



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Patient Goals

User Manual

Version 1.0
July 2012

Office of Information Technology (OIT)
Division of Information Resource Management
Albuquerque, New Mexico

Revision History

Date of Change	Location of Revision	Revision
02/2012		First published

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Preface

This manual provides the information required to understand and use the Patient Goals component within the Electronic Health Record (RPMS·EHR).

RPMS·EHR represents a novel approach to electronic health records. It is a highly customizable window into a patient's health record. Due to its flexibility, the RPMS·EHR can be tailored to meet the needs of a wide range of user roles: providers, nurses, pharmacists, clerks, and so on.

Since the exact layout and configuration of RPMS·EHR varies among user roles and healthcare facilities, this component also varies for each given user.

1.0 Introduction

The Patient Goals Component is part of a component framework. This means that the application the user sees is actually composed of functional components most suited to the user's role in patient care.

The main function of Patient Goals is to facilitate the participation of a patient in their plan of care. People are most likely to make the greatest gains when therapy and its related goals focus on activities that are meaningful to the patient, and are believed to make a difference in their lives.

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)

The documentation of patient's goals is an essential step towards engaging the patient in their care and providing self-management support.

2.0 Getting Started

To use the Patient Goals component, a Clinical Application Coordinator (CAC) must first add the component to the site's RPMS-EHR template or templates as applicable using Design Mode. Refer to the *CAC Setup Guide* for additional information.

Note: Due to the functionality of the Patient Goals component, we suggest that the component be placed on its own tab in the RPMS-EHR.

Once you have logged on to RPMS-EHR, the main window appears (ask your Clinical Applications Coordinator where the Patient Goals component was placed). The Patient Goals component is available to anyone who has access to the "Patient Goals" tab.

3.0 Access Patient Goals

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

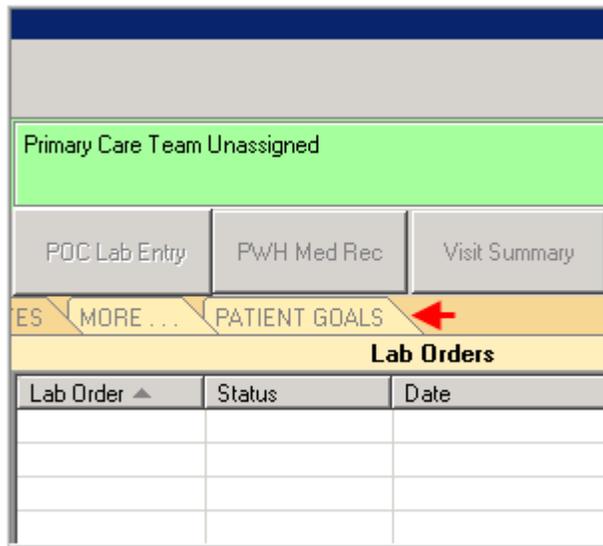


Figure 3-1. Patient Goal tab

The main **Patient Goals** window appears displaying all goals currently active for the patient.

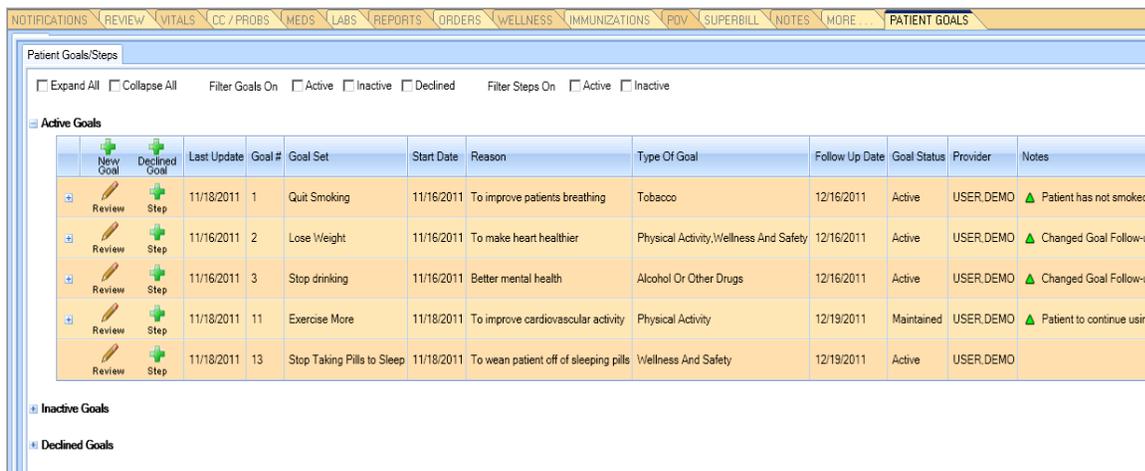


Figure 3-2. Patient Goals window

4.0 Functionality

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

4.1 Expand All

Once you are in the Patient Goals component, you have the ability to automatically expand the **Active Goals** areas by selecting the **Expand All** option radio button.



Figure 4-1. Expand All option radio button

You can also expand each goal area individually by clicking the **Expand** (🔍) button next to each goal type.

4.2 Collapse All

Selecting this option button collapses all of the steps for each goal so that only the goal itself displays.



Figure 4-2. Collapse All option radio button

4.3 Filter a Goal

The view on the **Patient Goals** window can be changed by selecting the appropriate goal filter.



Figure 4-3. Filtering Goals options

- **Active.** Clicking this view causes all of the Active goals to display.
- **Inactive.** Clicking this view causes only goals that are inactive to display.
- **Declined.** Clicking this view causes only goals that are declined by the patient to display.

When you select the check box of the view you want, all other goals are automatically hidden.

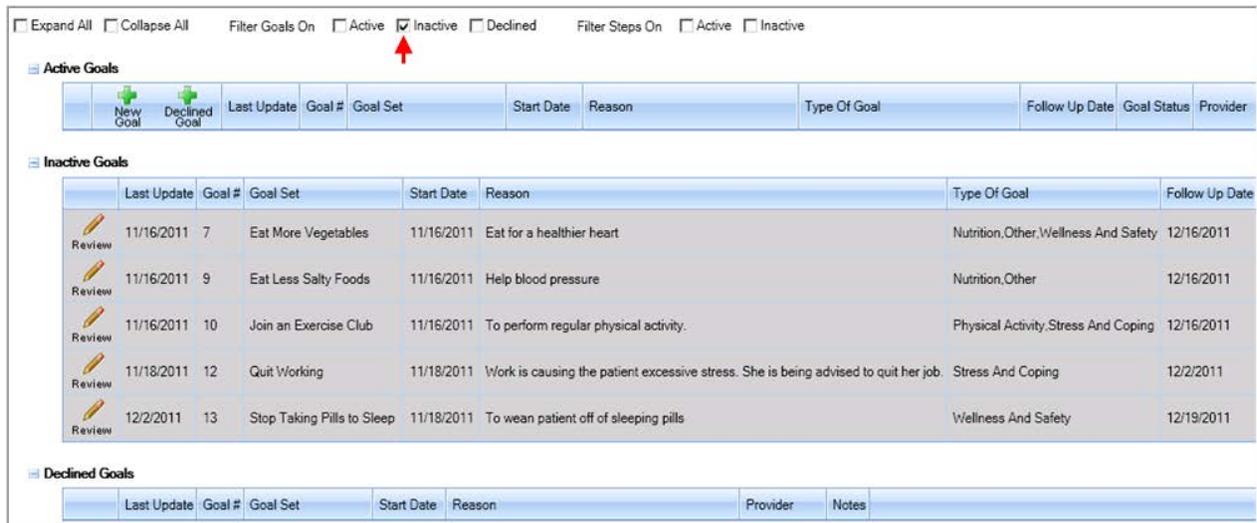


Figure 4-4. Goals filtered

4.4 Filter a Step

Steps for completing a goal can be filtered in the same way that goals are filtered.



Figure 4-5. Filter Steps On options

- **Active.** Causes all active steps to display
- **Inactive.** Causes all steps that are Inactive (Met, Stopped, Maintained) to display

When you select the appropriate check box, the steps display under that goal.

	Step #	Step	Start Date	Follow Up Date	Status
Review	1	Count Calories	2011-11-16	2011-12-16	Active
Review	2	Eat at Scheduled Times	2011-11-16	2011-11-17	Active

Figure 4-6. Filtered Steps

4.5 Sort Column Information

You can sort how information displays in a column by using the Sort feature. Each column, with the exception of the Notes column, has a small arrow at the top.

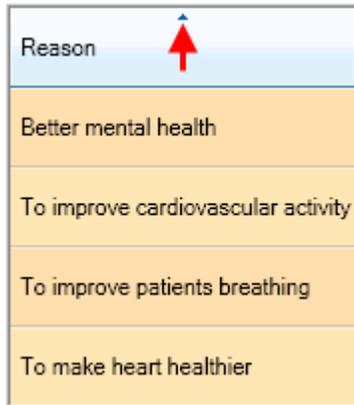


Figure 4-7. Column with Sort feature

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

1. Select a column containing the information you want to sort.
2. Click the arrow at the top of the column once. The information in the column changes. If you continue clicking, the sort order cycles through the list in ascending, descending, and original order.

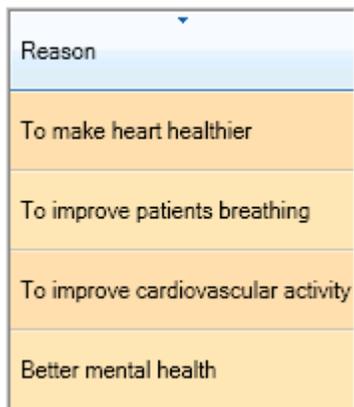


Figure 4-8. Information sorted

4.6 Move a Column

Columns can be moved horizontally, depending on the order you want them in. Highlight the column you want to move and drag it to the position you want.

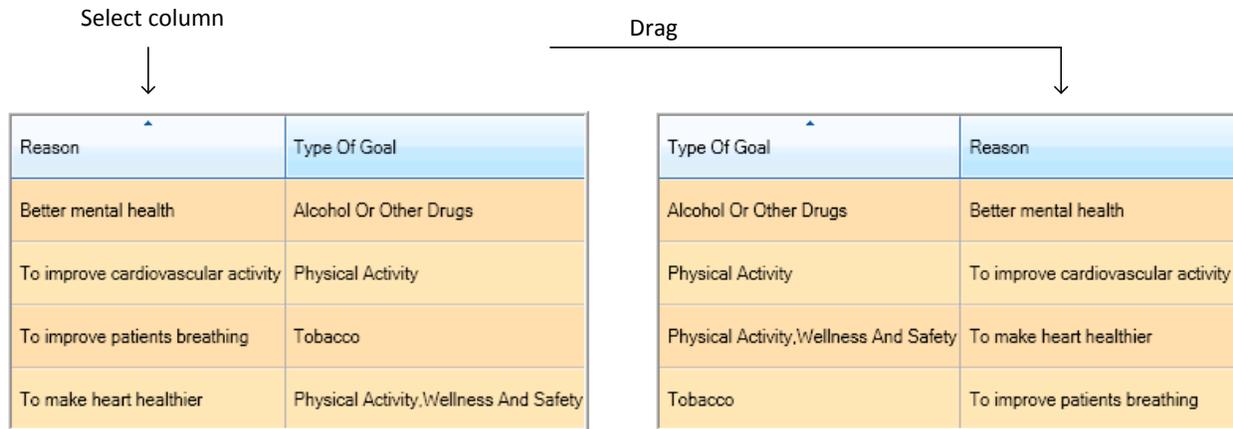


Figure 4-9: Moving columns

4.7 Add/Change a Start or Follow-up Date

There are two ways to add either a Start or Follow-up date. This applies to a goal and also to steps:

1. Simply type the date in the field in month/day/year format.

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

or

2. Click the **Calendar** icon (📅) at the end of the field. The Calendar appears.



Figure 4-10. Date calendar

- a. Select the date to start the goal or step. You can move from month-to-month in the calendar by clicking the left and right arrows in the header.



Figure 4-11. Selecting a month

- b. Enter a date to start or follow-up on the goal or step in the Follow-up Date field. You can click the **Calendar** icon in this field to add the date as well.



Figure 4-12. Goal or Step Follow-up Date field

- c. Click **OK**.

5.0 Patient Goals

When creating a Patient Goal, the clinician may choose to assign one or more categories for the goal. This will be used for reporting purposes (such as generating a list of patients who have set a tobacco-related goal). There are multiple categories of goals that can be selected.

Type(s) Of Goal:	<input type="checkbox"/> Physical Activity	<input type="checkbox"/> Tobacco
	<input type="checkbox"/> Nutrition	<input type="checkbox"/> Alcohol or Other Drugs
	<input type="checkbox"/> Medications	<input type="checkbox"/> Stress And Coping
	<input type="checkbox"/> Wellness And Safety (HPDP)	<input type="checkbox"/> Monitoring
	<input type="checkbox"/> Other	

Figure 5-1. Goal Types

5.1 Goal Number

Each goal is assigned a number by the system. When a goal is created, it is automatically given the next available number so each goal is unique.

5.2 Reason for Goal

A reason for the goal is an optional field that reflects the motivation for setting the goal. The patient's reason for the goal is entered here. This text box is a free-text field that allows the user to enter up to 120 characters.

5.3 Create a New Goal

1. Click **New Goal** in the **Active Goals** header menu bar.



Figure 5-2. New Goal button

The **New Goal** pane appears.

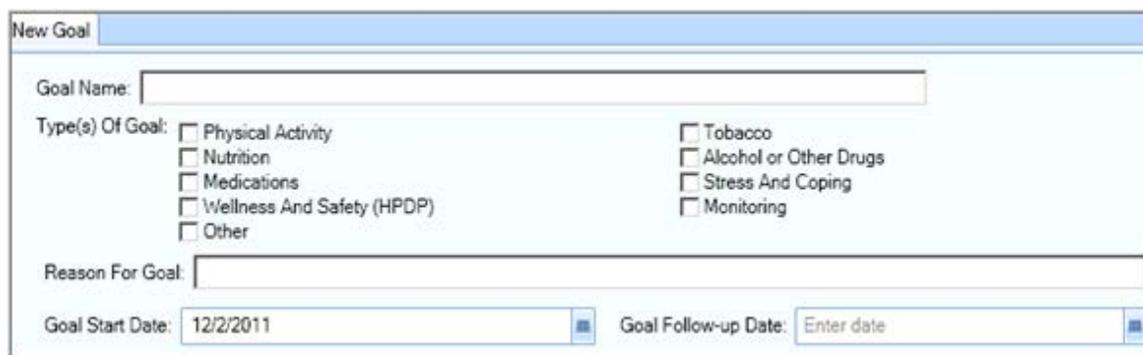


Figure 5-3. New Goal pane

2. Type a name for the new goal in the **Goal Name** field. This field accepts 120 characters. The goal name is the descriptor of the goal that is being set by the patient in the patient's own words.
3. Select a Goal Type.
4. Type a reason for the goal in the **Reason for Goal** field. This field accepts 120 characters.
5. Enter a date for the goal to start in the **Goal Start Date** field. See Section 4.7.
6. Click **OK** to create the goal.

5.4 Review an Active Goal

1. Click **Review** for the goal you want in the **Active Goals** header column.



Figure 5-4. Goal Review button

The **Edit Goal** pane appears.

Figure 5-5. Edit Goal pane

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

2. Add any new notes pertaining to the patient's progress. See Section 5.4.1
3. (Optional) Change the date in the **Goal Follow-up Date** field. See Section 4.7.
4. Click **OK**.

5.4.1 Add a New Note

Notes describing a patient's progress can be added to a goal, but they are not required. If a note was previously added to the goal, it displays in the **Notes** field.

Figure 5-6. Notes field

1. Click **Review** for the goal you want in the **Active Goals** header column. The **Edit Goal** pane appears.
2. Type a comment in the **Notes** field.
3. (Optional) Change the date in the **Goal Follow-up Date** field. See Section 4.7.
4. Click **OK**. The new note appears in the **Note** field of the goal.

5.4.1.1 View History of Notes on a Goal

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

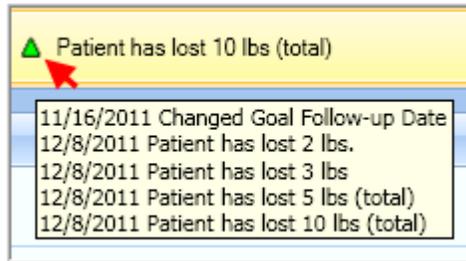


Figure 5-7. Patient Goal Notes

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

1. Click **Review** for the goal you want in the **Active Goals** header column. The **Edit Goal** pane appears.
2. View the **Notes History** field.
3. Click **OK**.

5.5 Maintain a Goal

Goals are discussed with patients by their health care provider. When a patient has met their goal, but makes the decision to continue a goal, it is marked as **Maintained**. Notes can continue to be added to the goal.

1. Click **Review** for the goal you want in the **Active Goals** header column. The **Edit Goal** pane appears.
2. Add any new Notes pertaining to the patient's progress. See Section 5.4.1
3. (Optional) Change the date in the **Goal Follow-up Date** Field. See Section 4.7.
4. Select the **Maintained** option button.
5. Click **OK**.

5.6 Goal Status

There are the following types of goal statuses:

- **Active**
- **Met**

- **Stopped**
- **Maintained**
- **Delete/Entered in Error**

5.6.1 Active

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

5.6.2 Met a Goal – Becomes Inactive

Once a patient has completed all of the steps within a Goal, the Goal has been Met.

1. Click **Review** for the goal you want in the **Active Goals** header column. The **Edit Goal** pane appears.
2. Select the **Met** option button.
3. Click **OK**.

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

5.7 Stopped Goal – Becomes Inactive

1. Click **Review** for the goal you want in the **Active Goals** header column. The **Edit Goal** pane appears.
2. In the **Notes** field, enter a reason for the goal being stopped. You cannot save the goal with the new status until you enter a note.
3. Select the **Stopped** option button.
4. Click **OK**.

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

5.8 Delete/Entered in Error Goal

1. Click **Review** for the goal you want to delete and click **Review**. The goal opens.
2. Select the **Delete/Entered in Error** radio button.



Figure 5-8. Delete/Entered In Error Option radio button

3. (Optional) Add any new Notes pertaining to the patient.
4. (Optional) Change the date in the Goal Follow-up Date field. See Section 4.7.
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. A text box appears enabling you to enter a reason up to 120 characters.

<input type="radio"/> Wrong Patient <input type="radio"/> Duplicate <input checked="" type="radio"/> Other	Patient does not feel he can complete this goal.
--	--

Figure 5-9. Other Reason for Goal Deletion text box

6. Click **OK**.

5.9 Decline a Goal

Patients have the right to decline setting a goal when discussing it with the healthcare provider. The declined goal is documented in the Patient Goal component of the patient's record.

1. Click the **Declined Goal** icon on the **Active Goals** menu bar.

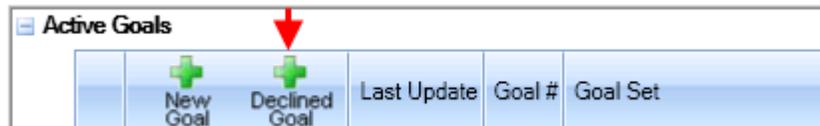


Figure 5-10. Declined Goals icon

The **New Declined Goal** pane opens.



Figure 5-11. New Declined Goal pane

2. Enter a 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. (Optional) Highlight the text in the **Reason Goal Declined** field and type a new description for why the goal is being declined if desired.
4. Click **OK**. The goal is moved to the **Declined Goals** pane.

5.10 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.

6.0 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.

6.1 Step Numbers

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

6.2 Create a Step

1. Click the **Step** button to the right of the **Review** button on the goal requiring a step.



Figure 6-1. Step button

The **New Step** pane appears.

Figure 6-2. New Step pane

2. Type a name for the step in the **Step Name** field.

Figure 6-3. Step Name field

3. Select the **Type of Step** that best describes the step's category. The step category can be different than the goal category.

Type Of Step:	<input type="radio"/> Physical Activity	<input type="radio"/> Tobacco
	<input type="radio"/> Nutrition	<input checked="" type="radio"/> Alcohol or Other Drugs
	<input type="radio"/> Medications	<input type="radio"/> Stress And Coping
	<input type="radio"/> Wellness And Safety (HPDP)	<input type="radio"/> Monitoring
	<input type="radio"/> Other	

Figure 6-4. Type of Step options

4. Enter a date for the step to start in the **Step Start Date** field. See Section 4.7.
5. Click **OK** to create the step.

6.3 Review a Step

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

1. To display the steps for a goal, open the goal by clicking the **Expand** (+) button. The steps for that goal display.
2. Click **Review** on the step you want to review.



Figure 6-5. Step Review button

The **Edit Step** pane appears.

Figure 6-6. Edit Step pane

3. (Optional) Select a new Step Status if the step has changed. There are five types of goal statuses:
 - **Active**
 - **Met**

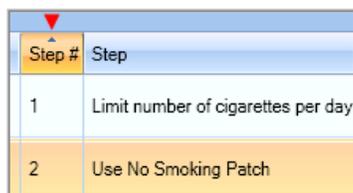
- **Stopped**
- **Maintained**
- **Delete/Entered in Error**

4. Add a new Follow-up Date. See Section 4.7.

6.4 Change a Step Position

A step's display order can be manually sorted by the user.

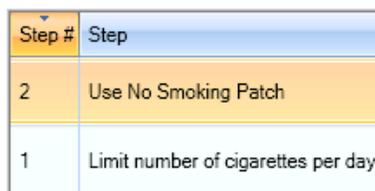
Click the arrow at the top of the **Step #** column.



Step #	Step
1	Limit number of cigarettes per day
2	Use No Smoking Patch

Figure 6-7. a. Step Number Column

The steps change position.



Step #	Step
2	Use No Smoking Patch
1	Limit number of cigarettes per day

Figure 6-8. b. Step Number Column

Refer to Section 4.5 for additional information.

6.5 Delete a Step

1. Expand the goal to display the steps for that goal.
2. Click **Review** for the step you want to delete. The **Edit Step** pane appears.
3. Select the **Deleted/Entered in Error** option radio button.



Deleted/Entered In Error
 Wrong Goal
 Duplicate
 Other

Figure 6-9. Deleted/Entered in Error option radio button

4. Select a reason for deleting the step.

- **Wrong Goal.** The step is applicable for a different goal.
- **Duplicate.** The step is a duplicate to another step already entered.
- **Other.** Causes a dialog box to appear for the user to type in a reason for deleting the step.

Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT Help Desk (IHS).

Phone: (505) 248-4371 or (888) 830-7280 (toll free)

Fax: (505) 248-4363

Web: <http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm>

Email: support@ihs.gov