NextStep Solutions
Moving Behavioral Health Forward

Treatment Plan Builder QRG

Treatment Plans are the long-term plans used to manage a client's care and track their progress. The Individualized Treatment Plan (ITP) Builder leads you through flows used to document Goals, Outcomes, and Objectives related to the plan. Some parts of the plan can be configured for your Agency's needs. A client must be admitted to a Program in order to be able to build a Treatment Plan.

Step 1: Start Building a Treatment Plan

1. Navigate to the ITP Builder: **Main Menu > Treatment Planning Menu > ITP Builder**.
2. Search for and select a client if not already displayed.
3. Click the **Treatment Plan Wizard** button.
4. Complete the following fields:
   - **Start Date**: The date the plan will be used.

     Note: Client Chart/Progress Notes cannot be written until the Treatment Plan start date.
   - **Review Date**: The exact date or length of time when the plan should be reviewed.
   - **Treatment Plan Supervisor**: The person overseeing the Treatment Plan. By default, the Primary Clinician from the Face Sheet is displayed. The Treatment Plan is displayed on this person's Reminders List.
5. In the Diagnoses (DSM-V) section:
   a. Type into the text box and click the **Search** button to select a diagnosis from the list or click **List All** to list all diagnoses and select from the list.
   b. Review and edit the **Effective Diagnosis** date as necessary.
   c. Click the **Diagnosis Type** drop-down and select from the list.
   d. Select a **Diagnosis Specifier** from the list.
   e. Click the **Add Diagnosis** button.
6. Fill in any additional fields that are displayed that may be required by your Agency (such as Strengths, Overall Instructions, etc).
7. Click the **Next** button to go to Step 2 of the ITP Wizard. See Step 2a: Outcomes, Goals, and Problems below.

Back to Top

Step 2a: Outcomes, Goals, and Problems

The ITP WIZARD - STEP 2 page contains a grid of Outcomes, Goals, and Problems. The Outcomes and Goals displayed are associated with the Program the client is admitted to. Problems identified during the assessment are imported here. From this page, you can add additional Problems, discontinue or defer a Problem, and tie Goals to Problems.

Add a New Problem

1. Hover over the **Add New Problem** column header, and click it when it turns green.
2. Enter the **Problem** in the space provided.
3. Click the **Save Problem** button. A column for the Problem is added to the grid and is displayed in orange.

Discontinue a Problem

1. Hover over a **Problem** column, and click it when it turns green.
2. Click the **Discontinue Problem** button.
3. Review the confirmation message and click **Yes** to confirm you want to discontinue the Problem. The Problem is removed.

Defer a Problem

1. Hover over a **Problem** column, and click it when it turns green.
2. Select the **Defer** radio button.
3. Enter in a **Defer Reason**.
4. Click the **Save Problem** button.
5. Review the confirmation message and click **Yes** to confirm you want to defer the Problem. The checkboxes in the Problem column are removed and DEFERRED is displayed under the Problem.

Refer a Problem

1. Hover over a **Problem** column, and click it when it turns green.
2. Select the **Refer** radio button.
3. Complete the **Referral For** and **Referral To** fields.
4. Click the **Save Problem** button.
5. Review the confirmation message and click **Yes** to confirm you want to refer the Problem. The checkboxes in the Problem column are removed and REFERRED is displayed under the Problem.

### Select Goals for the Client's Problem(s)

1. Select the relevant Goal checkbox(es) beneath a Problem that will help alleviate or resolve the Problem.

2. Click the **Next** button to personalize the Goals for the client. See Step 2b: Personalize Goals below.

Back to Top

Step 2b: Personalize Goals

The ITP WIZARD - STEP 2 PERSONALIZE GOALS page is used to capture details for each personalized Goal in the client's own words. Refer to the diagram below to see how Goals and Objectives relate to the desired Outcome:
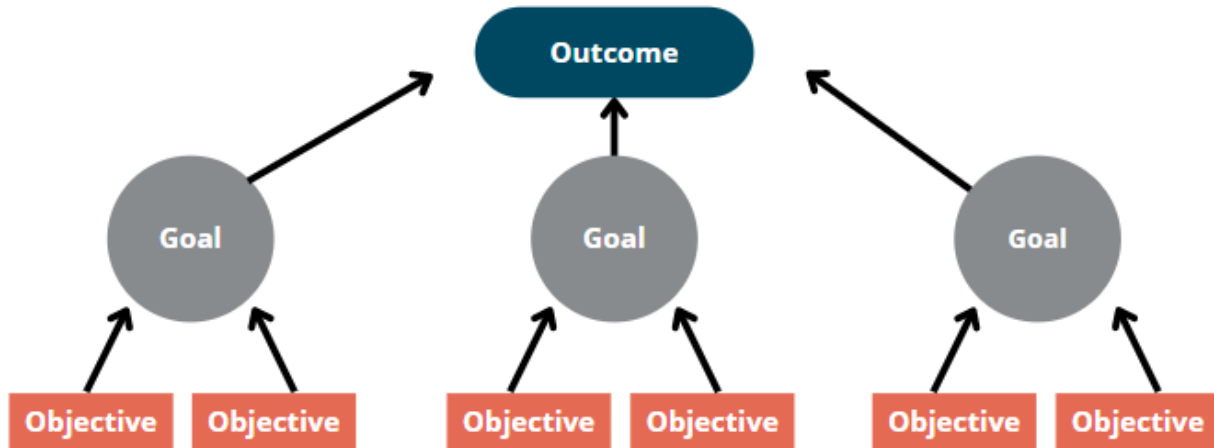
1. For each Outcome/Goal, review the Start and End Dates and change them as necessary. These dates default to the Treatment Plan Start and End Dates.
   - **Start Date**: When the staff should begin working toward meeting the Goal.
   - **End Date**: When the Goal is expected to be met or reviewed.
2. Complete the **Details of Personalized Goal** text box. These details are displayed for staff when they are charting on this Goal.
   - Describe in detail why this Goal has been identified and how it relates to the Problem.
   - Provide history and current issues, using quotation marks when quoting the client.
3. In the **Add/Remove Objections** section, select the **pertinent checkbox(es)** for the Objectives to add to the plan or select the **Add All Objectives** checkbox to add all Objectives.
4. *(Optional)* In the **Details of Personalized Objective** text box, add additional information about the Objective.
5. Fill in any additional fields that are displayed that may be required by your Agency.
6. Click the **Next** button to proceed to Step 3 of the ITP Wizard. See Step 3: Select Plan Interventions below.

Back to Top

Step 3: Select Plan Interventions

The ITP WIZARD - STEP 3 page displays each Goal and Objective, and checkboxes to select Intervention options for each. Agencies configure the available Interventions that can be tied to specific Goals and Objectives. Each Objective must have one or more Interventions selected. **Note:** Checkboxes are displayed if the Intervention is relevant to the Objective.

1. Select the **checkbox(es)** for the recommended Intervention(s) for each Objective.
2. Click the **Next** button to proceed to Step 4 of the ITP Wizard. See Step 4: Add Details for Interventions below.

Back to Top

Step 4: Add Details for Interventions

The ITP WIZARD - STEP 4 page displays Interventions along with the set of Objectives grouped by Goals. Here you will provide staff instructions to personalize each of the selected Interventions. Interventions are displayed in *italics*, Goals are displayed in **bold blue font**, and Objectives are displayed in **bold black font**.

1. Enter details into the **Staff Instructions** text box and complete any other fields your Agency requires.
2. Click the **Next** button to proceed to Step 5 of the ITP Wizard. See Step 5: Review, Finalize and Sign the Plan below.

Back to Top

Step 5: Review, Finalize and Sign the Plan

The ITP WIZARD - STEP 5 page provides a summary and verification of all completed treatment plan documentation in the software.

1. Review the Verification Results:
   - **Green Check Mark** ✅ : Displays if the automatic check to verify that your plan meets the design requirements has passed.

- **Red Cross-Out** 🚫 : Displays if an issue was found. Details about the issue(s) are displayed with a link to the Step in the ITP Builder that contains the issue.
  Note: You cannot finish the ITP until this is resolved.

- **Yellow Question Mark** ❓ : Displays if a warning was found. Details about the warning are displayed with a link to the Step in the ITP Builder that contains the warning.

2. *(Optional)* Click the **Assign To** button to manually route the treatment plan to another user.
   a. In the **Assign PCP To…** section, select one or multiple users to route the Treatment Plan to for it to be reviewed and signed.
   b. *(Optional)* In the **Due Date** field, add a due date for when the treatment plan needs to be signed by the user(s).
   c. *(Optional)* In the **Comment** field, add a comment for the user(s).
   d. Click the **Assign** button. The user(s) will see the treatment plan displayed on their Reminders List in the Assigned Treatment Plans section.

3. *(Optional)* If enabled, and the client verbally consented to treatment, select the **This client has verbally consented to treatment** checkbox.

4. Click the **E-Signtr/Finish** button.

5. On the E-Signature page, enter your **password** to sign or click the **Use E-Signatures** button.

6. Click the **Submit** button.

[Back to Top](#)

Other Actions

Once you've completed building the Treatment Plan, you can perform additional actions when accessing the ITP via the ITP Builder.
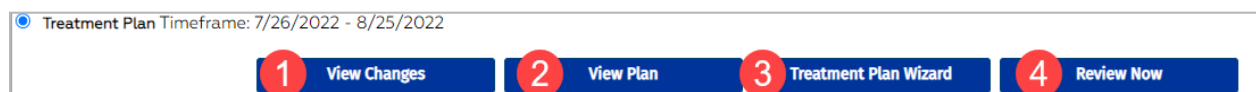
1. Navigate to the ITP Builder: **Main Menu > Treatment Planning Menu > ITP Builder**.
2. Search for and select a client if not already displayed.
3. Click one of the following buttons:
   - **(1) View Changes**: To view a change log that provides changes made, the user who made the change, and the date and time the change was made.
   - **(2) View Plan**: To view the ITP in a printable format as well as the option to add signatures.
   - **(3) Treatment Plan Wizard:** To open the ITP Builder and make changes to the Treatment Plan as needed.

- **(4) Review Now**: Review the instructions on the first page and to evaluate Goals and use the Treatment Plan, click the **Evaluate** button.

  Note: If this is an early evaluation, you will need to confirm that you understand that proceeding with the early evaluation will change the end date of the current plan.

[Back to Top](#)