

Goals Module

The “Goals” module also known as the G.A.S. (Goal Attainment Scale) allows users to create goals for their clients and rate them as they progress through the goal with the client.



****TIPS AND TRICKS* - The Goals module can be extensively customized. CRMS Administrators can add pre-populated values via the Category Table Editor in the Administration module.***

1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client by following instructions on page 50.
3. Open the client file and navigate to the **Goals** module as shown in Figure 362.

Follow Up Scheduler
Goals
Hospitalizations

Figure 362 - Goals Module

4. The Goals Module will then appear on screen as illustrated in Figure 363.

◀ Back

Kauffman, Alex (04055415-02) - Active

Disposition Date:

Template:

Program:

Template Type:

Goal:

Domain:

Review Date:

☒ Active ☐ Achieved

Action Plan:

Most Favourable (2)

More than Expected (1)

Expected (0)

Less than Expected (-1)

Most Unfavourable (-2)

☐ Show All

Date	Level	Worker
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New Review Edit Review

Figure 363 - Goals Module

5. Users can manually create their own goals, by inputting their own scales in the rating boxes.
6. Alternatively, they can use the pre-populated goal templates setup by their CRMS Administrator.
7. Begin by clicking on the **Template** drop down as shown in Figure 364. Select the desired **Template** value.

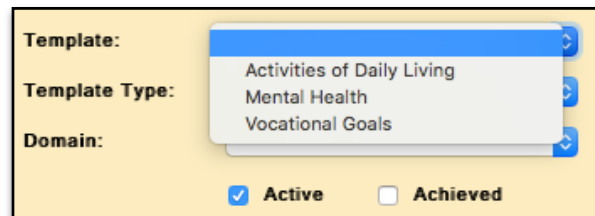


Figure 364 - Selecting from Pre-Populated Goal Template Menu

8. Upon selecting from the “Template” drop down the **Template Type** drop down will then be refreshed. From the **Template Type** drop down, select the desired value.

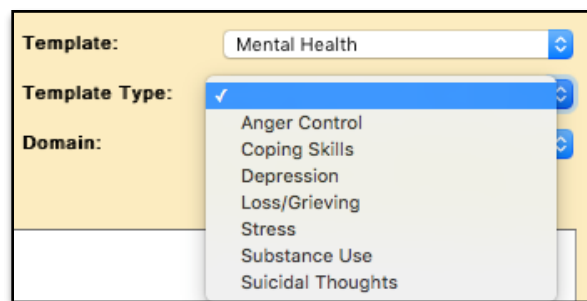


Figure 365 - Selecting from Pre-Populated Template Type Menu

9. The “Ratings” or “Outcomes” will then be automatically be populated as seen below in Figure 366.

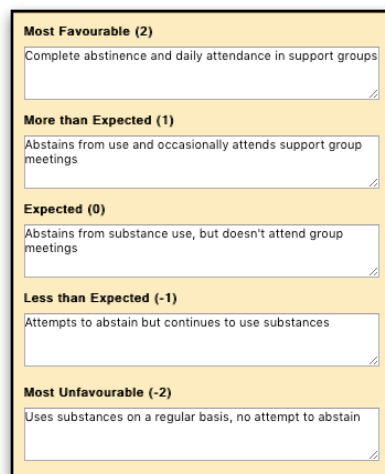


Figure 366 - Ratings Automatically Populated

10. Fill out the remainder of the necessary fields.
11. Figure 367 demonstrates the Goals module prior to saving.

Disposition Date: May 20, 2016 **Template:** Mental Health

Program: Case Management **Template Type:** Substance Use

Goal: Quit Smoking **Domain:**

Review Date: ☒ **Active** ☐ **Achieved**

Action Plan: Will assist Alex in quitting smoking by providing support and care as necessary.

Most Favourable (2)
Complete abstinence and daily attendance in support groups

More than Expected (1)
Abstains from use and occasionally attends support group meetings

Expected (0)
Abstains from substance use, but doesn't attend group meetings

Less than Expected (-1)
Attempts to abstain but continues to use substances

Most Unfavourable (-2)
Uses substances on a regular basis, no attempt to abstain

Date	Level	Worker
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New Review Edit Review

Figure 367 - Goals Module

12. The newly created goal will also then appear on the left hand side - known as the "Goals List".

◀ Back

Quit Smoking

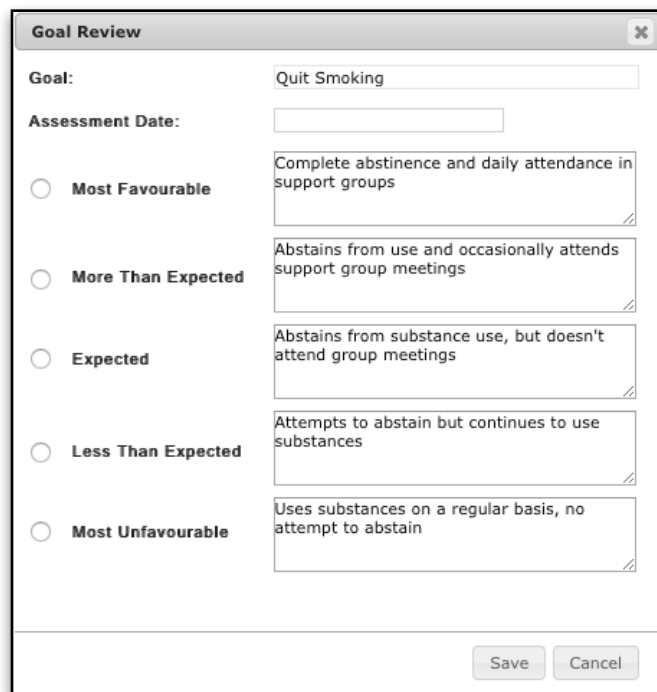
Figure 368 - Newly Created Goal Appears in the "Goals List"

13. Click to re-select the newly created goal in order to make a review. Click on **New Review** as seen below in Figure 369.



Figure 369 - Creating a New Goal Review

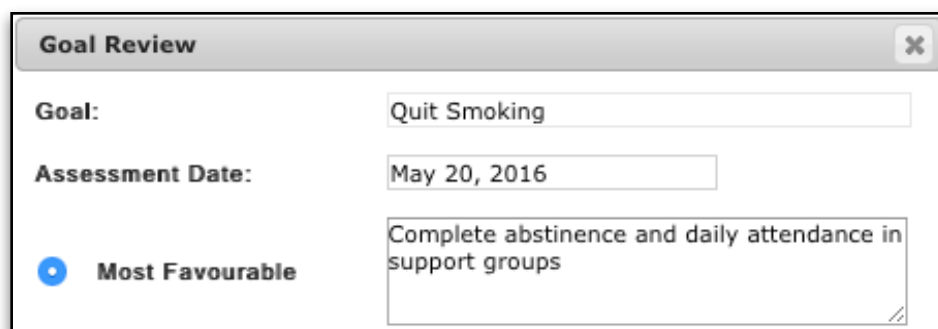
14. The Goal Review Dialog will then appear on screen as illustrated in Figure 370.

A dialog box titled "Goal Review" with a close button (X) in the top right corner. It contains the following fields and options:

- Goal:** A text field containing "Quit Smoking".
- Assessment Date:** An empty text field.
- Outcome Options:** Five radio buttons with corresponding text boxes:
 - ☐ **Most Favourable**: Complete abstinence and daily attendance in support groups
 - ☐ **More Than Expected**: Abstains from use and occasionally attends support group meetings
 - ☐ **Expected**: Abstains from substance use, but doesn't attend group meetings
 - ☐ **Less Than Expected**: Attempts to abstain but continues to use substances
 - ☐ **Most Unfavourable**: Uses substances on a regular basis, no attempt to abstain
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

Figure 370 - Goal Review Dialog

15. Fill out the "Assessment" date and select the desired outcome. In Figure 371 below, a user has rated the goal review as "Most Favourable".

The same "Goal Review" dialog box as in Figure 370, but with the following changes:

- Assessment Date:** Now contains "May 20, 2016".
- Outcome Selection:** The "Most Favourable" radio button is selected (indicated by a blue dot), and its corresponding text box "Complete abstinence and daily attendance in support groups" is visible.

Figure 371 - Reviewing Selected Goal

16. When satisfied with the assessment date and the goal review, click **Save** to finalize the process.

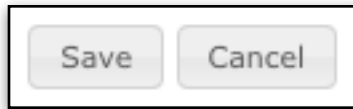


Figure 372 - Saving Goal Review

17. Upon saving the goal review, a message box will appear confirming the process was indeed successful.

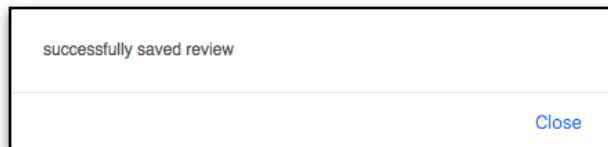


Figure 373 - Successfully Saved Goal Review

18. The newly saved goal review will then appear in the “Review List” as seen in Figure 374.

Date	Level	Worker
2016-05-20	2	Christian Gosselin

Figure 374 - Reviewing Successfully Saved Goal Review

Editing a Goal Review

1. In order to modify a previously saved goal review, first locate the desired goal by referring to page 167 above.
2. Once the desired goal has been selected, click to select the review which will be modified.

Date	Level	Worker
2016-05-20	2	Christian Gosselin

Figure 375 - Editing a Goal Review

3. When satisfied, click **Edit Review**.

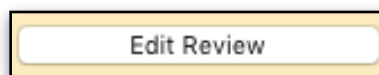


Figure 376 - Editing a Goal Review

4. The Goal Review Dialog will then appear on screen. Make the necessary changes and click **Save** when satisfied to finalize the process.
5. In Figure 377 below, a user has modified the goal review rating from “Most Favourable” to “Less than Expected”.

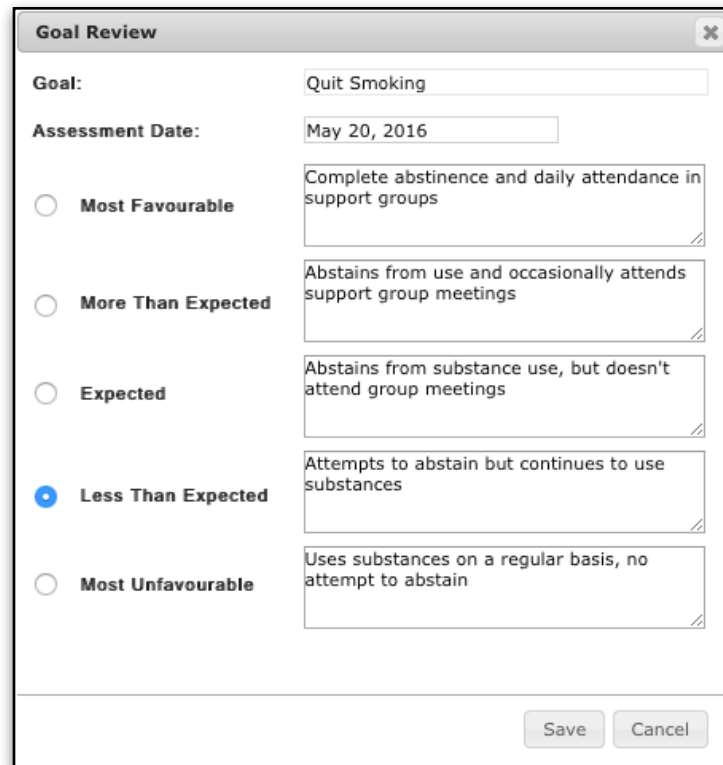
A screenshot of a 'Goal Review' dialog box. The 'Goal' field is 'Quit Smoking' and the 'Assessment Date' is 'May 20, 2016'. There are five radio button options for the review rating: 'Most Favourable', 'More Than Expected', 'Expected', 'Less Than Expected' (which is selected with a blue dot), and 'Most Unfavourable'. Each option has a corresponding text box describing the goal status. For 'Less Than Expected', the text is 'Attempts to abstain but continues to use substances'. At the bottom right are 'Save' and 'Cancel' buttons.

Figure 377 - Editing Goal Review

Marking a Goal as ‘Achieved’ or ‘Not Active’

Once a user has completed working on a particular goal, they can flag the goal as either “achieved”, or “not active”.

1. In order to modify a previously saved goal review, first locate the desired goal by referring to page 167 above.
2. To mark a goal as **achieved**, check off the “Achieved” check mark as demonstrated in Figure 378.

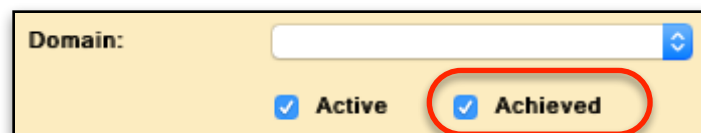
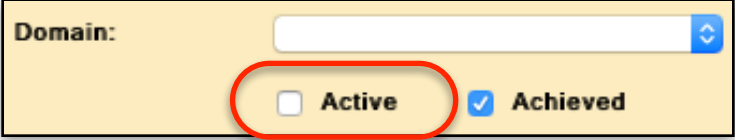
A screenshot of a goal status selection interface. It features a 'Domain:' label followed by a dropdown menu. Below this, there are two checkboxes: 'Active' and 'Achieved'. Both checkboxes are checked with blue checkmarks. The 'Achieved' checkbox and its label are circled in red.

Figure 378 - Marking a Goal as “Achieved”

3. Click **Save** to finalize the process.

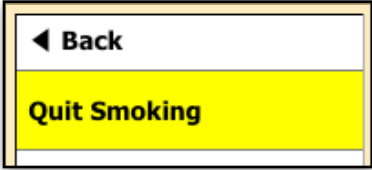
4. To mark a goal as **not active**, uncheck the “Active” check mark as demonstrated in Figure 379.



A screenshot of a user interface element. It features a label 'Domain:' followed by a text input field with a blue dropdown arrow on the right. Below this, there are two checkboxes. The first checkbox is unchecked and is labeled 'Active'; it is circled in red. The second checkbox is checked and is labeled 'Achieved'.

Figure 379 - Marking a Goal as “Not Active”

5. Click **Save** to finalize the process.
6. The “Goals List” will then automatically refresh to display the new ‘not active’ status for the selected goal. This is demonstrated below in Figure 380.



A screenshot of a goal card. At the top, there is a button with a left-pointing arrow and the text 'Back'. Below this, the card has a yellow background with the text 'Quit Smoking' in bold black font.

Figure 380 - Goal Successfully Marked as “Not Active”

Show All Goals

1. Once a goal has been marked as “not active”, it will no longer appear in the “Goals List” when loading the module.
2. Users can also bring back previously de-activated goals by clicking on **Show All** as shown in Figure 381.



A screenshot of a button with a yellow background and a thin border. It contains an unchecked checkbox followed by the text 'Show All'.

Figure 381 - Showing All Goals