Treatment Plan Template: Add and Edit Goals

Last Modified on 08/23/2022 7:57 am EDT

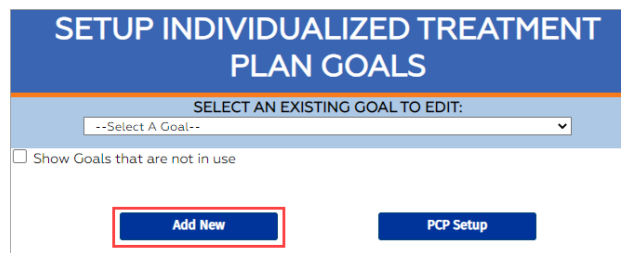**Path: Main Menu > Admin Tools Menu > Treatment Plan Template and Program Setup**

About

In Treatment Plan Template and Program Setup, you can add and edit new Goals and attach Objectives, measurable statements, and Programs to the Goals. You can also set a Goal as inactive if your Agency no longer wants to use it.
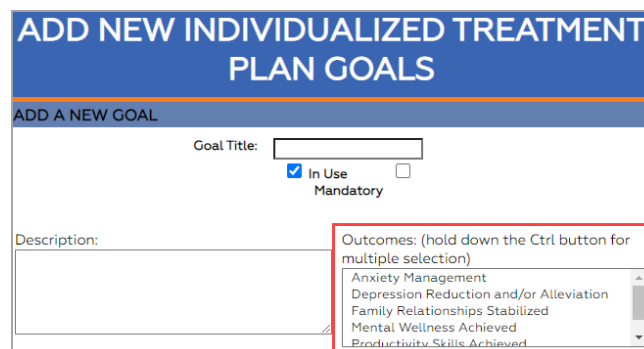
- Add a New Goal
- Edit an Existing Goal

Add a New Goal

1. Navigate to Treatment Plan Template and Program Setup by following the path above.
2. Select the **Add/Edit Goals** radio button.
3. Click the **Continue** button.
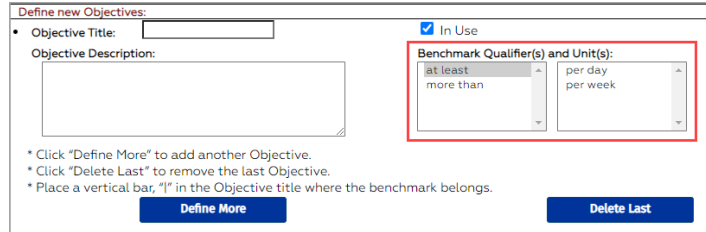4. Click the **Add New** button.

5. Enter a **Goal Title**.
6. *(Optional)* Select the **Mandatory** checkbox. If selected, a Treatment Plan cannot be completed without this Goal being selected (e.g. this may be used for a discharge Goal).
7. *(Optional)* Enter a **Description** into the text box. This can be used as a prompt for staff.
8. In the Outcomes section, select an **Outcome** or hold down the **Ctrl** button and click to **select multiple Outcomes** to link to the Goal.

9. In the Goal Objectives section:

   - **Select Goal Objectives:** Select objectives from the existing list.
   - *(Optional)* **Define new Objectives:** Create new Objectives to attach to the Goal.
     a. In the Define new Objectives section, click the link **Click here to define new Objectives. (These will have to be linked to Interventions later).**

b. Enter an **Objective Title**. If you will be adding a Benchmark in step d below, you are required to place a pipe/vertical bar "|" at the end of the title (*e.g.* Develop strategies for managing anxiety and panic symptoms |.)

c. *(Optional)* Enter an **Objective Description** into the text box.

d. *(Optional)* If you've entered **Benchmarks** into the system previously, they are displayed here. Select the Benchmark Qualifier(s) and Unit(s) to attach to the Objective. Hold down the **Ctrl** button and click to **select multiple Benchmarks.**
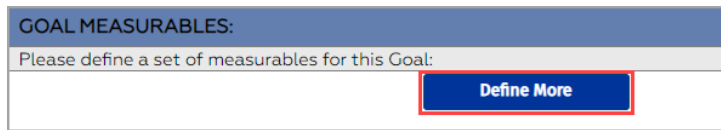

Notes:

- To add more new Objectives, click the **Define More** button. To delete the last Objective you entered, click the **Delete Last** button (see image above).
- If you've created new Objectives you will need to follow the instructions in**Treatment Plan Template: Add and Edit Interventions** to link the new Objectives to Interventions.

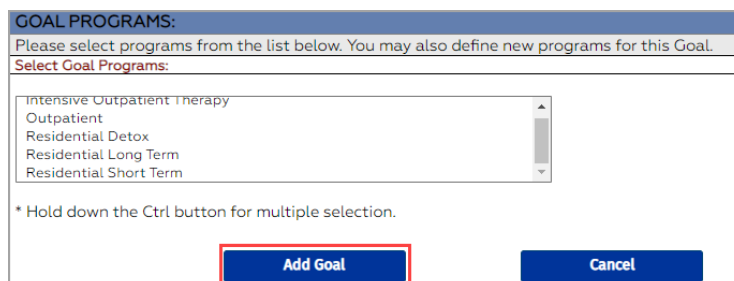10. In the Goal Measurables section, click the **Define More** button.

11. Enter a **Measurable Title**. This should be a measurable statement (e.g. "client reported improvement"). This is tied to the Treatment Plan review. At least one measurable statement must be added.

Note: To add more Measurables, click the **Define More** button. To delete the last Measurable you entered, click the **Delete Last** button.

12. In the Goal Programs section, select the **Program(s)** to attach to the Goal. Hold down the **Ctrl** button and click to **select multiple Programs**.
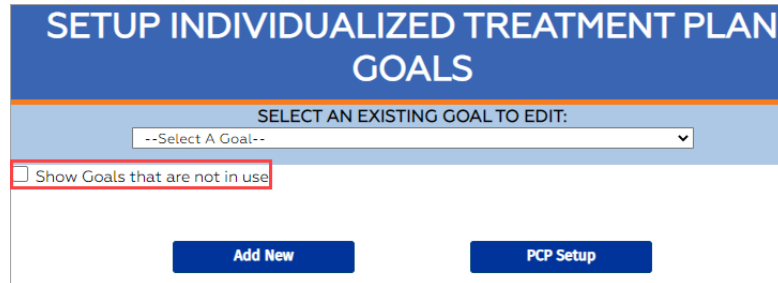
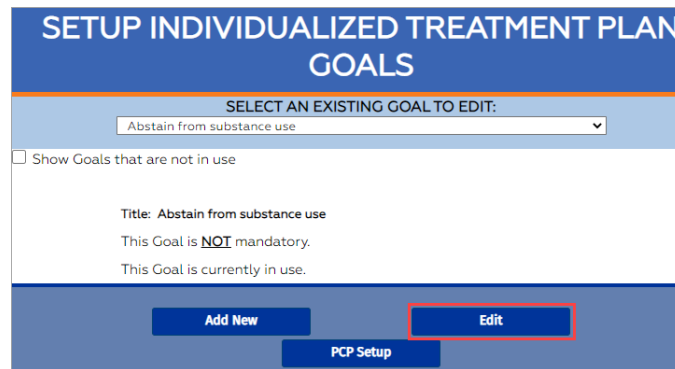13. Click the **Add Goal** button.

Edit an Existing Goal

1. Navigate to Treatment Plan Template and Program Setup:**Main Menu > Admin Tools Menu > Treatment Plan Template and Program Setup**.

2. Select the **Add/Edit Goals** radio button.

3. Click the **Continue** button.
4. Click the **Select an Existing Goal to Edit** drop-down and select a Goal.

Note: To see Goals that are not in use, select the **Show Goals that are not in use** checkbox. These Goals are displayed in gray in the list.

SETUP INDIVIDUALIZED TREATMENT PLAN GOALS

SELECT AN EXISTING GOAL TO EDIT:

--Select A Goal--

☐ Show Goals that are not in use

Add New   PCP Setup

5. Click the **Edit** button.

SETUP INDIVIDUALIZED TREATMENT PLAN GOALS

SELECT AN EXISTING GOAL TO EDIT:

Abstain from substance use

☐ Show Goals that are not in use

Title: Abstain from substance use

This Goal is **NOT** mandatory.

This Goal is currently in use.

Add New   Edit

PCP Setup

6. Make edits as necessary.

Notes:
- To mark the Goal as **inactive**, deselect the **In Use** checkbox. This will remove the Goal from being used in the Individualized Treatment Plan (ITP) Builder. It will still show if the Goal was attached to a previous ITP.
- To mark an inactive Goal as **active**, select the **In Use** checkbox.

Edit Individualized Treatment Plan Goals

EDIT THIS GOAL

Goal Title: Abstain from substan

☑ In Use   ☐ Mandatory

7. Click the **Save Changes** button.