Patient Goals

The main function of Patient Goals is to facilitate the participation of a patient in their plan of care.

Patient goal setting is a patient-driven activity through which the clinician provides a supportive role in assisting the patient in setting goals that are well defined and achievable. The Patient Goals component provides the clinician with a tool that can capture and document the patient's self-defined goals, and serve as a location where these goals can be monitored and followed up. Patient Goals enables documentation of the following:

- A goal set or not set at the visit
- A free-text field to indicate the patient's goals in their own words
- A goal categorization field for aggregation and reporting purposes
- Reason for goal (or motivation for goal)
- Goal start date
- Goal follow-up date
- Goal steps (when smaller steps are necessary to meet a larger goal)
- Ability to document short notes during goal follow up visits
- Ability to alter the status of the goal to reflect active goals (goals that have been created or are being maintained), as well as inactivation of goals (goals that have been met or stopped)

Patient Goal Information:

Accessing Patient Goals

Functionality

Functionality

Patient Goals Categories

Adding a Goal
Goal Status
Patient Goal Steps

Accessing Patient Goals

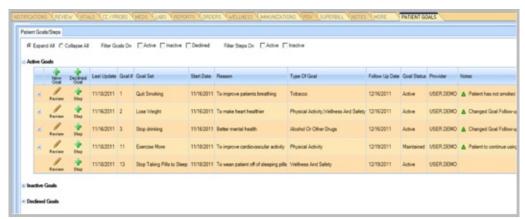
Note: Accessing the Patient Goals component may initially take longer than other EHR components.

- 1. Select a patient.
- 2. Select the PATIENT GOALS tab.



Patient Goals Tab

The main Patient Goals window displays, showing all goals currently active for the patient.



Patient Goals Window

Functionality

Note: Historical Notes cannot be edited at this time. The application may be modified to allow this in a future release.

In this book:

Expand All

Collapse All

Filter a Goal

Filter a Step

Sort by a Specific Column

Move a Column

Add/Change a Start Date or Follow-up Date

Expand All

At the Patient Goals tab, select the Expand All option button to expand the Active Goals. Expanding the goals displays all the steps associated with each goal.

Expand All Option Button

Expand each goal area individually by clicking the Expand button (\blacksquare) next to each goal type.

Collapse All

Select the Collapse All option button to collapse all of the steps for each goal so that only the goal itself displays.

© Collapse All

Collapse All Option Button

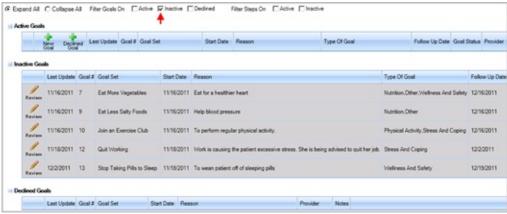
Filter a Goal

Select a Goal Filter to change the view on the Patient Goals tab.



- Active Displays all of the Active goals
- Inactive Displays only goals that are inactive
- Declined Displays only goals that are declined by the patient

Selecting a particular view causes all other goals to be hidden. This is helpful when there are large numbers of a certain type of goal.



Inactive Filtered Goals

Filter a Step

Steps can be filtered in the same way that goals are filtered.



- Active Displays all active steps
- Inactive Displays all steps that are Inactive (Met, Stopped, Maintained) Selecting the appropriate check box displays the steps under that goal.



Filtered Steps

Sort by a Specific Column

Use the sort feature to sort the list by a specific column. Each column, with the exception of the Notes column, has a small arrow at the top.



Column with Sort Feature

Note: The entire goal changes position in the list when you sort a column.

- 1. Identify the column by which the list should be sorted.
- 2. Click the arrow at the top of the column once to sort the list in ascending order by this column.
- a. Click a second time to sort the list in descending order by this column.
- b. Click a third time to return the list to its original sort order (the order before the arrow was clicked the first time).



Information Sorted

Move a Column

Columns can be moved horizontally to change their left-to-right display order. To move a column:

- 1. Click and hold the column heading.
- 2. Drag the column left or right to the desired position.
- 3. Release the mouse button.



Moving Columns

Add/Change a Start Date or Follow-up Date

The Start Date and the Follow-up Date fields function in the same manner. There are two ways to add a Start Date or Follow-up Date on a goal or step:



1. Type the date in the field.

Note: Today's date is the default for the Start Date field and it is automatically inserted into the field. This date can be changed.

2. Click the Calendar icon at the right of the field. The Calendar displays.



Calendar

- 3. Select the date to start the goal or step.
- 4. Click the Left arrow or the Right arrow in the header to move from month-to-month.



5. Click OK.

Patient Goals Categories

When creating a Patient Goal, the clinician may choose to assign one or more categories for the goal. This is used for reporting purposes (such as generating a list of patients who have set a tobacco-related goal). The available goal types are as follows:

Goal Types

In this book:

Goal Number

Goal Number

EHR assigns a number to each goal. When a goal is created, it is automatically given the next available number so each goal is unique.

Goal Actions

In this book:

Adding a Goal

Review an Active Goal

Add a New Note

View History of Notes on a Goal

Decline a Goal

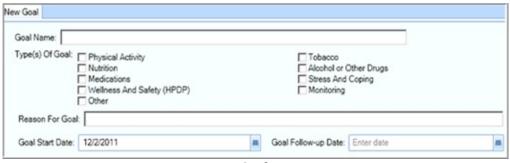
Inactive Goals

Adding a Goal

1. Click New Goal.



The New Goal pane displays.



New Goal Pane

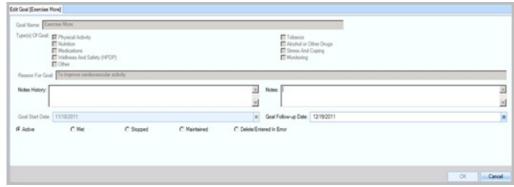
- 2. Type a name of up to 120 characters for the new goal in the Goal Name field. The goal name is the descriptor of the goal that is being set by the patient in their own words.
- 3. Select the Type of Goal.
- 4. Type a reason for the goal (up to 120 characters) in the Reason for Goal field.
- 5. Enter a date for the goal to start in the Goal Start Date field.
- 6. Click OK to create the goal.

Review an Active Goal

1. Select a goal and click Review.



The Edit Goal pane displays.



Edit Goal Pane

Note: The Goal Name, Type of Goal, and Reason for Goal fields are grayed out, as they cannot be edited.

- 2. Add any new notes pertaining to the patient's progress.
- 3. As necessary, change the date in the Follow-up Date field.
- 4. Click OK.

Add a New Note

Optional notes describing a patient's progress can be added to a goal and are displayed in the Notes field.



Notes Field

- 1. Select a goal and click Review. The Edit Goal pane displays.
- 2. Type a comment in the Notes field.
- 3. Optionally, change the date in the Follow-up Date field.
- 4. Click OK. The new note appears in the Notes field.

View History of Notes on a Goal

If there are multiple notes on a goal, only the last note added displays. Pause the mouse pointer over the Note History icon (and all notes for that goal display in chronological order.



Patient Goal Notes

The Notes History field within the goal shows all notes as well.

- 1. Select a goal and click Review. The Edit Goal pane displays.
- 2. View the Notes History field.
- 3. Click OK.

Decline a Goal

Patients have the right to decline setting a goal when discussing it with their health care provider. Record the declined goal in the Patient Goal component of the patient's record.

1. Click Declined Goal on the Active Goals menu.



Active Goals Menu

The New Declined Goal pane displays.



New Declined Goal Pane

2. Type the Goal Name.

Note: The Reason Goal Declined field opens with the default statement Not interested in setting a goal today. This text can be overwritten.

- 3. Optionally, highlight the automatic text in the Reason Goal Declined field and type a new description for why the goal is being declined.
- 4. Click OK. The goal is moved to the Declined Goals pane.

Inactive Goals

Once a goal has been stopped it becomes inactive. Inactive goals cannot be edited or deleted. They are saved as a record of the patient's treatment.

Goal Status

There are five goal statuses:

- Active
- Met
- Stopped
- Maintained
- Delete/Entered in Error

Active

The patient is still in the process of completing the steps for the goal.

Met a Goal – Becomes Inactive

A patient who has completed all of the steps within a Goal has met the goal.

- 1. Select a goal and click Review. The Edit Goal pane displays.
- 2. Select Met.
- 3. Click OK.

The goal moves to the Inactive Goals pane on the main Patient Goals window.

Maintained Goal

The patient discusses goals with the health care provider. When a patient has met a goal, but makes the decision to continue the goal, it is marked as Maintained. Additional notes may be added to the goal.

1. Select a goal and click Review. The Edit Goal pane displays.

- 2. Type any new notes pertaining to the patient's progress.
- 3. Optionally, change the date in the Follow-up Date field.
- 4. Select Maintained.
- 5. Click OK.

Stopped Goal – Becomes Inactive

- 1. Select a goal and click Review. The Edit Goal pane displays.
- 2. In the Notes field, type a reason for the goal being stopped. The goal cannot be saved with the new status unless a new note is provided.
- 3. Select Stopped.
- 4. Click OK.

The goal is moved to the Inactive Goals pane on the main Patient Goals window.

Delete/Entered in Error Goal

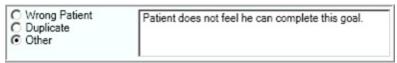
- 1. Select a goal and click Review. The Edit Goal pane displays.
- 2. Select Delete/Entered in Error.



Delete/Entered In Error Option Button

- 3. Optionally, add any new Notes pertaining to the patient.
- **4.** Optionally, change the date in the Follow-up Date field.
- 5. Select one of the following reasons for deleting the goal:
- Wrong Patient The goal was assigned to the wrong patient.
- Duplicate The goal is a duplicate to an existing goal for that patient.

• Other – There is another reason for the goal being deleted or entered in error. Type a reason of up to 120 characters in the text box.



Other Reason for Goal Deletion Field

6. Click OK.

Patient Goal Steps

Patient Goals include steps that are established to provide a progressive road map to help patients accomplish the goals set for them. Goals can have multiple steps.

In this book:

Step Numbers

Add a Step

Review a Step

Change a Step Position

Step Numbers

Steps are automatically assigned a number by the Patient Goal Component. When a new step is added, the step number defaults to the next available number.

Add a Step



Add a Step

1. Click the Plus Sign on the goal to add a step.



2. Enter the data into the step box.



Step Data

- The step name is free text.
- You can only associate one type with each step, but the types are the same as for the goal.
- The Step Start and Step Follow-up dates are similar to the dates of the goal. Steps must have a Follow-up date.
- 3. Click OK when finished.

Review a Step

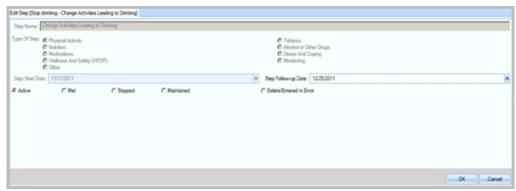
Selecting this option enables the Goal Status or the Follow-up Date on a step to be changed.

- 1. Click the expand button (ℍ) to display the steps for that goal.
- 2. Select a step and click Review.



Review Button

The Edit Step pane displays.



Edit Step Pane

- 3. Optionally, select a new status if the status has changed. There are five statuses:
- Active
- Met
- Stopped
- Maintained
- Delete/Entered in Error
- 4. Add a new Follow-up Date.

Change a Step Position

As with a goal, a step's display order can be changed if it makes more sense for one step to display before another.

Click the arrow at the top of the Step # column.



Step# Column

The steps change position.



Step# Column Reordered

Refer to **Sort Specific Column** for additional information.