

# Monthly/Quarterly Review

Article Number: 50 | Rating: Unrated | Last Updated: Mon, Aug 8, 2016 at 11:04 AM

## Overview

The Monthly/Quarterly Review is used to capture a snapshot of client progress across many areas. Medications/medical information, therapy/behavioral issues, reportable incidents, outcome progress and recommendations, and client comments are collected both monthly and quarterly, as appropriate.

## Applicable Staff

Directors/Supervisors, ID Staff, and Nursing may complete the form, all Avatar users can view the form.

## Usage

The review is client and episode specific and is reached from the Home View, inside a client's record, or via menu path Avatar CWS/Mercy Modeled Clinical Forms/Mercy ID Forms/Monthly-Quarterly Review 2. Select the client and episode, then choose whether to add a new review, edit or delete a previous review, or cancel the action.

This form can be used to document both Monthly and Quarterly Reviews of client progress in many areas as required. When completing the top portion, select either the **Monthly** or **Quarterly** radio button under **Type of Review**.

The **Review Date** and **Start Date of Review** are required fields and must be completed. Select an appropriate date range for the type of review being captured (monthly or quarterly) and click the **Import Historical Data** button. The system gathers information from Progress Notes written during the

selected time period and distributes it to each field in the form. Additional notes can be added to the historical data to complete the review.

The remaining fields are optional and should be filled out according to need and company policy for required monthly/quarterly review information. The following images show the available fields and any additional Help messages  contained therein.

Chart Monthly/Quarterly Review 2 (MIDS 604 A)

Review  Autosaved at 2:30 PM

Mercy Intellectual Disabilities Services

MONTHLY/QUARTERLY REVIEW

Review Date: 06/24/2016  Type of Review:  Monthly  Quarterly

Choose Monthly or Quarterly and enter Start and Through Dates to capture the type of review

Start Date of Review: 06/24/2016  Through Date: 07/24/2016  Import Historical Data

Attendance/Utilization Codes  
Historical Progress Note Data here  
==  
Current notes/comments, etc. entered here

Medical Appointments/Medical Concerns 1  
Historical  
==  
Current

The Import Historical Data button will collect data from Progress Notes during the selected time period above and enter that data in the following comment fields.

Medication Changes 2  
Historical  
==  
Current

Community Participation/Recreation Activities  
Historical  
==  
Current

Behavioral Issues  
Historical  
==  
Current

Psychiatric Issues  
Historical  
==  
Current

Special Therapies/SEEP Review  
Historical  
==  
Current

Contacts 3  
Historical  
==  
Current

Other Recommendations and Individual's comments/concerns  
Historical  
==  
Current

Meal time preparation/accommodations/checklist  
Historical  
==  
Current

Fire Drill  
Historical  
==  
Current

Reportable Incidents  
Historical  
==  
Current

Outcomes #1 Skill Area Monthly Progress  
Outcome Action Plan item to be discussed

Outcomes #1 Recommendations  
 Continue  Discontinue  Revise

Outcomes #2 Skill Area Monthly Progress  
Outcome Action Plan item to be discussed

Outcomes #2 Recommendations  
 Continue  Discontinue  Revise

Outcomes #3 Skill Area Monthly Progress  
Outcome Action Plan item to be discussed

Outcomes #3 Recommendations  
 Continue  Discontinue  Revise

Outcomes #4 Skill Area Monthly Progress  
Outcome Action Plan item to be discussed

Outcomes #4 Recommendations  
 Continue  Discontinue  Revise

MONTHLY SUMMARY/MONTHLY REVIEW - MIDS 604 A (December 2010)

 1 - Include seizure activity, hospitalizations, incontinence, etc.

 2 - Include dosage and frequency

 3 - e.g. family, day program, residential, ISC

Click the blue **Submit** button when complete to enter the form into the record. A printable copy with signature lines will be generated automatically. Print the form and collect all required signatures, then forward to HIM for scanning into the record as per company procedures. HIM Processes

## Tips & FAQ

Selections made in error can be cleared by clicking the desired area and pressing the F5 key.

**NOTE** - Each time the **Import Historical Data** button is clicked, it will delete all data in free text fields to avoid repeating data. This includes all information that was typed in by the person completing the form. Please verify type of review and date range before beginning to enter further data. **ALL INFORMATION WILL BE LOST IF THE BUTTON IS CLICKED AGAIN.**

## Technical Information

Menu Location (Avatar CWS/Mercy Modeled Clinical Forms/Mercy ID Forms/Monthly-Quarterly Review 2)

SQL Table(s): SYSTEM.ID\_monthly\_quarterly\_review

RAD Envelope (if applicable): ID\_monthly\_quarterly\_review

Related Forms and Reports (data from one form feeds another report/form): IDS Progress Note, Outcome Action Plan

Posted by: John Cookson - Tue, Apr 26, 2016 at 3:30 PM. This article has been viewed 3086 times.

Online URL: <https://www.mercykb.com/article.php?id=50>