

Create Treatment Plan in Tebra Clinical

https://helpme.kareo.com/Clinical/Patient_Management/Treatment_Plans/Create_Treatment_Plan

Create Treatment Plan

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Kareo's *Treatment Plans* allow providers or clinical assistants to build comprehensive treatment plans for their patients. This is a powerful tool for engaging patients in their treatment through detailed plans tailored to their individual needs. *Treatment Plans* help guide patients towards reaching their goals while providers can monitor their progress and **make treatment adjustments** when necessary.

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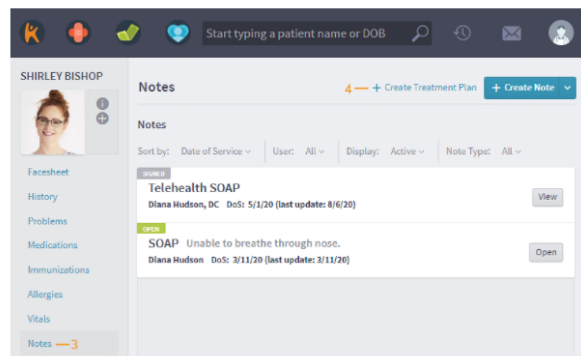
In addition to creating a detailed plan tailored to the patient's needs, provider can capture the patient signature via the *Patient Portal*. This gives the patient the ability to **review and sign their tailored treatment plan** at their own pace.

In order for the patient to sign the treatment plan via *Patient Portal*:

- **Invite the patient** to the *Patient Portal*
- The patient must activate the *Patient Portal* after receiving the email invitation

Access Notes

1. Enter the first 2-3 letters of the patient's name or date of birth (mm/dd/yyyy) in the top navigation bar search box.
2. Click to select the patient from the auto-populated results. The patient's record opens to the *Face Sheet*.
3. Click **Notes**. The *Notes* page opens.
4. Click **+ Create Treatment Plan**. The *Treatment Plan* page opens.



Create Treatment Plan

The treatment plan will automatically save as a draft after 10 minutes of inactivity.

1. Plan details:

Note: These fields can only be selected while the treatment plan is in *Draft*.

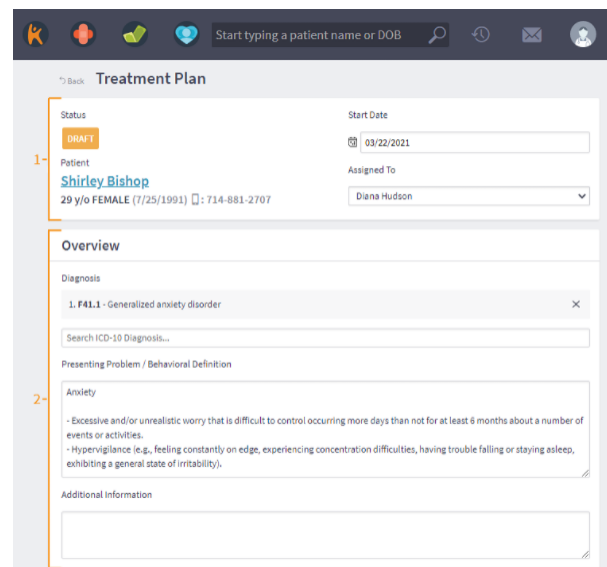
- a. The *Start Date* is defaulted to today's date. Select a new start date as desired.
- b. The *Assigned To* auto-populates the provider creating the treatment plan. Select a new provider as desired.

2. Overview:

- a. *Diagnosis*: Click to view and select from the patient's active problem list. Search for and select a different diagnosis, if desired.
- b. *Presenting Problem/Behavioral Definition*: Enter relevant information.
- c. *Additional Information*: Enter relevant information.

3. Goals: Add up to 10 goals, objectives, and interventions through a structured hierarchy. This allows providers to add multiple objectives to a goal and multiple interventions to an objective.

- a. Enter relevant information into *Goal 1*.
 - To add a *Target Date* for the goal, click to select a date from the calendar picker.
- b. Click **+Add Objective**. The *Objective 1* editor opens to add relevant information.
 - To add a *Target Date* for the objective, click to select a date from the calendar picker.



- To add additional objectives, click **+Add Objective**.

c. Click **+Add Intervention**. The *Intervention 1* editor opens to add relevant information.

- To add additional interventions, click **+Add Intervention**.

d. To add additional goals, click **+Add Goal**. Then, add objectives and interventions as desired.

Timeline:

- Target Completion Date:** Click to select a date from the calendar picker.
- Treatment Frequency:** Enter the frequency of the treatment (e.g., Every 2 weeks).

Signature: Capture providers and patient/guardian signatures to sign off on the developed treatment plan.

a. **Provider Signatures:** Providers electronically sign the form by typing their name in the designated field.

- To add additional provider signatures, click **+Provider Signatory**. The provider(s) electronically signs the form by typing their name in the designated field.

h. **Patient Signatures:** Choose the best method to document the patient's signature.


b. **Patient Signatures:** Choose the best method to document the patient's signature.

- Not required:** Click to select when a patient signature is not required.
- Electronic Signature:** Patients types their name in the designated field to electronically sign the form.
- Parent/Guardian:** Click to select when the designated field is for a parent/guardian signature.
- Capture via paper copy:** Click to select when the patient signature will be capture on a printed copy.
- Capture via Patient Portal:** Click to select when the patient signature will be captured in the *Patient Portal*. The patient will receive an **email notification** requesting the signature.

Note: Only the patient signature can be captured in the *Patient Portal*. Capture additional signatories via paper copy or in-office.

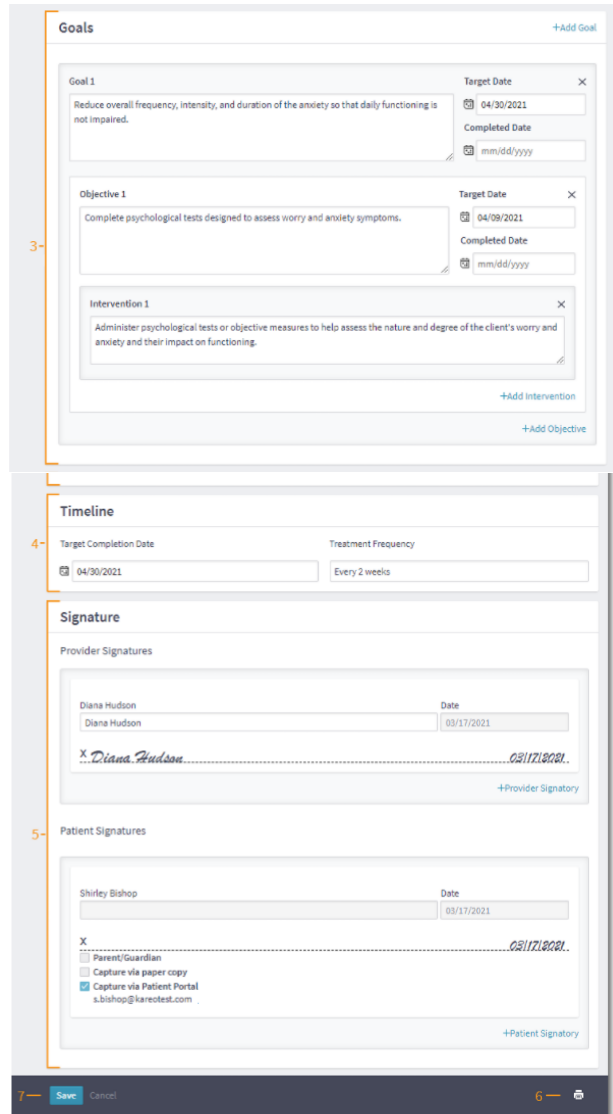
- If an orange or red icon displays, hover over the icon for details about the patient's portal status. Review **Patient Portal Status Indicators** for additional information.
- +Patient Signatory:** Click to add additional patient signatures.

6. Click the **print** icon to generate a PDF of the treatment plan. Save or print the PDF using the browser's functions.

 Print the PDF to capture signature(s) via paper copy. Then, scan and upload the signed treatment plans to the **patient's document**.

7. Click **Save & Exit** when finished. The treatment plan is now available on the **Notes page** to **monitor the patient's progress**.

- If "Capture via Patient Portal" was selected, advise the patient to log into the *Patient Portal* to sign their treatment plan. Review **Patient Experience: Sign Treatment Plan in Patient Portal** for the patient's workflow.







The screenshot displays a multi-step form for creating a treatment plan. It is divided into three main sections: Goals, Timeline, and Signature.

- Goals Section (Step 3):** Contains three sub-sections:
 - Goal 1:** "Reduce overall frequency, intensity, and duration of the anxiety so that daily functioning is not impaired." Target Date: 04/30/2021. Completed Date: mm/dd/yyyy.
 - Objective 1:** "Complete psychological tests designed to assess worry and anxiety symptoms." Target Date: 04/09/2021. Completed Date: mm/dd/yyyy.
 - Intervention 1:** "Administer psychological tests or objective measures to help assess the nature and degree of the client's worry and anxiety and their impact on functioning."
- Timeline Section (Step 4):**
 - Target Completion Date:** 04/30/2021
 - Treatment Frequency:** Every 2 weeks
- Signature Section (Step 5):**
 - Provider Signatures:** Diana Hudson, Date: 03/17/2021. Includes a handwritten signature and a QR code.
 - Patient Signatures:** Shirley Bishop, Date: 03/17/2021. Includes a handwritten signature and a QR code.
 - Signature Method Selection:**
 - Parent/Guardian
 - Capture via paper copy
 - Capture via Patient Portal (with email s.bishop@karetest.com)

At the bottom, there are "Save" and "Cancel" buttons, and a "7" icon in the bottom left corner.

The status of the treatment plan changes to *In Progress* when the provider and patient signature is documented. Otherwise, the status stays as *Draft*.

Patient Portal Status Indicator

Status	Displays When	Next Step
<p>Patient Portal not activated. Invite will be sent to email address on file.</p> <p>Activate</p> 	<p>The patient has not been invited to or activated a <i>Patient Portal</i> account. Send an invite to the email in the patient's chart.</p>	<p>Send an invite to the email in the patient's chart.</p> <ol style="list-style-type: none"> 1. From the pop-up message, click Activate. The <i>Activate Patient Portal</i> pop-up window opens. 2. Verify the email address, and click Activate. "Capture via Patient Portal" is selected and an invitation to activate the <i>Patient Portal</i> is emailed to the patient. 3. After activating the portal, the patient can now sign the treatment plan in the <i>Patient Portal</i>.
<p>Patient Portal not activated. Please add an email address to activate.</p> <p>Add email</p> 	<p>The patient does not have a saved email address in the patient's chart.</p>	<p>Add an email address to send a <i>Patient Portal</i> invite.</p> <ol style="list-style-type: none"> 1. From the pop-up message, click Add Email. The <i>Activate Patient Portal</i> pop-up window opens. 2. Enter the patient's <i>Email Address</i> and click Activate. "Capture via Patient Portal" is selected and an invitation to activate the <i>Patient Portal</i> is emailed to the patient. <i>Note:</i> The email address enter is saved to the patient's chart. 3. After activating the portal, the patient can now sign the treatment plan in the <i>Patient Portal</i>.
<p>The patient has an active patient portal but no personal email address on file. Please enter an email address to update the patient record and notify patient of treatment plan signature.</p> <p>Add email</p> 	<p>The patient has activated their <i>Patient Portal</i> account, but does not have a saved email address in the patient's chart.</p>	<p>Add an email address to the patient's chart.</p> <ol style="list-style-type: none"> 1. From the pop-up message, click Add Email. The <i>Add Patient Email</i> pop-up window opens. 2. Enter the patient's <i>Email Address</i> and click Add Email. "Capture via Patient Portal" is selected. <i>Note:</i> The email address enter is saved to the patient's chart. 3. The patient can now sign the treatment plan in the <i>Patient Portal</i>.
<p>Patient has opted out of Patient Portal</p> 	<p>The patient has opted out of the <i>Patient Portal</i>.</p>	<p>Capture the patient signature in-office or via paper.</p>