



## Treatment Planning System Configuration

### Treatment Plan Types

The screenshot shows a web application interface for configuring Treatment Plan Types. At the top, there is a navigation bar with tabs: TREATMENT PLAN TYPES (selected), INTERVENTIONS, ASSESSMENTS, TREATMENT METHODS, OBJECTIVES, MILESTONES, PROBLEMS, and STAGES OF CHANGE. Below the navigation bar, there is a sidebar on the left with a 'NEW TREATMENT PLAN TYPE' button and a 'Filter By Name' section. The main content area contains a form for creating a new plan type. The form includes a 'Name' field with a red asterisk, a 'Start Date' and 'End Date' field with calendar icons, a 'Review Period (Days)' field, a 'Summary Form' dropdown menu, and a 'Problem Form' dropdown menu. The 'Name' field is populated with 'Initial Treatment Plan'. The 'Summary Form' dropdown is set to 'Treatment Plan Summary' and the 'Problem Form' dropdown is set to 'Problem Summary'.

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 FDNNext. 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 FDNNext. The form should contain the fields that you want to capture at the Problem level on treatment plans.



## Interventions

TREATMENT PLAN TYPES INTERVENTIONS ASSESSMENTS TREATMENT METHODS OBJECTIVES MILESTONES PROBLEMS STAGES OF CHANGE

NEW INTERVENTION

Filter By Name

MH Case Management

MH Outpatient Counseling

Multi-modal interventions

Therapy - Group

Therapy - Individual and Family

Name \*

Therapy - Individual and Family

Start Date

09/01/2022 End Date

Required Credentials \*

Lic. Clinical Addiction Specia x Billable to BCBS x Lic Clinical Social Worker x Lic Mental Health Counselor x Registered Nurse x  
Lic Marriage and Fam Therapist x Licensed Professional Counselor x Doctor of Osteopathic Medicine x Clinical Nurse Specialist x  
Licensed Psychological Assoc. x Nurse Practitioner x Physician Assistant x Doctor of Medicine x Licensed Psychologist x

Progress Note Form \*

SOAPPN4

Valid Component Codes

Program	Location	Activity
OUTMH Outpatient Mental Health	CRISIS Crisis Center	IND Individual Therapy

Attendance	Recipient	
CAN Cancelled Appointment HERE Client has arrived KPT Kept Appointment NOS No Show PEND Pending	ADULT Adult Age >17 Years Old	+

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

TREATMENT PLAN TYPES INTERVENTIONS **ASSESSMENTS** TREATMENT METHODS OBJECTIVES MILESTONES PROBLEMS STAGES OF CHANGE

[NEW ASSESSMENT](#)

Filter By Name

C-SSRS Suicide Severity Score

PCL-5 Post Traumatic Stress Disorder Score

PHQ-9 Depression Score

**Name \***  
PHQ-9 Depression Score

**Start Date**  
09/01/2022 **End Date**  Include as option in Clinical Hub

**Description**

**Form**  
PHQ9

**Data View \***  
VAssessment\_PHQ9

**Filter View**  
VAssessmentClients\_HasEnrollment

**Rules**

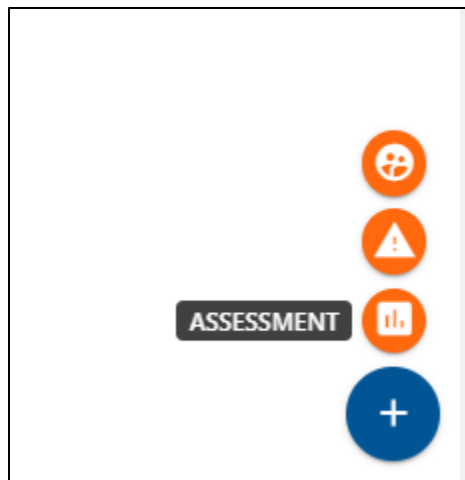
[+ ADD RULE](#)

Clinical Severity *	Min Score *	Max Score *	Indicates Need	
None - Minimal	0.0	4.0	<input type="checkbox"/>	
Mild	5.0	9.0	<input type="checkbox"/>	
Moderate	10.0	14.0	<input checked="" type="checkbox"/>	
Moderately Severe	15.0	19.0	<input checked="" type="checkbox"/>	
Severe	20.0	27.0	<input checked="" type="checkbox"/>	

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.



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.

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## Stages of Changes

The screenshot displays the 'Stages of Change' management interface. At the top, a navigation bar includes tabs for 'TREATMENT PLAN TYPES', 'INTERVENTIONS', 'ASSESSMENTS', 'TREATMENT METHODS', 'OBJECTIVES', 'MILESTONES', 'PROBLEMS', and 'STAGES OF CHANGE'. The 'STAGES OF CHANGE' tab is active. Below the navigation bar, there is a 'NEW STAGE OF CHANGE' button with a plus icon and a menu icon. A 'Filter By Name' search bar is positioned below the button. A list of existing stages is shown, including 'Pre-contemplative' and 'Contemplative'. To the right of the list, there are input fields for 'Name \*', 'Action', 'Start Date', and 'End Date'.

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.

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## Treatment Methods

The screenshot displays the 'Treatment Methods' configuration page. On the left is a sidebar with a 'NEW TREATMENT METHOD' button and a 'Filter By Name' search bar. Below the search bar is a list of existing methods: '(CAMS) Collaborative Assessment and Management of Suicidality', '(CBT) Cognitive Behavioral Therapy', 'Hamilton Treatment Method', and 'MH Case Management Treatment Method'. The main area shows the configuration for the selected method, '(CAMS) Collaborative Assessment and Management of Suicidality'. It includes a 'Name' field with a red asterisk, 'Start Date' and 'End Date' fields with calendar icons, a 'Required Credentials' dropdown menu, and a 'Use of Objectives' dropdown menu. The 'Use of Objectives' menu is open, showing two options: 'User chooses objectives on client treatment plans' and 'Include all objectives on client treatment plans', with the latter selected. Below these fields are three sections of objectives: 'Preparation' (one objective), 'Contemplative' (two objectives), and 'Pre-contemplative' (one objective). Each objective has a dropdown arrow, an edit icon, and a delete icon. A '+ ADD OBJECTIVE' button is present at the bottom of each section. A 'Maintenance' section is partially visible at the bottom.

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.

Add Objective to Treatment Method ✕

**NEW OBJECTIVE** EXISTING OBJECTIVE

Name \*


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Start Date  End Date 

Description

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Milestones

**+ ADD MILESTONE**  REORDER  Show Inactive

No active milestones

## Objectives

The screenshot shows a web interface for managing objectives. At the top, there is a navigation bar with tabs: TREATMENT PLAN TYPES, INTERVENTIONS, ASSESSMENTS, TREATMENT METHODS, OBJECTIVES (selected), MILESTONES, PROBLEMS, and STAGES OF CHANGE. On the left, there is a sidebar with a 'NEW OBJECTIVE' button and a 'Filter By Name' search bar. Below the search bar is a list of objective suggestions, including 'Assess client's overall suicide risk weekly', 'Assist client in admitting their may be some work that needs to be done on their thinking patterns.', 'Assist client in completing detailed safety plan/stabilization plan which includes reducing access to lethal means and engagement of social supports', 'Assist client in identifying and processing troubling situations in their life', and 'Assist client in identifying negative or inaccurate thinking'. The main content area shows a form for creating or editing an objective. The 'Name' field contains 'Assess client's overall suicide risk weekly'. Below the name are fields for 'Start Date' and 'End Date', each with a calendar icon. A 'Description' field is also present. Underneath is a 'Milestones' section with '+ ADD MILESTONE' and 'REORDER' buttons, and a 'Show Inactive' toggle. A table lists three milestones:

Name *	Start Date	End Date	
Client expressed low risk and high management of suicidality			
Client reports using safety plan			
Client participated in CAMS assessment of risk			



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

TREATMENT PLAN TYPES	INTERVENTIONS	ASSESSMENTS	TREATMENT METHODS	OBJECTIVES	<b>MILESTONES</b>	PROBLEMS	STAGES OF CHANGE
<b>+ NEW MILESTONE</b>							
<b>Filter By Name</b>							
1 Able to identify physical reactions to trauma.							
10 Caregiver can talk about how their past experiences impact their current parenting							
100 Youth will identify benefits of post-traumatic growth.							
		<b>Name *</b> 10 Caregiver can talk about how their past experiences impact their current parenting					
		<b>Start Date</b> 08/01/2022  <b>End Date</b> 					

Create as many Milestones as you need.

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

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## Problems

TREATMENT PLAN TYPES INTERVENTIONS ASSESSMENTS TREATMENT METHODS OBJECTIVES MILESTONES PROBLEMS STAGES OF CHANGE

[NEW PROBLEM](#)

Filter By Name

- 21 Trauma
- 22 Wraparound
- 23 Service Coordination
- 24 Suicidality or Risk Factors
- 3 Anxiety
- 4 Attachment
- 5 Criminogenic Thinking
- 6 Depression**
- 7 Emotional Regulation
- 8 Employment & Education
- 9 Excessive Mood Swings

**Name \***  
6 Depression

**Start Date**  
07/15/2022 **End Date**

**Treatment Methods**

(IMR) Illness Management and Recovery X (RSS) Peer Support X (REBT) Rational Emotive Behavior Therapy X  
(SFBT) Solution-Focused Brief Therapy X (PCIT) Parent-Child Interaction Therapy X (CBT) Cognitive Behavioral Therapy X  
(CCPT) Child-Centered Play Therapy X Team Solutions for Wellness X (CPRT) Child Parent Relationship Therapy X  
(BSFT) Brief Strategic Family Therapy X (BISS) Behavioral Intervention Services and Supports X T.E.A.C.H (Child & Adolescent) X  
(EMDR) Eye Movement Desensitization and Reprocessing X (MI) Motivational Interviewing X

**Assessments**

Client Rated Function - Depression X PHQ-9 Depression Score X

**Billable ICD-10 Diagnosis**

All diagnoses are billable

[+ ADD DIAGNOSIS](#)

F05	Delirium due to known physiological condition	
F06.0	Psychotic disorder with hallucinations due to known physiological condition	
F06.1	Catatonic disorder due to known physiological condition	
F06.2	Psychotic disorder with delusions due to known physiological condition	

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

# Treatment Method 1

