

<b>TITLE:</b> Case Review and Presentation	<b>PAGE:</b> Page 1 of 2
<b>DEPT./SECTION</b> Behavioral Health/Service	<b>NUMBER:</b> YCHC-BHS-7.19
<b>AFFECTS:</b> Client and Staff/PROVIDERS	<b>DATE CREATED:</b> 3/9/2016 <b>DATE APPROVED:</b> 05/01/17 <b>DATE REVISED:</b>

**Policy:**

BHS staff and providers will review all treatment plans and client progress, as well as appropriate medical cases, regularly to ensure appropriate treatment is provided.

**Purpose:**

All clients must receive the most clinically-appropriate services based upon his or her individual needs. Case reviews and presentations are designed to give the BHS team an opportunity to review the client's progress and receive feedback from other BHS staff. This system is designed to allow discussion regarding different strategies and modalities of treatment, and to discuss possible changes to the clinical assessment/report, diagnosis, and/or proposed current treatment plan.

**NOTE:** It is acknowledged that the BHS team is small; consisting of a Case manager (CSM)/Licensed Professional Counselor (LPC), Substance Abuse Counselor (CDC), and a Psychiatric Mental Health Nurse Practitioner; therefore all team members are included in team meetings and case reviews.

**Procedure:**

1. Case Reviews will occur during BHS team meetings or as needed.
2. The BH Providers will review all initial assessments and treatment plans with priority for High Risk Youth (SED) or High Risk Adults (SMI/COD) during scheduled Interdisciplinary Clinical Meetings and/or BHS team meetings.
3. The client's records will reflect that these reviews have occurred.
  - A. Documentation in the EHR progress note.
    - 1) Encounter created and titled appropriately:
      - a) Case Review Team Meeting, Treatment Plan Meeting, Treatment Plan Review/Update, Interdisciplinary Meeting.
      - 2) A note is entered into the EHR and signed by patient's provider.
  - B. Documents scanned into EHR as appropriate.
4. The BH Providers will review each client's case monthly during BH Case Reviews with the treatment team and whenever changes occur.
  - A. The client's records will reflect that these reviews have been completed as above.
5. Case Reviews and presentations are part of the Quality Improvement. Staff will be cognizant of:
  - A. Related policies and procedures when reviewing and presenting cases (See BHS policy BHS 6.02 *Continuous Quality Improvement*).
  - B. Medical necessity of services being recommended.

<b>APPROVED BY:</b>	
<b>Medical Director Signature, Eva Sensmeier PA-C</b> Eva D. Sensmeier PA-C/med Dir 5/1/17	
<b>Executive Health Director Signature, Rhoda Jensen</b> Rhoda Jensen 5/1/17	
<b>Quality Improvement Chairperson Signature</b> Ann Marie Dryden APRN, QI Dir Ann Dryden APRN 5/1/17	