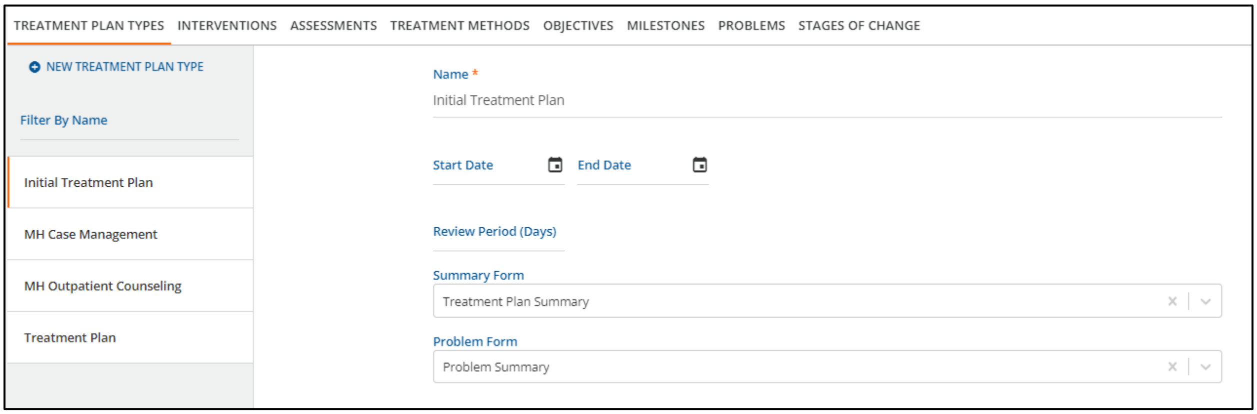
Treatment Planning System Configuration

Treatment Plan Types



Create as many Treatment Plan Types as you need. Separate Treatment Plan Types should be created if:

1) There are different review periods.
2) Different information (different forms) should be captured on different plans (e.g., different plans for different programs).
3) Different types of staff should be able to access different types of plans.

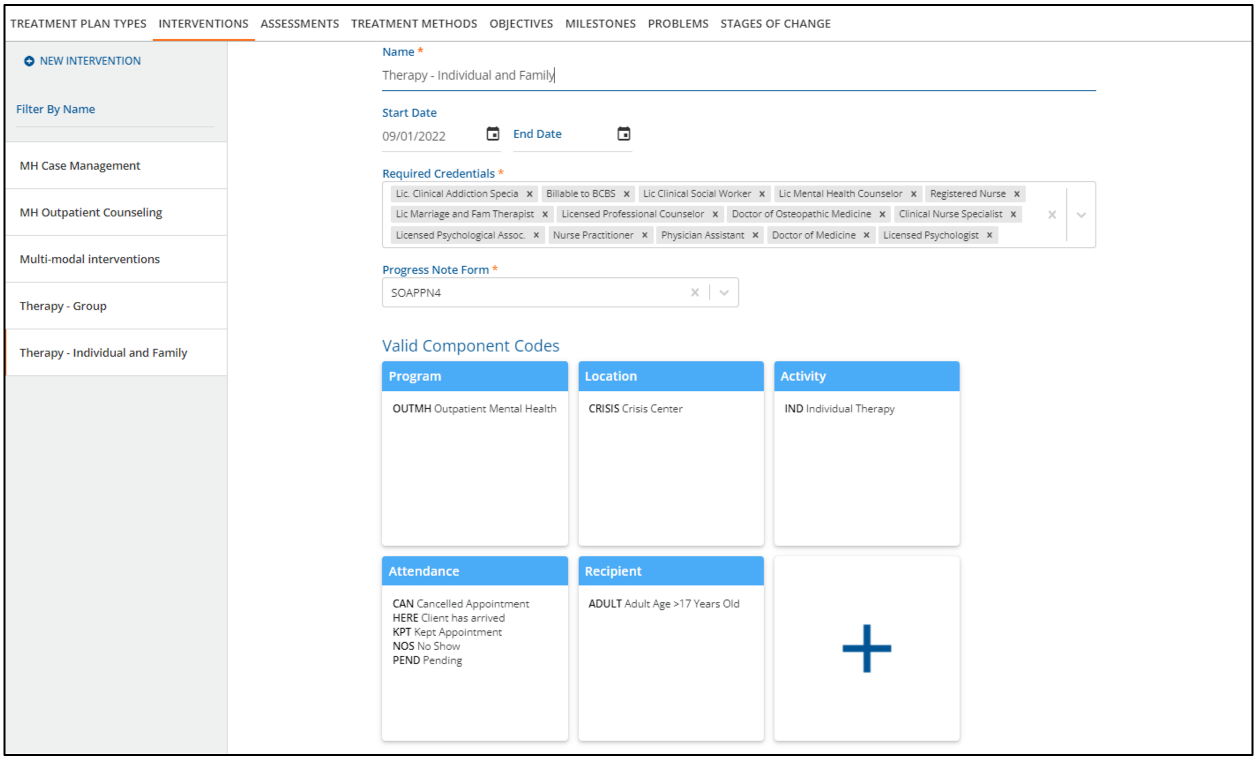
Choose a **Name** for each Treatment Plan Type, along with Start and End Dates if necessary.

Enter a **Review Period** that will be used to automatically populate the end date on specific treatment plans.

Choose a **Summary Form**. These forms are created using FDNext. The form should contain the fields that are appropriate for the treatment plan type generally. This form may not be necessary for every Treatment Plan Type (e.g., Initial Treatment Plan).,

Choose a **Problem Form**. These forms are created using FDNext. The form should contain the fields that you want to capture at the Problem level on treatment plans.

Interventions



Create as many Interventions as you need. You can combine services into one intervention if they:

1) Use the same credentials for billing.
2) Use the same service components.
3) Use the same Progress Note form.

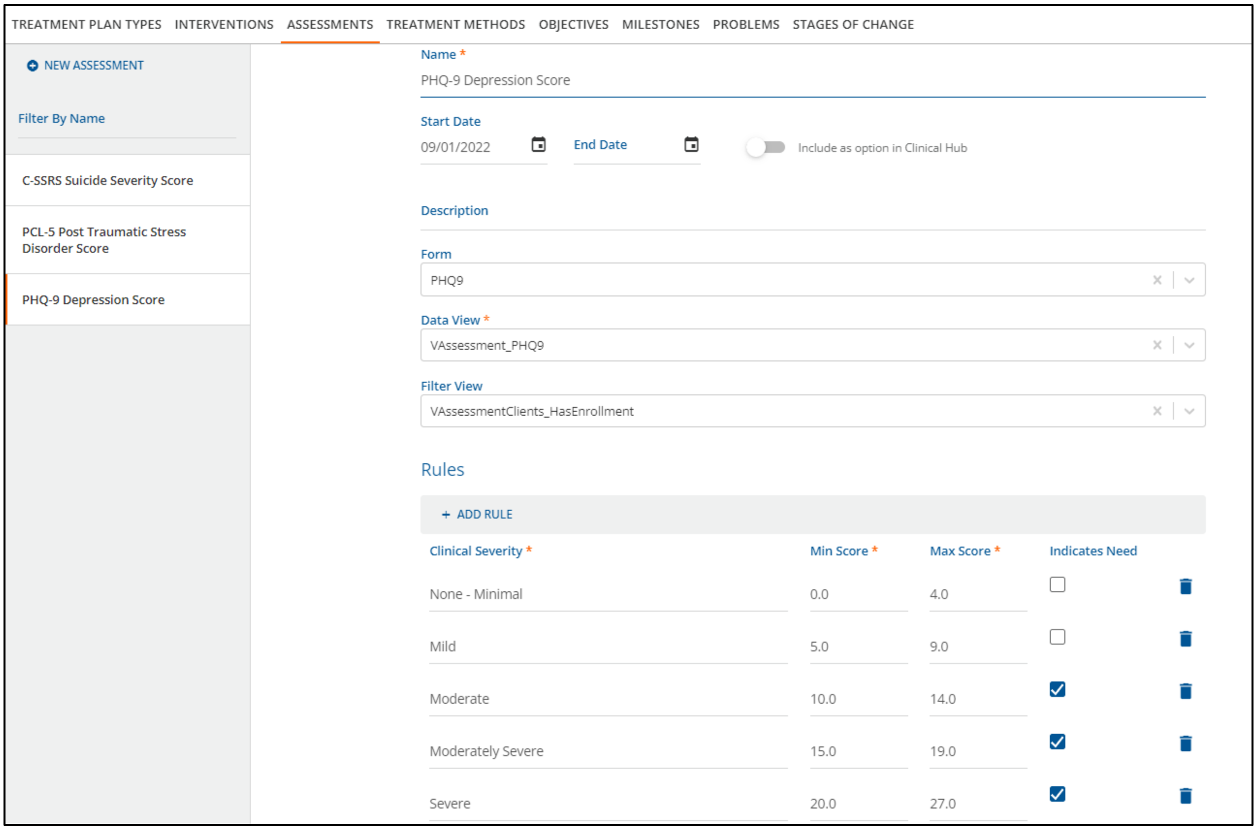
Choose a **Name** for each Intervention, along with Start and End Dates for the use of the type if necessary.

Choose **Required Credentials** for Billing.

Choose the **Progress Note Form** to be entered when the service is delivered. These forms are created using FormDesignEHR.

Choose the **Valid Component Codes** for the Service. These will limit the choices for the end user.

Assessments



Create as many Assessments as you need. If you are using the same assessment but have different forms (e.g., adolescent vs. adult), create separate assessments.

Choose a **Name** for each Assessment, along with Start and End Dates if necessary.

Choose whether or not to Include the assessment in the Clinical Hub. This determines whether the assessment appears as an option for the “plus” icon located in the bottom right-hand corner of Face Sheets, Treatment Plans, and Encounters so that users can add a new assessment when necessary.

Therapy Brands

Enter a **Description** (not required).

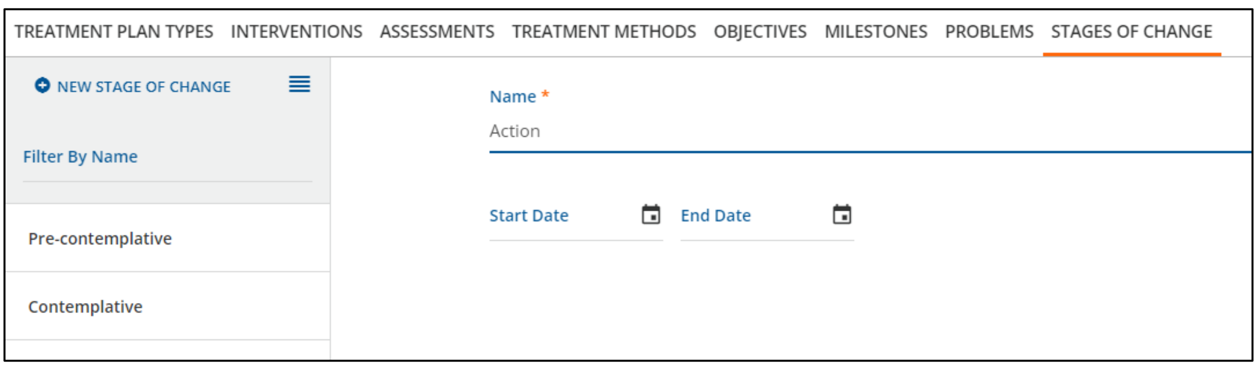
Choose the **Assessment Form** to be entered when the service is delivered. These forms are created using FormDesignEHR. In FormDesignEHR, there must be a location "assessment" option chosen in order for the assessment form to appear in the drop-down.

Choose the **Data View** that pulls the results of the assessment. Based on this view, the assessment results will appear in a graph under Outcomes on the Face Sheet, assuming that the associated Problem (see Problems below) has been associated with the individual's treatment plan.

Choose the **Filter View** that filters which clients are appropriate for this assessment. This could be, for example, clients that have open enrollments, or clients within a certain age group. This field is not required.

Choose **Rules** for the assessment. Based on these rules, the Clinical Severity appears on the treatment plan for the end user. Additionally, the Indicates Need checkbox allows for Suggested Problems to appear on the Face Sheet and Treatment Plan if the Rule is met. For each Rule, enter a name for the Clinical Severity category, the Min and Max Scores associated with that category, and whether the category indicates a need for associated Problems to be addressed on the treatment plan.

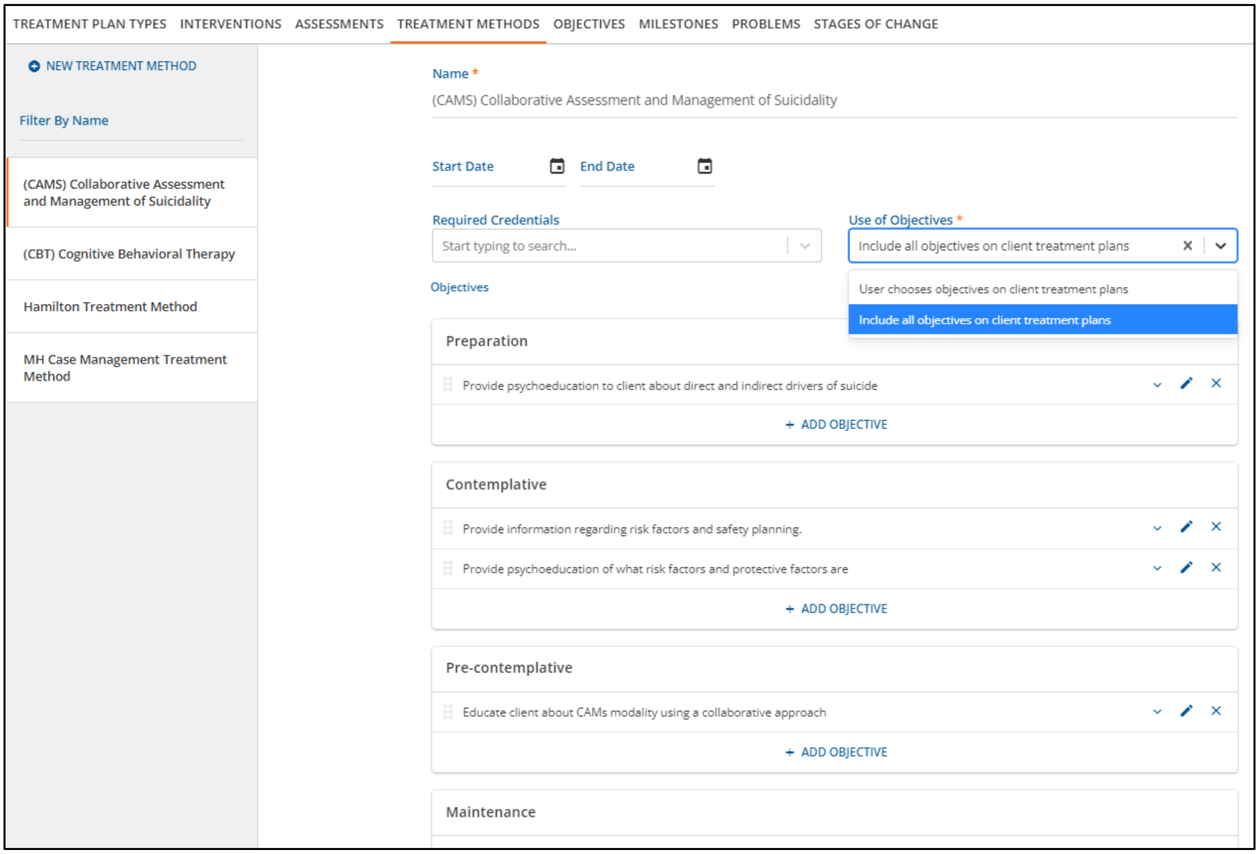
Stages of Changes



Create as many Stages of Change as you need. If you're not using Stages of Change, you can create a generic Stage of Change (e.g., "Active") that end users will see but will not be distracting.

Choose a **Name** for each Stage of Change, along with Start and End Dates if necessary.

Treatment Methods



Create as many Treatment Methods as you need. Note that you may want to set up your Objectives and Milestones

Choose a **Name** for each Treatment Method, along with Start and End Dates if necessary.

Choose **Required Credentials** for Billing.

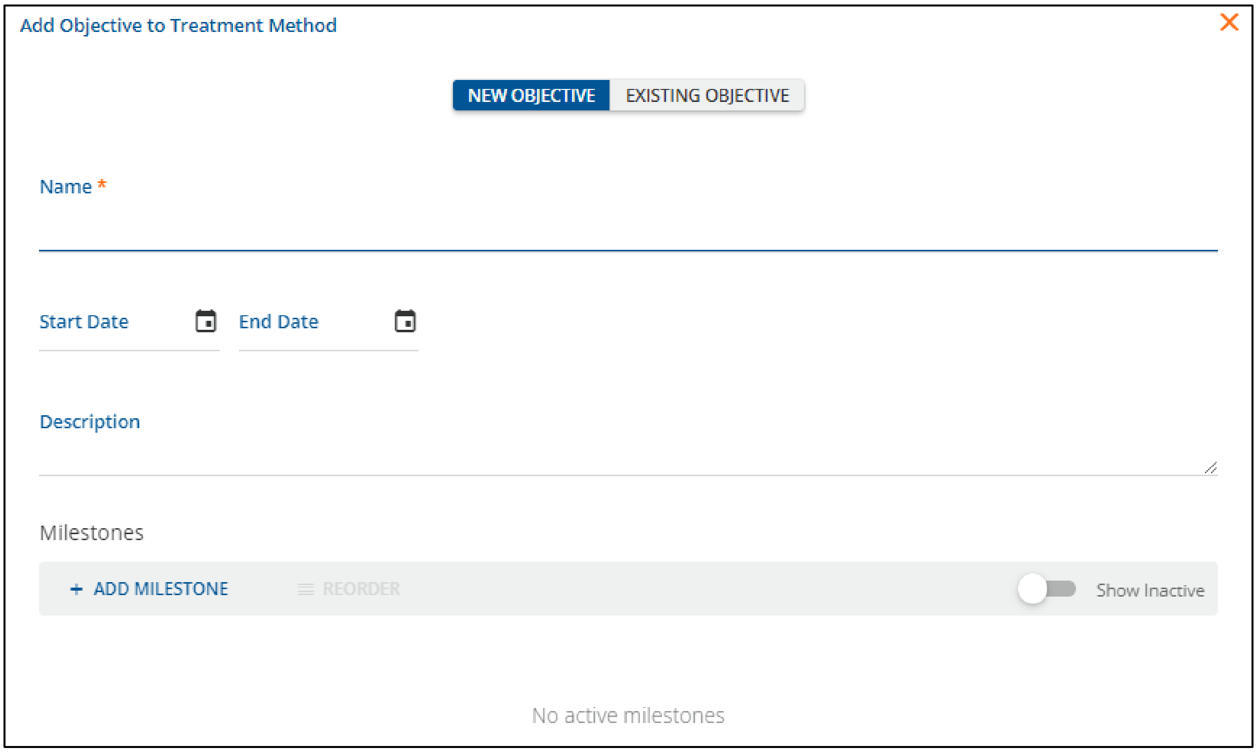
Choose **how Objectives can be used** by the end user. This determines whether objectives and milestones are automatically included in the treatment plan, or whether end users are allowed which objectives to include, for this particular Treatment Method.

*Please see Appendix A for a diagram of a Treatment Method's association with Stages of Change, Objectives, and Milestones.

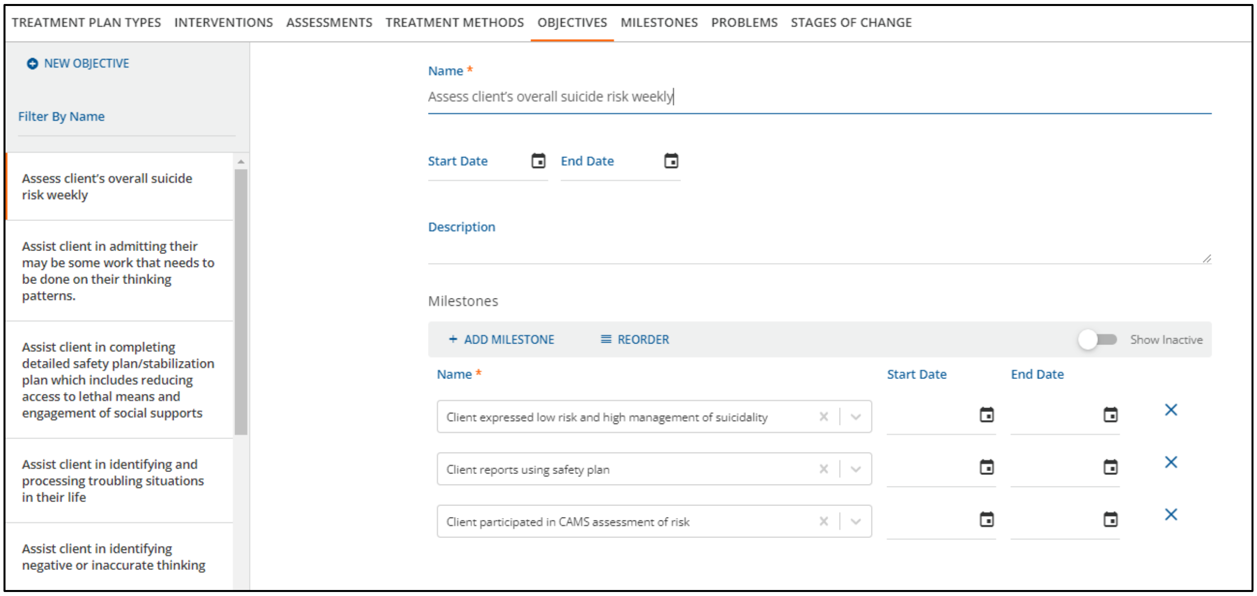
Treatment Methods, continued

Objectives

For each configured **Stage of Change**, choose Objectives and Milestones. These Objectives and Milestones may be entered directly using the Objectives/Milestones tabs, or new Objectives can be entered through the Treatment Methods tab. Order Objectives as you choose. Choose Add Objective to add new objectives or associate existing objectives to the Treatment Method/Stage of Change. New Milestones must be entered through the Milestones tab.



Objectives



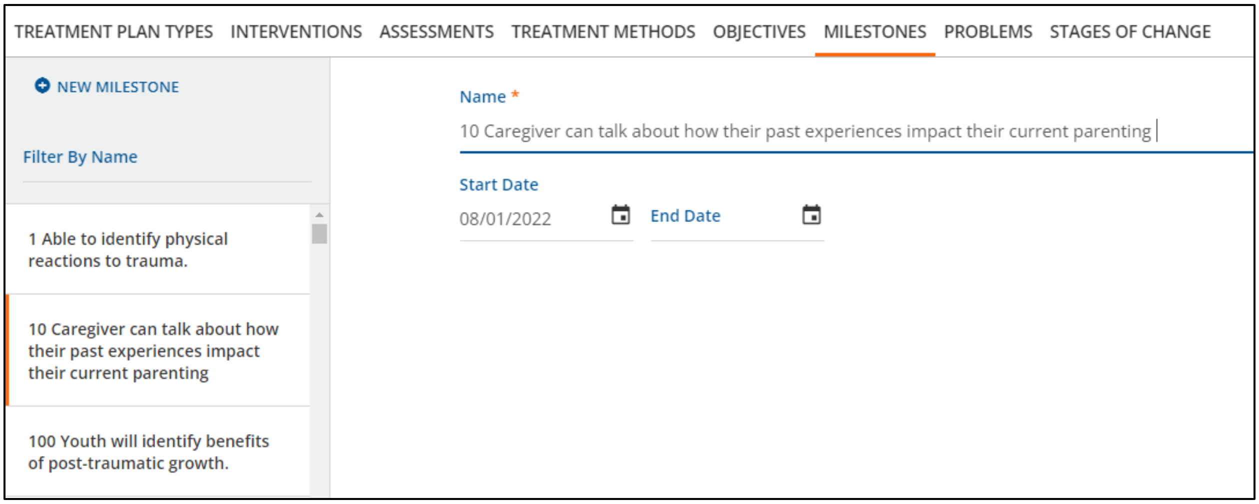
Create as many Objectives as you need. Objectives may also be created directly from the Treatment Methods tab. Objectives can be associated with multiple Treatment Methods. Note that agencies have chosen to number objectives to more easily reference them.

Choose a **Name** for each Objective, along with Start and End Dates if necessary.

Enter a **Description** (not required).

Associate **Milestones** with each Objective, including a Start Date and End Date if necessary. Order Milestones as you choose. Note that agencies have chosen to number objectives in order to more easily reference them. New Milestones must be entered through the Milestones tab.

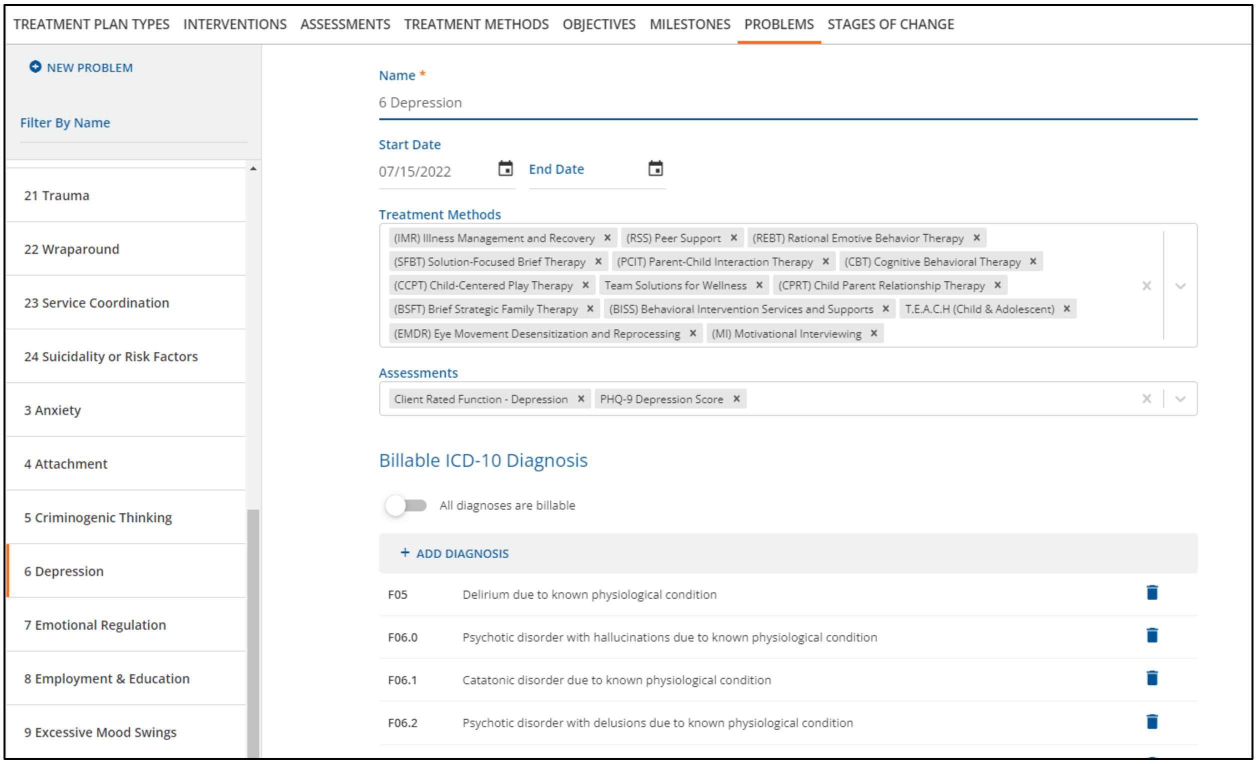
Milestones



Create as many Milestones as you need.

Choose a **Name** for each Milestone, along with Start and End Dates if necessary.

Problems



Create as many Problems as you need. End users will be able to associate Problems with Treatment Plans, and Treatment Methods will then be limited to those appropriate for the given Problem. Problems will appear on the Face Sheet in the Outcomes column if they have received an associated assessment and if the problem has been added to the individual's treatment plan.

Choose a **Name** for each Problem, along with Start and End Dates if necessary.

Choose all **Treatment Methods** that are appropriate in working with this Problem.

Choose all **Assessments** that should be associated with this Problem.

Choose whether all **Diagnoses** are billable, or not. If not, choose which Diagnoses should be billable for this Problem.

Appendix A. Diagram of Treatment Method Association with Other Treatment Plan Objects