

### Adding A New EA Treatment Plan

Select Treatment Plan from the Menu Pick on the Left

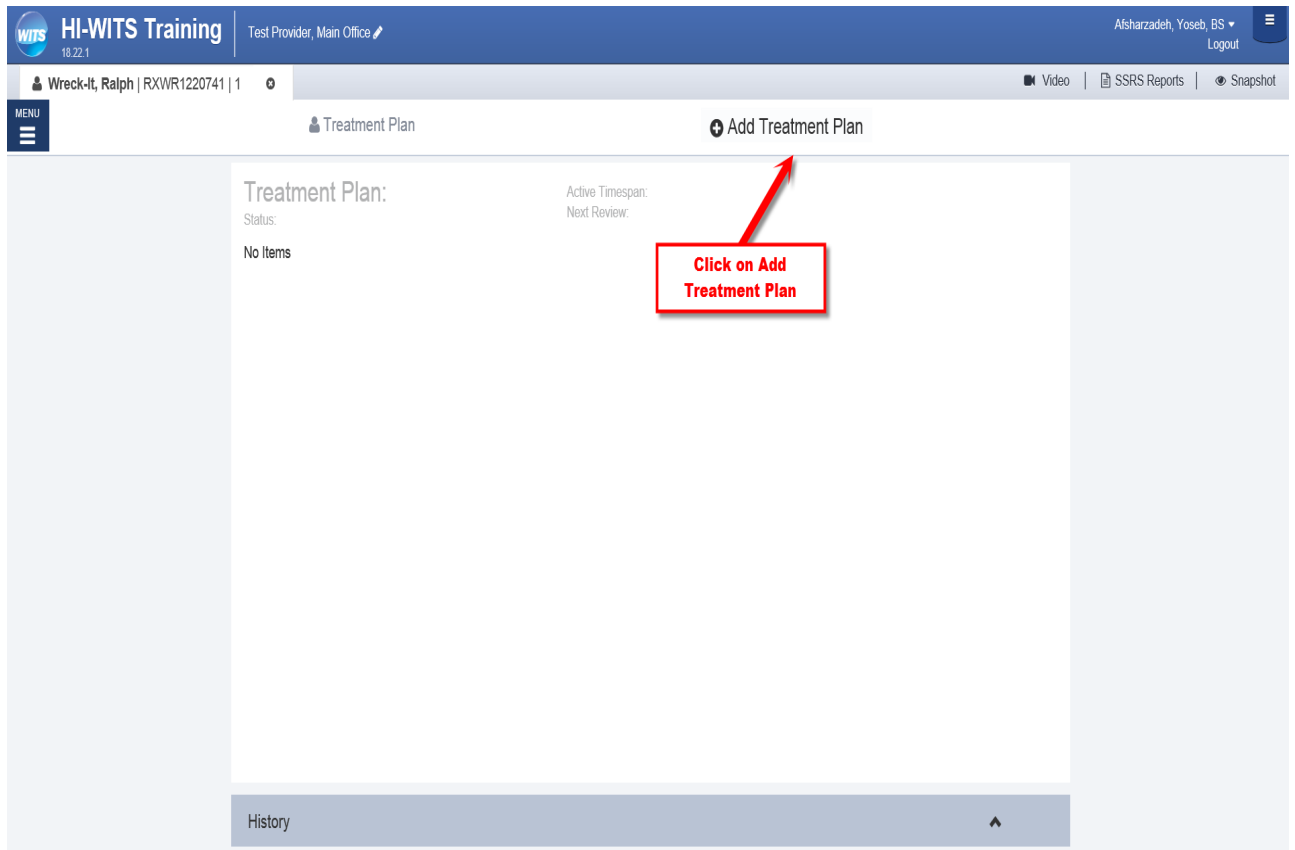
HI-WITS Training  
18.22.1

Wreck-It, Ralph | RXWR1220741

- Home Page
- ▶ Agency
- ▶ Group List
- Clinical Dashboard
- ▼ Client List
  - ▶ Client Profile
    - Linked Consents
    - Payor Group Enrollment
    - Non-Episode Contact
  - ▼ Activity List
    - Intake
    - ▶ Drug Testing
    - Wait List
    - Tx Team
    - ▶ Screening
    - ▶ Assessments
    - ▶ Admission
    - ▶ ASAM
    - Program Enroll
    - Diagnosis List
    - ▶ Encounters
    - ▶ Notes
    - Treatment Plan
    - ▶ Treatment
    - ▶ Outcomes

**Click on Treatment Plan**

*Note: TX Plan Menu Pick will no longer be available*



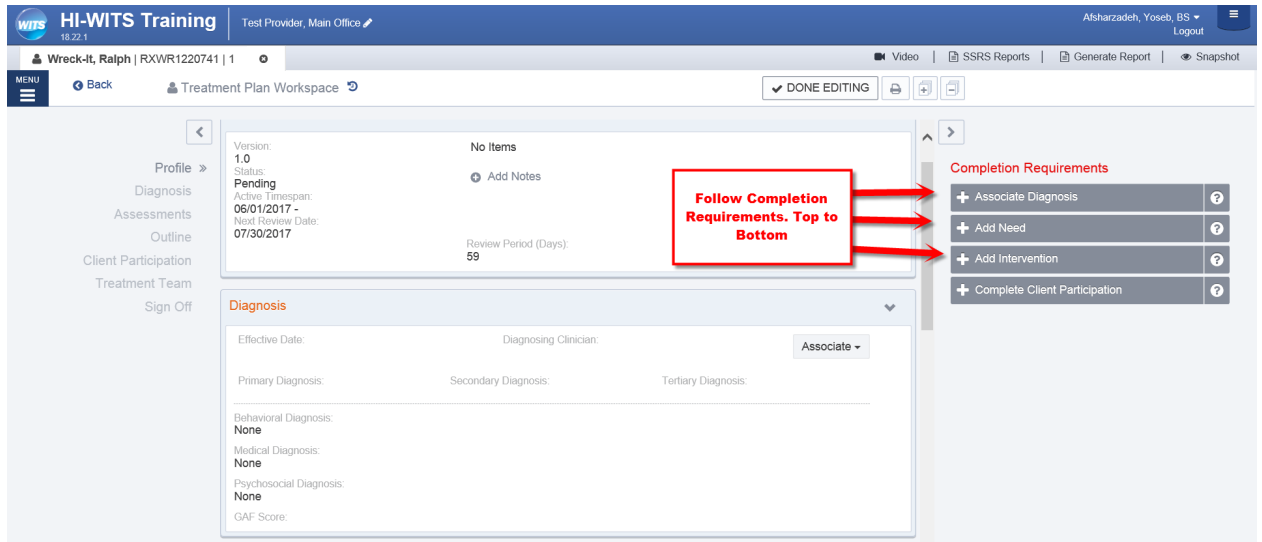
1. Click on the Add Treatment Plan button



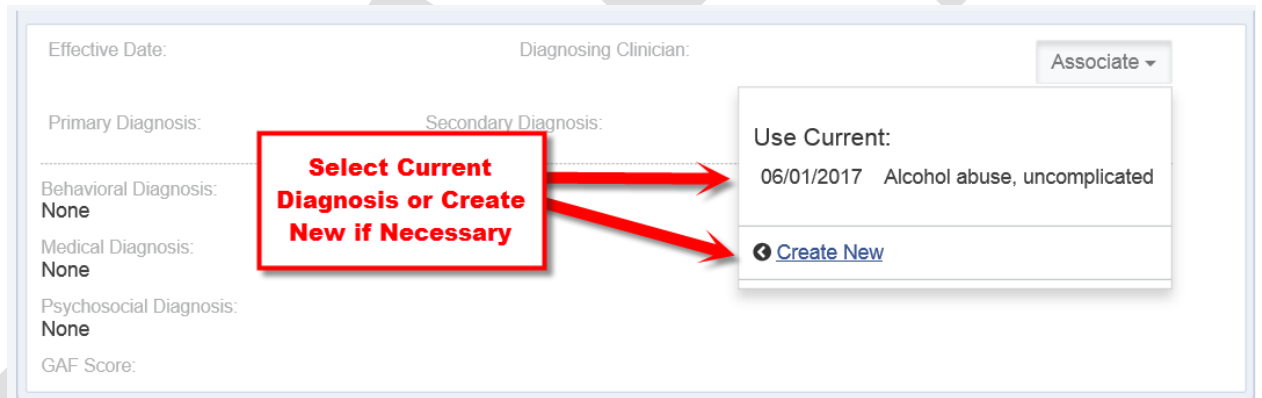
The screenshot shows a dialog box titled "Add Treatment Plan" with a close button (X) in the top right corner. The form contains the following fields and options:

- Active Timespan:** Two date pickers with a minus sign between them. A red box labeled "Beginning Date" has an arrow pointing to the first date picker.
- Has end date**
- Review Period (Days):** A text input field. A red box labeled "Set # of Days" has an arrow pointing to this field.
- Next Review Date:** A date picker. A red box labeled "Review Date" has an arrow pointing to this field.
- Copy values from Active Plan if available.** A red box labeled "Select if Client has prior Current Active Treatment Plan" has an arrow pointing to this checkbox.
- Buttons: "Save" (highlighted in blue) and "Cancel".

2. Add Active Timespan dates, Review Period and Next Review Date



3. Follow Completion Requirements from Top to Bottom



4. Select Current Diagnosis or Create New Diagnosis if necessary.



5. Add Need formerly known as Problem Statement in Prime Tx Plan

**Add Need** ✕

Need Type:  
Category:

Select ▲

- ADAD - Social
- ASAM 1 - Acute Intoxication and/or Withdrawal potential
- ASAM 2 - Biomedical condition and complications
- ASAM 3 - Emotional, Behavioral, or cognitive conditions and complications
- ASAM 4 - Readiness to change
- ASAM 5 - Relapse, continued Use or continued problem potential
- ASAM 6 - Recovery/Living environment
- ASI - Alcohol

Select correct  
Area of Focus for  
Need

6. Choose the correct “Area of Focus” for selected Need

7. Select Correct Need Type Category. Add specific client "Need" and click Save

**Add Need** [X]

Need Type:  
Category:  
ASAM 5 - Relapse, continued Use or continued pro... [X]

Type:  
Other [X]

Client does not know how to identify Triggers that contribute to Relapse

Deferred:  
Is Deferred: [v]

Is Referred: [v]

Save Cancel

**Select "Other" on Type drop-down  
Add specific need**

**If Deferred**

**If Referred**

**Click "Save"**

*Note: If Deferred or Referred select "Yes" then choose Date*

8. Select Add specific Goal from Completion Requirements list.

**Completion Requirements**

- + Add Goal for Client does not know how to identify Triggers that contribute to Relapse [?]
- + Add Intervention [?]
- + Complete Client Participation [?]

**Click on Add specific "Goal"**

The screenshot shows a form titled "Add Goal" with a close button (X) in the top right corner. The form contains the following fields:

- Name:** A text input field containing "Client to identify Triggers that contribute to Relapse". A red callout box labeled "Add Specific Goal to address Need" has an arrow pointing to this field.
- Projected:** A date input field containing "07/30/2017" and a calendar icon. A red callout box labeled "Add Date" has an arrow pointing to this field.
- Is Deferred:** A dropdown menu with a downward arrow icon.
- Buttons:** "Save" and "Cancel" buttons. A red callout box labeled "Click Save" has an arrow pointing to the "Save" button.

9. Add specific "Goal" to address the identified "Need" when finished click "Save"

The screenshot shows a section titled "Completion Requirements" with a list of three items:

- + Add Objective for Client to identify Triggers that contribute to Relapse
- + Add Intervention
- + Complete Client Participation

Each item has a question mark icon in a circle to its right. A red callout box labeled "Add Objective to attain Goal" has an arrow pointing to the question mark icon of the first item.

10. Click "Add Objective" from Completion Requirements list

**Add Objective** [X]

Name:  
Client will attend all Group Counseling classes and Participate

Projected:  
p7/30/2017 [Calendar Icon]

Is Deferred:

Save Cancel

**Add Specific Objective** (points to Name field)

**Add Projected completion date or next date of Review** (points to Projected date field)

**Click "Save"** (points to Save button)

11. Add Specific Objective to obtain “Goal” set Projected Completion date, click “Save”

**Completion Requirements**

- + Add Intervention [?]
- + Associate intervention for Client will attend all Group Counseling classes and Participate [?]
- + Complete Client Participation [?]

**Add Intervention** (points to the first item)

12. Click Add Intervention from Completion Requirement list



### Add Intervention ✕

**Name:**  
Counselor will follow up on progress

**Responsible Party:**  
**Type:**  
Staff Member ✕ ▾

**Staff Member:**  
B, Staff, CSAC,MSW-I,CSAC ✕ ▾

**Program Enrollment:**  
Intensive Outpatient ✕ ▾

**Service Location:**

<input type="text" value="off"/>	<input type="text"/>
Office	Office ✕

**Deferred:**  
**Is Deferred:**  
No ▾

**Service:**  
Group Counseling - Skill Building Group (H2014) ✕ ▾

**Add Intervention  
Finish Required fields**

13. Add Intervention and fill in Required fields after making your selection click Finish

### Associate Intervention ✕

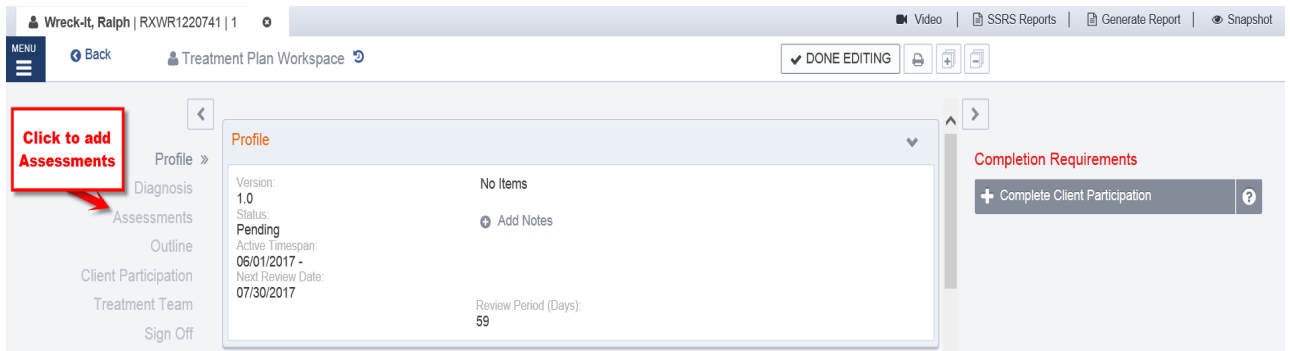
Interventions:

**Counselor will follow up on progress**

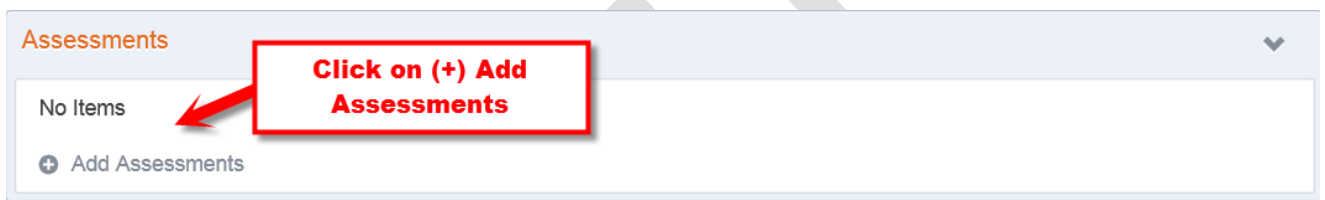
**Select added  
Intervention**

14. Select the correct Intervention then click “Save”

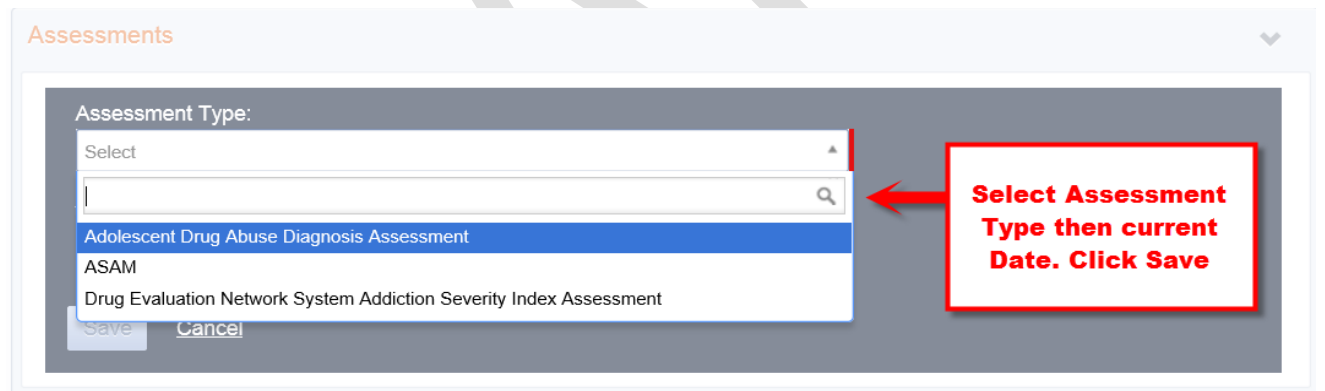
15. Click on Assessments on left Menu pick to Add Assessments (ASAM, ADAD or ASI)



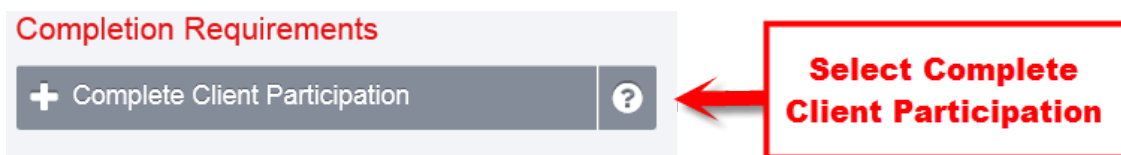
16. Click Add Assessment



17. Choose desired Assessment type, select date of Assessment then click "Save"



18. Select Complete Client Participation from Completion Requirements list



Did the client participate in the planning process?:  
Yes

Did the client sign the plan?:  
Yes

Was the client offered a copy of the plan?:  
Yes

Save Cancel

**Click Save**

**Answer ALL Client Participation Questions**

19. Answer ALL Client Participation questions then click “Save” once finished.

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Video | Generate Report | Snapshot

Back Treatment Plan Workspace

DONE EDITING

Client Participation

Did the client participate in the planning process?  
Yes  
Did the client sign the plan?  
Yes  
Was the client offered a copy of the plan?  
Yes

Click on Sign Off

Go To Treatment Team

Name:	Primary Care:	Role/Relation:	Active:
B, Staff, CSAC,MSW-I,CSAC	Yes	Counselor	06/01/2017 -
Jackson, Ron, MD	No	Attending Physician	07/06/2017 -

Sign Off

No Items

Click on Sign and Finalize to "Activate" Treatment Plan

Sign and Finalize Sign For

**Note: User must have Treatment Plan (Full Access) and SignOffAndFinalize TreatmentPlan Roles added to Profile**

20. Click Sign and Finalize in order to “Activate” the Treatment Plan