achieve goals and objectives.

Completion of The Integrated Clinical Summary is an opportunity to reassess the patient’s program assignment and level of care status. For example, a determination can be made as to whether the patient will most likely require or benefit from intermediate or long term treatment. Accordingly, a related program assignment can be made and the “Program/Level of Care” form updated in TIER<sup>®</sup>.

In addition, the patient’s program and level of care history, for the current episode of treatment or overall treatment history, can be tracked through use of a TIER<sup>®</sup> Drill Down or report. Such reports are also useful to facilitate tracking “clinical case management” and “caseload management.” patterns and trends. A copy of the Integrated Summary form is below:

The screenshot shows the 'Integrated Clinical Summary' software interface. At the top, there is a title bar with the text 'Integrated Clinical Summary' and standard window control buttons. Below the title bar is a toolbar containing icons for print, save, and cancel. A yellow bar below the toolbar contains 'Save' and 'Cancel' buttons. The main content area is divided into several sections. At the top of the main area, there is a tabbed interface with 'Summary - Page 2 | Problems List' selected. Below this, there are 'Date' and 'Staff' dropdown menus, and a 'Guidelines' button. The next section is 'Summary of Key Assessment Findings', which is a large text area. Below this is a section titled 'Patient Strengths/Resources' containing two columns of checkboxes: 'Responsive', 'Bright', 'Energetic', 'Hopeful', 'Good support system', 'Resourceful', 'Previous success in treatment', and 'History of stable functioning'. The final section is 'Patient Motivation/Ability to Participate', which contains three radio buttons: 'Highly motivated and able to participate in treatment', 'Somewhat motivated and able to participate in treatment', and 'Unmotivated and minimally able to participate in treatment'.

**Integrated Clinical Summary**

Options

Save Cancel

Summary | Summary - Page 2 | Problems List

Family Motivation/Willingness to Participate:

- Highly motivated and willing to participate in treatment
- Somewhat motivated and willing to participate in treatment
- Unmotivated and unwilling to participate in treatment

Comments

Overall Treatment Strategy

Obstacles to Discharge

**Integrated Clinical Summary (Akers, William)**

File Edit Search Object

Save Prev Next List Print Cut Copy Paste Info

Akers, William

Save Cancel

Summary | Summary - Page 2 | Problems List

Core Problem

List Problems

blems	Status
Anxiety	Carry to Treatment Plan
Difficulty developing supportive relationships with others	Carry to Treatment Plan
Difficulty using leisure time well	Deferred to Later in Treatment
Need for improved attention to my overall health status.	Deferred to Discharge

Diagnosis

**Conclusion:**

The Integrated Clinical Summary in TIER<sup>®</sup>'s Service Delivery Module provides clinicians with a useful resource to help clients identify and focus treatment priorities and develop related treatment plan goals and objectives. The Summary also gives staff a basis to define effective treatment strategies to achieve goals and objectives as well as provide clinical managers with a supportive rationale for clients' continued stay in treatment.