WTPD71
How to Develop Treatment Plans that Make Sense to Clients: Improving Documentation and Clinical Use of the Treatment Plan and Progress Notes

Workshop Description
The person who should know most about their treatment plan is the client. It is their life, and they are the ones who should be working the hardest on their treatment plan. However, in real life in many treatment settings, the client is not even aware of what their treatment plan is; or is basically “doing time” rather than “doing treatment.”

Clinicians struggle with how to focus and target treatment, especially in fixed length-of-stay programs, how to change old ways of documentation to reflect individualized treatment, and how to effectively engage the patient into a cooperative and accountable treatment plan.

This workshop will improve participants' knowledge in providing focused, targeted, individualized addiction treatment. It will provide the opportunity to practice assessment and priority identification, and translate that into a workable, accountable treatment plan that makes sense to the client. Reference will be made to the assessment dimensions of the ASAM criteria to help organize assessment and treatment data.

Learning Objectives
1. Review principles of individualized treatment planning and how to engage clients in a treatment contract.
2. Apply ways to individualize problems, goals, strategies and progress notes that have client "buy-in" and collaboration.
3. Demonstrate how to communicate the treatment plan to care managers and others, most importantly, the patient.

Workshop Agenda

8:30 AM  Registration
9:00 AM    A. Principles of Focused, Targeted Treatment Planning

   a. Why treatment plans and why use them?
   b. Common documentation issues for improvement
   c. NIDA principles of drug treatment

   B. How to Organize Assessment Data

   a. Multidimensional assessment – ASAM dimensions
   b. Moving from assessment to treatment plans

10:30 AM  Break

For more information about these live trainings, contact Bill Calhoun: bcalhoun@changecompanies.net • 888-889-8866
## Treatment Planning & Documentation Workshops

with Dr. David Mee-Lee

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:45 AM</td>
<td><strong>C. How to Target and Focus Treatment Priorities</strong></td>
</tr>
<tr>
<td></td>
<td>a. Using the multidimensional assessment to identify priorities</td>
</tr>
<tr>
<td></td>
<td>b. Treatment planning and documentation skills – problem identification; measurable goals; progress notes</td>
</tr>
<tr>
<td>12:00 PM</td>
<td>Lunch</td>
</tr>
<tr>
<td>1:00 PM</td>
<td><strong>D. Skill-building in Developing and Communicating the Treatment Plan</strong></td>
</tr>
<tr>
<td></td>
<td>a. The treatment contract and implications for measurable objectives</td>
</tr>
<tr>
<td></td>
<td>b. Person-centered, accountable treatment plans and progress notes</td>
</tr>
<tr>
<td></td>
<td>c. Presenting the clinical data to colleagues and care managers</td>
</tr>
<tr>
<td>2:30 PM</td>
<td>Break</td>
</tr>
<tr>
<td>2:45 PM</td>
<td><strong>E. Making a Treatment Plan a “Living” Document</strong></td>
</tr>
<tr>
<td></td>
<td>a. Dealing with meaningless paperwork</td>
</tr>
<tr>
<td></td>
<td>b. Implications for documentation forms and client records</td>
</tr>
<tr>
<td></td>
<td>c. Changes necessary to “re-tool” treatment planning and services</td>
</tr>
<tr>
<td>4:00 PM</td>
<td>Adjourn</td>
</tr>
</tbody>
</table>

For more information about these live trainings, contact Bill Calhoun:

bcalhoun@changecompanies.net • 888-889-8866
WTPD54
Focused, Targeted, Cost-conscious, Individualized Addiction Treatment

Workshop Description
The behavioral health care field continues to change rapidly. Many clinicians struggle with how to change old ways of assessment, placement and documentation to reflect the kind of flexible, individualized treatment needed to survive in a managed care environment. They also find it difficult to effectively communicate patient information with managed care and utilization review.

The aim of this workshop is to broaden participants' knowledge about the changing healthcare environment, and help practitioners deliver cost-conscious, individualized addiction services. It will provide the opportunity to practice assessment processes, treatment planning and care management strategies to better meet the needs of clients. It will offer a framework that encourages providers to develop more specific, targeted assessment and treatment planning strategies and better communicate and cope with managed care.

Learning Objectives
1. Identify the clinical, financial and resource pressures that contribute to the current healthcare environment and their effect on clinicians and services involved.
2. Review the underlying principles of cost-conscious, individualized addiction treatment and the increasing need to focus on quality, outcomes and value in services.
3. Understand essential assessment data. Understand how to organize data in focused and targeted ways to improve individualization of problems and treatment plans, and determine proper placement decisions.
4. Identify ways to communicate the treatment plan to others, most importantly, to the patient. Learn ways to convey patient information to fellow clinicians, care managers and those involved in care and utilization management.

Workshop Agenda

<table>
<thead>
<tr>
<th>8:30 AM</th>
<th>Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 AM</td>
<td>A. The Current Environment – Cost versus Quality</td>
</tr>
<tr>
<td></td>
<td>a. Healthcare reform and managed care</td>
</tr>
<tr>
<td></td>
<td>b. Accountability and treatment outcomes</td>
</tr>
<tr>
<td></td>
<td>B. Underlying Principles of Individualized Behavioral Health Care</td>
</tr>
<tr>
<td></td>
<td>a. Unifying perspective on behavioral health disorders</td>
</tr>
<tr>
<td></td>
<td>b. Multidimensional assessment and level of</td>
</tr>
</tbody>
</table>

For more information about these live trainings, contact Bill Calhoun: bcalhoun@changecompanies.net • 888-889-8866
## C. How to Organize Assessment Data
- Immediate need assessment and ongoing assessment
- Common language for cross-systems communication

### 10:30 AM Break

### 10:45 AM

#### D. How to Target and Focus Treatment Priorities
- Moving from the multidimensional assessment to priorities
- Treatment planning and documentation skills – problem identification, individualized treatment plans

### 12:00 PM Lunch

### 1:00 PM

#### E. Skill-building in Engaging the Patient in the Treatment Plan
- Understanding the stages of change
- Assessing readiness to change
- The patient as “customer”
- Implications for changes in services

### 2:30 PM Break

### 2:45 PM

#### F. The “Real World”
- Improving communication between the treatment plan, outside reviewers and agencies
- Dealing with disputes over level of care; continuing service
- Changes necessary to “retool” treatment planning and systems

### 4:00 PM Adjourn
KTPD47
How to Develop Treatment Plans that Make Sense to Clients: Turning Paperwork into Peoplework

Presentation Overview
The person who should know most about their treatment plan is the client. It is their life; they are the ones who should be working the hardest on their treatment plan. However, in real life in many treatment settings, the client is not even aware of what their treatment plan is; or is basically "doing time" rather than "doing treatment."

Clinicians struggle with how to focus and target treatment, especially in fixed length-of-stay programs, how to change old ways of documentation to reflect individualized treatment, and how to effectively engage the patient into a cooperative and accountable treatment plan.

This presentation will improve participants' knowledge about developing an accountable treatment plan that makes sense to the client. Reference will be made to the assessment dimensions of the ASAM criteria to help organize assessment and treatment data.

Learning Objectives
1. Review principles of individualized treatment planning and how to incorporate paperwork and documentation into person-centered "people" work.
2. Identify how to organize assessment data to practice individualization of problems and treatment plans that make sense to the client and the family.
3. Discuss how to involve the individual in developing problems, goals, strategies and progress notes that have client "buy in" and participation.