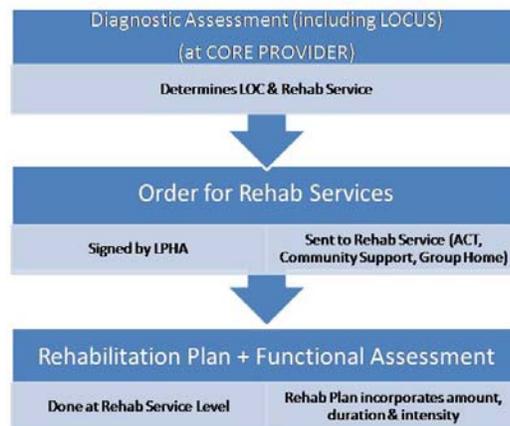


# MRO Clinical Management Workgroup

February 15, 2007

Present: Tina Kane (Reliance House), Cathy Kimball (DuBois), Daniel Wartenberg (SW), Travis Martin (Rushford), Angela Shelton (Intercommunity), Colleen Harrington (USI), Lou DeStefano (Rushford), Lori Behling (USI), Sue Graham (OOC), Lee Ann Slayton (consultant).

1. Following introductions, Lee Ann reviewed the history of this workgroup and the overall need for functional assessment tools at three levels:
  - a. Level of Care Recommendation Tool
    - i. Used as part of Master Treatment Plan/service ordering level
    - ii. May be used as part of an authorization process
  - b. Treatment Planning Tools
    - i. Helps to determine priorities of treatment objectives
    - ii. Helps to determine amount and duration of services\
  - c. Intervention Planning Tools
    - i. Helps to get to very specific detailed “steps” of skills and knowledge that client needs to learn to achieve goals
    - ii. May be paired with a curriculum or set of curricula
    - iii. May be staff or client administered
2. The group discussed the assessment and treatment planning flow and a tool to help clarify the role of “ordering” a rehab service. The flow that evolved is:



2/15/2007 Draft

3. A draft of a form that could serve as an order for rehab services was reviewed and edited. The outcome is attached to these minutes.
4. Only one of the agencies represented had been able to use the tools in treatment planning. That agency was clearly in favor of the CASIG, and did not find the others helpful. There was concern that the CASIG might take too long (for both staff and client); however, the revised

treatment planning flow lessened this concern. The group discussed how community support (or ACT) staff could use the tool over time with clients rather than trying to do it in one sitting, and possibly only do those portions that matched up with priority treatment planning goals.

5. All the agencies will work with the CASIG (priority) and the FARS, ANSA and LSI over the next few weeks to see how they work in actual community-based treatment planning. They will report back at the next meeting.
6. The tools and review grid will be posted on [www.slaytonconsulting.com](http://www.slaytonconsulting.com) under the resources tab.
7. Next meeting: March 15, 2007 at 1 pm at CVH. Room to be announced.

# ORDER FOR MHRS SERVICES

**Client Name:** \_\_\_\_\_

**ID #** \_\_\_\_\_

**Start Date:** \_\_\_\_\_

**End Date:** \_\_\_\_\_

**Clinical Formulation Summary:**

Primary Diagnosis	
Axis 1	_____
Axis 2	_____
Axis 3	_____
Axis 4	_____
Axis 5	_____

Prioritized Rehabilitation Goals	
1	_____
2	_____
3	_____
4	_____
5	_____

**Rehab Service Ordered:**

- Community Support Team**
- Assertive Community Treatment**
- Residential Rehabilitation in a MH Group Home**

Signed: \_\_\_\_\_

Name & Credentials: \_\_\_\_\_ Date of Signature: \_\_\_\_\_

Core Provider: \_\_\_\_\_

Specialty Provider (If Any): \_\_\_\_\_