



SBHG EMR Training Phase II Care Plan/Treatment Plan User's Guide

**Volume IV
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WELCOME TO THE PHASE II OF THE EMR TRAINING CARE PLAN/TREATMENT PLAN USERS GUIDE

At the completion of training you will be able to:

1. Enter Problems/Needs
2. Enter Strengths
3. Enter a New Treatment Plan
4. Review/update a Treatment Plan

ENTER THE EMR

- Click the Internet Explorer icon
- Click into the training environment
- Login using the user name and password on the laminated login card
- Click on "Return to Main"

Refer to Phase I Manual for entering the EMR outside the SBHG network.

SELECT YOUR CLIENT

1. Click on the Client Module
2. Click on Select Client
3. Enter Search criteria
 - o If you do not remember how to spell the client's name
 - Type in the percent symbol % which brings up all the names of client's you have access to
 - Type in part of the last or first name
4. Click on your client's name

ENTERING PROBLEMS / NEEDS

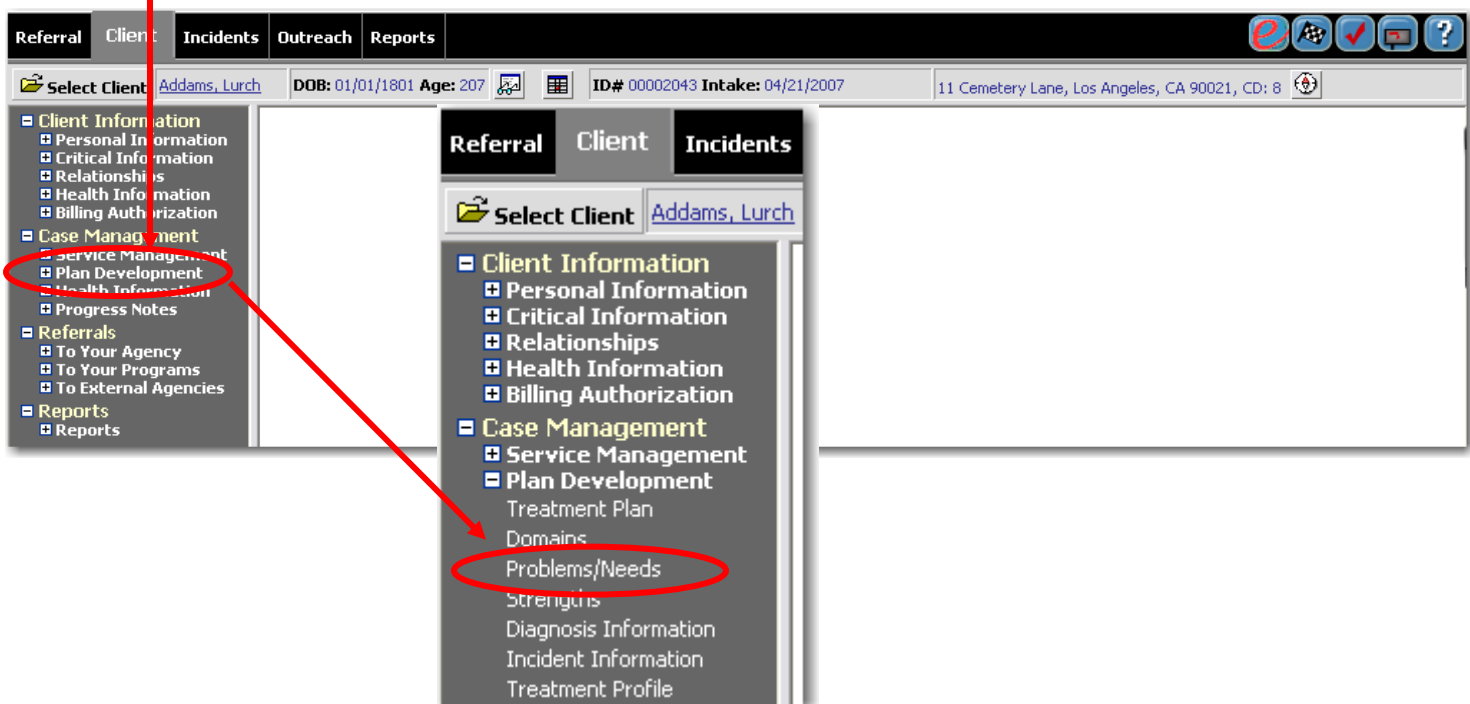
NOTE: You **MUST** enter Problems/Needs prior to building a Treatment Plan for your client. Without a problem/need on file you cannot build a treatment plan.

Problems/needs are the symptoms identified that lead to the diagnosis. Prior to entering in Problems/Needs an assessment must be completed with a Diagnosis. You can find the Diagnosis by clicking on Diagnosis Information under Plan Development.

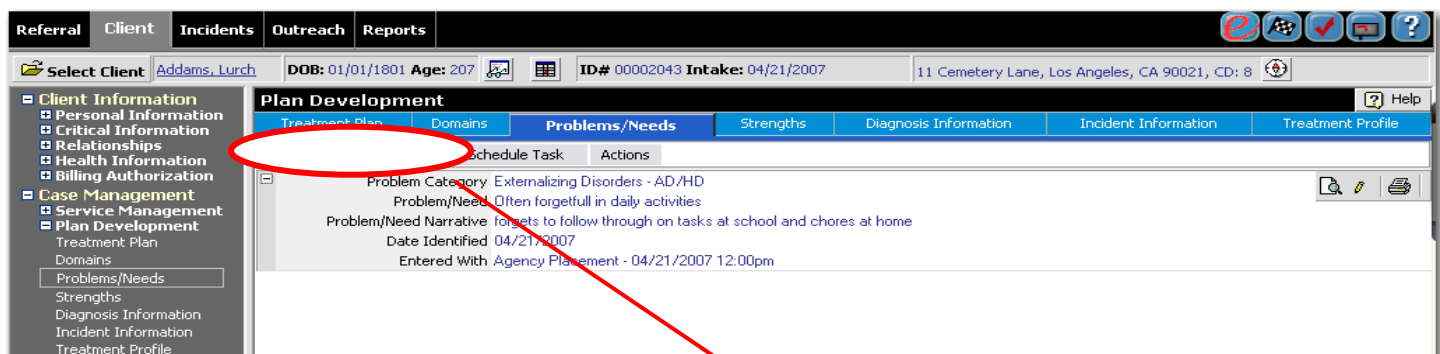
Enter a Problem/Need for your client.

Under Case Management

1. Click Plan Development
2. Click Problems/Needs

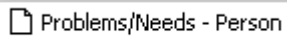


If there are Problems/Needs on file for your client they will list here. If there are no Problems/Needs you will see "None on file".

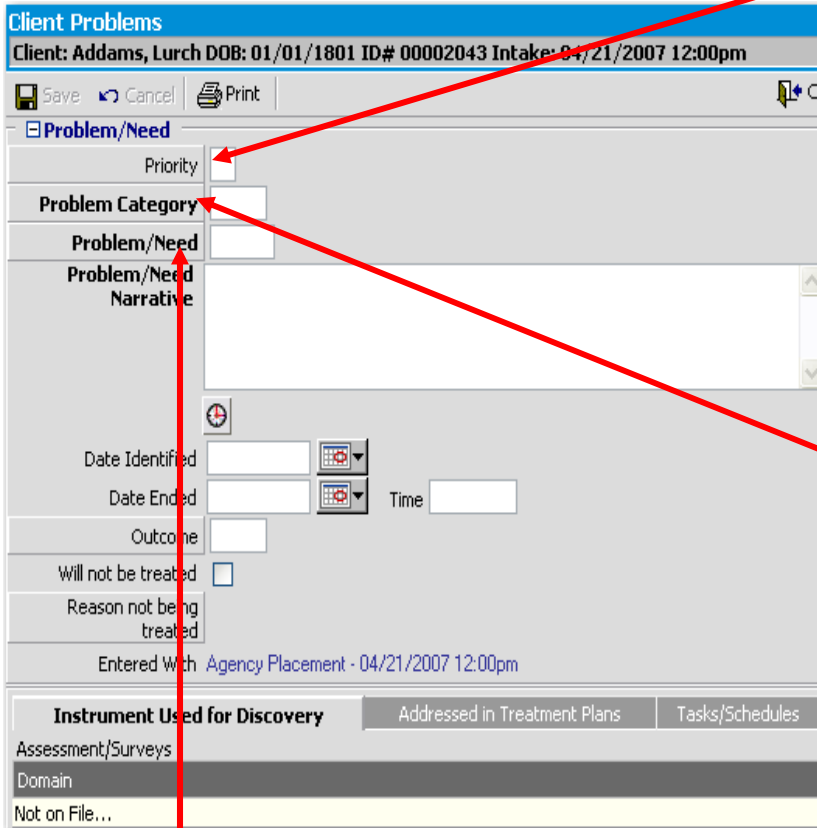


To add a new Problem/Need click New Manual Event

New Manual Event

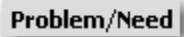
Click on Problems/Needs - Person 

A Client Problems data entry box will open.



3. Problem/Need:

Lists the functional impairments /
Diagnosis criteria for the Problem Category

1. Click on the Problem/Need button

2. A drop down list will open with the list of criteria that coincides with the category selected
3. Select only one criteria (for additional criteria you must enter a new Problem/Need)

1. Priority: Allows you to prioritize the problem as Primary, Secondary, Tertiary or Other.

If you would like to prioritize your client's problems click on the Priority button.

2. Problem Category:

Categorizes your client's problem into the 7 Clinical Pathways listed below:

- *Internalizing Disorder
- *Externalizing Disorder
- *Severe Mental Illness
- Chemical Dependency
- Safety Concerns
- Social Service Needs
- Education

The *Clinical Pathways are linked to a DSM Diagnosis

1. Click on the Problem Category button 
2. A drop down list of Clinical Pathways will open
3. Click on the Clinical Pathway that corresponds to your clients Diagnosis



When entering a Problem / Need for a client receiving Mental Health Services DO NOT select Social Service Needs or Education.



You are able to select Social Service Needs and Education for those services provided OUTSIDE Mental Health Services (i.e. Wraparound, HRHN, FSP TAY and Child Youth).

4. Problem Need Narrative:

A text box that allows you to type in information that qualifies the Problem/Need selected. Type in the specific behaviors noted that lead to the Diagnosis.

5. Date Identified:

Enter the date the behaviors began or were identified. If unsure of the exact date use the date the care plan was developed.

You can either type in the date or select

6. Date Ended:

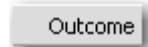
The date this specific problem/need was extinguished or stopped. If unsure of the exact end date use the date the Care Plan will be reviewed/updated.

You can either type in the date or select it from the calendar.

7. Outcome: (use ONLY when ending a Problem/Need)

This allows you to indicate the outcome of the Problem/Need.

1. Click the Outcome button



2. A drop down list will open
3. Select the Outcome of this Problem/Need
 - o Achieved
 - o Can't be achieved
 - o No longer present
 - o Not achieved

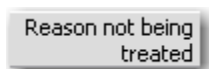
8. Will not be treated:

If the Problem/Need will not be addressed you can check this box.

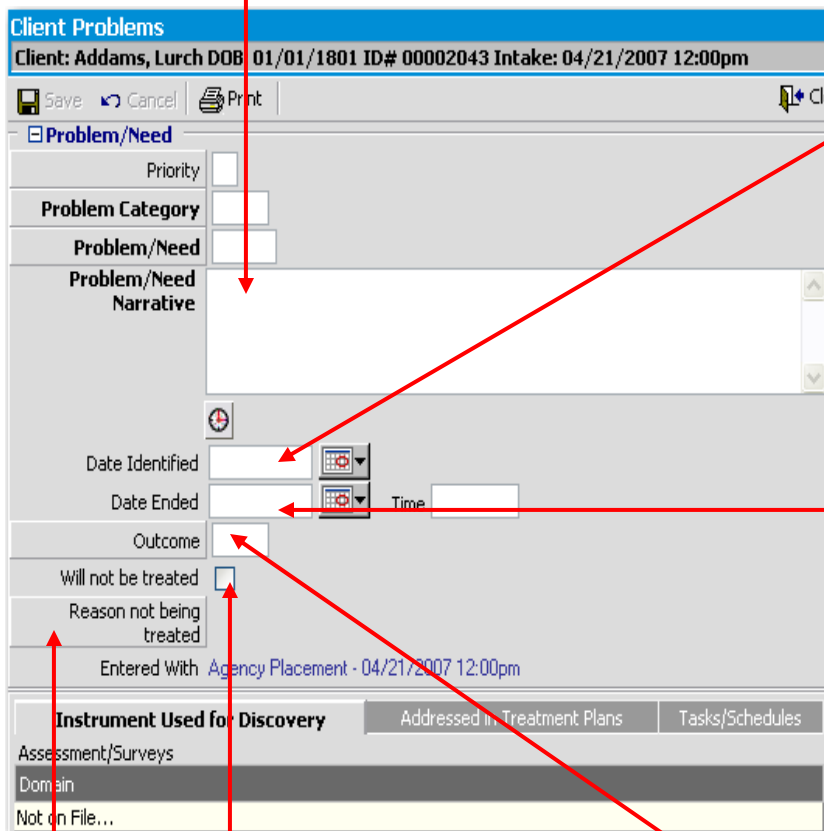
9. Reason not being treated:

If you checked the box "Will not be treated" you must indicate a reason.

1. Click the Reason not being treated box

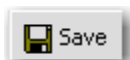


2. Select the reason

A screenshot of a software interface titled "Client Problems". At the top, it displays client information: "Client: Addams, Lurch DOB 01/01/1801 ID# 00002043 Intake: 04/21/2007 12:00pm". Below this is a toolbar with "Save", "Cancel", and "Print" buttons. The main section is titled "Problem/Need" and contains several fields: "Priority" (a dropdown), "Problem Category" (a dropdown), "Problem/Need" (a dropdown), and a large "Problem/Need Narrative" text area. Below these are "Date Identified" and "Date Ended" fields, each with a calendar icon and a "Time" field. There is an "Outcome" dropdown and a checkbox labeled "Will not be treated". Below the checkbox is a "Reason not being treated" dropdown. At the bottom, there is a section "Entered With" showing "Agency Placement - 04/21/2007 12:00pm". The bottom of the form has tabs for "Instrument Used for Discovery", "Addressed in Treatment Plans", and "Tasks/Schedules". The "Instrument Used for Discovery" tab is active, showing a list with "Assessment/Surveys" and "Domain", and a "Not on File..." entry.

Your Client Problems box should look similar to the screen shot in your manual.

Click **Save**



Client Problems
 Client: Addams, Lurch DOB: 01/01/1801 ID# 00002043 Intake: 04/21/2007 12:00pm

Cancel Print

Problem/Need

Priority

Problem Category ADHD Externalizing Disorders - AD/HD

Problem/Need Often leaves assigned seat without permission

Problem/Need Narrative This is where you qualify the Problem/Need you selected.

Date Identified 07/02/2008

Date Ended Time

Outcome

Will not be treated ☐

Reason not being treated

Entered With Agency Placement - 04/21/2007 12:00pm

Instrument Used for Discovery Addressed in Treatment Plans Tasks/Schedules

Assessment/Surveys

Domain

Not on File...

After clicking save, you will be brought back to the list of all Problems/Needs on file for your client.

New Manual Event		Schedule Task		Actions							
		Priority	Problem Category	Problem/Need	Problem/Need Narrative	Date Identified	Date Ended	Outcome	Will not be treated	Entered With	
+			Externalizing Disorders - AD/HD	Often forgetful in daily activities	forgets to follow through on tasks at school and chores at home	04/21/2007			No	Agency Placement - 04/21/2007 12:00pm	
+			Externalizing Disorders - AD/HD	Often leaves assigned seat without permission	This is where you qualify the Problem/Need you selected.	07/02/2008			No	Agency Placement - 04/21/2007 12:00pm	

You **must** follow this same process for each symptom and Problem/Need identified. If your client meets several criteria for a particular Diagnosis you will need to have a Problem/Need selected for each of the symptom.

Only select the Problem Category that corresponds to the client's Diagnosis. If you choose to develop an objective related to a Secondary and perhaps a Tertiary Diagnosis make sure to select a corresponding Problem Category.

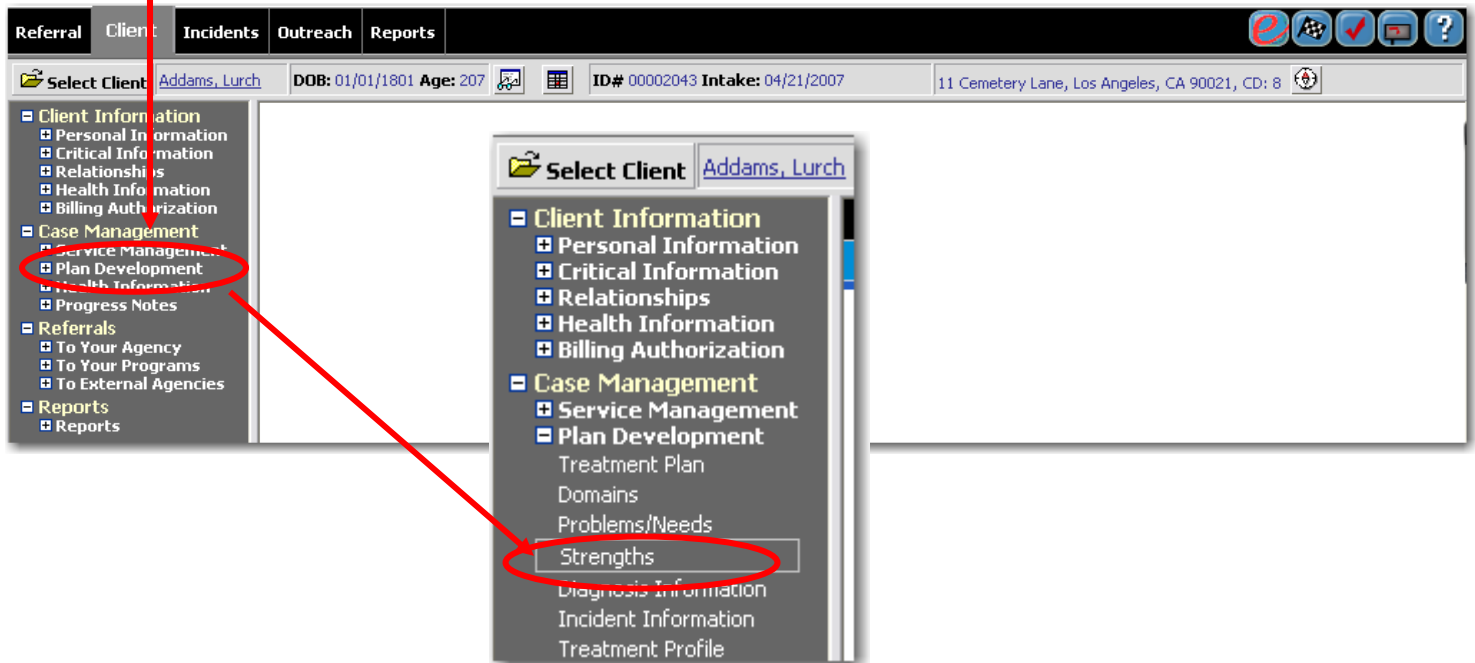
Clients typically benefit from a tight focus on only a few (2-3) problems. After initial Problems are resolved subsequent and less critical problems may be added and Tx Planned in the Review process.

ENTERING STRENGTHS

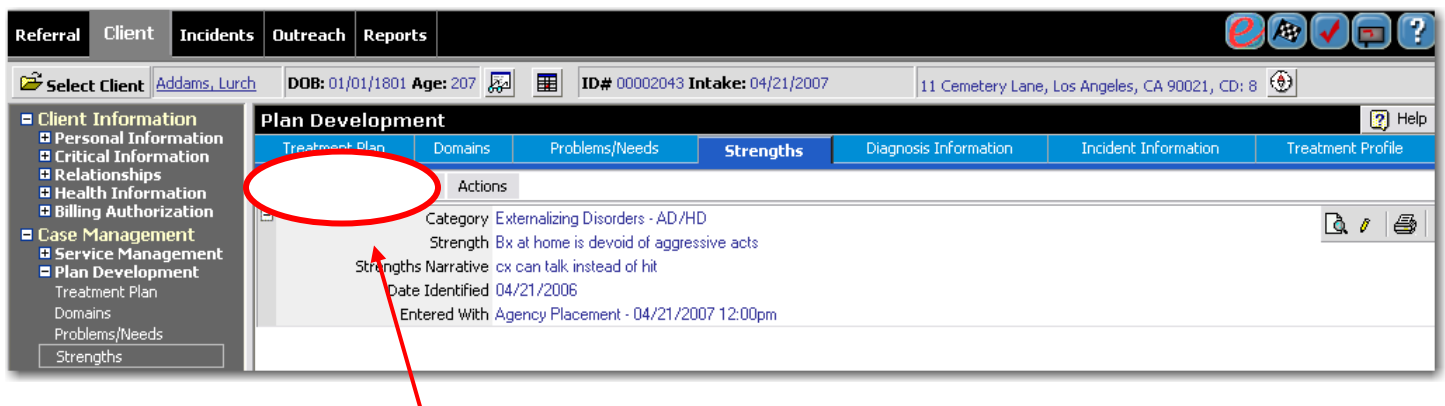
You should always identify strengths of your client.

Under Case Management

1. Click Plan Development
2. Click Strengths



If there are Strengths on file for your client they will list here. If there are no Strengths you will see “None of file”.



Click New Manual Event

A menu will drop down with only one choice

Click of Strengths - Person

A Client Strengths box will open

1. **Priority:** Allows you to identify the problem as Primary, Secondary, Tertiary or Other.

If you would like to prioritize your client's strengths click on the Priority button.

ADD Form -- Webpage Dialog

Client Strengths

Client: Addams, Lurch DOB: 01/01/1801 ID# 00002043 Intake: 04/21/2007 12:00pm

Save Cancel Print Close

Strength

Priority

Category

Strength

Strengths Narrative

Date Identified

Ended

Entered With Agency Placement - 04/21/2007 12:00pm

Instrument Used for Discovery

Assessment/Survey

Domain

Not on File...

2. **Category:** Categorizes your client's strengths into the 4 Clinical Pathways:

- Internalizing Disorder
- Externalizing Disorder
- Chemical Dependency
- Severe Mental Illness

The 4 Clinical Pathways are linked to a DSM Diagnosis

- Click on the Category button

Category

- A drop down list of Clinical Pathways will open
- Click on the Clinical Pathway that corresponds to your clients Diagnosis

3. **Strength:** The Strengths list is the same for all Categories – it is a list of 104 strengths.

- Click on the Strength button

Strength

- A drop down list will open
- Select the strength

4. **Strengths Narrative:** A text box that allows you to type in information that qualifies the Strength selected.

ADD Form -- Webpage Dialog

Client Strengths

Client: Addams, Lurch DOB: 01/01/1801 ID# 00002043 Intake: 04/21/2007 12:00pm

Save Cancel Print Close

Strength

Priority

Category

Strength

Strengths Narrative

Date Identified

Ended

Entered With Agency Placement - 04/21/2007 12:00pm

Instrument Used for Discovery

Assessment/Survey

Domain

Not on File...

5. **Date Identified:** This is the date the strengths began or were identified. If you or the caregiver is not sure of the exact date use the date the care plan was developed.

You can either type in the date or select it from the calendar.

6. **Ended:** Do not enter an end date for strengths. This field needs to be left blank.

Instrument Used for Discovery is not being used at this time.

Once you have completed all the elements for a strength your Client Strengths box will look similar to the screen shot in your manual.

Client Strengths
 Client: Addams, Lurch DOB: 01/01/1801 ID# 00002043 Intake: 04/21/2007 12:00pm

Cancel Print

Strength

Priority

Category ADHD Externalizing Disorders - AD/HD

Strength Caregiver asks for help when needed

Strengths Narrative This is where you qualify the strength you selected.

Date Identified 07/01/2008

Ended

Entered With Agency Placement - 04/21/2007 12:00pm

Instrument Used for Discovery

Assessment/Survey

Domain

Not on File...

Click **Save**



After clicking save, you will be brought back to the list of all Strengths on file for your client.

New Manual Event		Actions						
		Priority	Category	Strength	Strengths Narrative	Date Identified	Ended	Entered With
+			Externalizing Disorders - AD/HD	Bx at home is devoid of aggressive acts	cx can talk instead of hit	04/21/2006		Agency Placement - 04/21/2007 12:00pm
+			Externalizing Disorders - AD/HD	Caregiver asks for help when needed	This is where you qualify the strength you selected.	07/01/2008		Agency Placement - 04/21/2007 12:00pm

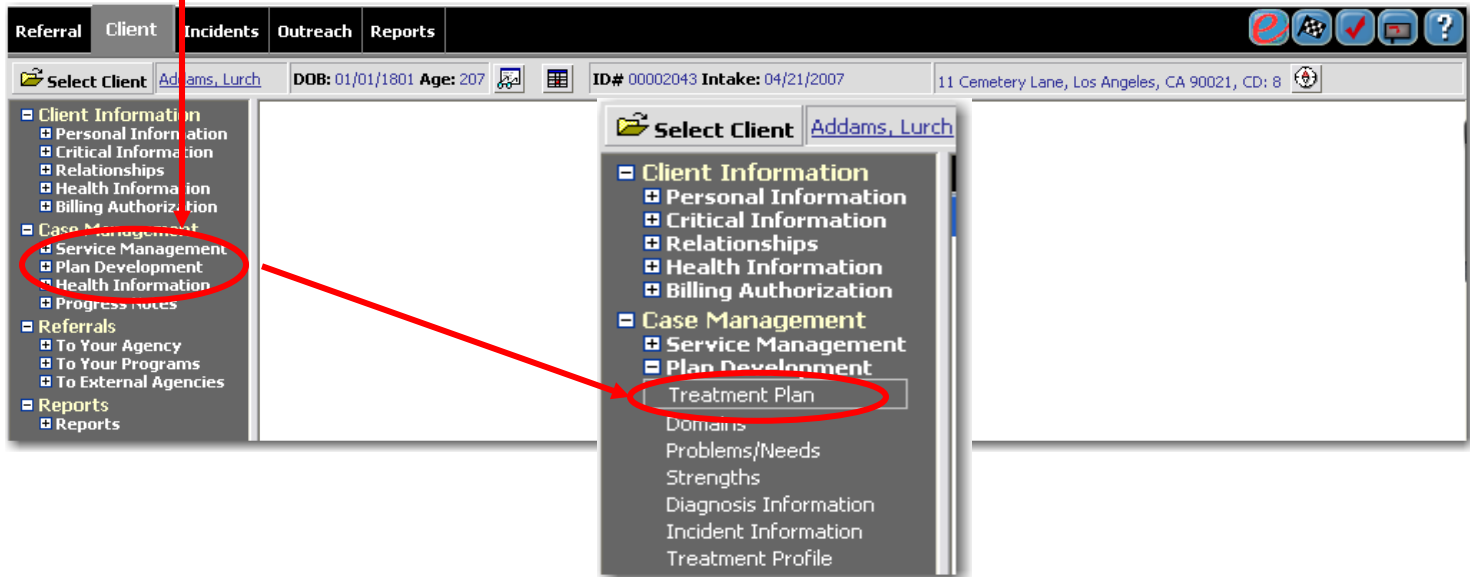
You **must** follow this same process for every Strength identified.

ENTERING THE INITIAL TREATMENT PLAN

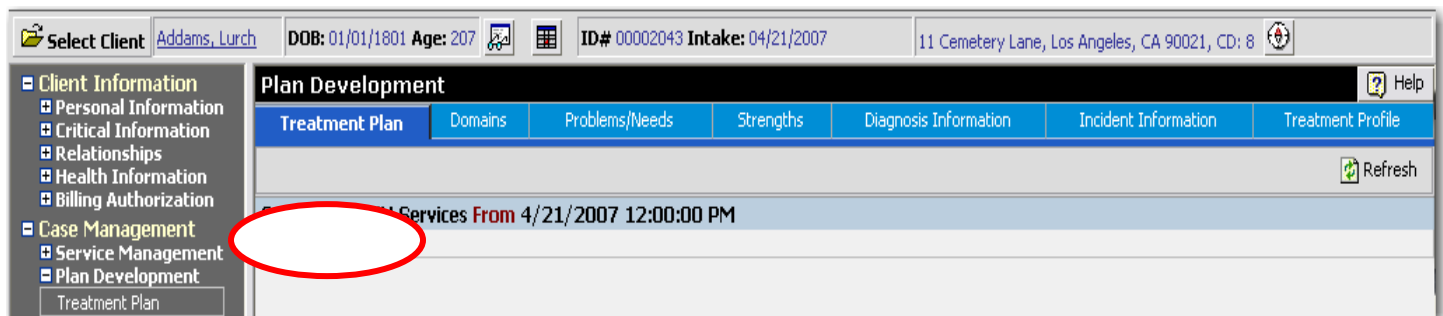
Enter a new Treatment Plan for your client.

Under Case Management

1. Click Plan Development
2. Click Treatment Plan



The following screen will appear. This is where all Treatment Plans for this client will be stored. **The Treatment Plan will not appear on the Service Entry Screen.**



Under Community MH Services click on the <Start New Plan> hyperlink.

Your client may have multiple Program Enrollments (i.e. TBS, Medication Support, etc.) and each one must have their own Treatment Plan. Make sure you are selecting the Treatment Plan under the appropriate program.

A Treatment Plan will open and will look like the screen shot on the next page.

ADD Form [Treatment Plan] -- Webpage Dialog

CMHS
Client: Addams, Cousin Itt DOB: 01/01/1901 ID# 00003362 Intake: 12/04/2003 12:00am

Save Cancel Print Close

Information

County ID
Status
Program CMHS Community MH Services
Facility
Type CMHS - Initial Plan

Completed Information

Date Started Time
Face-to-Face Time
Other Time (Service + Documentation + Travel)
Total Time 00:00
Number of Family Collaterals
Number of Non-Family Collaterals
Evidence Based Practice
Completed By Boyd, Angela
Submit To

Client Care Plan

Problems Currently on file

Category	Problem	Statement	Date Identified	End Date
Externalizing Disorders - Adjust Dr w/ Conduct	Easily frustrated, loses temper easily	when cl gets angry he punshes teacher	12/17/2008	

Strengths Currently on file

Category	Strength	Statement	Date Identified	End Date
Externalizing Disorders - Adjust Dr w/ Conduct	Accepts direction from caregiver	cl is deeply	12/17/2008	

Planning

Problems [Category:]

Category

Objective [Category:] [Goal:]

Problem Addressed
Goal
Goal Statement
Target Date
Staff Who Established
Status Established
Status Date

New Delete

Interventions [Category:] [Goal:] [Method:]

Method
Method Statement
Target Date
Program
Service
of Times Per Interval 0
Interval/Frequency
Staff Responsible
Other Person Responsible
Status Established
Status Date

New Delete

Current Diagnosis

Axis	Date	Priority	Priority Description	Diagnosis	DSMIV	ICD9	GAF Score
------	------	----------	----------------------	-----------	-------	------	-----------

Not on File...

Signatures

*Client Signature and Date

* Document reason for lack of Signature in note. Signature must be obtained at next visit.

Caregiver Signature and Date

LPHA Signature and Date

* Psychiatrist/MD Signature and Date

* N/A if client is not being treated by the Psychiatrist

Cx received copy of Care Plan (Cx initials / date)

Progress Note

Paragraph

Font Size

Confidentiality Statement

Confidentiality Statement This confidential inform

Participants

Tasks/Schedules

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INFORMATION AND COMPLETED INFORMATION SECTIONS

To complete a Treatment Plan start with the Information section and Completed Information sections. You will notice there are similarities between these sections and other Service Entry forms. You will need to complete the required fields. Let's review some fields that require additional explanation.

The screenshot shows a web-based form for creating a Treatment Plan. It is divided into two main sections: 'Information' and 'Completed Information'. The 'Information' section includes fields for County ID, Status (set to 'Draft'), Program (set to 'CMHS' with a link to 'Community MH Services'), Facility, and Type (set to 'CMHS - Initial Plan'). The 'Completed Information' section includes fields for Date Started (with a calendar icon), Time, Face-to-Face Time, Other Time (Service + Documentation + Travel), Total Time (set to '00:00'), Number of Family Collaterals, Number of Non-Family Collaterals, Evidence Based Practice, Completed By (set to 'Boyd, Angela'), and Submit To.

In the Information section County ID, Status and Program auto populate.

Status indicates the stage of the completion/approval process.

Facility: Is equivalent to facility providing service box in the Service Entry.

Follow the same procedure as located in the Phase 1 Users Guide on page 26.

Date Started: Actual date you started writing the Treatment Plan.

Time: Actual time of day you began to write the Treatment Plan.

The remaining fields are identical to the Service Entry fields explained in detail in Phase 1 manual.

CLIENT CARE PLAN SECTION

This is where all problems, needs and strengths information shows including the problems/needs and strengths you entered earlier.

Client Care Plan				
Problems Currently on file				
Category	Problem	Statement	Date Identified	End Date
Externalizing Disorders - Adjust Dr w/ Conduct	Easily frustrated, loses temper easily	when cl gets angry he punishes teacher	12/17/2008	
Strengths Currently on file				
Category	Strength	Statement	Date Identified	End Date
Externalizing Disorders - Adjust Dr w/ Conduct	Accepts direction from caregiver	cl is deeply	12/17/2008	

PLANNING SECTION – PROBLEMS / OBJECTIVES (GOALS) / INTERVENTIONS

We have now reached the beginning of the Treatment Plan. To begin building the Treatment Plan start in the Problems Category.

It is necessary to work top down from Problems/Categories through the Goal in sequence.

You must follow the steps 1 through 3 in order or you will lose information already selected. Also, if you go out of order, the system will not narrow the search for information in each section.

Planning

Problems [Category:] ← **Step 1** New ▾ X Delete

Category

Objective [Category:][Goal:] ← **Step 2** New ▾ X Delete

Problem Addressed

Goal

Goal Statement

Target Date

Staff Who Established

Status Established

Status Date

Interventions [Category:][Goal:][Method:] ← **Step 3** New ▾ X Delete

Method

Method Statement

Target Date

Program

Service

of Times Per Interval 0

Interval/Frequency

Staff Responsible

Other Person Responsible

Status Established

Status Date

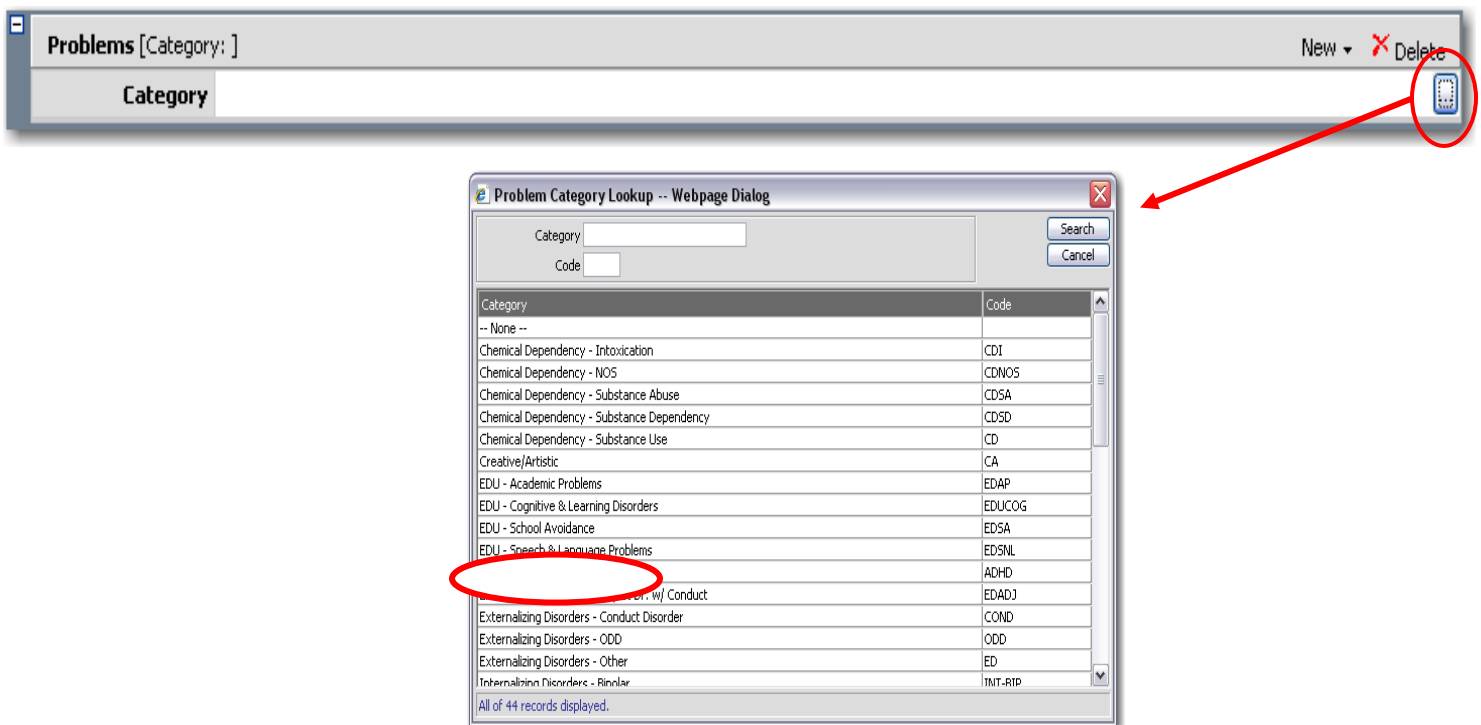
Now, let's take a closer look at **each section needed for** completing the Treatment Plan.

PROBLEMS SECTION

Step 1: CATEGORY

This is the overarching category from the Treatment Library that is a direct link back to the client's diagnosis. This category choice also dictates what objectives and interventions will be available via the Treatment Library.

- First click on the category ellipse at the far right
- A drop down box will open with a list of all problem categories
- Select the correct problem category by clicking on it
- The field will then populate with the chosen problem category



Select the Category that relates to the Diagnosis of the client. For example, if your client is diagnosed with Oppositional Defiant Disorder you will select Externalizing Disorders – ODD.

Step 2: OBJECTIVE SECTION [CATEGORY] [GOAL]

Objective [Category:] [Goal:] New Delete

Problem Addressed		...
Goal		...
Goal Statement		...
Target Date		
Staff Who Established		...
Status	Established	...
Status Date		

PROBLEM ADDRESSED

You will now utilize the Problems/Needs you developed earlier. For each problem you identify, you'll build out the Objective and then the Intervention for this specific problem.

- First click on the Problem Addressed ellipse at the far right
- A drop down box will open with a list of all problems identified on file
- Select the identified problem that you want to write an objective for by clicking on it
- The field will then populate with the chosen identified problem

Objective [Category:] [Goal:] New Delete

Problem Addressed		...
Goal		...
Goal Statement		...
Target Date		
Staff Who Established		...
Status	Established	...
Status Date		

Problems Identified (People/Category) -- Webpage Dialog

Category Search
Problem Cancel
Date Identified New
Description

Category	Problem	Date Identified	Description
-- None --		--	
Externalizing Disorders - AD/HD	Blurts out answers / Interrupts others	7/22/2008	Blurts out answers / Interrupts others: Speaks out of turn in class. Cuts off mother in the middle of conversations. 07/22/2008 01:39 PM - 2, MHS (Date Identified: 07/22/2008 End Date: ***)

All of 2 records displayed.

GOAL

The Goal is directly linked to the problem category chosen at step 1.

- First click on the Goal ellipse at the far right
- A drop down box will open with a list of all goals linked to the problem category
- Select the identified problem that you want to write an objective for by clicking on it
- The field will then populate with the chosen goal

Objective [Category:] [Goal:] New Delete

Problem Addressed	Often leaves assigned seat without permission: Gets out of seat during class without permission. (Date Identified: 07/30/2008, End Date: xxxx)	
Goal		
Goal Statement		
Target Date		
Staff Who Established		
Status	Established	
Status Date		

Treatment Plan Library (by Category) -- Webpage Dialog

Type

Category

Description

Search Cancel New

Type	Category	Description
-- None --		
Goal	Externalizing Disorders - AD/HD	Controls impulsive behaviors
Goal	Externalizing Disorders - AD/HD	Controls self when interacting with others
Goal	Externalizing Disorders - AD/HD	Controls self when interacting with others
Goal	Externalizing Disorders - AD/HD	Controls self when interacting with others
Goal	Externalizing Disorders - AD/HD	Decreased fidgeting and/or impulsive behaviors
Goal	Externalizing Disorders - AD/HD	Increase attention to tasks at hand
Goal	Externalizing Disorders - AD/HD	Increase intentional, focused behavior
Goal	Externalizing Disorders - AD/HD	Maintains appropriate physical boundaries
Goal	Externalizing Disorders - AD/HD	Maintains attention to activities
Goal	Externalizing Disorders - AD/HD	Remain seated for duration of activity or class
Goal	Externalizing Disorders - AD/HD	Responds to directives
Goal	Externalizing Disorders - AD/HD	Successful completion of tasks
Goal	Externalizing Disorders - AD/HD	TCM focused on linkage and consultation to...
Goal	Externalizing Disorders - AD/HD	Utilizes a self control strategy
Goal	Externalizing Disorders - AD/HD	Waits turn in line and/or class

All of 16 records displayed.

GOAL STATEMENT

This is the specific, observable and quantifiable objective required by DMH. This is a statement specific to the client. Once you click the goal, a default statement populates the goal statement field.

You will see (Measurable Objective) and Client agrees to participate by (IN CLIENT'S OWN WORDS)....

- First click on the Goal ellipse at the far right
- A text box will open

The 'Objective' form contains the following fields:

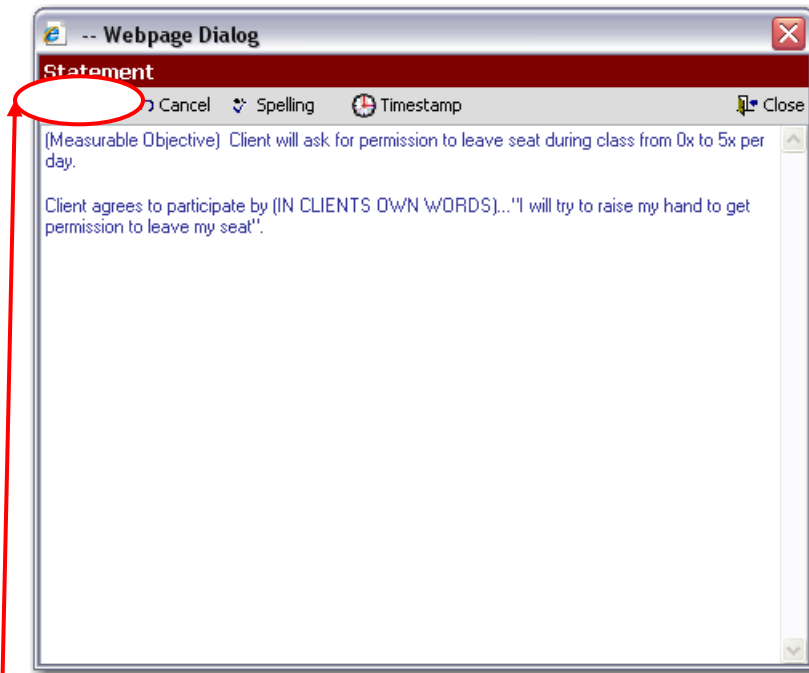
Objective [Category:][Goal:]		New ▾	Delete ✕
Problem Addressed	Often leaves assigned seat without permission: Gets out of seat during class without permission. (Date Identified: 07/30/2008, End Date: ***)		
Goal	Able to stay seated during activity		
Goal Statement	(Measurable Objective) Client agrees to participate by (IN CLIENTS OWN WORDS)...		
Target Date			
Staff Who Established			
Status	Established		
Status Date			

The 'Webpage Dialog' window titled 'Statement' shows the text: (Measurable Objective) Client agrees to participate by (IN CLIENTS OWN WORDS)...

Type in the objective. Notice that prior to typing the Statement bar is blue. Once you start typing the Statement bar changes to red. This indicates there is new information in the box that needs to be saved.

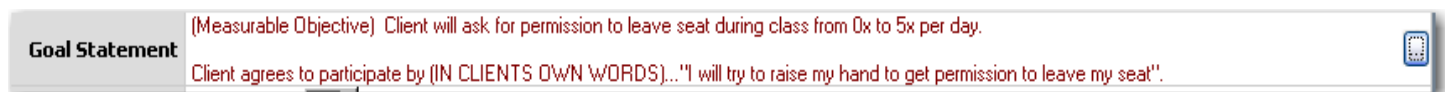
Set the curser in front of "Client agrees to participate by" and click on enter twice. This ensures that there will be space between the (measurable objective) and "Client agrees to participate by".

1. Type in the client's specific objective after the words (Measurable Objective)
2. Then following "client agrees to participate by (IN CLIENT'S OWN WORDS)" type what the client says regarding how they will participate in meeting the objective. Enter the client statement using quotes if necessary.



3. Once you have finished entering the objective and "client agrees to participate by" **click Update.**
4. **If you don't click Update prior to closing the box you will loose the information entered.**
5. Click Close

Once you close the text box the written measurable objective and client statement will now appear.



TARGET DATE

This date reflects a future date when this objective will be revisited for updates or completion. Typically this is the end of your six month cycle date although you are able to update objectives at any time.

- Either type in date or click on the calendar and select the date

The screenshot shows the 'Objective' form with the following fields:

- Objective [Category:] [Goal:]** (New, Delete)
- Problem Addressed**: Often leaves assigned seat without permission: Gets out of seat during class without permission. (Date Identified: 07/30/2008, End Date: ****)
- Goal**: Able to stay seated during activity
- Goal Statement**: (Measurable Objective) Client will ask for permission to leave seat during class from 0x to 5x per day. Client agrees to participate by (IN CLIENTS OWN WORDS)... "I will try to raise my hand to get permission to leave my seat".
- Staff Who Established**: (Empty field)
- Status**: Established
- Status Date**: (Calendar icon)

A red box highlights the 'Status Date' field, and a red arrow points to the calendar pop-up showing January 2009. The date 30 is selected.

STAFF WHO ESTABLISHED

This is the name of the staff who establishes the objective

- First click on the Staff Who Established ellipse at the far right
- A search box containing staff names will open
- Search for either the last name or first name of the identified staff member
- Then click on the name

The screenshot shows the 'Objective' form with the 'Staff Who Established' field clicked. A red circle highlights the search icon (magnifying glass) next to the field. A red arrow points to the search icon in the 'Staff - Service Providers (by Staff_id) -- Webpage Dialog' window.

The 'Staff - Service Providers (by Staff_id) -- Webpage Dialog' window shows a search box with fields for Last Name, First Name, and Job Title. Below the search box is a table of staff members:

Staff Name	Job Title	Active
-- None --		No
1, MHS	Mental Health Specialist II	Yes
10, MHS	Mental Health Specialist II	Yes
11, MHS	Mental Health Specialist II	Yes
12, MHS	Mental Health Specialist II	Yes
13, MHS	Mental Health Specialist II	Yes
2, MHS	Mental Health Specialist II	Yes
3, MHS	Mental Health Specialist II	Yes
4, MHS	Mental Health Specialist II	Yes

First 100 records out of 479 displayed.

STATUS

This will always default to Established for the Initial Plan. Any future updates of the treatment plan will indicate revised.

STATUS DATE

This is the date the goal was established.

- Either type in date or click on the calendar and select the date
- Have the participants select today's date
- The date will populate the filed

The screenshot shows a software interface for creating an objective. The form has several fields: Problem Addressed, Goal, Goal Statement, Target Date, Staff Who Established, and Status. The Status field is currently set to "Established" and is highlighted with a red box. A calendar pop-up is open, showing the month of July 2008. The date 30 is selected. A red arrow points from the red box around the Status field to the calendar pop-up.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Completed Objective should resemble screen shot below.

The screenshot shows the completed objective form. The Status field is now "Established" and the Status Date field is populated with "7/30/2008".

Objective	[Category:] [Goal:]	New ▾ ✕ Delete
Problem Addressed	Often leaves assigned seat without permission: Gets out of seat during class without permission. (Date Identified: 07/30/2008, End Date: xxxx)	...
Goal	Able to stay seated during activity	...
Goal Statement	(Measurable Objective) Client will ask for permission to leave seat during class from 0x to 5x per day. Client agrees to participate by (IN CLIENTS OWN WORDS)... "I will try to raise my hand to get permission to leave my seat".	...
Target Date	1/30/2009	...
Staff Who Established	10, MHS	...
Status	Established	...
Status Date	7/30/2008	...

Step 3: INTERVENTIONS SECTION

Interventions [Category:] [Goal:] [Method:]		New ▾	Delete ✕
Method			...
Method Statement			...
Target Date			
Program			...
Service			...
# of Times Per Interval	0		
Interval/Frequency			...
Staff Responsible			...
Other Person Responsible			...
Status	Established		...
Status Date			

METHOD

This is directly linked to the category chosen at the beginning of this plan. This is the category of intervention, **NOT** the specific intervention.

- First click on the Method ellipse at the far right
- A drop down box will open with a list of all interventions linked to the problem category
- Select the category description that you want to write an intervention for by clicking on it
- The field will then populate with the chosen category description

Interventions [Category:] [Goal:] [Method:]		New ▾	Delete ✕
Method			...
Method Statement			...
Target Date			
Program			...
Service			...
# of Times Per Interval	0		
Interval/Frequency			...
Staff Responsible			...
Other Person Responsible			...
Status	Established		...
Status Date			

Treatment Plan Library (by Category) -- Webpage Dialog

Type

Category

Description

Search

Cancel

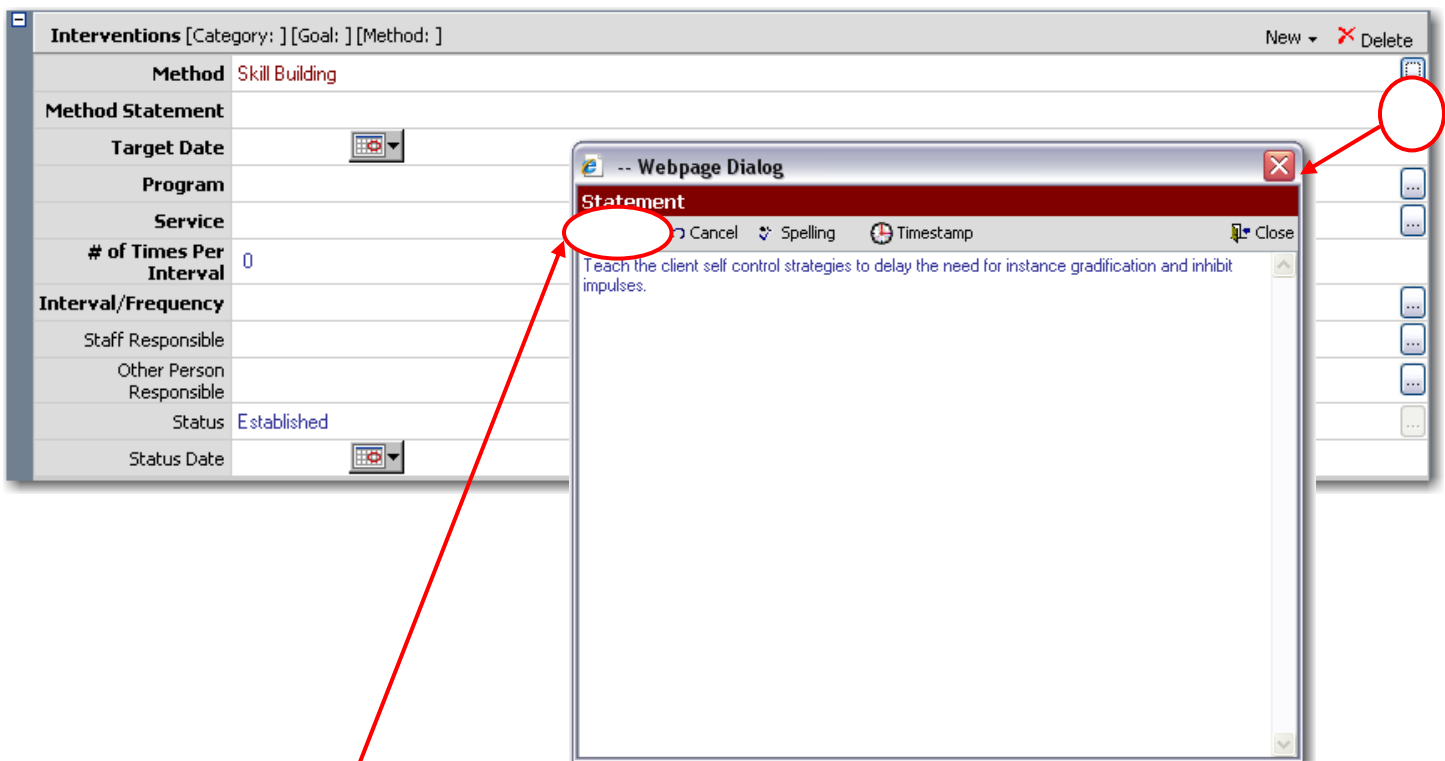
Type	Category	Description
-- None --		
Method	Externalizing Disorders - AD/HD	Behavior Rehearsal
Method	Externalizing Disorders - AD/HD	Consult with School Teacher/Personnel
Method	Externalizing Disorders - AD/HD	Family Therapy
Method	Externalizing Disorders - AD/HD	Group services for AD/HD issues
Method	Externalizing Disorders - AD/HD	Linkage to Services
Method	Externalizing Disorders - AD/HD	Medication Evaluation
Method	Externalizing Disorders - AD/HD	Medication Support
Method	Externalizing Disorders - AD/HD	Parent Skills Training related to AD/HD issues
Method	Externalizing Disorders - AD/HD	Psychoeducation to develop coping strategies
Method	Externalizing Disorders - AD/HD	Psychotherapy - Other
Method	Externalizing Disorders - AD/HD	Refer for advanced assessment - Neuropsych, etc.
Method	Externalizing Disorders - AD/HD	Use of Behavior Support Aide
Method	Externalizing Disorders - AD/HD	Use of Point Card

All of 15 records displayed.

METHOD STATEMENT

This is a statement that qualifies the category description (method) selected specific to the client.

- First click on the Method Statement ellipse at the far right
- A text box will open
- Compose and type in an intervention to meet the objective for the client



- Once you have finished entering the method statement **click Update**
-  **You must click Update prior to closing the box or you will loose the information you entered**
- Click Close

TARGET DATE

This date reflects a future date when this intervention will be revisited for updates. Typically this is the end of your six month cycle date although you are able to update interventions at any time.

- Either type in date or click on the calendar and select the date

The screenshot shows the 'Interventions' form with the following details:

- Method:** Skill Building
- Method Statement:** Teach the client self control strategies to delay the need for instance gradification and inhibit impulses.
- Program:** (Empty field, highlighted with a red box)
- Service:** (Empty field)
- # of Times Per Interval:** 0
- Interval/Frequency:** (Empty field)
- Staff Responsible:** (Empty field)
- Other Person Responsible:** (Empty field)
- Status:** Established
- Status Date:** (Empty field)

A calendar pop-up is displayed over the 'Program' field, showing the month of January 2009. The date 30 is selected. A red arrow points from the 'Program' field to the calendar.

PROGRAM

The program the client is enrolled in.

- First click on the Program ellipse at the far right
- A drop down box will open with a list of all SBHG programs
- Select Community MH Services
- This is the only Program Name you should ever choose
- The field will then populate with the chosen Program Name

The screenshot shows the 'Interventions' form with the following details:

- Method:** Skill Building
- Method Statement:** Teach the client self control strategies to delay the need for instance gradification and inhibit impulses.
- Target Date:** 1/30/2009
- Program:** (Empty field)
- Service:** (Empty field)
- # of Times Per Interval:** 0
- Interval/Frequency:** (Empty field)
- Staff Responsible:** (Empty field)
- Other Person Responsible:** (Empty field)
- Status:** Established
- Status Date:** (Empty field)

The 'Program Listing By Agency and Worker -- Webpage Dialog' is open, showing a list of programs. A red circle highlights the 'X' button in the top right corner of the dialog box. A red box highlights the first row of the list, which is 'Community MH Services - TBS Only'.

Program Name	Program Type
-- None --	
Community MH Services - TBS Only	Community
Community Treatment Facility	Residential
Crisis Stabilization Service	Community
CTF Bed Hold	Residential
Day Treatment Intensive	Community
Family Preservation	Community
Family Support	Community
Foster Care Youth Services	Community
FSP - Transitional Aged Youth	Community
FSP- Child/Youth	Community
Head Start	Community
High Risk High Need	Community
Integrated Services and Recovery Center	Community
Medication Services	Community

All of 25 records displayed.

SERVICE

This is the service mode of the intervention used to accomplish the objective(s).

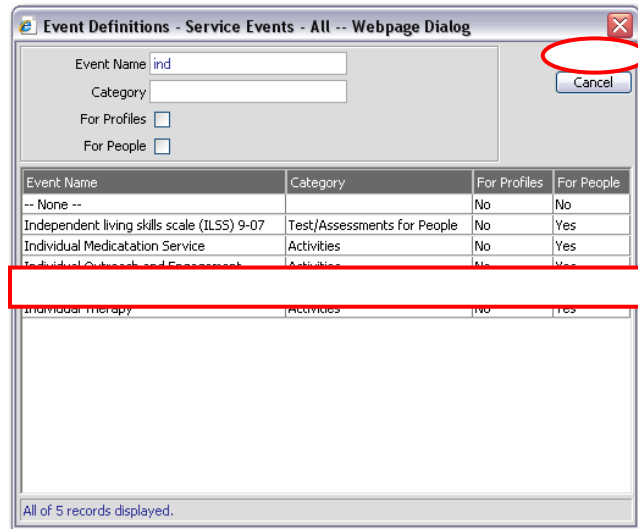
- First click on the Service ellipse at the far right
- A drop down box will open with a list of all SBHG service events
- One of these 5 service events listed below should be selected:
 1. Individual Therapy
 2. Individual Rehabilitation
 3. Targeted Case Management
 4. Family Therapy
 5. Collateral (if the collateral is going to be a consistent part of treatment)

The screenshot displays the 'Interventions' form in the SBHG EMR system. The form is titled 'Interventions [Category: Externalizing Disorders - AD/HD] [Goal: Able to stay seated during activity] [Method: Skill Building]'. It includes fields for Method (Skill Building), Method Statement (Teach the client self control strategies to delay the need for instance gradification and inhibit impulses), Target Date (1/30/2009), Program (Community MH Services), Service (empty), # of Times Per Interval (0), Interval/Frequency (empty), Staff Responsible (empty), Other Person Responsible (empty), Status (Established), and Status Date (empty). A red circle highlights the 'Service' field, which is currently empty. To the right of the 'Service' field, a dropdown menu is open, showing a list of service events. The dropdown menu is titled 'Event Definitions - Service Events - All -- Webpage Dialog'. It contains a search bar, a category dropdown, and checkboxes for 'For Profiles' and 'For People'. Below these are two columns: 'Event Name' and 'Category'. The list of events includes: 3 - page Child Assessment (LA DMH) 8.03, Activity Note, Administered Medication, Administrative D/C Summary / Aftercare Plan 7-07, Admissions Problem Sheet, Adult Initial Assessment DMH 8-03 (MH 532), Adult Substance Use Self Evaluation (DMH) MH555, Aftercare Plan, Annual Assessment Update (LA DMH) 1-06, Attendance Checker, and Attendance Enrollment. The first 100 records out of 188 are displayed.

Event Name	Category	For Profiles	For People
-- None --		No	No
3 - page Child Assessment (LA DMH) 8.03	Test/Assessments for People	No	Yes
Activity Note	Activities	No	Yes
Administered Medication	Medication Administration	No	Yes
Administrative D/C Summary / Aftercare Plan 7-07	Test/Assessments for People	No	Yes
Admissions Problem Sheet	Test/Assessments for People	No	Yes
Adult Initial Assessment DMH 8-03 (MH 532)	Test/Assessments for People	No	Yes
Adult Substance Use Self Evaluation (DMH) MH555	Test/Assessments for People	No	Yes
Aftercare Plan	Test/Assessments for People	No	Yes
Annual Assessment Update (LA DMH) 1-06	Test/Assessments for People	No	Yes
Attendance Checker	Test/Assessments for People	No	Yes
Attendance Enrollment	Memberships/Placement in	Yes	Yes

When you click on the service ellipse a search box will open. It contains a scroll down listing of the first 100 of 188 possible SBHG services available in the company. If the service event is not listed within the first 100 possible choices you will need to narrow your search by using the first few letters of the service event name.

For example, in the event name field, if you type the letters ind and click search. The search will return the following services:

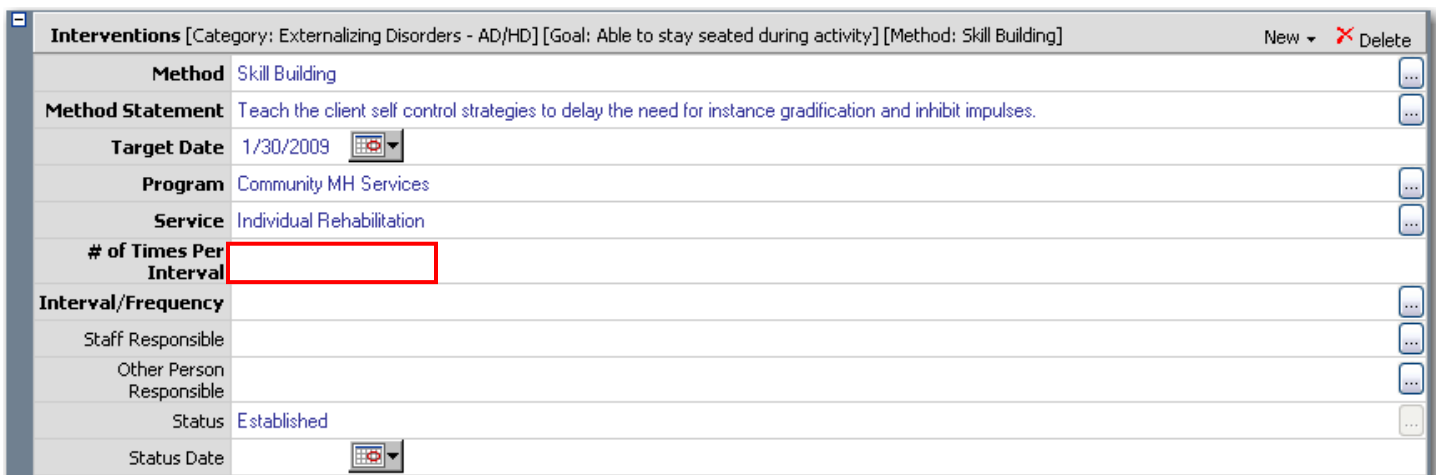


Event Name	Category	For Profiles	For People
-- None --		No	No
Independent living skills scale (ILSS) 9-07	Test/Assessments for People	No	Yes
Individual Medication Service	Activities	No	Yes
Individual Outreach and Engagement	Activities	No	Yes
Individual Therapy	Activities	No	Yes

- Click on the appropriate service event name
- The field will then populate with the chosen service event name

OF TIMES PER INTERVAL

This is the frequency of how many times you will be providing the specific service event. This field auto-populates to 0 (zero). You will need to change the 0 (zero) to the minimum number of sessions or service events you plan to provide. **This field must be populated with only a whole number. You can not type in a times symbol (x), a percentage sign, decimal, fraction or dashes after the number.** The interval/frequency is delineated in the next field.



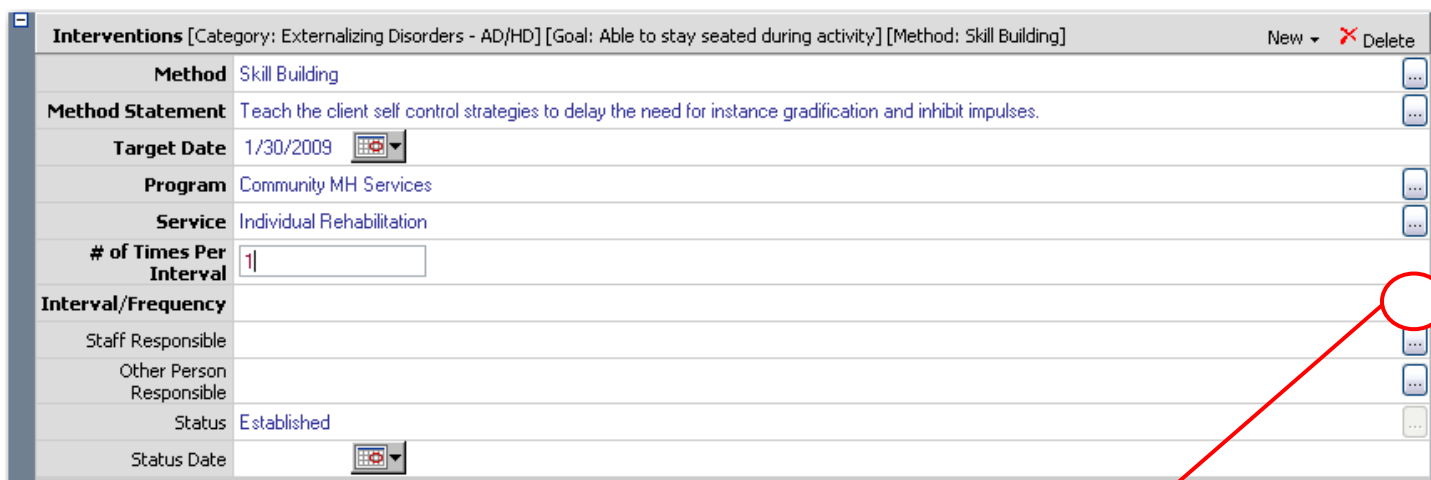
Interventions [Category: Externalizing Disorders - AD/HD] [Goal: Able to stay seated during activity] [Method: Skill Building]		New ▾ ✕ Delete
Method	Skill Building	...
Method Statement	Teach the client self control strategies to delay the need for instance gradification and inhibit impulses.	...
Target Date	1/30/2009	...
Program	Community MH Services	...
Service	Individual Rehabilitation	...
# of Times Per Interval	0	...
Interval/Frequency		...
Staff Responsible		...
Other Person Responsible		...
Status	Established	...
Status Date		...

- Type in a number in the # of Times Per Interval field

INTERVAL / FREQUENCY

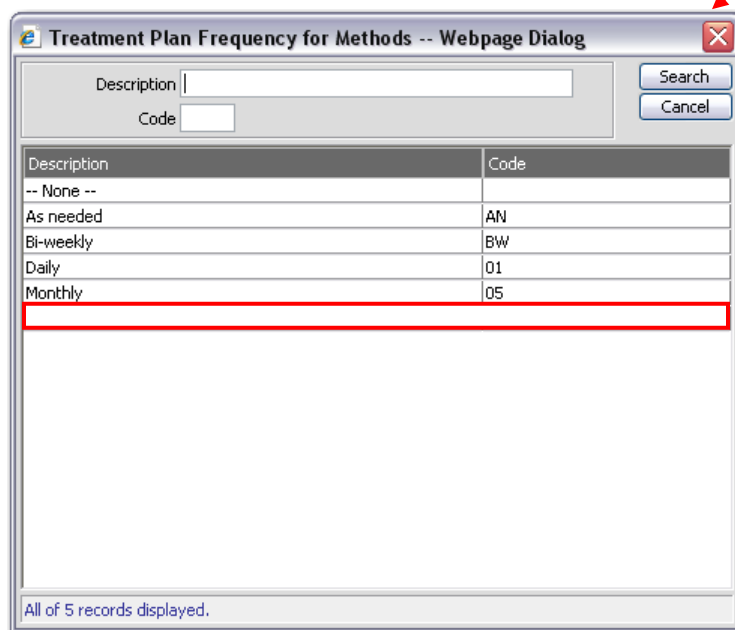
The frequency the intervention will be performed (example daily, monthly, etc.)

- First click on the Interval/Frequency ellipse at the far right
- A drop down box will open with a list of frequencies
- Select a frequency
- The field will then populate with the chosen frequency



Interventions [Category: Externalizing Disorders - AD/HD] [Goal: Able to stay seated during activity] [Method: Skill Building] New Delete

Method	Skill Building	...
Method Statement	Teach the client self control strategies to delay the need for instance gradification and inhibit impulses.	...
Target Date	1/30/2009	...
Program	Community MH Services	...
Service	Individual Rehabilitation	...
# of Times Per Interval	1	
Interval/Frequency		...
Staff Responsible		...
Other Person Responsible		...
Status	Established	...
Status Date		...



Treatment Plan Frequency for Methods -- Webpage Dialog

Description: Search Cancel

Code:

Description	Code
-- None --	
As needed	AN
Bi-weekly	BW
Daily	01
Monthly	05

All of 5 records displayed.

Select the As needed frequency only when you are not planning on providing the selected service on a regular basis. The As needed frequency should not be used as a catch-all.

STAFF RESPONSIBLE

This field identifies the staff responsible for the service provided. If the person who establishes the goal is also responsible for the service provided their name must be selected again.

- First click on the Staff Responsible ellipse at the far right
- A search box will open
- Search for the staff's name
- Click on the desired name
- The field will then populate with the chosen name

The screenshot shows the 'Interventions' form with the following details:

- Category: Externalizing Disorders - AD/HD
- Goal: Able to stay seated during activity
- Method: Skill Building
- Method Statement: Teach the client self control strategies to delay the need for instance gradification and inhibit impulses.
- Target Date: 1/30/2009
- Program: Community MH Services
- Service: Individual Rehabilitation
- # of Times Per Interval: 1
- Interval/Frequency: Weekly
- Staff Responsible: (empty field with an ellipse icon on the right)
- Other Person Responsible: (empty field)
- Status: Established
- Status Date: (empty field)

A red circle highlights the ellipse icon next to the 'Staff Responsible' field, with a red arrow pointing to the 'Staff - Service Providers' dialog box below.

The dialog box displays a search interface for staff members. It includes fields for Last Name, First Name, and Job Title, along with Search and Cancel buttons. Below these fields is a table of staff members.

Staff Name	Job Title	Active
-- None --		No
1, MHS	Mental Health Specialist II	Yes
11, MHS	Mental Health Specialist II	Yes
12, MHS	Mental Health Specialist II	Yes
13, MHS	Mental Health Specialist II	Yes
2, MHS	Mental Health Specialist II	Yes
3, MHS	Mental Health Specialist II	Yes
4, MHS	Mental Health Specialist II	Yes
5, MHS	Mental Health Specialist II	Yes
6, MHS	Mental Health Specialist II	Yes
7, MHS	Mental Health Specialist II	Yes
8, MHS	Mental Health Specialist II	Yes
9, MHS	Mental Health Specialist II	Yes
Ahrlessian, Nnemi	Wranaround Facilitator I	Yes

First 100 records out of 479 displayed.

OTHER STAFF RESPONSIBLE

This field identifies the additional staff responsible for the service provided. If there are two staff identified providing the same service with the client, a clear distinction **must** be made between the interventions provided by each staff.

IF there will be additional staff follow the steps outlined below. If there is no other staff person responsible you can leave this field blank.

- First click on the Staff Responsible ellipse at the far right
- A search box will open
- Search for the staff's name
- Click on the desired name
- The field will then populate with the chosen name

The screenshot shows the 'Interventions' form with the following details:

- Category: Externalizing Disorders - AD/HD
- Goal: Able to stay seated during activity
- Method: Skill Building
- Method Statement: Teach the client self control strategies to delay the need for instance gradification and inhibit impulses.
- Target Date: 1/30/2009
- Program: Community MH Services
- Service: Individual Rehabilitation
- # of Times Per Interval: 1
- Interval/Frequency: Weekly
- Staff Responsible: 10, MHS
- Other Person Responsible: (empty)
- Status: Established
- Status Date: (empty)

The 'Staff Responsible' field has an ellipse icon at the far right, which is circled in red. A red arrow points from this icon to the 'All People Table -- Webpage Dialog' window below.

The 'All People Table -- Webpage Dialog' window is open, showing a search interface with the following fields:

- First Name: (empty)
- SSN: (empty)
- Date of Birth: (empty)

Buttons: Search, Cancel, New.

Instructions: Please enter the search criteria... (at the bottom)

STATUS

Status will always default to Established for the Initial Plan. Any future updates of the treatment plan will indicate revised.

STATUS DATE

This is the date the Method/Intervention was established

- Either type in date or click on the calendar and select the date
- Have the participants select today's date.
- The date will populate the filed

The screenshot shows the 'Interventions' form with the following details:

- Interventions** [Category: Externalizing Disorders - AD/HD] [Goal: Able to stay seated during activity] [Method: Skill Building] New Delete
- Method**: Skill Building
- Method Statement**: Teach the client self control strategies to delay the need for instance gradification and inhibit impulses.
- Target Date**: 1/30/2009
- Program**: Community MH Services
- Service**: Individual Rehabilitation
- # of Times Per Interval**: 1
- Interval/Frequency**: Weekly
- Staff Responsible**: 10, MHS
- Other Person Responsible**: 13, MHS
- Status**: Established

A red box highlights the empty **Status Date** field, and a red arrow points to a calendar picker showing July 2008, with the 30th selected.

Completed Intervention should resemble screen shot below.

The screenshot shows the completed 'Interventions' form with the following details:

- Interventions** [Category: Externalizing Disorders - AD/HD] [Goal: Able to stay seated during activity] [Method: Skill Building] New Delete
- Method**: Skill Building
- Method Statement**: Teach the client self control strategies to delay the need for instance gradification and inhibit impulses.
- Target Date**: 1/30/2009
- Program**: Community MH Services
- Service**: Individual Rehabilitation
- # of Times Per Interval**: 1
- Interval/Frequency**: Weekly
- Staff Responsible**: 10, MHS
- Other Person Responsible**: 13, MHS
- Status**: Established
- Status Date**: 7/30/2008

CURRENT DIAGNOSIS

This is a **view only** display of the current diagnosis. It can not be edited here. If there is a need to change the Diagnosis an MHS II must complete a Change of Diagnosis form and turn it into the Center/TM Intake Coordinator. Then complete the billing for the Change of Diagnosis in the EMR.

Current Diagnosis							
Diagnosis							
Axis	Date	Priority	Priority Description	Diagnosis	DSMIV	ICD9	GAF Score
	6/6/2006	2	Secondary	DEPRESSIVE DISORDER NEC	311	311.	
1	6/1/2008	1	Primary	AD/HD Combined Type	314.01	314.01	
2	6/1/2006	9	Other	Diagnosis Deferred on this Axis	799.9	799.9	
3	6/1/2006			Premature Infant	765.1	765.1	
4	6/5/2008			Problems with primary support group			
5	6/1/2006			45			45

SIGNATURES

The signature section can not be edited. They are place holders for signatures when printed.

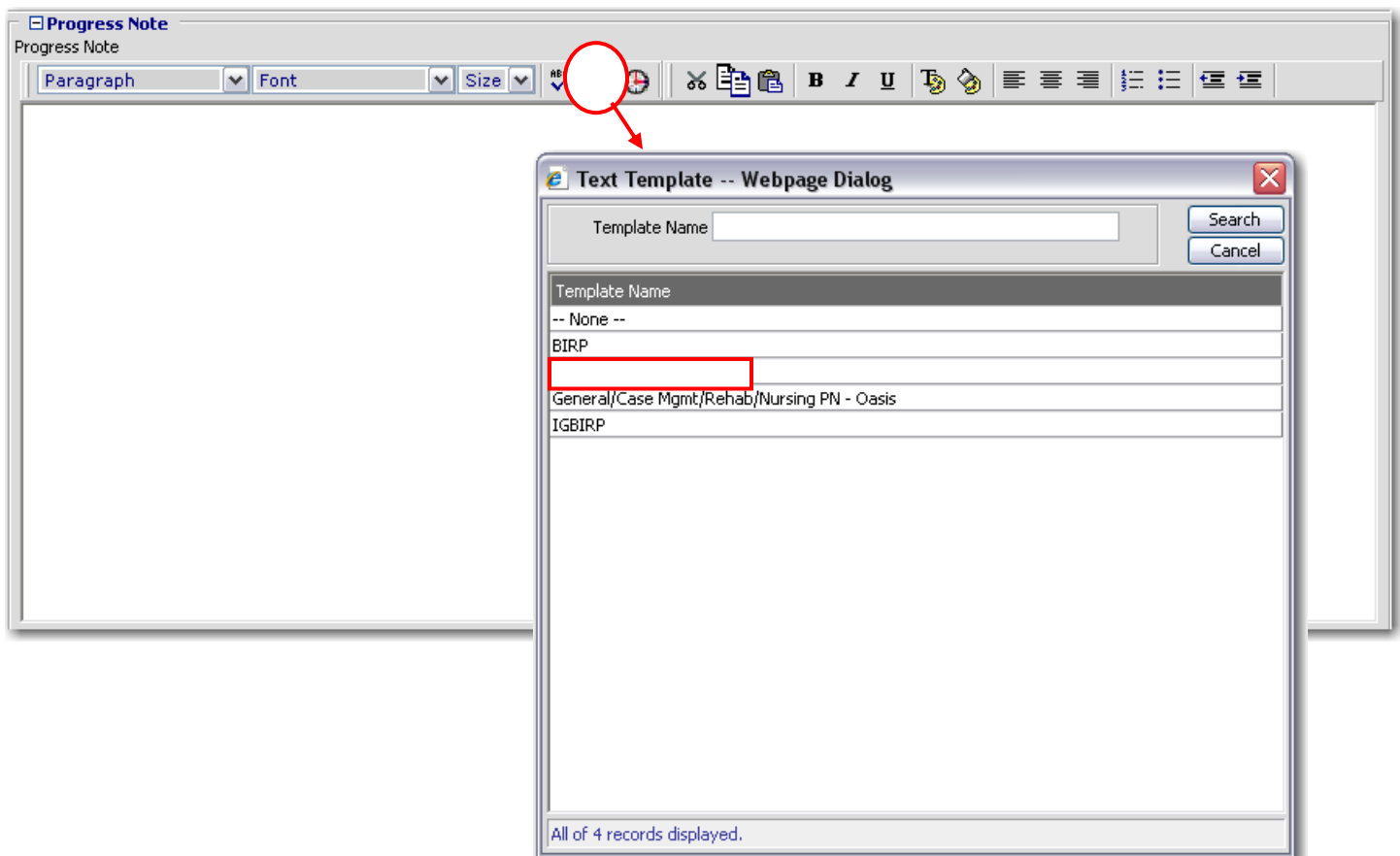
Signatures	
*Client Signature and Date	
* Document reason for lack of Signature in note. Signature must be obtained at next visit.	
Caregiver Signature and Date	
LPHA Signature and Date	
* Psychiatrist/MD Signature and Date	
* N/A if client is not being treated by the Psychiatrist	
Cx received copy of Care Plan (Cx initials / date)	

When you print the Care Plan to bring to the Caregiver and client to obtain their signatures make sure that you obtain ALL the signatures listed above. Sometimes when the Care Plan is printed some of the signature lines will end up on a separate printed page. You are REQUIRED to obtain ALL relevant signatures including the Client's Initials indicating they have received a copy of the Care Plan.

PROGRESS NOTE

For the Initial Care Plan and Annual update you would select the Care Plan PN template. **NOTE: For the 6-month update you would type in the progress note field “completed client care plan”.**

- To select the Care Plan PN template click on the template icon (circled below)
- Click on Care Plan PN Template



CARE PLAN PROGRESS NOTE TEMPLATE

The following headers will populate the Progress Note field. Type appropriate information under each header.

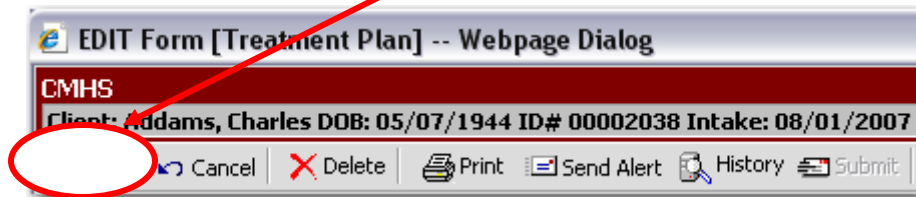
Progress Note
Progress Note

Paragraph Font Size ABC 123 456 789 101112 131415 161718 192021222324252627282930 31323334353637383940 41424344454647484950 51525354555657585960 61626364656667686970 71727374757677787980 81828384858687888990 919293949596979899100 101102103104105106107108109110 111112113114115116117118119120 121122123124125126127128129130 131132133134135136137138139140 141142143144145146147148149150 151152153154155156157158159160 161162163164165166167168169170 171172173174175176177178179180 181182183184185186187188189190 191192193194195196197198199200 201202203204205206207208209210 211212213214215216217218219220 221222223224225226227228229230 231232233234235236237238239240 241242243244245246247248249250 251252253254255256257258259260 261262263264265266267268269270 271272273274275276277278279280 281282283284285286287288289290 291292293294295296297298299300 301302303304305306307308309310 311312313314315316317318319320 321322323324325326327328329330 331332333334335336337338339340 341342343344345346347348349350 351352353354355356357358359360 361362363364365366367368369370 371372373374375376377378379380 381382383384385386387388389390 391392393394395396397398399400 401402403404405406407408409410 411412413414415416417418419420 421422423424425426427428429430 431432433434435436437438439440 441442443444445446447448449450 451452453454455456457458459460 461462463464465466467468469470 471472473474475476477478479480 481482483484485486487488489490 491492493494495496497498499500 501502503504505506507508509510 511512513514515516517518519520 521522523524525526527528529530 531532533534535536537538539540 541542543544545546547548549550 551552553554555556557558559560 561562563564565566567568569570 571572573574575576577578579580 581582583584585586587588589590 591592593594595596597598599600 601602603604605606607608609610 611612613614615616617618619620 621622623624625626627628629630 631632633634635636637638639640 641642643644645646647648649650 651652653654655656657658659660 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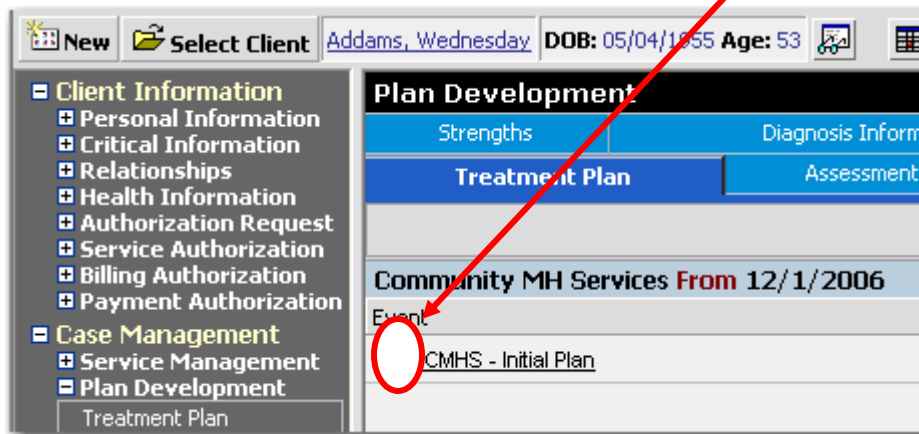
SAVING THE CARE PLAN / TREATMENT PLAN

After **ALL** required (**bolded**) fields are complete you are ready to save the Care Plan/Treatment Plan. You MUST save the Care Plan first before you can submit it to your supervisor or designee; notice the “submit” button is not available.

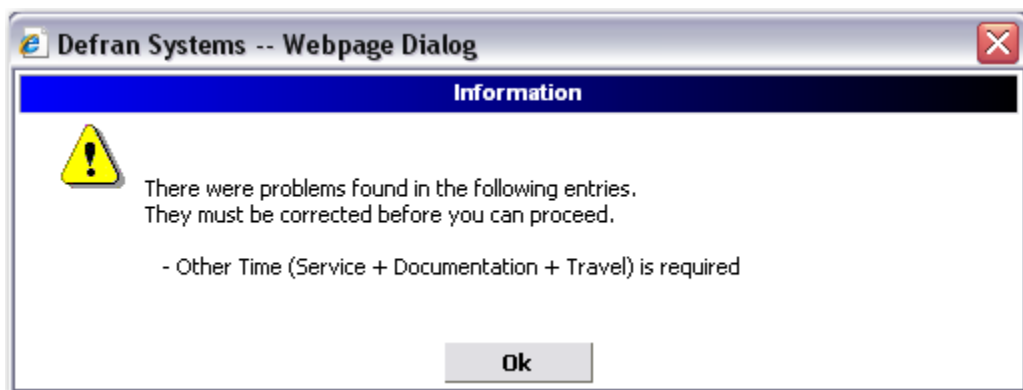
At the top of the Care Plan/Treatment Plan click on the  button.



The Care Plan/Treatment Plan will close and you will be brought back to the Treatment Plan page. You can now see the Care Plan/Treatment Plan in draft format indicated by the  (pencil) to the left of the Care Plan.



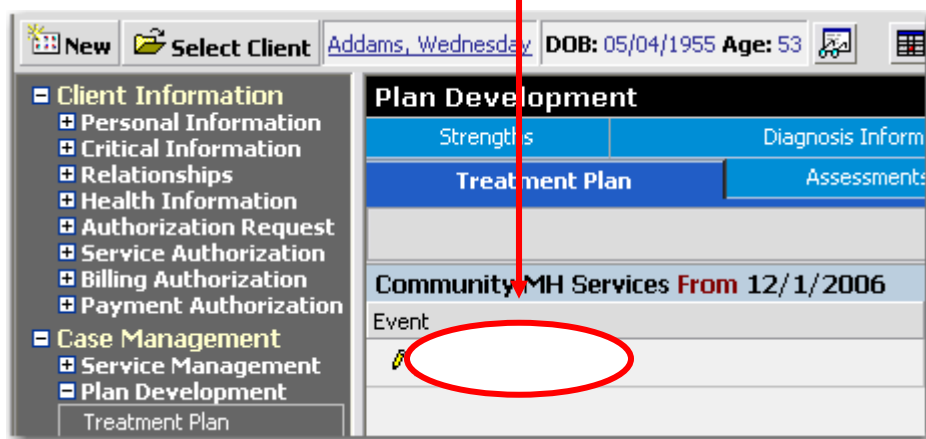
If you have missed any of the bolded (required) fields, you will receive an error message indicating what information must be complete before you can save. Below you can see an example of the error message you will get if you did not complete the “Other Time” field.



SUBMITTING THE CARE PLAN / TREATMENT PLAN

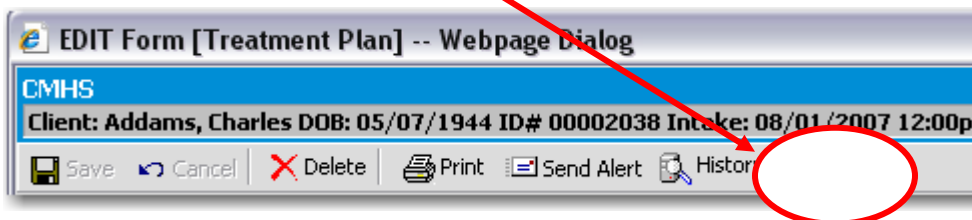
In order to submit the Care Plan to your supervisor or to the designee you **MUST** open up the Care Plan again. Do NOT leave the Care Plan in Draft status after its due date. A Care Plan in draft status will not be billed and is not considered a final Care Plan until the supervisor approves it.

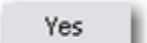
To open the Care Plan again, click on the words “CMHS – Initial Plan” or “Review Plan”.

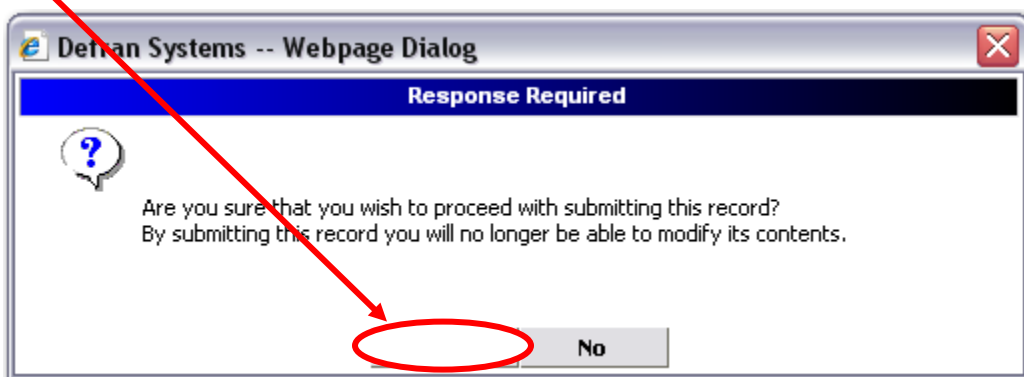


The Care Plan will open in Draft format.

At the top of the Care Plan the  button is now available; Click on it.



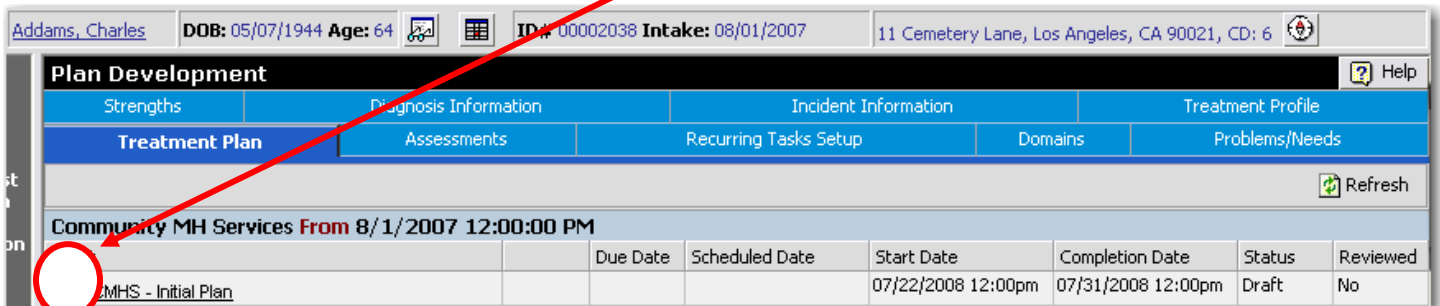
You will receive this message asking you if you are sure you want to proceed with submitting the Care Plan. Click  .



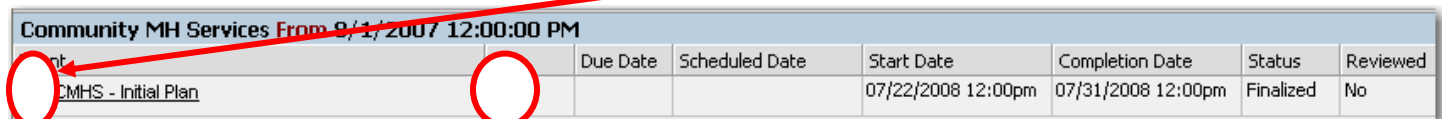
The Care Plan will now show in a format that is not editable. Click the  button to return to the Treatment Plan screen.



You will now see the Care Plan listed with an envelope icon  to the left of the service in the Treatment Plan screen.



When your supervisor or designee APPROVES the Care Plan you will see a green check mark  to the left of the service.



Also notice the eyeglass icon  to the right of the service. The eyeglass icon indicates the Care Plan can be updated.

BEFORE UPDATING THE CARE PLAN / TREATMENT PLAN



STOP: Before updating the Care Plan ask yourself the following two questions:

First, Is your client displaying any new Problems-Needs and/or Strengths?

- If yes, then PRIOR to updating the Care Plan, you **MUST** first add the Problems-Needs and/or Strengths (see pages 5 – 12 in this manual on how to add new Problems-Needs and/or Strengths).
- If not, then ask yourself the next question.

Second, Did any of the current Problems-Needs END during the previous 6-months?

- If yes, then you will need to add an END date to the specific Problem-Need. To end a Problem-Need; follow the instructions in the next section of this manual.
- If not, then you can skip to page 42 of this manual on how to Update the Care Plan.

ENDING A PROBLEM/NEED

See page 3 of this manual on where Problem-Needs are located.

To add an End Date to a current Problem-Need click on the pencil icon  at the right hand corner.



Problem Category	Externalizing Disorders - Conduct Disorder
Problem/Need	Aggressively confronts others
Problem/Need Narrative	Cx is aggressive towards siblings
Date Identified	11/27/2008
Entered With	Agency Placement - 12/16/2004 12:00am
Scheduled Task(s) Originated	
From	

The Problem-Need box will open. The system will allow you to edit ANY field of the Problem-Need, but the ONLY two fields you should edit are the Date Ended and the Outcome.

EDIT Form -- Webpage Dialog

Client Problems

Client: Addams, Lurch DOB: 01/01/1801 ID# 00003366 Intake: 12/16/2004 12:00am

Save Cancel Print Send Alert History Close

Date Ended Time

Outcome

Entered With Agency Placement - 12/16/2004 12:00am

Instrument Used for Discovery

Assessment/Surveys

Domain

Not on File...

Addressed in Treatment Plans

Tasks/Schedules

DO NOT *EDIT/CHANGE* the:

- PRIORITY
- PROBLEM CATEGORY
- PROBLEM/NEED
- PROBLEM/NEED NARRATIVE
- DATE IDENTIFIED
- WILL NOT BE TREATED
- REASON NOT BEING TREATED.

Doing so will cause problems. Remember that you have already written objectives with this Problem/Need identified.

Date Ended:

The date this specific problem/need was extinguished or stopped. If unsure of the exact end date use the date the Care Plan will be reviewed/updated.

You can either type in the date or select it from the calendar.

Outcome: (use ONLY when ending a Problem/Need)

This allows you to indicate the outcome of the Problem/Need.

- Click the Outcome button
-
- A drop down list will open
 - Select the Outcome of this Problem/Need
 - Achieved
 - Can't be achieved
 - No longer present
 - Not achieved

When you have entered the End Date and the Outcome you will need to click Save  at the top left hand corner.

EDIT Form -- Webpage Dialog

Client Problems

Client: Addams, Lurch DOB: 01/01/1801 ID# 00003366 Intake: 12/16/2004 12:00am

Cancel Print Send Alert History Close

Need

Priority

Problem Category COND Externalizing Disorders - Conduct Disorder

Problem/Need Aggressively confronts others

Problem/Need Narrative Cx is aggressive towards siblings

Date Identified 11/27/2008

Date Ended 12/31/2009 Time 1:00 PM

Outcome 21 No longer Present

Will not be treated

Reason not being treated

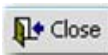
Entered With Agency Placement - 12/16/2004 12:00am

Instrument Used for Discovery

Assessment/Surveys

Domain

Not on File...

The box will remain open, notice the Save button is now grayed out. You will then have to click the Close  button at the top right hand corner.

EDIT Form -- Webpage Dialog

Client Problems

Client: Addams, Lurch DOB: 01/01/1801 ID# 00003366 Intake: 12/16/2004 12:00am

Save Cancel Print Send Alert History Close

Problem/Need

Priority

Problem Category COND Externalizing Disorders - Conduct Disorder

Problem/Need Aggressively confronts others

Problem/Need Narrative Cx is aggressive towards siblings

Date Identified 11/27/2008

Date Ended 12/31/2009 Time 01:00pm

Outcome 21 No longer Present

Will not be treated

Reason not being treated

Entered With Agency Placement - 12/16/2004 12:00am

Instrument Used for Discovery

Assessment/Surveys

Domain

Not on File...

The box will close and you will be brought back to the Problem/Needs screen. The Problem/Need you just ended will look like this. Notice the End Date and Outcome section.

Problem Category Externalizing Disorders - Conduct Disorder

Problem/Need Aggressively confronts others

Problem/Need Narrative Cx is aggressive towards siblings

Date Identified 11/27/2008

Date Ended 12/31/2009 01:00pm

Outcome No longer Present

Entered With Agency Placement - 12/16/2004 12:00am

Scheduled Task(s) Originated From

You are now ready to Update the Care Plan.

Updating the Care Plan / Treatment Plan

You can update the Care Plan at any time but at the very minimum the objectives **MUST** be updated every 6-months per DMH regulations. You should consider updating the Plan of Care earlier than the 6-month workflow if the client experiences a significant change of condition (such as hospitalization, other dramatic Tx-life event). Refer to the top of page 13 in this manual to locate the Care Plan in the EMR.

There are **TWO** options when updating a Care Plan:

First, the EMR will automatically schedule the CMHS – Review Plan for the next 6-months based on the date you completed the previous Care Plan. If, when you are in the Treatment Plan section of the EMR, you see a CMHS – Review Plan in **RED** then the EMR had scheduled the CMHS – Review Plan for you to complete. You can complete the Care Plan this way regardless if you are updating the Care Plan early or not.

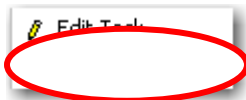
Community MH Services From 5/8/2007 12:00:00 PM							
Event		Due Date	Scheduled Date	Start Date	Completion Date	Status	Reviewed
		4/19/2009					
✓ CMHS - Review Plan				10/19/2008 08:45am	10/19/2008 08:55am	Finalized	No
✓ CMHS - Review Plan				07/24/2008 11:10am	07/24/2008 11:10am	Finalized	Yes
✓ CMHS - Initial Plan				04/28/2008 08:00am	04/28/2008 08:44am	Finalized	Yes

Click on the CMHS – Review Plan in **RED**

Event		Due Date	Scheduled Date	Start Date	Completion Date	Status	Reviewed
CMHS - Review Plan		4/19/2009					
Edit Task				10/19/2008 08:45am	10/19/2008 08:55am	Finalized	No
Complete Task				07/24/2008 11:10am	07/24/2008 11:10am	Finalized	Yes

A drop down list will open asking you to Edit the Task or Complete the Task

Click on Complete Task



If there is already a scheduled CMHS – Review Plan in **RED**, you will need to update the Care Plan by following the above steps. **Only use the eyeglass icon (explained below) if there is NOT a scheduled CMHS – Review Plan in RED.** If you do not click on the **RED** CMHS – Review Plan you will see multiple scheduled CMHS – Review Plans the next time you update a Care Plan.

Second, if the EMR did not schedule the CMHS – Review Plan for you to Update the Care Plan, you **MUST** click the eyeglass icon  to the right of the approved Care Plan. You **can not** update a Care Plan in draft format.

Community MH Services From 8/1/2007 12:00:00 PM							
Event		Due Date	Scheduled Date	Start Date	Completion Date	Status	Reviewed
✓ CMHS - Initial Plan				07/22/2008 12:00pm	07/31/2008 12:00pm	Finalized	No

A drop down box will open. Click on the CMHS – Review Plan.



The Service Plan Review Item box will open. This box will show ALL Problem Categories, objectives and methods with a status of open and closed on file for the client.

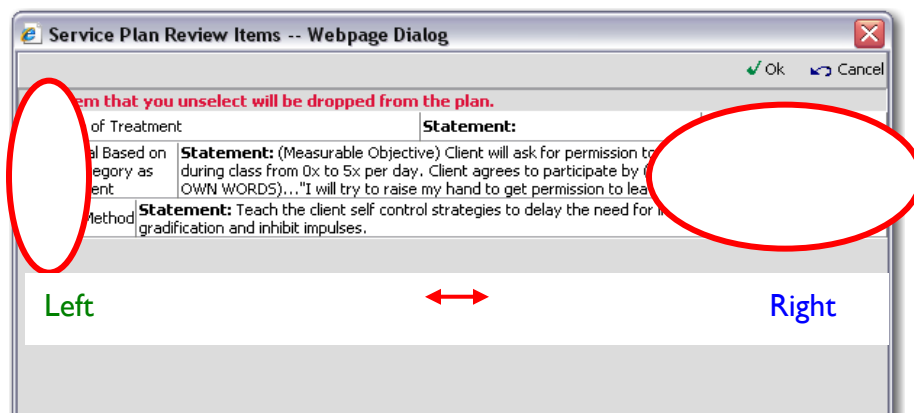
The following statuses are considered OPEN:

- Continued – No Change
- Continued – Positive Change
- Continued – Negative Change
- Revised – Positive Change
- Revised – Negative Change
- Revised – No Change
- Established

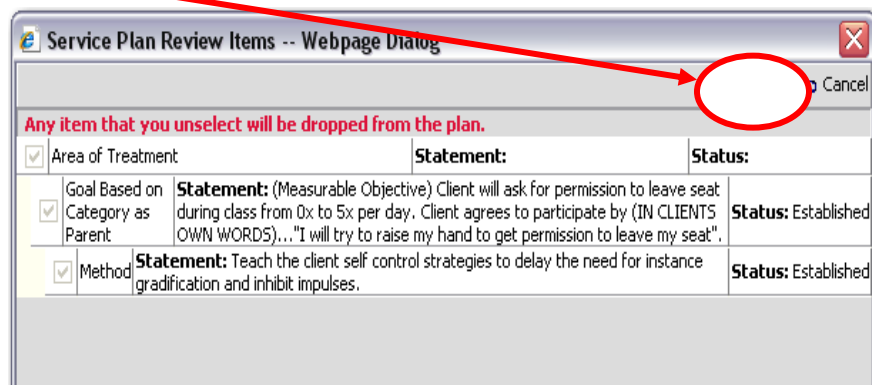
The following statuses are considered CLOSED:

- Discontinued
- Achieved

Notice the status column to the right of the objective and method. If the Status of the Area of Treatment (Problem Category), Goal (Objective) and/or Method (Intervention) fall under the OPEN category listed above, **you will not** have the choice to drop the Problem Category, Objective or Method. This is indicated by the grayed out check marks to the left of the Area of Treatment, goal and/or method. The EMR will NOT let OPEN Area of Treatment, Goals or Methods to be dropped without given it a closed status.



If all the check marks to the left of the Area of Treatment, Goal and Method are grayed out then click the OK button  at the top right hand corner of the box. Then SKIP to page 47 of this manual.



Based on the closed status of the Problem Categories, objectives and/or interventions you will be able to “drop” the Area of Treatment, goal and/or method from the Care Plan you are about to Update OR you have the option to make them active again.

In the screen shot example below notice the Status column to the **right** of the Area of Treatment, Goal and Method, they all indicate Discontinued. This means that all the Area of Treatment, Goals and Methods are closed. Notice to the **left** of the Area of Treatment, Goal and Method. The check boxes are not grayed out. You now have the ability to un-check an Area of Treatment, Goal and/or Method.

- The Area of Treatment is the Problem Category (remember the problem category is the clinical pathway linked to the diagnosis – i.e. Internalizing Disorder – Dysthymic)
- The Goal Based on Category as Parent is the Objective
- The Method is the Intervention

Left		Right
☒ Area of Treatment	Statement:	Status:
☒ Goal Based on Category as Parent	Statement: Client will increase her ability to focus & follow through with completion of tasks as evidenced by turning in homework, following through with instructions, waiting her turn, following classroom rules, in lieu of jumping into conversations, getting distracted & not completing assignments/losing focus from 0x per day to 2x per day, per MHS observation and teacher report.	Status: Discontinued
☒ Method	Statement: MHS will follow up with school teacher/personnel to monitor client's progress and assist with bx strategies to help the client learn	Status: Discontinued
☒ Method	Statement: MHS will assist caregiver in increasing structure (e.g. rule board, role model, eye contact, client repeat back cg instructions, etc.) to help the client learn to delay gratification for longer-term goals (e.g., completing homework or chores before playing).	Status: Discontinued
☒ Method	Statement: MHS will teach client self-control strategies. MHS and client will explore and identify stressful factors that contribute to an increase in distractibility and develop positive coping strategies (e.g., "stop, look, listen and think," relaxation techniques, positive self-talk) to manage stress more effectively.	Status: Discontinued
☒ Method	Statement: MHS will encourage client to, during session, engage in activities that require attention, helping client follow through and identify factors contributing to her lack of attention and lack of focus. MHS will encourage client to engage in similar types of attention building activities at home; MHS will collaborate with caregiver and teacher to ensure client's engagement and follow through.	Status: Discontinued
☒ Method	Statement: MHS will encourage client to engage during session in activities in which she will follow gradually increasing instructions, and/or multitasking, as to facilitate her increased focus and facilitate the use of techniques to follow through (eye contact when listening to instructions, repeating instructions, writing down tasks). MHS will educate cg/teacher as to ensure follow through.	Status: Discontinued
☒ Area of Treatment	Statement:	Status:
☒ Goal Based on Category as Parent	Statement: Client's mood will improve as evidenced by engaging socially, talking to friends, more involvement in age appropriate activities in lieu of isolating from 0x per week to 2x per week.	Status: Discontinued
☒ Method	Statement: MHS will teach boundaries, assertiveness training (rather than physical aggression), bx strategies (walking away from peers' name calling, etc.) and self-esteem raising exercises as well as consult with teacher regarding appropriate classroom interventions for peers' teasing and name calling of client.	Status: Discontinued
☒ Area of Treatment	Statement:	Status:
☒ Goal Based on Category as Parent	Statement: Ct & caregiver will increase use of community resources as needed in order to ensure proper linkage to support groups, special resources for ADHD, medication support from 0x per month to 2x per month.	Status: Discontinued
☒ Method	Statement: MHS will provide caregiver with psychoeducational training and material as well as refer out to community resources, as needed, in order to ensure that client & cg will increase use of community resources in order to ensure proper linkage to support groups (i.e. parenting), special resources for ADHD, medication support.	Status: Discontinued

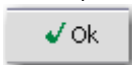
If you would like to make an objective previously discontinued or achieved active again you should leave the Area of Treatment (Problem Category) checked.

If you do not want the discontinued or achieved objective to show on your updated Care Plan then you **MUST uncheck the AREA OF TREATMENT** that corresponds to that objective. For instance, I do not want the first objective to show on my updated Care Plan so I would need to uncheck the AREA OF TREATMENT that corresponds to the first objective.

If you uncheck only the objective that corresponds to an AREA OF TREATMENT then when you update the Care Plan the AREA OF TREATMENT will show and not the objective. **You will then be REQUIRED to add another objective under that AREA OF TREATMENT. If this happens and you did not want that AREA OF TREATMENT to show you will be required to start your Care Plan over again and loose any data you entered.**

You also have the option of making an AREA OF TREATMENT and GOAL active again and not the METHOD. To do this, uncheck the METHODS you do not want to show on the updated Care Plan.

Any item that you unselect will be dropped from the plan.			
	Area of Treatment	Statement:	Status:
☒	Area of Treatment		
☒	Goal Based on Category as Parent	Statement: Client will increase her ability to focus & follow through with completion of tasks as evidenced by turning in homework, following through with instructions, waiting her turn, following classroom rules, in lieu of jumping into conversations, getting distracted & not completing assignments/losing focus from 0x per day to 2x per day, per MHS observation and teacher report.	Status: Discontinued
☒	Method	Statement: MHS will follow up with school teacher/personnel to monitor client's progress and assist with bx strategies to help the client learn.	Status: Discontinued
☒	Method	Statement: MHS will assist caregiver in increasing structure (e.g. rule board, role model, eye contact, client repeat back cg instructions, etc.) to help the client learn to delay gratification for longer-term goals (e.g., completing homework or chores before playing).	Status: Discontinued
☒	Method	Statement: MHS will teach client self-control strategies. MHS and client will explore and identify stressful factors that contribute to an increase in distractibility and develop positive coping strategies (e.g., "stop, look, listen and think," relaxation techniques, positive self-talk) to manage stress more effectively.	Status: Discontinued
☒	Method	Statement: MHS will encourage client to, during session, engage in activities that require attention, helping client follow through and identify factors contributing to her lack of attention and lack of focus. MHS will encourage client to engage in similar types of attention building activities at home; MHS will collaborate with caregiver and teacher to ensure client's engagement and follow through.	Status: Discontinued
☒	Method	Statement: MHS will encourage client to engage during session in activities in which she will follow gradually increasing instructions, and/or multitasking, as to facilitate her increased focus and facilitate the use of techniques to follow through (eye contact when listening to instructions, repeating instructions, writing down tasks). MHS will educate cg/teacher as to ensure follow thorough.	Status: Discontinued
☒	Area of Treatment		
☒	Goal Based on Category as Parent	Statement: Client's mood will improve as evidenced by engaging socially, talking to friends, more involvement in age appropriate activities in lieu of isolating from 0x per week to 2x per week.	Status: Discontinued
☒	Method	Statement: MHS will teach boundaries, assertiveness training (rather than physical aggression), bx strategies (walking away from peers' name calling, etc.) and self-esteem raising exercises as well as consult with teacher regarding appropriate classroom interventions for peers' teasing and name calling of client.	Status: Discontinued
☒	Area of Treatment		
☒	Goal Based on Category as Parent	Statement: Ct & caregiver will increase use of community resources as needed in order to ensure proper linkage to support groups, special resources for ADHD, medication support from 0x per month to 2x per month.	Status: Discontinued
☒	Method	Statement: MHS will provide caregiver with psychoeducational training and material as well as refer out to community resources, as needed, in order to ensure that client & cg will increase use of community resources in order to ensure proper linkage to support groups (i.e. parenting), special resources for ADHD, medication support.	Status: Discontinued

When you have checked or unchecked ALL the Area of Treatment, Goals and/or Methods you would like to have on the updated Care Plan you are ready to click  at the top right hand corner.

The Care Plan page will open showing the objectives with a open status AND those closed objectives not unchecked (see next page).

ADD Form [Treatment Plan] -- Webpage Dialog

CMHS
Client: Addams, Lurch DOB: 01/01/1801 ID# 00003366 Intake: 12/16/2004 12:00am

Save Cancel Print Close

Information
County ID
Status Draft
Program CMHS Community MH Services
Facility
Type CMHS - Review Plan

Completed Information
Date Started Time
Face-to-Face Time
Other Time (Service + Documentation + Travel)
Total Time 00:00
Number of Family Collaterals
Number of Non-Family Collaterals
Evidence Based Practice
Completed By Boyd, Angela
Submit To

Client Care Plan
Problems Currently on file

Category	Problem	Statement	Date Identified	End Date
Externalizing Disorders - Conduct Disorder	Aggressively confronts others	Cx is aggressive towards siblings	11/27/2008	

Strengths Currently on file

Category	Strength	Statement	Date Identified	End Date
Externalizing Disorders - Conduct Disorder	Completes schoolwork	Cx listens to his teachers and turns his hw	11/26/2008	

Planning

Problems [Category: Externalizing Disorders - Conduct Disorder] New
Category Externalizing Disorders - Conduct Disorder
Objective [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] New

Problem Addressed Problem:Aggressively confronts others, Statement:Cx is aggressive towards siblings
Goal Terminate all acts of violence/cruelty to people
Goal Statement (Measurable Objective) Cx will decrease hitting sibling from 4x a week to 0 times per week Client agrees to participate by (IN CLIENTS OWN WORDS)... "I will will outside when I want to hit my siblings"
Target Date 5/31/2009
Staff Who Established 5, MHS
Status
Status Date
Review Remarks

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques] New

Method Teach client mediation/self-control techniques
Method Statement MHS will work with this client on deep breathing skills
Target Date 5/31/2009
Program Community MH Services
Service Individual Rehabilitation
of Times Per Interval 1
Interval/Frequency Weekly
Staff Responsible 5, MHS
Other Person Responsible
Status
Status Date
Review Remarks

Current Diagnosis

Axis	Date	Priority	Priority Description	Diagnosis	DSMIV	ICD9	GAF Score
Not on File...							

Signatures
*Client Signature and Date
* Document reason for lack of Signature in note. Signature must be obtained at next visit.
Caregiver Signature and Date
LPHA Signature and Date
* Psychiatrist/MD Signature and Date
* N/A if client is not being treated by the Psychiatrist
Cx received copy of Care Plan (Cx initials / date)

Progress Note
Progress Note
Paragraph Font Size

Confidentiality Statement This confidential inform
Participants
Tasks/Schedules

The Care Plan looks exactly the same as the first Care Plan with the exception of the objectives. The Review Care Plan will list the problem categories, objectives and interventions either in an OPEN status or what you have indicated you wanted to show on the Care Plan for the client.

Let's review each section of the Review Care Plan.

To complete a Treatment Plan start with the Information section. You will notice there are similarities between this section and other Service Entry forms. You will need to complete the required fields.

INFORMATION AND COMPLETED INFORMATION SECTIONS

ADD Form [Treatment Plan] -- Webpage Dialog

CMHS
Client: Addams, Lurch DOB: 01/01/1801 ID# 00003366 Intake: 12/16/2004 12:00am

Save Cancel Print

Information

County ID
 Status
 Program Community MH Services
 Facility
 Type

Completed Information

Date Started Time
 Face-to-Face Time
 Other Time (Service + Documentation + Travel)
 Total Time
 Number of Family Collaterals
 Number of Non-Family Collaterals
 Evidence Based Practice
 Completed By
 Submit To

Refer to page 15 of this manual or pages 20 – 24 of Phase I manual if you need assistance in completing the information and Completed Information sections.

CLIENT CARE PLAN SECTION

This is where all Problems/Needs and Strengths information currently on file for the client shows.

Client Care Plan				
Problems Currently on file				
Category	Problem	Statement	Date Identified	End Date
Externalizing Disorders - Conduct Disorder	Aggressively confronts others	Client is aggressive towards siblings.	11/27/2008	
Externalizing Disorders - Disruptive Disorder NOS	Refuses to comply with adult rules	Foster mom reports that she has to prompt cx 5 times before cx obey	11/12/2008	
Internalizing Disorders - Depression NOS	Low interest in Activity	Low interest in activities leading to moderate isolation and avoidance	1/16/2009	
Internalizing Disorders - Dysthymic	Irritable Mood (with duration of at least 1 year)	(In children and adolescents, mood can be irritable and duration must be at least 1 year)	12/18/2008	
Strengths Currently on file				
Category	Strength	Statement	Date Identified	End Date
Externalizing Disorders - Conduct Disorder	Completes schoolwork	Client listens to teachers and turns in his work on time.	11/27/2008	
Externalizing Disorders - Disruptive Disorder NOS	Attends school regularly	Cx states he enjoys school	11/12/2008	
Internalizing Disorders - Depression NOS	Ability to envision long-term goals	Client wants to go to college	1/16/2009	
Internalizing Disorders - Dysthymic	A positive relationship with caregiver(s)	Client is able to identify need for assistance.	12/18/2008	

PLANNING SECTION

ACHIEVING AN OBJECTIVE

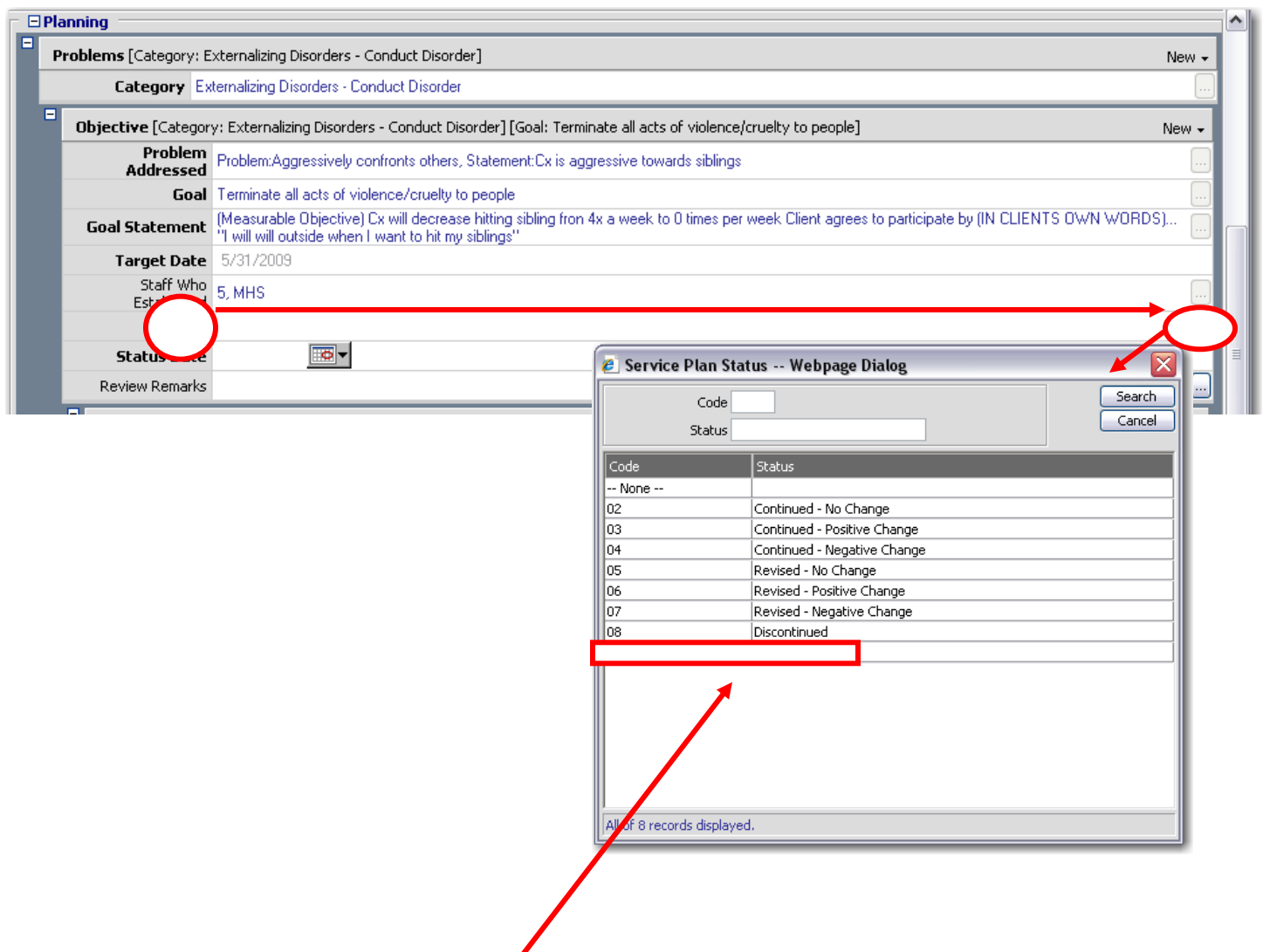
You MUST give a Status to EVERY objective listed in order to Review the Care Plan.

If the client has achieved the Objective and the Objective will not be continued you need to select Achieved under the status field.

When selecting Achieved you will be required to complete the following fields under both the Objective and Intervention:

- Status
- Status Date
- Review Remarks

Click the ellipses button to the left of the Status field.



A drop down box will open, click on Achieved.

Next, you will need to indicate a **Status Date** of the objective.

This is the date the objective was reviewed.

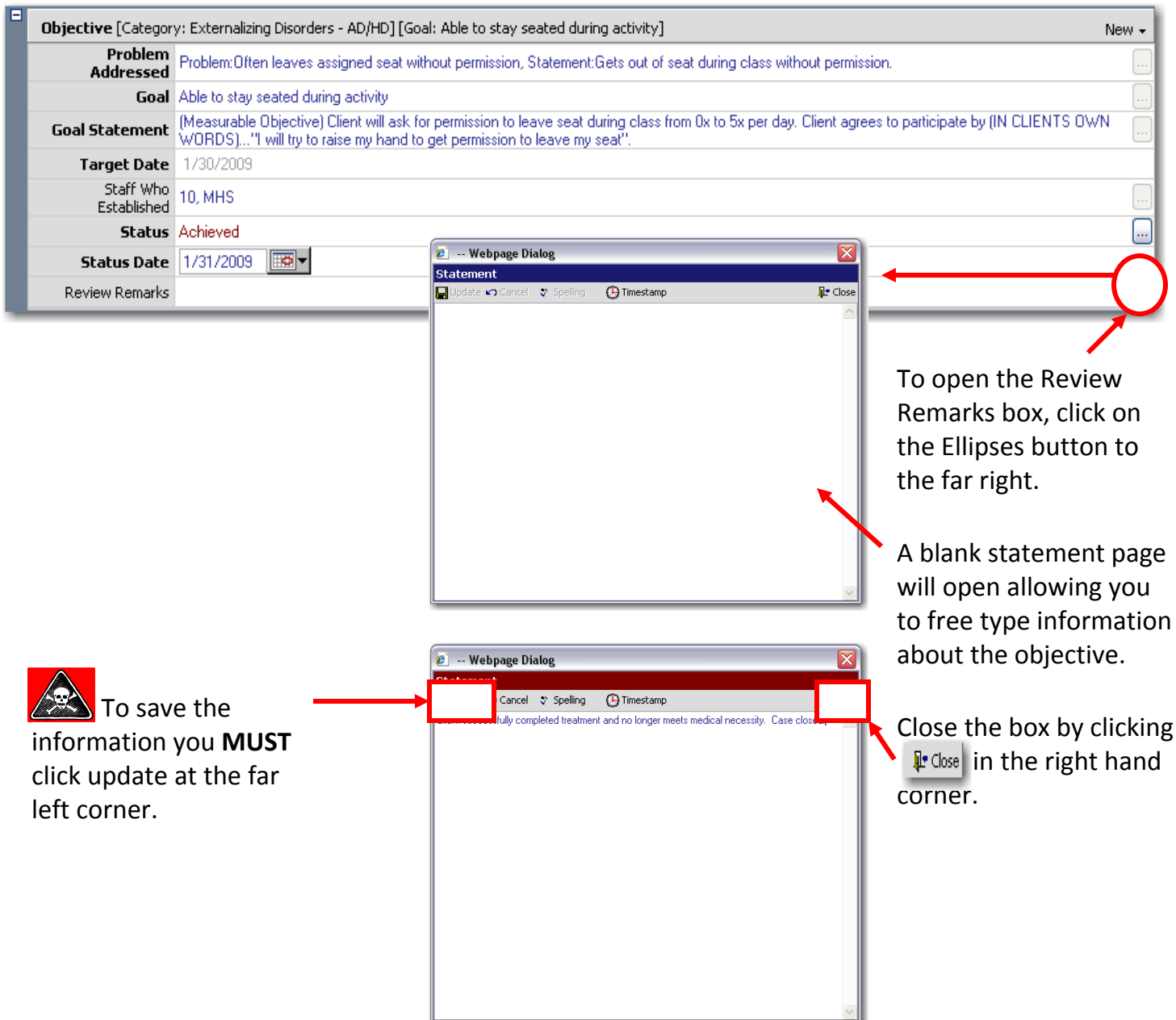
- Either type in date or click on the calendar and select the date
- The date will populate the field

The screenshot shows a software interface with a form for 'Problems' and 'Objectives'. The 'Problems' section is expanded, showing details for 'Externalizing Disorders - Conduct Disorder'. The 'Objectives' section is also expanded, showing details for 'Terminate all acts of violence/cruelty to people'. The 'Status Date' field is highlighted with a red circle, and a red arrow points from it to a calendar widget. The calendar widget shows the month of January 2009, with dates 1 through 31 displayed in a grid.

Problems [Category: Externalizing Disorders - Conduct Disorder]						
Category		Externalizing Disorders - Conduct Disorder				
Objective [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people]						
Problem Addressed	Problem:Aggressively confronts others, Statement:Cx is aggressive towards siblings					
Goal	Terminate all acts of violence/cruelty to people					
Goal Statement	(Measurable Objective) Cx will decrease hitting sibling from 4x a week to 0 times per week Client agrees to participate by (IN CLIENTS OWN WORDS)... "I will will outside when I want to hit my siblings"					
Target Date	5/31/2009					
Staff Who Established	5, MHS					
Status	Achieved					
Status Date						
Review Remarks						

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Next, you need to indicate more detailed information about the status of the objective on why/how it was achieved in the **Review Remarks** field.



The image shows a screenshot of the 'Objective' form and a 'Webpage Dialog' box. The 'Objective' form has the following fields: Problem Addressed, Goal, Goal Statement, Target Date, Staff Who Established, Status, Status Date, and Review Remarks. The 'Webpage Dialog' box is titled 'Statement' and has a 'Close' button in the top right corner. A red circle highlights the 'Close' button. A red arrow points from the 'Close' button to the text: 'To open the Review Remarks box, click on the Ellipses button to the far right.' Another red arrow points from the 'Update' button in the 'Webpage Dialog' box to the text: 'To save the information you **MUST** click update at the far left corner.' A third red arrow points from the 'Close' button in the 'Webpage Dialog' box to the text: 'Close the box by clicking in the right hand corner.'

Objective [Category: Externalizing Disorders - AD/HD] [Goal: Able to stay seated during activity] New ▾

Problem Addressed	Problem:Often leaves assigned seat without permission, Statement:Gets out of seat during class without permission.	...
Goal	Able to stay seated during activity	...
Goal Statement	(Measurable Objective) Client will ask for permission to leave seat during class from 0x to 5x per day. Client agrees to participate by (IN CLIENTS OWN WORDS)... "I will try to raise my hand to get permission to leave my seat".	...
Target Date	1/30/2009	...
Staff Who Established	10, MHS	...
Status	Achieved	...
Status Date	1/31/2009	...
Review Remarks		...

Webpage Dialog
Statement
Update Cancel Spelling Timestamp Close

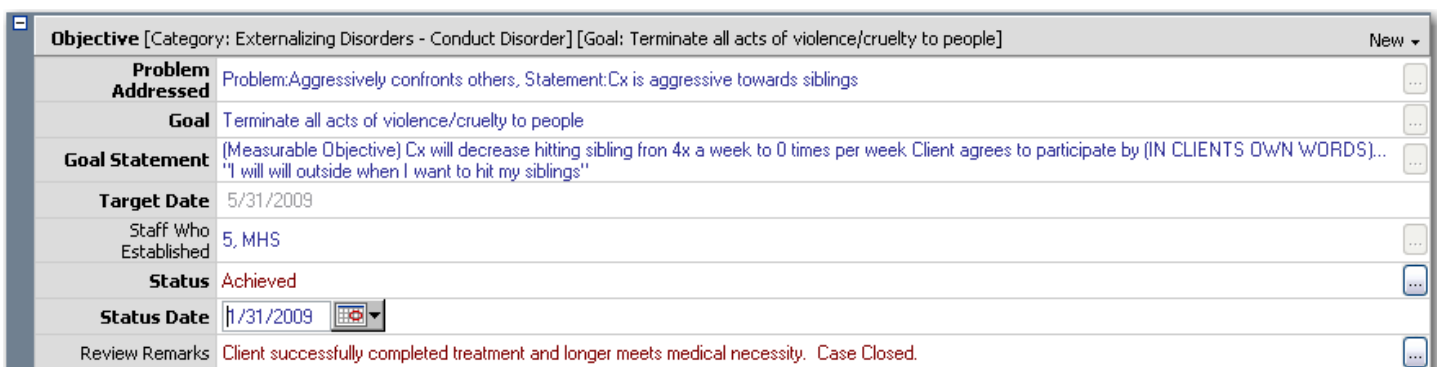
To open the Review Remarks box, click on the Ellipses button to the far right.

A blank statement page will open allowing you to free type information about the objective.

To save the information you **MUST** click update at the far left corner.

Close the box by clicking in the right hand corner.

A completed objective section should look like this:



The image shows a screenshot of a completed 'Objective' form. The 'Objective' form has the following fields: Problem Addressed, Goal, Goal Statement, Target Date, Staff Who Established, Status, Status Date, and Review Remarks. The 'Review Remarks' field contains the text: 'Client successfully completed treatment and longer meets medical necessity. Case Closed.'

Objective [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] New ▾

Problem Addressed	Problem:Aggressively confronts others, Statement:Cx is aggressive towards siblings	...
Goal	Terminate all acts of violence/cruelty to people	...
Goal Statement	(Measurable Objective) Cx will decrease hitting sibling from 4x a week to 0 times per week Client agrees to participate by (IN CLIENTS OWN WORDS)... "I will will outside when I want to hit my siblings"	...
Target Date	5/31/2009	...
Staff Who Established	5, MHS	...
Status	Achieved	...
Status Date	1/31/2009	...
Review Remarks	Client successfully completed treatment and longer meets medical necessity. Case Closed.	...

ACHIEVING AN INTERVENTION

Notice that when you selected Achieved under the Objective Status, the system auto-populated Achieved under the Status field of the Intervention. You are able to change the status of the Intervention if desired and leave the Objective status as is. To do so, click on the ellipses button to the far right of the Intervention status and select a different status.

The screenshot shows the 'Interventions' form with the following fields: Method (Skill Building), Method Statement (Teach the client self control strategies to delay the need for instance gradification and inhibit impulses.), Target Date (1/30/2009), Program (Community MH Services), Service (Individual Rehabilitation), # of Times Per Interval (1), Interval/Frequency (Weekly), Staff Responsible (10, MHS), and Other Person Responsible (13, MHS). The Status field is currently empty, and a red circle highlights the ellipsis button to its right. A red rectangle highlights the empty Status field.

Follow the same process for the Intervention **Status date** and **Review Remarks** as you did with the Objective Status date and Review remarks (refer to the previous three pages if needed).

A completed Intervention section should look like this:

The screenshot shows the 'Interventions' form with the following fields: Method (Skill Building), Method Statement (Teach the client self control strategies to delay the need for instance gradification and inhibit impulses.), Target Date (1/30/2009), Program (Community MH Services), Service (Individual Rehabilitation), # of Times Per Interval (1), Interval/Frequency (Weekly), Staff Responsible (10, MHS), and Other Person Responsible (13, MHS). The Status field is now set to 'Achieved', and the Status Date is set to '1/31/2009'. The Review Remarks field contains the text 'Client successfully acheived objective. Case Closed'.

DISCONTINUING AN OBJECTIVE

Follow the same steps outlined on pages 48 – 50 with the only difference being that you select Discontinued in the Status field.

DISCONTINUING AN INTERVENTION

Follow the same steps outlined on this page for Invention Status date and Review Remarks as you did with the Objective Status date and Review remarks.

REMEMBER that Achieving or Discontinuing an Objective will **CLOSE** the objective.

CONTINUED-NO CHANGE, CONTINUED-POSITIVE CHANGE, OR CONTINUED-NEGATIVE CHANGE OBJECTIVE STATUS

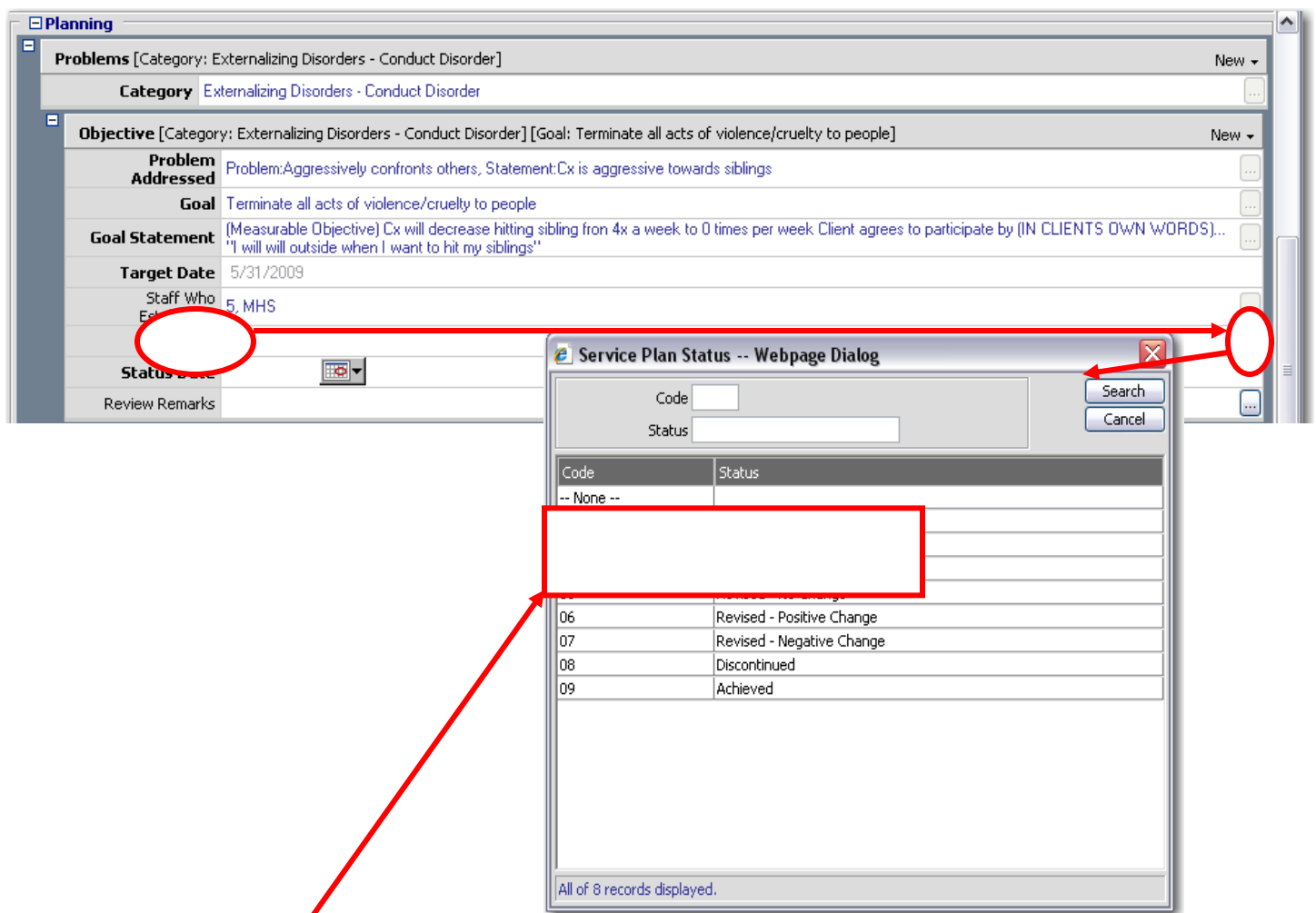
The status of CONTINUED-No Change, CONTINUED-Positive Change and CONTINUED-Negative Change does NOT mean the objective or intervention is changing. It literally means the objective or intervention is going to be continued WITHOUT changing any of the content (including the measurable part of the objective).

When you select Continued-No Change, Continued-Positive Change or Continued-Negative Change for the objective you can only edit the following fields:

- Target Date
- Staff Who Established
- Status
- Status Date
- Review Remarks

First you have to give the objective a **Status** before you can change the Target Date or Staff Who Established.

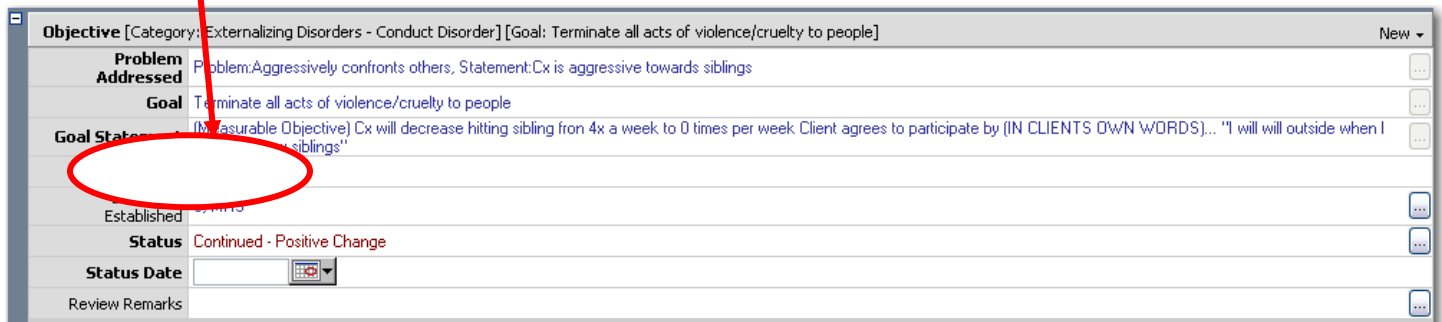
To select a Status, click the ellipses button to the left of the Status field.



A drop down box will open, click on either Continued-No Change, Continued-Positive Change OR Continued –Negative Change.

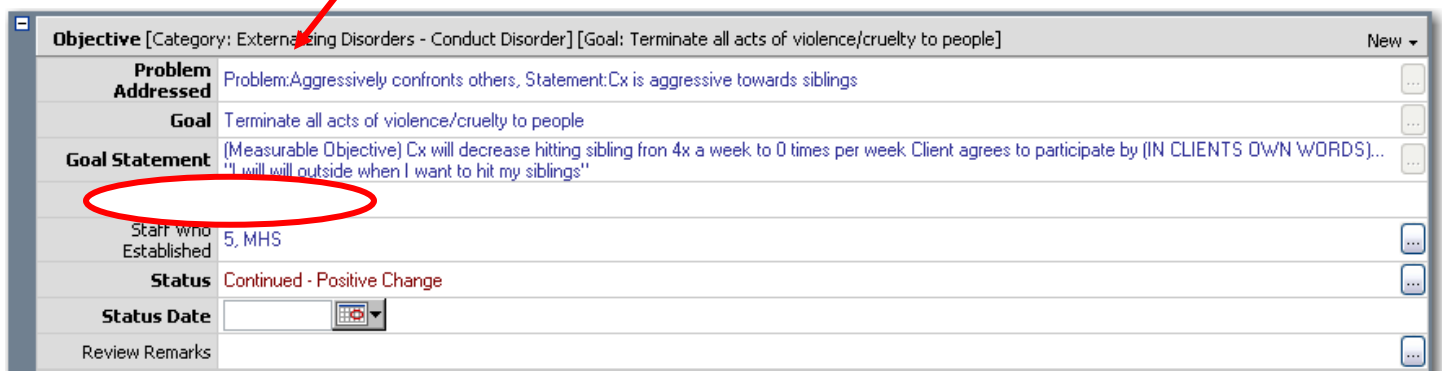
Changing the Target Date

The system automatically populates the Target Date field based on the target date you entered in the previous Care Plan. You will need to change the Target Date of this objective. Remember the Target Date is the last day of the month PRIOR to the due date of the Care Plan.



The screenshot shows a form titled "Objective [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people]". The form has several fields: "Problem Addressed" (Problem: Aggressively confronts others, Statement: Cx is aggressive towards siblings), "Goal" (Terminate all acts of violence/cruelty to people), "Goal Statement" ((Measurable Objective) Cx will decrease hitting sibling from 4x a week to 0 times per week Client agrees to participate by (IN CLIENTS OWN WORDS)... "I will will outside when I want to hit my siblings"), "Established" (5/14/13), "Status" (Continued - Positive Change), "Status Date" (empty field with a calendar icon), and "Review Remarks" (empty field). A red circle highlights the "Status Date" field, and a red arrow points to it from the text above.

To change the Target Date you will need to click into the Target Date field and delete the pre-populated Target Date. You **MUST** type a new target date in the 00/00/00 format.



The screenshot shows the same form as above, but with a red circle highlighting the "Status Date" field. A red arrow points to the "Status Date" field from the text above.

To change the **Staff Who Established** the Objective, click on the ellipses to the far right of the field.

The screenshot shows the 'Objective' form with the following fields: Problem Addressed, Goal, Goal Statement, Target Date (8/31/2009), Status (Continued - Positive Change), Status Date, and Review Remarks. A red circle highlights the ellipsis button next to the 'Staff Who Established' field. A red arrow points from this circle to a 'Staff - Service Providers (by Staff_id) -- Webpage Dialog' box. This dialog box contains search fields for Last Name, First Name, and Job Title, and a table of staff members. A red circle highlights the 'X' button in the top right corner of the dialog box. A red arrow points from the 'X' button to the 'Staff Who Established' field in the main form.

Last Name	First Name	Job Title	
Azar, Antoinette		Psychiatrist	Yes
Banuelos, Guadalupe		Intake Coordinator	Yes
Barker, Nalra		Wraparound Facilitator I	Yes
Barnes, Gary		Assistant Chief Financial Officer (CFO)	Yes
Barrett-Lockett, Catherine		Center Coordinator	Yes
Belmonte, Patricia		ACFS II	Yes
Bergam, Katherine R.		Mental Health Specialist II	Yes
Binda, Tina		Wraparound Director	Yes
Blair, Kere		Mental Health Specialist II	Yes
Bland, Kasey		Mental Health Specialist I	Yes
Bolinger, Todd		Psychiatrist	Yes
Bonilla, Angela		Parent Partner	Yes
Braden, Cynthia M.		Contract Therapist	Yes

A drop down list will open.

Select the staff member's name of the person who established the objective.

If the Staff Who Established has not changed, leave the pre-populated name in the field.

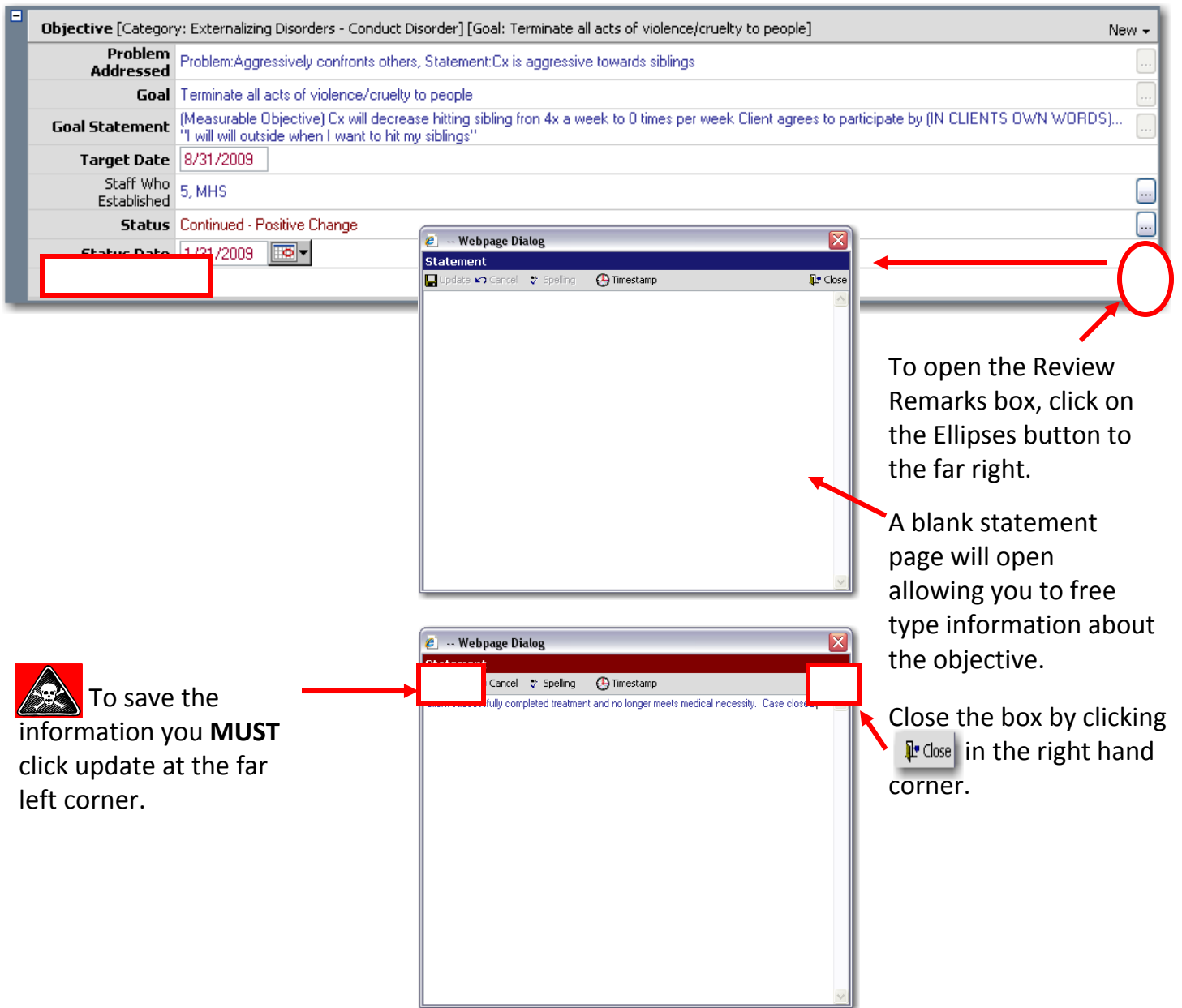
Next, you will need to indicate a **Status Date** of the objective.

The screenshot shows the 'Objective' form with the 'Status' field circled in red. A red arrow points from this circle to a calendar pop-up. The calendar shows the month of January 2009, with the date 8/31/2009 selected. The calendar is a standard grid showing days of the week and dates.

This is the date the objective was reviewed.

- Either type in date or click on the calendar and select the date
- The date will populate the field

Next, you need to indicate more detailed information about the status of the objective on why/how it was continued in the **Review Remarks** field.



The image shows a screenshot of the 'Objective' form and two 'Webpage Dialog' boxes. The 'Objective' form has the following fields: Problem Addressed, Goal, Goal Statement, Target Date, Staff Who Established, Status, Status Date, and Review Remarks. The 'Status' field is highlighted with a red box. The 'Webpage Dialog' boxes are titled 'Statement' and have a 'Close' button in the top right corner. Red arrows and a red circle highlight the 'Close' button and the 'Update' button in the 'Webpage Dialog' boxes.

To open the Review Remarks box, click on the Ellipses button to the far right.

A blank statement page will open allowing you to free type information about the objective.

To save the information you **MUST** click update at the far left corner.

Close the box by clicking  in the right hand corner.

A completed objective section should look like this:

Objective [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people]		New
Problem Addressed	Problem:Aggressively confronts others, Statement:Cx is aggressive towards siblings	
Goal	Terminate all acts of violence/cruelty to people	
Goal Statement	(Measurable Objective) Cx will decrease hitting sibling from 4x a week to 0 times per week Client agrees to participate by (IN CLIENTS OWN WORDS)... "I will will outside when I want to hit my siblings"	
Target Date	8/31/2009	
Staff Who Established	5, MHS	
Status	Continued - Positive Change	
Status Date	1/31/2009	
Review Remarks	Client continues to make positive movement toward meeting objective. Client currently at 2x per week. Objective continued.	

CONTINUED-NO CHANGE, CONTINUED-POSITIVE CHANGE, OR CONTINUED-NEGATIVE CHANGE INTERVENTION STATUS

When you select Continued-No Change, Continued-Positive Change or Continued-Negative Change in the intervention Status you can edit the following fields:

- Target Date
- Staff Responsible
- Other Person Responsible (if needed)
- Status
- Status Date
- Review Remarks

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques] New ▾

Method	Teach client mediation/self-control techniques	...
Method Statement	MHS will work with this client on deep breathing skills	...
Program	Community MH Services	...
Service	Individual Rehabilitation	...
# of Times Per Interval	1	
Interval/Frequency	Weekly	...
		...
		...
		...
		...

Changing the Target Date

The system automatically populates the Target Date field based on the target date you entered in the previous Care Plan. You will need to change the Target Date of this objective. Remember the Target Date is the last day of the month PRIOR to the due date of the Care Plan.

To do this you will need to click into the Target Date field and delete the pre-populated Target Date. You MUST type a new target date in the 00/00/00 format.

Changing the Staff Responsible if needed

Staff Responsible for the intervention will auto-populate based on the name entered in the previous Care Plan. If the person responsible for the intervention is longer responsible (maybe they no longer working with the client) then you will need to change the Staff Responsible.

To change the Staff Responsible, click on the ellipses to the far right of the field.

The screenshot shows the 'Interventions' form with the following details:

- Category: Externalizing Disorders - Conduct Disorder
- Goal: Terminate all acts of violence/cruelty to people
- Method: Teach client mediation/self-control techniques
- Method Statement: MHS will work with this client on deep breathing skills
- Target Date: 5/31/2009
- Program: Community MH Services
- Service: Individual Rehabilitation
- # of Times Per Interval: 1
- Interval/Frequency: Weekly
- Staff Responsible: 5, MHS
- Status: Continued - Positive Change

A red circle highlights the ellipsis button to the right of the 'Staff Responsible' field. A red arrow points from this circle to the 'Staff - Service Providers (by Staff_id) -- Webpage Dialog' window. Another red arrow points from the text 'A drop down list will open.' to the top of the dialog box. A third red arrow points from the text 'Select the staff member's name that will be responsible for the intervention.' to a red box highlighting the list of staff members in the dialog.

Staff - Service Providers (by Staff_id) -- Webpage Dialog

Last Name	First Name	Job Title	
Azar, Antoinette		Psychiatrist	Yes
Banuelos, Guadalupe		Intake Coordinator	Yes
Barker, Nitra		Wraparound Facilitator I	Yes
Barnes, Gary		Assistant Chief Financial Officer (CFO)	Yes
Barrett-Lockett, Catherine		Center Coordinator	Yes
Belmonte, Patricia		ACFS II	Yes
Bergam, Katherine R.		Mental Health Specialist II	Yes
Binda, Tina		Wraparound Director	Yes
Blair, Kere		Mental Health Specialist II	Yes
Bland, Kasey		Mental Health Specialist I	Yes
Bolinger, Todd		Psychiatrist	Yes
Bonilla, Angela		Parent Partner	Yes
Braden, Cynthia M.		Contract Therapist	Yes

First 100 records out of 632 displayed.

If there is an additional Staff Responsible for the intervention you are able to select them in the Other Person Responsible field by following the same steps. If the Staff Responsible has not changed then leave the pre-populated name in this field.

Changing the Status if needed

The screenshot shows the 'Interventions' form with the same details as the previous one. A red box highlights the 'Status' field, which currently shows 'Continued - Positive Change'. A red arrow points from the text 'Remember, when you selected the Continued status in the Objective the EMR auto-populates the same status in the Intervention. You are able to change the status of the Intervention if desired and leave the Objective status as is. To do so, click on the ellipses button to the far right of the Intervention status and select a different status.' to the ellipsis button to the right of the 'Status' field.

Remember, when you selected the Continued status in the Objective the EMR auto-populates the same status in the Intervention. You are able to change the status of the Intervention if desired and leave the Objective status as is. To do so, click on the ellipses button to the far right of the Intervention status and select a different status.

Status Date

Next, you will need to indicate a “Status Date” of the intervention.

The screenshot shows an EMR interface for an intervention. The form fields are as follows:

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques]		New ▾
Method	Teach client mediation/self-control techniques	...
Method Statement	MHS will work with this client on deep breathing skills	...
Target Date	5/31/2009	
Program	Community MH Services	...
Service	Individual Rehabilitation	...
# of Times Per Interval	1	
Interval/Frequency	Weekly	...
Staff Responsible	5, MHS	...
Other Person Responsible		...
Status	Continued, No Change	...
Review Remarks		...

A red oval highlights the "Status" field, and a red arrow points from it to a calendar pop-up. The calendar shows January 2009, with the date 31 (Friday) highlighted.

This is the date the intervention was reviewed.

- Either type in date or click on the calendar and select the date
- The date will populate the field

Next, you need to indicate more detailed information about the status of the intervention on why/how it was continued in the **Review Remarks** field.

To open the Review Remarks box, click on the Ellipses button to the far right.

A blank statement page will open allowing you to free type information about the objective.

To save the information you **MUST** click update at the far left corner.

Close the box by clicking **Close** in the right hand corner.

A completed Intervention section should look like this:

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques]		New
Method	Teach client mediation/self-control techniques	...
Method Statement	MHS will work with this client on deep breathing skills	...
Target Date	8/31/2009	...
Program	Community MH Services	...
Service	Individual Rehabilitation	...
# of Times Per Interval	1	...
Interval/Frequency	Weekly	...
Staff Responsible	5, MHS	...
Other Person Responsible		...
Status	Continued - Positive Change	...
Status Date	1/31/2009	...
Review Remarks	Client continues to respond positively to the intervention and is making progress toward objective. Intervention continued.	...

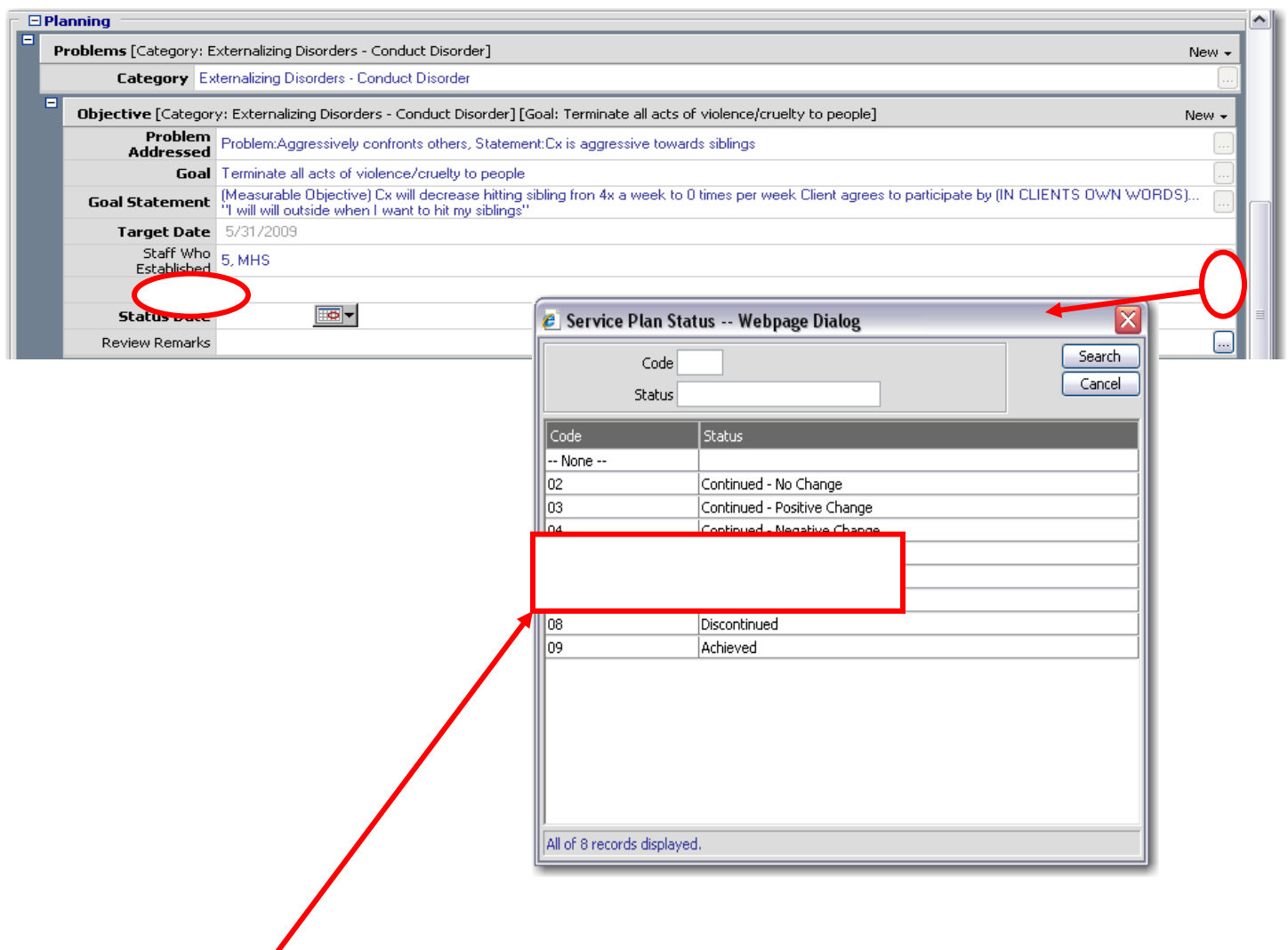
REVISED-NO CHANGE, REVISED-POSITIVE CHANGE, OR REVISED-NEGATIVE CHANGE OBJECTIVE STATUS

The Revised-No Change, Revised-Positive Change or Revised-Negative Change Status literally means the content of the Objective and/or Intervention will be changing (including the measurable part of the Objective).

When you select Revised-No Change, Revised-Positive Change or Revised-Negative Change for the objective you can edit the following fields:

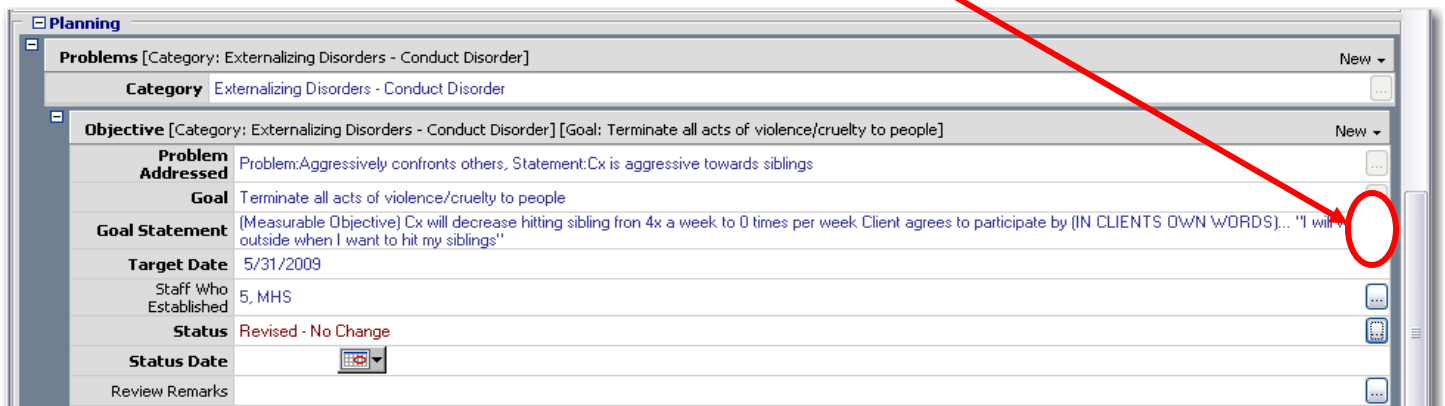
- Goal Statement
- Target Date
- Staff Who Established
- Status
- Status Date
- Review Remarks

First you have to give the objective a **Status** before you can change the Goal Statement and Target Date. To select a Status, click the ellipses button to the left of the Status field.



A drop down box will open, click on either Revised-No Change, Revised-Positive Change OR Revised-Negative Change.

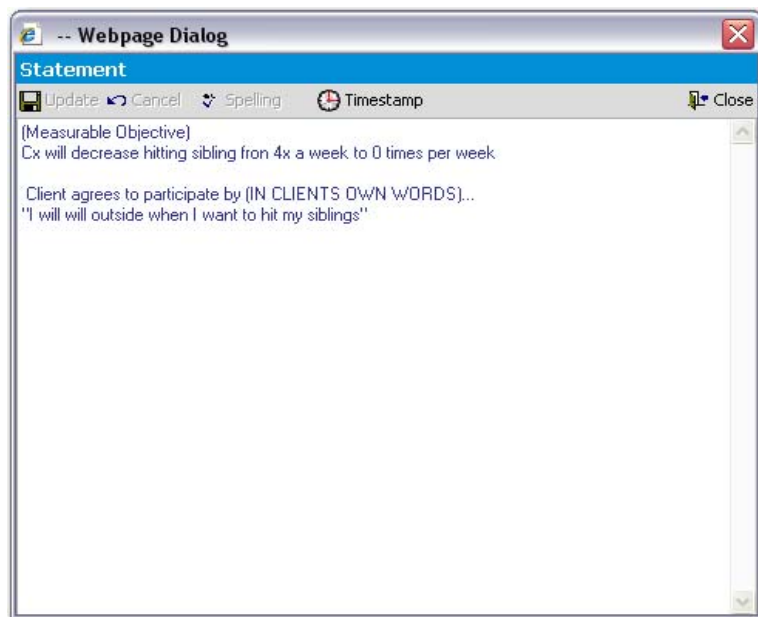
Once the Status field is populated with any of the Revised status' you are able to **change the Goal Statement**. To do this click on the ellipses to the far right of the Goal Statement field.



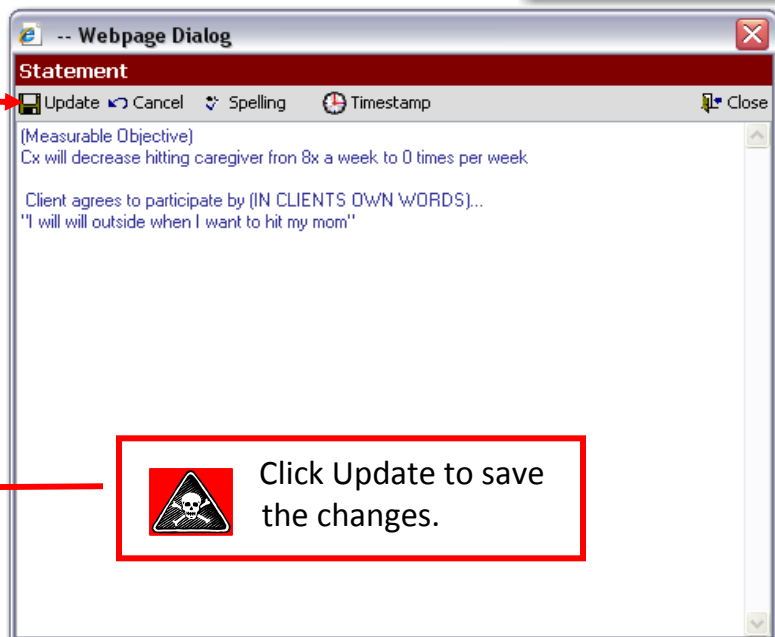
The screenshot shows the 'Planning' window with a table of objectives. The 'Goal Statement' field is highlighted, and a red circle is drawn around the ellipsis button at the end of the field. A red arrow points from the text above to this button.

Problem Addressed	Goal	Goal Statement	Target Date	Staff Who Established	Status	Status Date	Review Remarks
Problem: Aggressively confronts others, Statement: Cx is aggressive towards siblings	Terminate all acts of violence/cruelty to people	(Measurable Objective) Cx will decrease hitting sibling from 4x a week to 0 times per week. Client agrees to participate by (IN CLIENTS OWN WORDS)... "I will will outside when I want to hit my siblings"	5/31/2009	5, MHS	Revised - No Change		

A Statement drop down box will open allowing you to change the content of the objective.



The screenshot shows a 'Statement' drop-down box with the following text: (Measurable Objective) Cx will decrease hitting sibling from 4x a week to 0 times per week. Client agrees to participate by (IN CLIENTS OWN WORDS)... "I will will outside when I want to hit my siblings".



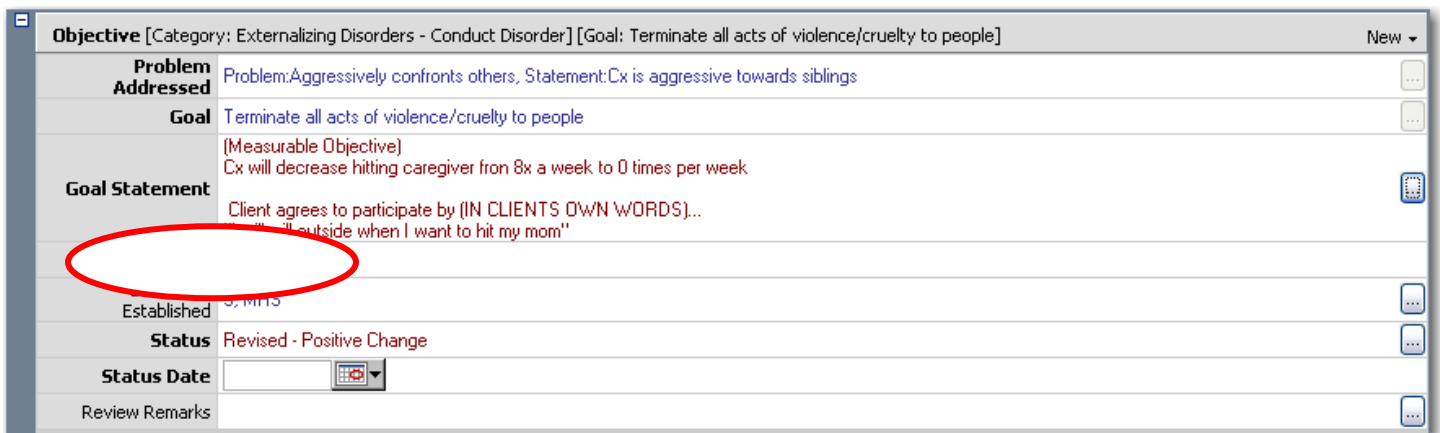
The screenshot shows the 'Statement' drop-down box with the following text: (Measurable Objective) Cx will decrease hitting caregiver from 8x a week to 0 times per week. Client agrees to participate by (IN CLIENTS OWN WORDS)... "I will will outside when I want to hit my mom". A red box highlights the 'Update' button and a warning icon.

 Click Update to save the changes.

Click anywhere in the statement box and change the desired information. Changing the information DOES NOT change the original objective. You are now creating a revised objective.

Changing the Target Date

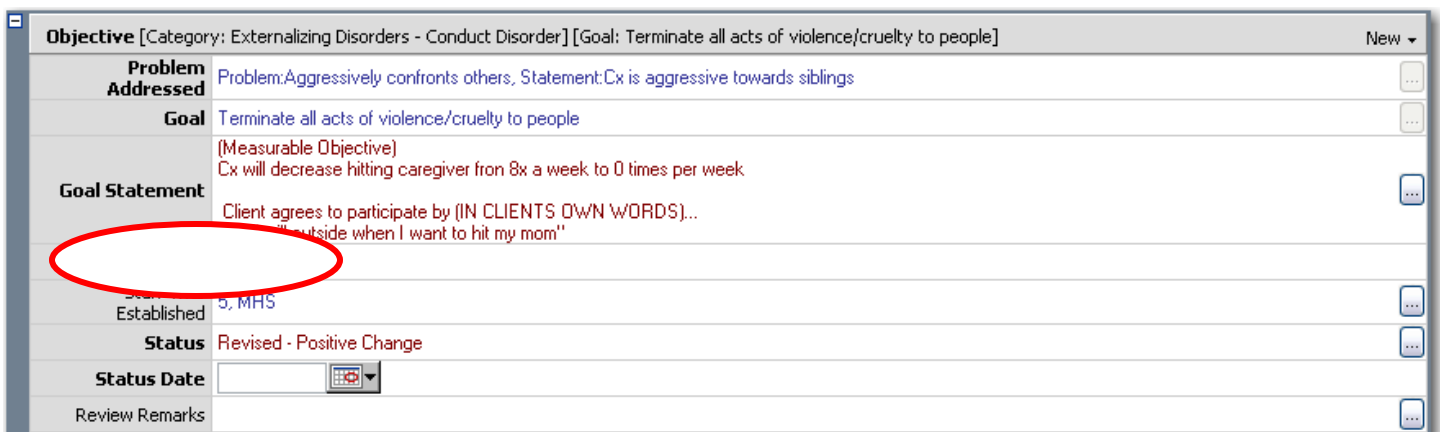
The system automatically populates the Target Date field based on the target date you entered in the previous Care Plan. You will need to change the Target Date of this objective. Remember the Target Date is the last day of the month PRIOR to the due date of the Care Plan.



The screenshot shows a software interface for an 'Objective' form. The title bar reads 'Objective [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people]' with a 'New' dropdown on the right. The form contains several fields: 'Problem Addressed' (Problem: Aggressively confronts others, Statement: Cx is aggressive towards siblings), 'Goal' (Terminate all acts of violence/cruelty to people), 'Goal Statement' (Measurable Objective: Cx will decrease hitting caregiver from 8x a week to 0 times per week; Client agrees to participate by (IN CLIENTS OWN WORDS)...), 'Established' (5, MHS), 'Status' (Revised - Positive Change), 'Status Date' (a date picker), and 'Review Remarks'. A red circle highlights the 'Status Date' field.

Objective [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] New ▾	
Problem Addressed	Problem: Aggressively confronts others, Statement: Cx is aggressive towards siblings
Goal	Terminate all acts of violence/cruelty to people
Goal Statement	(Measurable Objective) Cx will decrease hitting caregiver from 8x a week to 0 times per week Client agrees to participate by (IN CLIENTS OWN WORDS)...
Established	5, MHS
Status	Revised - Positive Change
Status Date	
Review Remarks	

To change the Target Date you will need to click into the Target Date field and delete the pre-populated Target Date. You **MUST** type a new target date in the 00/00/00 format.



This screenshot is identical to the one above, showing the same 'Objective' form. The 'Status Date' field is circled in red, indicating where the user should click to change the date.

Objective [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] New ▾	
Problem Addressed	Problem: Aggressively confronts others, Statement: Cx is aggressive towards siblings
Goal	Terminate all acts of violence/cruelty to people
Goal Statement	(Measurable Objective) Cx will decrease hitting caregiver from 8x a week to 0 times per week Client agrees to participate by (IN CLIENTS OWN WORDS)...
Established	5, MHS
Status	Revised - Positive Change
Status Date	
Review Remarks	

To change the Staff Who Established the Objective, click on the ellipses to the far right of the field.

The screenshot shows the 'Objective' form with the following fields: Problem Addressed, Goal, Goal Statement, Target Date (8/31/09), Status (Revised - Positive Change), Status Date, and Review Remarks. A red circle highlights the ellipsis icon to the right of the 'Status' field. A red arrow points from this circle to the 'Staff - Service Providers (by Staff_id) -- Webpage Dialog' box. This dialog box has search fields for Last Name, First Name, and Job Title, and a table of staff members. A red box highlights the 'Staff Who Established' field in the main form, which is currently empty.

Last Name	First Name	Job Title	
Azar, Antoinette		Psychiatrist	Yes
Banuelos, Guadalupe		Intake Coordinator	Yes
Barker, Natra		Wraparound Facilitator I	Yes
Barnes, Gary		Assistant Chief Financial Officer (CFO)	Yes
Barrett-Lockett, Catherine		Center Coordinator	Yes
Belmonte, Patricia		ACFS II	Yes
Bergam, Katherine R.		Mental Health Specialist II	Yes
Binda, Tina		Wraparound Director	Yes
Blair, Kere		Mental Health Specialist II	Yes
Bland, Kasey		Mental Health Specialist I	Yes
Bolinger, Todd		Psychiatrist	Yes
Bonilla, Angela		Parent Partner	Yes
Braden, Cynthia M.		Contract Therapist	Yes

A drop down list will open.

Select the staff member's name of the person who established the objective.

If the Staff Who Established is not changing then leave the pre-populated name in this field.

Next, you will need to indicate a **Status Date** of the objective.

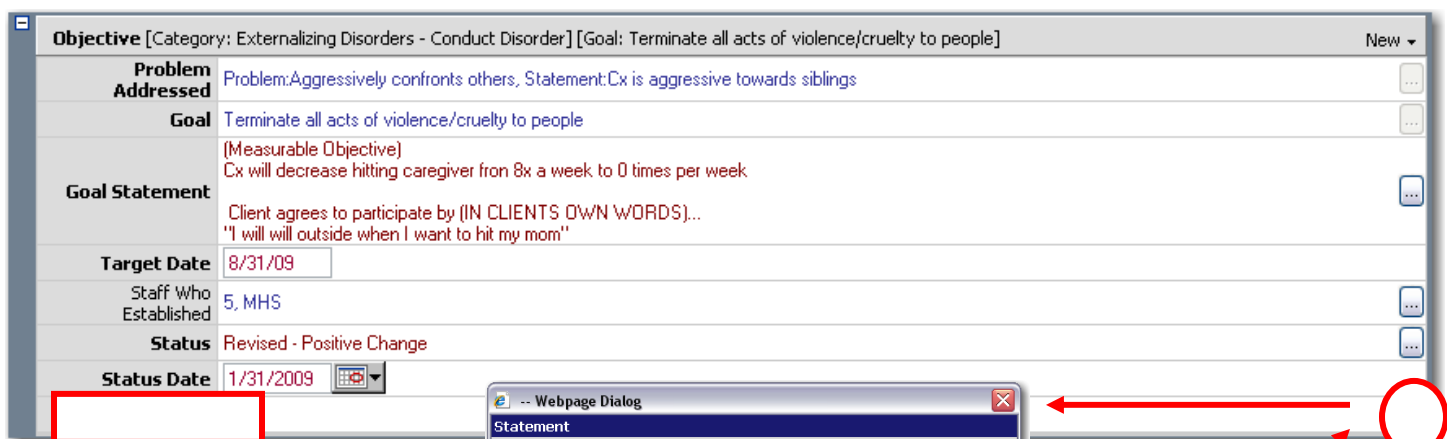
The screenshot shows the 'Objective' form with the 'Status Date' field highlighted by a red circle. A red arrow points from this circle to a calendar popup showing the month of January 2009. The calendar has a grid of days from Sunday to Saturday.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

This is the date the objective was reviewed.

- Either type in date or click on the calendar and select the date
- The date will populate the field

Next, you need to indicate more detailed information about the status of the Objective on why/how it was continued in the **Review Remarks** field.



The screenshot shows a form titled "Objective" with the following fields and values:

- Category:** Externalizing Disorders - Conduct Disorder
- Goal:** Terminate all acts of violence/cruelty to people
- Problem Addressed:** Problem:Aggressively confronts others, Statement:Cx is aggressive towards siblings
- Goal:** Terminate all acts of violence/cruelty to people
- Goal Statement:** (Measurable Objective)
Cx will decrease hitting caregiver from 8x a week to 0 times per week
Client agrees to participate by (IN CLIENTS OWN WORDS)...
"I will will outside when I want to hit my mom"
- Target Date:** 8/31/09
- Staff Who Established:** 5, MHS
- Status:** Revised - Positive Change
- Status Date:** 1/31/2009

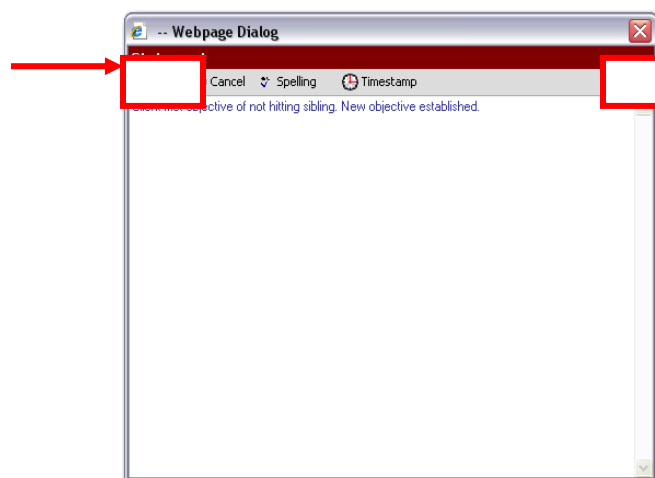
Annotations include a red box around the "Status Date" field, a red circle around the "More" button (three dots) in the top right corner, and a red arrow pointing from the circle to the "Review Remarks" dialog box.

To open the Review Remarks box, click on the Ellipses button to the far right.

A blank statement page will open allowing you to free type information about the objective.



To save the information you **MUST** click update at the far left corner.



The screenshot shows the "Review Remarks" dialog box with the following fields and values:

- Statement:** (Blank text area)
- Update:** (Button)
- Cancel:** (Button)
- Spelling:** (Button)
- Timestamp:** (Button)
- Close:** (Button)

Annotations include a red box around the "Update" button, a red box around the "Close" button, and a red arrow pointing from the "Update" button to the "Review Remarks" dialog box.

Close the box by clicking in the right hand corner.

A completed Objective section should look like this:

Objective [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people]		New ▾
Problem Addressed	Problem:Aggressively confronts others, Statement:Cx is aggressive towards siblings	
Goal	Terminate all acts of violence/cruelty to people	
Goal Statement	(Measurable Objective) Cx will decrease hitting caregiver from 8x a week to 0 times per week Client agrees to participate by (IN CLIENTS OWN WORDS)... "I will will outside when I want to hit my mom"	
Target Date	8/31/09	
Staff Who Established	5, MHS	
Status	Revised - Positive Change	
Status Date	1/31/2009	
Review Remarks	Client met objective of not hitting sibling. New objective started.	

REVISED-NO CHANGE, REVISED-POSITIVE CHANGE, OR REVISED-NEGATIVE CHANGE INTERVENTION STATUS

When you select Revised-No Change, Revised-Positive Change or Revised-Negative Change in the intervention Status you can edit the following fields:

- Method Statement
- Target Date
- Program Responsible
- Service
- # of Times Per Interval
- Interval / Frequency
- Staff Responsible
- Other Person Responsible (if needed)
- Status
- Status Date
- Review Remarks

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques]		New ▾
Method	Teach client mediation/self-control techniques	

Changing the Method Statement

Changing the Method Statement is necessary if the Intervention is changing.

To change the Intervention details, click on the ellipses to the far right of the Method Statement field.

The screenshot shows the 'Interventions' form on the left and a 'Webpage Dialog' box on the right. The form has fields for Method, Method Statement, Target Date, Program, Service, # of Times Per Interval, Interval/Frequency, Staff Responsible, Other Person Responsible, Status, Status Date, and Review Remarks. The 'Method Statement' field is highlighted with a red circle, and a red arrow points to it. The 'Webpage Dialog' box is titled 'Statement' and contains the text 'MHS will work with this client on deep breathing skills'. A red box highlights the 'Update' button in the top left corner of the dialog. A red arrow points from the 'Update' button to the 'Webpage Dialog' box. A red box highlights the 'Close' button in the top right corner of the dialog. A red arrow points from the 'Close' button to the 'Webpage Dialog' box. A red box highlights the 'Statement' text area in the dialog. A red arrow points from the 'Statement' text area to the 'Webpage Dialog' box. A red box highlights the 'Statement' text area in the dialog. A red arrow points from the 'Statement' text area to the 'Webpage Dialog' box.

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques] New

Method	Teach client mediation/self-control techniques
Method Statement	MHS will work with this client on deep breathing skills
Target Date	5/31/2009
Program	Community MH Services
Service	Individual Rehabilitation
# of Times Per Interval	1
Interval/Frequency	Weekly
Staff Responsible	5, MHS
Other Person Responsible	
Status	Revised - Positive Change
Status Date	
Review Remarks	

Webpage Dialog

Statement

Update Cancel Spelling Timestamp Close

MHS will work with this client on deep breathing skills

A drop down Statement box will open with the detailed information from the previous Method Statement.

Webpage Dialog

Statement

Update Cancel Spelling Timestamp Close

MHS will count to 10 when he feels the urge to hit his mom.

To save the information you **MUST** click update at the far left corner.

Delete the previous information and type in the new Intervention in the Statement box.

Close the box by clicking in the right hand corner.

Changing the Target Date

The system automatically populates the Target Date field based on the target date you entered in the previous Care Plan. You will need to change the Target Date of this objective. Remember the Target Date is the last day of the month PRIOR to the due date of the Care Plan.

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques] New ▾

Method	Teach client mediation/self-control techniques	...
Method Statement	MHS will count to 10 when he feels the urge to hit his mom.	...
Program	Community MH Services	...
Service	Individual Rehabilitation	...
# of Times Per Interval	1	...
Interval/Frequency	Weekly	...
Staff Responsible	5, MHS	...
Other Person Responsible		...
Status	Revised - Positive Change	...
Status Date		...
Review Remarks		...

To do this you will need to click into the Target Date field and delete the pre-populated Target Date. You MUST type a new target date in the 00/00/00 format.

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques] New ▾

Method	Teach client mediation/self-control techniques	...
Method Statement	MHS will count to 10 when he feels the urge to hit his mom.	...
Program	Community MH Services	...
Service	Individual Rehabilitation	...
# of Times Per Interval	1	...
Interval/Frequency	Weekly	...
Staff Responsible	5, MHS	...
Other Person Responsible		...
Status	Revised - Positive Change	...
Status Date		...
Review Remarks		...

Changing the Program if needed (not likely)

If you need to change the Program that the service will be provided under you will need to click the ellipses to the right of the Program field. Changing the Program is NOT likely in which case you will leave Community Mental Health pre-populated in this field.

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques] New ▾

Method	Teach client mediation/self-control techniques	...
Method Statement	MHS will count to 10 when he feels the urge to hit his mom.	...
Target Date	8/31/2009	...
Program	Community Mental Health Services	...
Service	Individual Rehabilitation	...
# of Times Per Interval	1	...
Interval/Frequency	Weekly	...
Staff Responsible	5, MHS	...
Other Person Responsible		...
Status	Revised - Positive Change	...
Status Date		...
Review Remarks		...

Changing the Service if needed

If the mode of Service to be used in the Intervention is going to be changed, you will need to click the ellipses to the far right of the Service field. Refer to page 27 – 28 of this manual on selecting mode of service. If nothing has changed then leave the pre-populated mode of Service in this field.

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques] New ▾

Method	Teach client mediation/self-control techniques	...
Method Statement	MHS will count to 10 when he feels the urge to hit his mom.	...
Target Date	8/31/2009	...
Program	Community Mental Health Services	...
Service	Individual Rehabilitation	...
# of Times Per Interval	1	...
Interval/Frequency	Weekly	...
Staff Responsible	5, MHS	...
Other Person Responsible		...
Status	Revised - Positive Change	...
Status Date		...
Review Remarks		...

Changing the # of Times Per Interval if needed

If the # of Times Per Interval needs to be changed then click in the # of Times Per Interval field and delete the pre-populated number and type in the new number. Refer to page 28 of this manual on completing the # of Times Per Interval field. If nothing has changed then leave the pre-populated # of Times Per Interval in this field.

The screenshot shows the 'Interventions' form with the following fields and values:

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques]		New ▾
Method	Teach client mediation/self-control techniques	...
Method Statement	MHS will count to 10 when he feels the urge to hit his mom.	...
Target Date	8/31/2009	
Program	Community MH Services	...
Service	Individual Rehabilitation	...
Interval/Frequency	Weekly	...
Staff Responsible	5, MHS	...
Other Person Responsible		...
Status	Revised - Positive Change	...
Status Date		
Review Remarks		...

The 'Interval/Frequency' field, which currently contains 'Weekly', is circled in red.

Changing the Interval/Frequency if needed

If the Interval/Frequency needs to be changed then click ellipses to the far right of the Interval/Frequency field. Refer to page 29 of this manual on completing the Interval/Frequency field. If nothing has changed then leave the pre-populated Interval/Frequency in this field.

The screenshot shows the 'Interventions' form with the following fields and values:

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques]		New ▾
Method	Teach client mediation/self-control techniques	...
Method Statement	MHS will count to 10 when he feels the urge to hit his mom.	...
Target Date	8/31/2009	
Program	Community MH Services	...
Service	Individual Rehabilitation	...
# of Times Per Interval	1	...
Staff Responsible	5, MHS	...
Other Person Responsible		...
Status	Revised - Positive Change	...
Status Date		
Review Remarks		...

The '# of Times Per Interval' field, which currently contains '1', and its corresponding ellipsis button to the right are circled in red.

Changing the Staff Responsible if needed

Staff Responsible for the intervention will auto-populate based on the name entered in the previous Care Plan. If the person responsible for the intervention is longer responsible (maybe they no longer working with the client) then you will need to change the Staff Responsible.

To change the Staff Responsible, click on the ellipses to the far right of the field.

The screenshot shows the 'Interventions' form with the following details:

- Category: Externalizing Disorders - Conduct Disorder
- Goal: Terminate all acts of violence/cruelty to people
- Method: Teach client mediation/self-control techniques
- Method Statement: MHS will count to 10 when he feels the urge to hit his mom.
- Target Date: 8/31/2009
- Program: Community MH Services
- Service: Individual Rehabilitation
- # of Times Per Interval: 1
- Interval/Frequency: Weekly
- Responsible: [Redacted]
- Status: Revised - Positive Change
- Status Date: [Redacted]
- Review Remarks: [Redacted]

The 'Interval/Frequency' field is circled in red. A red arrow points from this field to the 'Staff - Service Providers (by Staff_id) -- Webpage Dialog' window. In this dialog, a list of staff members is shown, and the 'Responsible' field is highlighted with a red box. A red circle highlights the ellipsis button to the right of the 'Responsible' field in the main form.

Last Name	First Name	Job Title	
Azar, Antoinette		Psychiatrist	Yes
Banuelos, Guadalupe		Intake Coordinator	Yes
Barker, Nitra		Wraparound Facilitator I	Yes
Barnes, Gary		Assistant Chief Financial Officer (CFO)	Yes
Barrett-Lockett, Catherine		Center Coordinator	Yes
Belmonte, Patricia		ACFS II	Yes
Bergam, Katherine R.		Mental Health Specialist II	Yes
Binda, Tina		Wraparound Director	Yes
Blair, Kere		Mental Health Specialist II	Yes
Bland, Kasey		Mental Health Specialist I	Yes
Bolinger, Todd		Psychiatrist	Yes
Bonilla, Angela		Parent Partner	Yes
Boykin, Tamire		Medical Records Clerk	Yes
Braden, Cynthia M.		Contract Therapist	Yes

A drop down list will open.

Select the staff member's name that will be responsible for the intervention.

If there is an additional Staff Member Responsible for the intervention you are able to select them in the "Other Person Responsible" field by following the same steps. If there is no other staff responsible, leave this field blank.

Changing the Status if needed

Remember, when you selected the Revised status in the Objective the EMR auto-populates the same status in the Intervention. You are able to change the status of the Intervention if desired and leave the Objective status as is.

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques] New ▾

Method	Teach client mediation/self-control techniques	...
Method Statement	MHS will count to 10 when he feels the urge to hit his mom.	...
Target Date	8/31/2009	...
Program	Community MH Services	...
Service	Individual Rehabilitation	...
# of Times Per Interval	1	...
Interval/Frequency	Weekly	...
Staff Responsible	5, MHS	...
Other Person Responsible		...
Status Date		...
Review Remarks		...

To do so, click on the ellipses button to the far right of the Intervention status and select a different status.

Status Date

Next, you will need to indicate a "Status Date" of the intervention.

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques] New ▾

Method	Teach client mediation/self-control techniques	...
Method Statement	MHS will count to 10 when he feels the urge to hit his mom.	...
Target Date	8/31/2009	...
Program	Community MH Services	...
Service	Individual Rehabilitation	...
# of Times Per Interval	1	...
Interval/Frequency	Weekly	...
Staff Responsible	5, MHS	...
Other Person Responsible		...
Status Date		...
Review Remarks		...

Calendar: Jan 2009

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

This is the date the intervention was reviewed.

- Either type in date or click on the calendar and select the date
- The date will populate the field

Next, you need to indicate more detailed information about the status of the intervention on why/how it was continued in the **Review Remarks** field.

The screenshot shows the 'Interventions' form. The 'Review Remarks' field at the bottom is highlighted with a red rectangle. To the right of the form, a red circle highlights the ellipses button. A red arrow points from this circle to the 'Webpage Dialog' window shown below.

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques]		New ▾
Method	Teach client mediation/self-control techniques	
Method Statement	MHS will count to 10 when he feels the urge to hit his mom.	
Target Date	8/31/2009	
Program	Community MH Services	
Service	Individual Rehabilitation	
# of Times Per Interval	1	
Interval/Frequency	Weekly	
Staff Responsible	5, MHS	
Other Person Responsible		
Status	Revised - Positive Change	
Status Date	8/31/2009	
Review Remarks		

To open the Review Remarks box, click on the Ellipses button to the far right.

A blank statement page will open allowing you to free type information about the objective.



To save the information you **MUST** click update at the far left corner.

The screenshot shows the 'Webpage Dialog' window. A red box highlights the 'Update' button in the top left corner. Another red box highlights the 'Close' button in the top right corner. A red arrow points from the 'Update' button to the text on the left, and another red arrow points from the 'Close' button to the text on the right.

Webpage Dialog

Statement

Update Cancel Spelling Timestamp Close

Client responds positively to self control techniques. Client to try new self control technique.

Close the box by clicking in the right hand corner.

A completed Intervention section should look like this:

Interventions [Category: Externalizing Disorders - Conduct Disorder] [Goal: Terminate all acts of violence/cruelty to people] [Method: Teach client mediation/self-control techniques]		New ▾
Method	Teach client mediation/self-control techniques	...
Method Statement	MHS will count to 10 when he feels the urge to hit his mom.	...
Target Date	8/31/2009	
Program	Community MH Services	...
Service	Individual Rehabilitation	...
# of Times Per Interval	1	
Interval/Frequency	Weekly	...
Staff Responsible	5, MHS	...
Other Person Responsible		...
Status	Revised - Positive Change	...
Status Date	1/31/2009	...
Review Remarks	Client responds positively to self control techniques. Client to try new self control technique	

ADDING ADDITIONAL PROBLEM CATEGORIES

You have the ability to add additional problem categories for clients who have Axis I primary and secondary diagnoses. To do so:

- Click on New
- A drop down box will open
- Select Problems

Problems [Category:]	New ▾	Delete
Category Externalizing Disorders - AD/HD		...

Problems

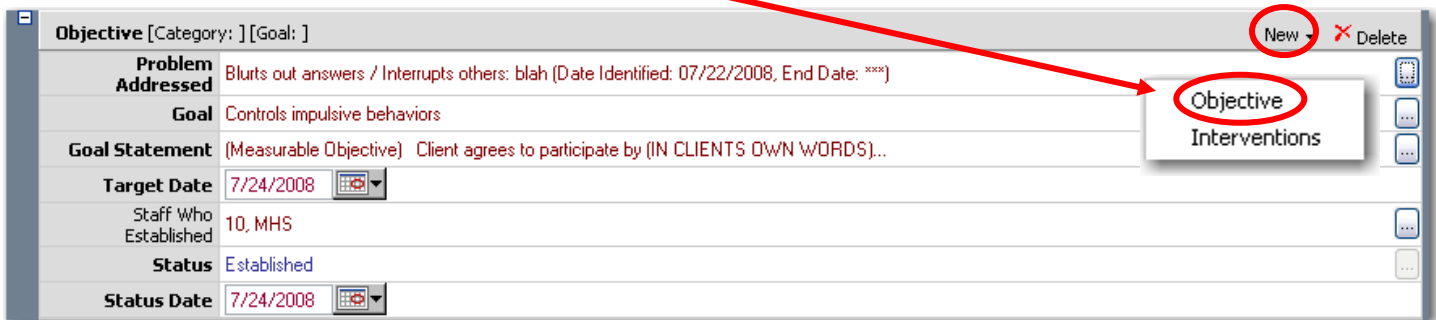
Objective

- A new Problem, Objective and Intervention section will open
- Follow the same process as when you completed the first Problem

ADDING ADDITIONAL OBJECTIVES

You have the ability to add additional objectives under this problem category. To do so:

- Click on New
- A drop down box will open
- Select Objectives



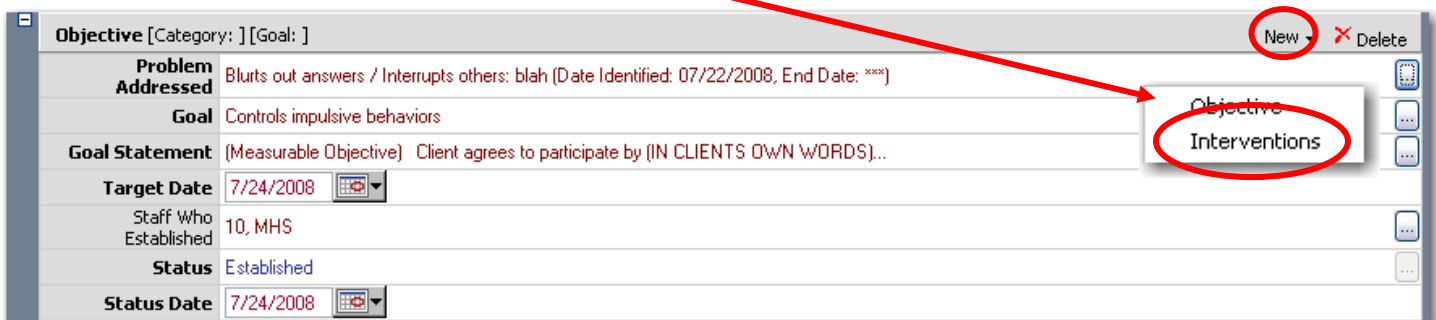
The screenshot shows a form titled 'Objective [Category:] [Goal:]'. The form contains the following fields: 'Problem Addressed' (Blurts out answers / Interrupts others: blah (Date Identified: 07/22/2008, End Date: ***)), 'Goal' (Controls impulsive behaviors), 'Goal Statement' ((Measurable Objective) Client agrees to participate by (IN CLIENTS OWN WORDS)...), 'Target Date' (7/24/2008), 'Staff Who Established' (10, MHS), 'Status' (Established), and 'Status Date' (7/24/2008). A red circle highlights the 'New' button in the top right corner. A red arrow points from the third bullet point of the list above to a dropdown menu that is open, showing 'Objective' and 'Interventions' options. The 'Objective' option is circled in red.

- A new Objective and Intervention section will open
- Follow the same process as when you completed your first Objective

ADDING ADDITIONAL INTERVENTIONS

You have the ability to add additional Interventions under this problem category. To do so:

- Click on New
- A drop down box will open
- Select Interventions



The screenshot shows the same 'Objective' form as above. A red circle highlights the 'New' button in the top right corner. A red arrow points from the third bullet point of the list above to a dropdown menu that is open, showing 'Objective' and 'Interventions' options. The 'Interventions' option is circled in red.

- A new Intervention section will open
- Follow the same process as when you completed your first Intervention

CURRENT DIAGNOSIS

This is a **view only** display of the current diagnosis. It can not be edited here. If there is a need to change the Diagnosis an MHS II must complete a Change of Diagnosis form and turn it into the Center/TM Intake Coordinator. Then complete the billing for the Change of Diagnosis in the EMR.

Current Diagnosis							
Diagnosis							
Axis	Date	Priority	Priority Description	Diagnosis	DSMIV	ICD9	GAF Score
	6/6/2006	2	Secondary	DEPRESSIVE DISORDER NEC	311	311.	
1	6/1/2008	1	Primary	AD/HD Combined Type	314.01	314.01	
2	6/1/2006	9	Other	Diagnosis Deferred on this Axis	799.9	799.9	
3	6/1/2006			Premature Infant	765.1	765.1	
4	6/5/2008			Problems with primary support group			
5	6/1/2006			45			45

SIGNATURES

The signature section can not be edited. They are place holders for signatures when printed.

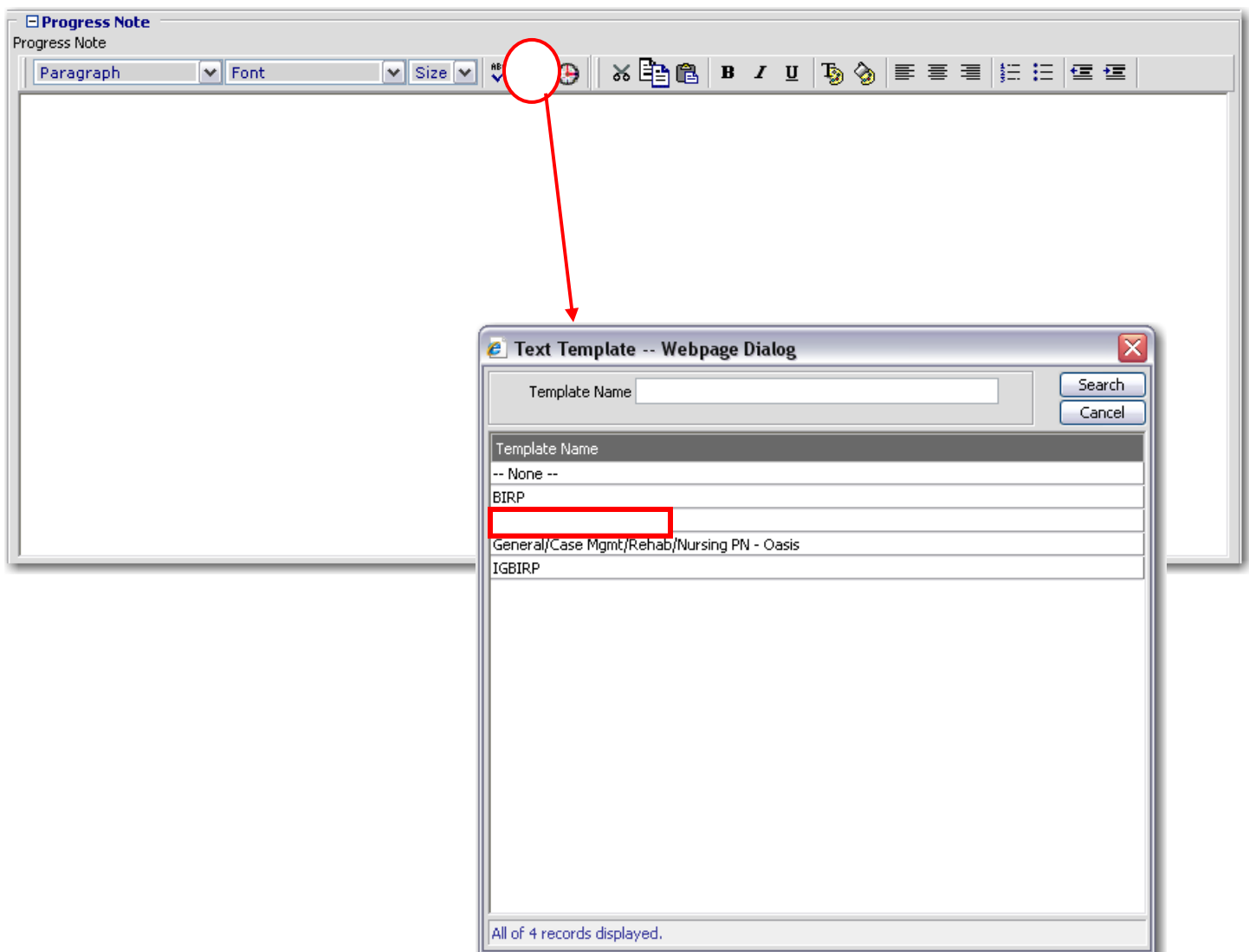
Signatures	
*Client Signature and Date	
* Document reason for lack of Signature in note. Signature must be obtained at next visit.	
Caregiver Signature and Date	
LPHA Signature and Date	
* Psychiatrist/MD Signature and Date	
* N/A if client is not being treated by the Psychiatrist	
Cx received copy of Care Plan (Cx initials / date)	

When you print the Care Plan to bring to the Caregiver and client to obtain their signatures make sure that you obtain ALL the signatures listed above. Sometimes when the Care Plan is printed some of the signature lines will end up on a separate printed page. You are REQUIRED to obtain ALL relevant signatures including the Client's Initials indicating they have received a copy of the Care Plan.

PROGRESS NOTE

For the Initial Care Plan and Annual update you would select the Care Plan PN template. **NOTE: For the 6-month update you would type in the progress note field “completed client care plan”.**

- To select the Care Plan PN template click on the template icon (circled below)
- Click on Care Plan PN Template



CARE PLAN PROGRESS NOTE TEMPLATE

The following headers will populate the Progress Note field. Type appropriate information under each header.

The screenshot shows a web-based form titled "Progress Note". The form has a toolbar with options for Paragraph, Font, Size, and various text formatting icons (bold, italic, underline, etc.). The form contains several headers for documentation, each preceded by a red underlined text prompt. The headers are:

- DMH requires the following information to be completed at intake and annually.**
- Desired Outcome/Long Term Goals:**
- Barriers to Reaching Goals:**
- Presenting Problems/Symptoms: (based on DSM or client's presentation. Must be related to information from Initial Assessment or Annual Assessment.)**
- Functional Impairment(s) Caused by Problem(s)/Symptom(s) [work, school, home, community, living arrangements, etc.]: (based on DSM or client's presentation. Must be related to information from Initial Assessment or Annual Assessment.)**
- Do cultural/linguistic, co-occurring, and/or health factors impact Presenting Problems? If yes, please describe:**
- Describes client's strengths: (as related to problems and objectives in client plan)**
- Does client consent to family involvement?**
- Does family agree to participate?**
- Indicate Planned Family Involvement:**

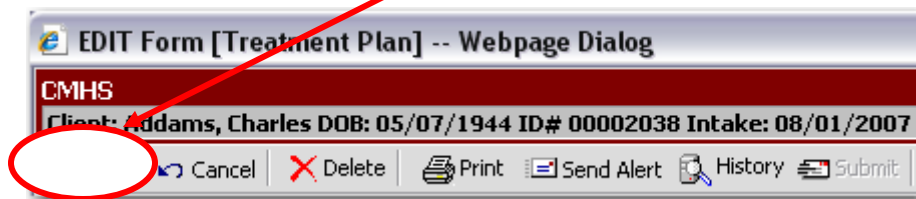
You do not need to enter or complete the Confidentiality Statement, Participants or Tasks/Schedules tabs.

The screenshot shows the bottom navigation bar of the form. It contains three tabs: "Confidentiality Statement", "Participants", and "Tasks/Schedules". The "Confidentiality Statement" tab is currently selected and active, showing a text input field with the placeholder text "This confidential inform".

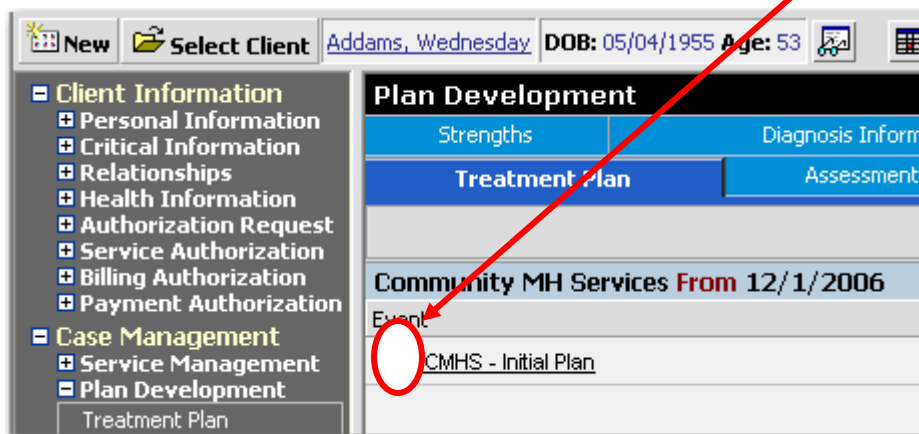
SAVING THE UPDATED CARE PLAN / TREATMENT PLAN

After **ALL** required (**bolded**) fields are complete you are ready to save the Care Plan/Treatment Plan. You MUST save the Care Plan first before you can submit it to your supervisor or designee; notice the "submit" button is not available.

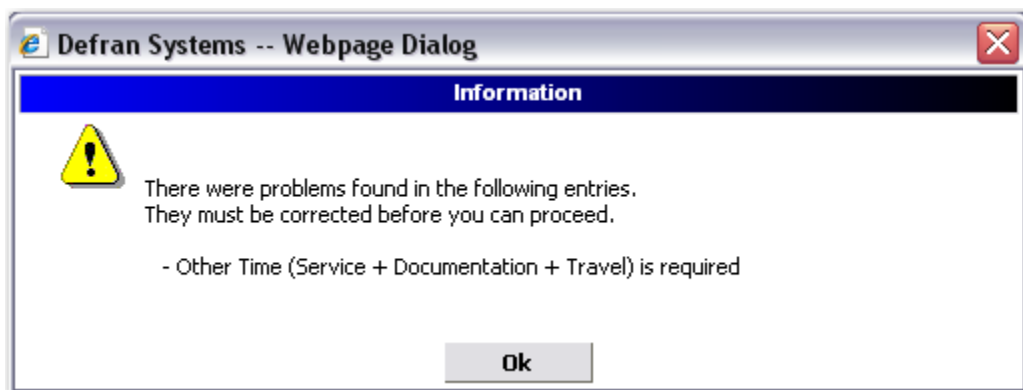
At the top of the Care Plan/Treatment Plan click on the  button.



The Care Plan/Treatment Plan will close and you will be brought back to the Treatment Plan page. You can now see the Care Plan/Treatment Plan in draft format indicated by the  (pencil) to the left of the Care Plan.



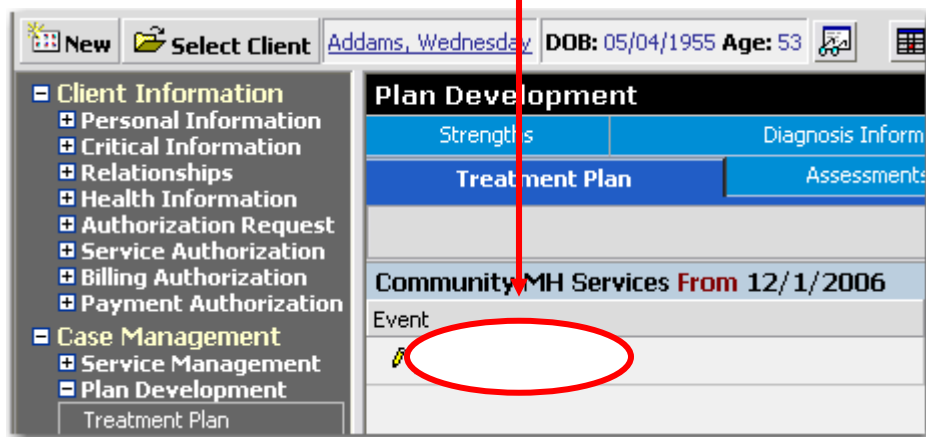
If you have missed any of the bolded (required) fields, you will receive an error message indicating what information must be complete before you can save. Below you can see an example of the error message you will get if you did not complete the "Other Time" field.



SUBMITTING THE UPDATED CARE PLAN / TREATMENT PLAN

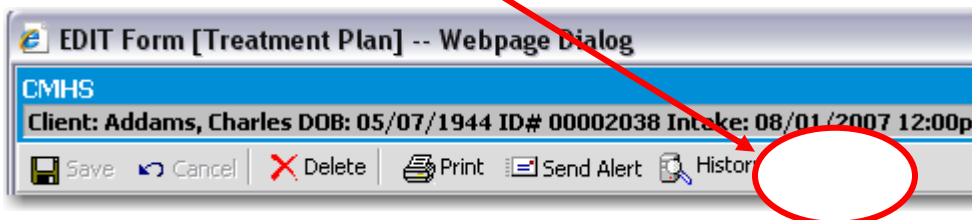
In order to submit the Care Plan to your supervisor or to the designee you **MUST** open up the Care Plan again. Do NOT leave the Care Plan in Draft status after its due date. A Care Plan in draft status will not be billed and is not considered a final Care Plan until the supervisor approves it.

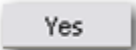
To open the Care Plan again, click on the words **“CMHS – Initial Plan”** or **“Review Plan”**.

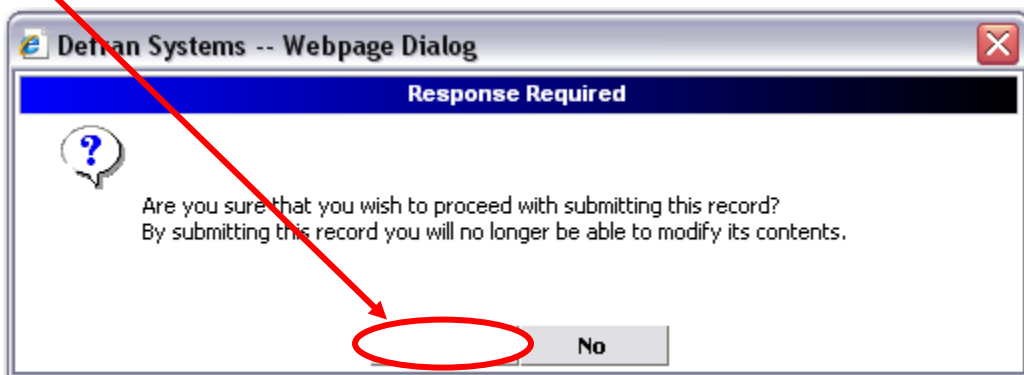


The Care Plan will open in Draft format.

At the top of the Care Plan the  **Submit** button is now available; Click on it.



You will receive this message asking you if you are sure you want to proceed with submitting the Care Plan. Click  .



The Care Plan will now show in a format that is not editable. Click the  button to return to the Treatment Plan screen.



EDIT Form [Treatment Plan] -- Webpage Dialog

CMHS

Print Send Alert History

Information

County ID MIS NUMBER

Status Draft-Submitted For Approval

Program Community MH Services

Facility Star View Community Services - LB (Lic.# 00543)

Type CMHS - Initial Plan

Completed Information

Date Started 07/22/2008 12:00pm

Date Completed 07/31/2008 12:00pm

Face-to-Face Time 0

Other Time 45

Number of Family Collaterals 0

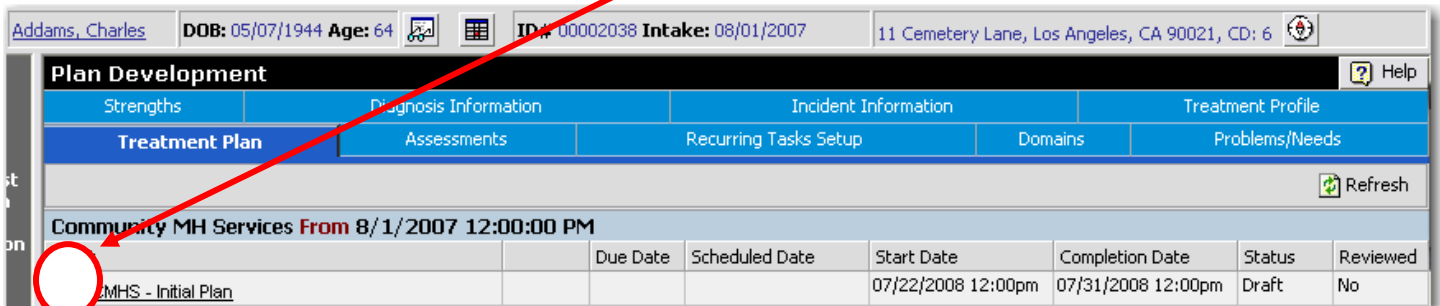
Number of Non-Family Collaterals 0

Evidence Based Practice

Completed By Boyd, Angela

Submit To

You will now see the Care Plan listed with an envelope icon  to the left of the service in the Treatment Plan screen.



Addams, Charles DOB: 05/07/1944 Age: 64 ID#: 00002038 Intake: 08/01/2007 11 Cemetery Lane, Los Angeles, CA 90021, CD: 6

Plan Development

Strengths Diagnosis Information Incident Information Treatment Profile

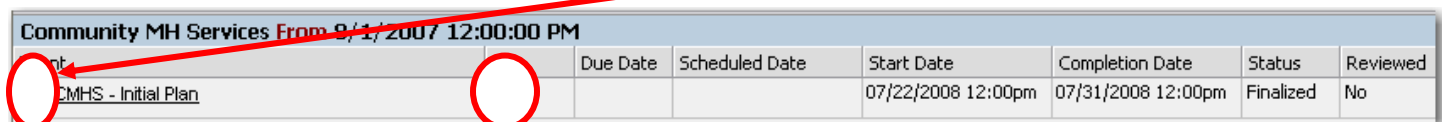
Treatment Plan Assessments Recurring Tasks Setup Domains Problems/Needs

Refresh

Community MH Services From 8/1/2007 12:00:00 PM

	Due Date	Scheduled Date	Start Date	Completion Date	Status	Reviewed
CMHS - Initial Plan			07/22/2008 12:00pm	07/31/2008 12:00pm	Draft	No

When your supervisor or designee APPROVES the Care Plan you will see a green check mark  to the left of the service.



Community MH Services From 8/1/2007 12:00:00 PM

	Due Date	Scheduled Date	Start Date	Completion Date	Status	Reviewed
CMHS - Initial Plan			07/22/2008 12:00pm	07/31/2008 12:00pm	Finalized	No

Also notice the eyeglass icon  to the right of the service. The eyeglass icon indicates the Care Plan can be updated.

Repeat the Update process for each subsequent Care Plan update.

COMPLETING THE DISCHARGE CARE PLAN

When discharging a client you **MUST** update the Care Plan and complete the outcome for each objective on file for the client. In the EMR the outcome is a combination of the status date, status and review remarks for the objective and intervention AND ending the Problems / Needs on file for the client.

Ending Problems / Needs at the time of Discharge: follow the instructions on pages 39 – 40.

Updating the Care Plan at the time of Discharge: follow the instructions on pages 42 – 51 and 76 – 80 of this manual.

- Exception to the **Date Started** in the Updated Care Plan
 - If you are completing an *Administrative D/C* you ***need*** to use the Last Billable Date of Service as the **Date Started** **AND** enter **0 (zero) minutes in both Face-to-Face AND Other Time** (doing this will prevent a problem with discharging the client in the EMR and prevent the service from being billed)
 - If you are NOT completing an Administrative D/C refer to page 15 of this manual for a definition of Date Started
- Under **Status**, select either Discontinued OR Achieved and then follow the instructions on pages 49 – 51 of this manual

UN-APPROVING / UN-SUBMITTING THE CARE PLAN / TREATMENT PLAN

IF you make a mistake on the Care Plan, depending on the status of the Care Plan, you need to do the following:

Draft status (indicated by the pencil icon to the left of the service):

- You are able to click into the Care Plan and change the information at anytime.



Submitted status (indicated by the envelope icon to the left of the service):

- Contact your supervisor and request they UN-SUBMIT the Care Plan back to you to make the needed corrections. Once the Care Plan is un-submitted it will show in draft status.

The screenshot shows a software interface for 'Plan Development' for a user named 'Addams, Charles'. At the top, it displays 'DOB: 05/07/1944 Age: 64' and 'ID# 0000'. The main section has tabs for 'Strengths', 'Diagnosis Information', 'Treatment Plan', and 'Assessments'. Below these tabs, it says 'Community MH Services From 8/1/2007 12:00:00 PM'. Under the 'Event' column, there is a red circle next to the text 'CMHS - Initial Plan', indicating the service's status.

Approved status – single Care Plan (indicated by the green check mark to the left of the service):

- Contact your supervisor and request them to UN-APPROVE and UN-SUBMIT the Care Plan back to you to make the needed corrections.
- Once the Care Plan is un-approved AND un-submitted it will show in draft status.

The screenshot shows a software interface for 'Plan Development' for a user named 'Addams, Lurch'. At the top, it displays 'DOB: 01/01/1801 Age: 208' and 'ID#'. The main section has tabs for 'Strengths', 'Diagnosis Information', 'Treatment Plan', and 'Assessments'. Below these tabs, it says 'Community MH Services From 12/16/2004'. Under the 'Event' column, there is a green check mark next to the text 'MHS - Initial Plan', indicating the service's status.

Approved status – multiple Care Plans (indicated by the green check mark to the left of the service):

- Once a Care Plan (either the Initial or Review Plan) has been approved AND you started the next Review Plan, the previous Care Plan(s) - either the Initial or Review Plan - are a PERMANENT part of the client's record and CAN NOT be changed. Your supervisor will not have the option to un-approve / un-submit the care plan.
- The ONLY way to correct mistakes on an approved Care Plan in this situation is to Discontinue the Objective or Intervention on the next Review Plan and add a new Area of Treatment, Goal or Method with the correct information.

Plan Development			
Strengths	Diagnosis Information		Incident
Treatment Plan		Assessments	Recurring Tasks Setup
Community MH Services From 5/8/2007 12:00:00 PM			
Event			Due Date
 CMHS - Review Plan			4/19/2009
 CMHS - Review Plan			

If you have any questions about the Care Plan, contact your QA Manager/Coordinator.